

HEALTH AND SOCIAL SERVICES

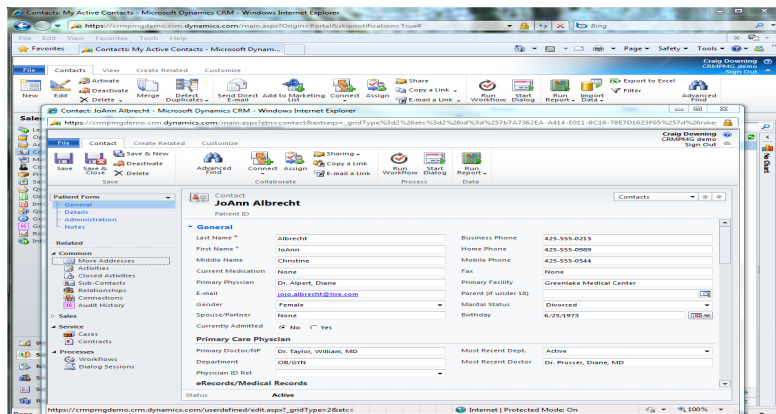
Microsoft Dynamics CRM

Benefits

- **Integrate with existing applications.** Integrating front-end client and case coordination applications with back-end legacy systems allows you to create formalized workflows between agencies, which saves time and maximizes the value of your current IT infrastructure.
- **Gain a 360° view of the client.** Having the ability to view data spanning multiple programs helps caseworkers serve clients' varied needs. Caseworkers and program managers can achieve meaningful collaboration with a single, unified view of the client. Only with a 360° view is client-centered care possible.
- **Report on program success to secure funding.** Empower management by giving them a view into daily activities and overall progress with dashboards showing visual reports of customizable key performance indicators. Informed commissioners and department managers can evaluate program success and report on specific activities, which helps ensure necessary funds are granted.
- **Improve case manager effectiveness.** Easily accessed client data and automated reminders help case managers more quickly assess needs, review results of care plans underway, identify additional benefits available, and complete follow-up activities.
- **Support an increasingly mobile workforce.** Maximize the time caseworkers spend with clients in the field by providing remote data access and the ability to easily upload case information.

Health and social services agencies worldwide provide a wide range of services such as family support, elderly and disability care, child protection, substance abuse, public health, and education services. Historically, business practices and limited technology have resulted in clients being served by multiple agencies in a disconnected fashion. Today, increased focus on access, quality, and efficiency in the financing and delivery of care is driving advancements in case coordination across agencies.

By connecting disparate systems, organizations can improve communication, optimize care plans, integrate eligibility determinations, eliminate inefficiencies, and reduce the administrative burden. This frees up time for caseworkers to focus on providing the best possible care and services to their clients.



Microsoft Dynamics® CRM can serve as the central database linking multiple systems together to provide a 360° view of client information. Microsoft Dynamics CRM works like and with familiar Microsoft productivity tools, such as Microsoft® Office Outlook®, making it easy for case managers to learn and use. Workflow capabilities can streamline standard processes to help improve client care and treatment outcomes.

Choose a solution that works the way you do. Every health and social services agency has unique processes and requirements. Microsoft Dynamics CRM provides a platform that can be molded to work the way you do while streamlining processes and helping to improve client satisfaction across all your functional areas. With Microsoft Dynamics CRM, your caseworkers are equipped with tools that help them improve lives and reduce costs by delivering citizen-centric care.

FEATURES

Client Information Management

Because many social service agencies use disparate systems, it's difficult for caseworkers to understand how their clients are being served across multiple programs. Give your caseworkers access to centralized master client records that can link together systems across agencies and programs. Convenient links provide easy access to a complete view of your clients, which helps remove barriers to cross-agency collaboration and leads to improved client care.

Client Assessment and Eligibility

Clients and their families are often eligible for multiple programs. The current assessment and application processes are usually complex and cumbersome due to disparate technology and regulations. Automated process workflows that provide convenient links to application forms and span multiple programs ease the administrative burden and improve client experience.

Caseworker Schedule Coordination

As the population ages and more citizens become eligible for programs, case managers' workloads are increasing. Help them make the most of their available time by providing convenient scheduling tools that are fully integrated with Microsoft Office Outlook. Automated reminders help streamline client follow-up activities and improve communications when multiple caseworkers are collaborating on a single case.

Program Performance Assessment

Assessing daily activities and overall program performance is essential to ensure clients are getting the best service possible, and that grant funds are being used and tracked appropriately. Commissioners and department managers can use convenient dashboards that visually show results of key performance indicators thus helping them to assess results, direct improvements, and secure funding.

Family Outreach Management

Informing and enlisting support from clients' family members can help ensure successful outcomes of many programs, such as adoptions or the treatment of substance abuse. Track family relationships with client records for easy access. Use health and social services marketing campaign tools to distribute informational mailings, track responses, and automate follow-up.

Volunteer Relationship Management

Attracting committed, capable volunteers is essential to the ongoing success of most non-profit programs. Create marketing campaigns to increase awareness and recruit volunteers. Easily track responses and automate follow-up communications to secure and retain volunteer commitment.

Process and Policy Compliance

The safety and well-being of your clients and employees is a top concern, as is ensuring your programs are administered in compliance with regulatory guidelines. Create processes that streamline standard procedures, help maintain compliance with policy and privacy regulations, and enable deeper collaboration across agencies. Make process and policy guidelines accessible with centralized document libraries.

Call Center Management

Many social services agencies spend a significant amount of time responding to client inquiries. Call center services can be streamlined by providing centralized access to historical situation data and automating follow-up tasks.

For more information about Microsoft Dynamics CRM, visit www.microsoft.com/dynamics/crm.

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