



Healthcare CRM

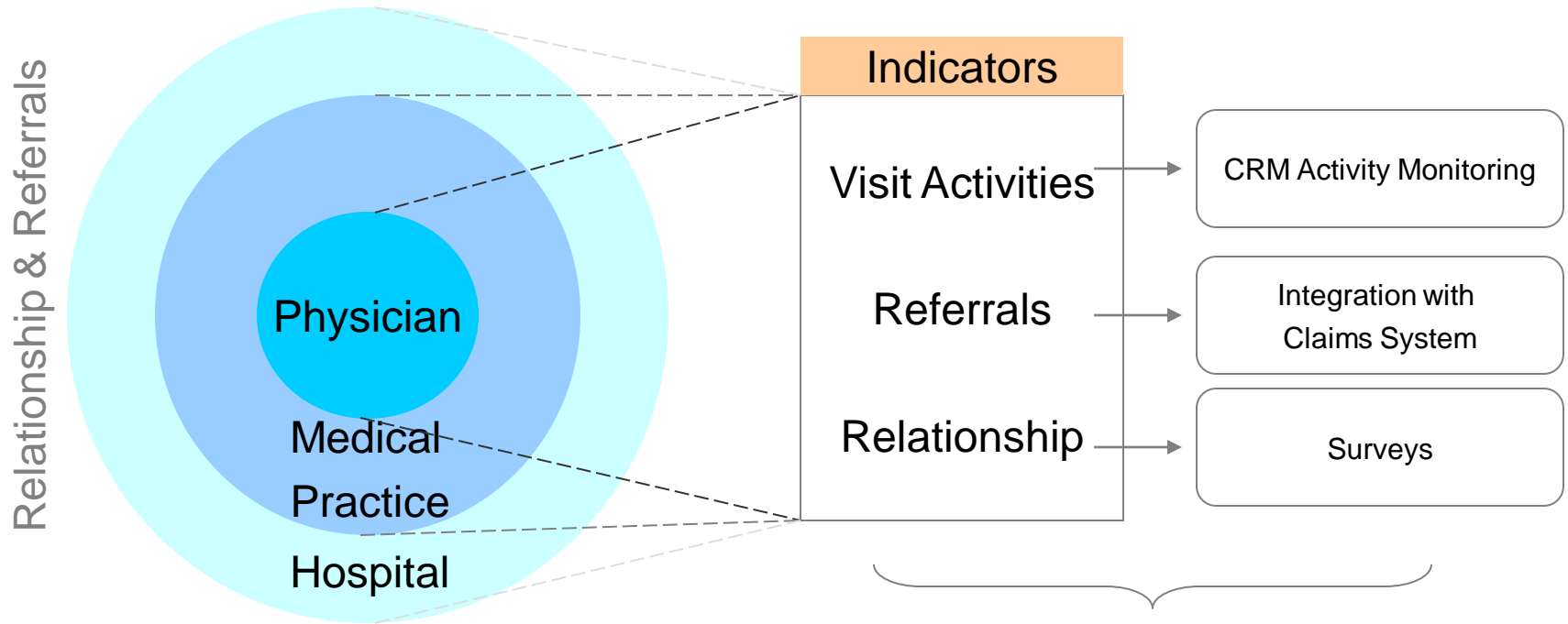
Physician Relationship Management

by Avankia LLC

Physician Relationship Management

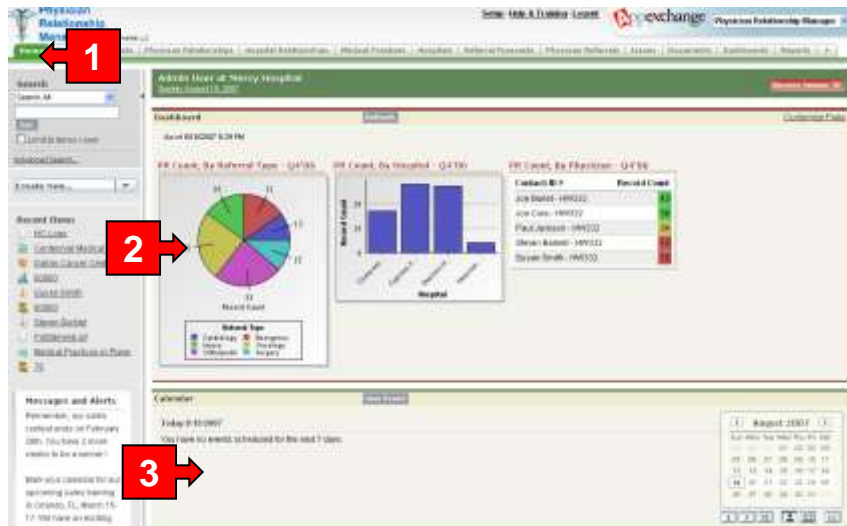
- Targeted to Healthcare Providers like
 - Hospitals
 - Radiology centers
 - Orthopedic centers
 - ...
- Increase and monitor touch points with your physicians network
- Increase Referral Activities
- Be in touch with surveys, emails
- Integrate with Claims warehouse using DBSync to get ROI and analytics on referrals and revenue by procedure, specialty, insurance and others

