

QUICK VIEW

CareDx



INDUSTRY
Healthcare

LOCATIONS
Brisbane, California

URL
www.caredx.com

Company Overview

CareDx is committed to improving transplant patient outcomes by providing innovative and intelligent solutions throughout the entire patient journey. Their mission-driven culture is fueled by the embodiment of five core values permeating across the company—innovation, patient centricity, accountability, continuous improvement, and a culture built by collaboration and a can-do attitude.

Optimizing Patient Appointments & Mobile Workforce Scheduling with Salesforce

Business Challenge:

CareDx Inc, provides products and services to help improve the lives of patients through non-invasive diagnostics. In addition to its own employees, CareDx also works with individual contractors and agencies to fulfill patient blood draw appointments. CareDx has deployed multiple systems to track patients and their phlebotomy appointments. Appointments are captured in Salesforce via an integration from LIMS and duplicated manually into Workpath, an appointment fulfillment system.

With the Workpath software being decommissioned, CareDx wanted to increase operational efficiency and improve its patient scheduling processes by utilizing a single system as a portal for all 3rd party interactions. With the current platform, CareDx was facing challenges with the dual entry of data, complexity around managing routing for multiple jobs, and issues with allowing agencies to view and manage their appointments.

The Solution:

CareDx partnered with OSI Digital to design and deploy a solution on Salesforce that included implementation of the Skedulo scheduling software along with numerous enhancements and automation of Salesforce workflows to simplify the job scheduling process for phlebotomists.

OSI's team enabled a portal front-end on Salesforce that allowed CareDx's centralized job schedulers to view the availability of its mobile phlebotomist workforce. The solution also allowed CareDx to match patients to phlebotomists based on geography, certified skills, equipment type, availability, and optimized travel routes based on real-time traffic. OSI Digital integrated customer accounts and opportunities from Salesforce to automatically create jobs in Skedulo that could then be assigned to their mobile workforce. The OSI team also deployed an app for the phlebotomists to use on their mobile phones. The app allowed the mobile workforce to view the jobs assigned to them and drive to the jobs sequentially leveraging optimized real-time route guidance. OSI also built an extension for CareDx's 3rd party agencies, allowing them to securely view and schedule their own field agents for jobs created by CareDx.

The Salesforce solution was configured and designed to support the additional functionality:

- Automatic job creation in addition to supporting the current manual processes
- Autofill of laboratory drop-off address locations for each job
- Job rejection by agencies and rescheduling / reassignment by centralized schedulers
- Allowing phlebotomists (mobile workforce) to reschedule jobs on their own

OSI designed and deployed the entire solution in 4 weeks with the onboarding of schedulers, agencies and phlebotomists. The team also facilitated organizational change management, user training and the rollout of the solution to all the national branches of CareDx in 3 weeks.

Results

The Salesforce scheduling project was successfully delivered on time against a critical looming deadline for the CareDx team. Here are the highlights of the results:

- Enabled centralized scheduling of a geographically distributed mobile workforce
- Removed manual tasks and eliminated duplicate entry on multiple systems by using Salesforce as the single source of interaction and truth
- Enabled external agencies to use their own schedulers to assign jobs and schedule resources
- Created platform sharing and cost optimization across agencies without the need for additional licensing
- Facilitated mobile enabled job acceptance, re-assignment and optimized real-time traffic routing for phlebotomists



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