Dextara DATAMATICS

Elective Healthcare Accelerator Overview
Powered by Salesforce

The Elective Healthcare Accelerator (EHA) is a preconfigured Salesforce package specifically designed for medical practices that focus on elective/ cash-based services. The Accelerator enables the practice to manage the patient relationship and customer experience in a fully integrated CRM system.

The Accelerator requires Salesforce Sales Cloud or Health Cloud and is installed as a package on top of the Salesforce platform. The Accelerator includes the components outlined below:

- **Lead Management:** Log prospective patients and track all interactions (calls, email, SMS). Convert to patients when consults are scheduled.

- **Patient Management:** Manage all non-medical information about patients (contact info, personal story, referral history, marketing) and track all interactions (calls, email, SMS).

- **MD Management:** Manage all MDs in your partner network, track all interactions (calls, email, SMS), track all patients referred and associated value, and designate if part of a co-management program.

- **Opportunity Management:** Track prospec ve sales opportunities for consults & surgical procedures including status, value, and all interactions (calls, email, SMS).

- **Practice Management System Integration:** Push patient info to/from Salesforce and appointments to Salesforce.

- **Reports & Dashboards:** Custom reports/dashboards for Sales Pipeline, Consult Conversion, Surgical Performance, and MD Management.

Optional components for EHA at an additional cost include

- **Website Integration:** Push leads directly to EHA, create associated opportunities, and alert the sales team.

- **Invoicing and Payments:** Generate and email invoices from opportunities, process payments online and in the office, send automated past due notices, and report on financial performance.

- **Case Management:** Log service issues and requests from patients, route to appropriate work team, and track resolution.

- **SMS:** Send/receive SMS within Salesforce for sales and patient communications /confirmations/reminders.

- **Telephony Integration:** Utilize PC-based sotiphone within Salesforce for making, receiving, and logging calls.

- **Collaboration/Messaging Integration:** Push real-time notifications to Slack or Teams for new leads, closed opportunities, past due invoices, new appointments, and many others.

- **eSignature Document Integration:** Send/receive/track consents and other patient forms in Salesforce.

- **Email Marketing Integration:** Sync email list subscribers with Salesforce as well as manage and send emails from Salesforce.

- **Surveys:** Send/receive/track surveys from Salesforce and report on the results.

Salesforce - EHR Integration Overview

The Elective Healthcare Accelerator will include integration with the healthcare practices' Electronic Health Records (EHR) systems. The integration eliminates manual data entry and increases visibility of patient records in both systems. The integration provides a streamlined.

patient management experience and allows for increased analytics and reporting. Patient Demographic Information can sync bi-directionally between EHR system and Salesforce CRM.
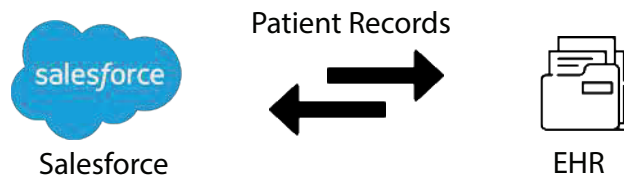
When changes or updates are made to Patient Records, the changes are automatically reflected in both systems. Updates are made bi-directionally.

Appointments made in the EHR will be visible in Salesforce and related to the Patient Record and associated Patient Opportunities.
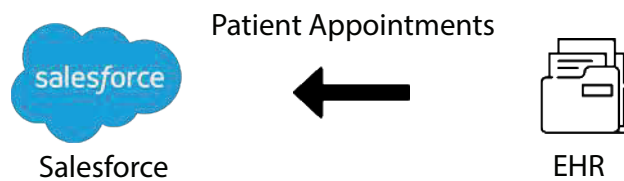
Additional integration points could also include the following:

- Insurance Coverage
- Insurance Charges and Payments
- Referring Providers

*The customer's EHR must adhere to FHIR standards