Optimizing Patient Intake
Healthcare Organization

Challenge

A healthcare organization needed to optimize a decentralized workflow and simplify its central repository to provide analytics and real-time status updates. The fragmented patient intake process led to inefficiencies in admissions, pre-admittance tracking, insurance review, financial clearance, and scheduling. The organization sought to streamline operations, improve visibility, and enhance the patient experience.

Solution

TEKsystems Global Services partnered with the organization to deploy workflow automation using Salesforce. The approach included:

- Enabling Salesforce features to centralize intake and admissions.

- Automating pre-admittance tasks such as insurance review, financial clearance, and scheduling to reduce manual effort.

- Integrating Salesforce with hospital systems for unified data and real-time visibility.

- Implementing dashboards for staff to monitor metrics and workflow progress.

- Streamlining identification and admissions to boost efficiency and improve patient experience.

Results

- Successfully created an identification process that allowed for a more streamlined workflow from initial patient call to admissions.

- Provided a single unified interface to improve the patient's journey.

- Enabled all tiers of employment to view the metrics and workflow process via a dashboard so they could better understand their long-term business and prepare for the future.

- Integrated Salesforce with other contrasting systems that allowed for more information to be processed.

Streamlined workflow from initial call to admissions

resulting in faster processing times, reduced bottlenecks, and a significantly improved patient experience.