



DemandBlue unearths hidden features of Salesforce to help a Rehab Center to automate their physician onboarding process

Client is a leading Assisted Living Facility and Rehab Center network based in Mid-West. They run a network of facilities spanning 4 states, helping senior citizens live a comfortable life.

Their Challenge

With more than 20 facilities across 4 states as part of their network, there would be a lot of physicians and providers who needed to be on-boarded on a regular basis. This required getting the physicians' contracts signed, updating their data, getting their credentialing performed, and filling up some state forms for compliance. All this took up a lot of time and effort by the administration team leading to resource crunch for other activities. Client wanted to automate the entire onboarding process to improve operational efficiency.

DemandBlue's Solution

Once the client was engaged for DemandBlue's On Demand Services (ODS) for Salesforce, the designated point of contact immediately set up an expert team with healthcare experience to talk to the client's stakeholders, especially the administrative team that handles physician on-boarding. After extensive requirement gathering session, the high priority challenges were listed as contract signing process and physician credentialing along with minor challenges like state form fills, data collection, and data input. The DemandBlue experts explained to the client that their problems can be solved with some judicious customizations, strategic integration, and process automations.

Once the client gave approval to the suggested plan, the DemandBlue team went ahead with the execution in an agile manner. Here are some of the key activities performed -

- **Contract** signing process was addressed first by integrating DocuSign with Salesforce. With this in place, the admin and the physicians no longer had to print, sign, scan and mail the contracts. They could now e-sign the contracts and close the process in a matter of minutes.
- **Provider** names and details had to be stored during onboarding process. We renamed the standard contact object as Provider. Similarly, objects were renamed as Location and Provider-Location, where Provider-Location can be junction object. We added the Providers to the standard Campaign object to track the results at a later stage. We used the standard opportunity object to track whether the process is a closed-won or closed-loss outcome.
- We utilized the standard Product and Pricebook functionality in Salesforce to add provider **network**. We renamed Product as Provider and Asset as Active Network.
- **Credentialing** is one of the key challenges and for these custom objects were created to hold all relevant data and linked to the appropriate provider.
- **Chatter** was enabled for cross-team communication so that all data can be stored within Salesforce.
- **Process Automation** was enabled through process builder wherein specific activities would trigger updates to the administrative team. Credentialing would be assigned to the first free member in the admin team. These logs would also show up on the dashboard.
- **Dashboards** were created according to the client's requirement and this dashboard can be used to share data across the organization and to track results.

Significant Benefits

- DocuSign integration reduced their contract signing process from a matter of days to a matter of minutes, an epic 90% improvement in efficiency
- Credentialing process automations that included auto assignment fast tracked this process by 75%
- Custom dashboards help track and analyze the team's activities at all times
- End user engagement improved both from the client's staff's perspective and from the physicians' perspective