Physician Relationship Management



Forecast Referrals
Manage Relationships
Manage your Reps
Measure ROI

Home Tab



1. From the Home Tab

- view your calendar and tasks
- select tab and sidebar options to access other information
- You can also search for information and view messages and custom links provided by your administrator.

2. Personalize your Home Tab includes several

- “Dashboard Components”, that allow you to quickly understand key business metrics around physician referral activity and the activity levels of the physician relationship managers”.

3. Be connected with your tasks

- View and manage your tasks and appointments from their Home Tab
- Complete integration and synchronization with Microsoft Outlook is fully supported – eliminating duplicate entry
- Use it offline or while in the field by integrating with your a mobile PDA or laptop with internet connection.

Physicians/Contacts Tab

1

2

3

Active	Name	Medical Practice Name	Referral Activity	Issues	Last 12 mos	Last 12 mos score	Days since last activity	Activity Indicator	Relationship Score	Relationship
<input type="checkbox"/>	Dr. John Doe	Cardiovascular Center	High	1	20	40	20	High	40	High
<input type="checkbox"/>	Dr. Jane Smith	Cardiovascular Center	Low	2	70	40	70	Low	40	Low
<input type="checkbox"/>	Dr. John Doe	Cardiovascular Center	High	5	80	70	10	High	70	High

1. Customizable List Views to view your physician information in a **variety** of different ways
2. Key performance indicators allows you to at a glance **determine which physicians you need to visit so you can effectively manage your time for maximum results.**
 - recent referral activity
 - number of issue (problems) reported
 - activity levels
3. Quickly see those physicians with whom **referral activity** is low, or that have a lower than desired Relationship Score using periodic surveys.

Physicians/Contacts Record

The screenshot displays the 'Physician/Contact Detail' page in the 'Physician Relationship Management' software. The interface includes a sidebar with navigation links and a main content area with several sections. Red arrows with numbers 1 through 5 point to specific features:

- 1** points to the 'Physician/Contact Detail' header.
- 2** points to the 'Physician Profile' section.
- 3** points to the 'Relationship Profile' section.
- 4** points to the 'Relationship Score' indicator.
- 5** points to the 'Relationship Indicator' section.

The 'Physician Profile' section contains the following information:

Physician/Contact Name	Dr. John Smith	Phone	(972) 000-0000
Name	Dr. John Smith	Mobile	
Medical Practice	Dr. John Smith, MD	Home Phone	
Title	Physician	Fax	
Physician/Contact Source	Physician	Email	john.smith@med.com
Typical Address	2405 Oak Ave Houston, TX 77011	Other Address	

The 'Relationship Profile' section contains the following information:

Last Survey Score	88	Physician Last 10 Score	8
Last Relationship Survey	10/20/2010	Referral Activity	High
Relationship Score	40	Last Activity Date	
Relationship Indicator	■	Physician Last Activity	
		Activity Indicator	■

1. Capture essential pieces of physician information
2. Physician Profile section provides details such as
 - educational background
 - area of medical specialty, and more.
 - **Easily customizable** to add more information as needed.
3. Relationship Profile section allows users to
 - quickly understand **important facts affecting physician relationships**, and thus their referral activity.
 - Easily customizable **Physician surveys can be easily mass emailed** and results would automatically be factored into the relationship score.
4. **Relationship Score** an indicators derived from surveys, issues and others is automatically computed for analytics.
5. Quickly ascertain important information about their relationship building and marketing activity levels with key physicians. This allows relationship managers to **"stay on top"** of their activity goals.

Physicians/Contacts “Related Lists”

The screenshot displays the 'Physician Relationship Manager' interface. On the left, a search bar is labeled '1'. The main content area shows a 'Referral Forecasts' table for 'Dr. Susan Smith'. The table has columns for 'Action', 'Referral Forecast Period', 'Period Ending Date', 'Forecasted', 'Actual', '%Change', and 'Flag'. Red arrows '2' and '3' point to the 'Forecasted' and 'Actual' columns respectively. Below the table, a summary section lists details for Dr. Susan Smith, including her years of experience, education, and specialties.

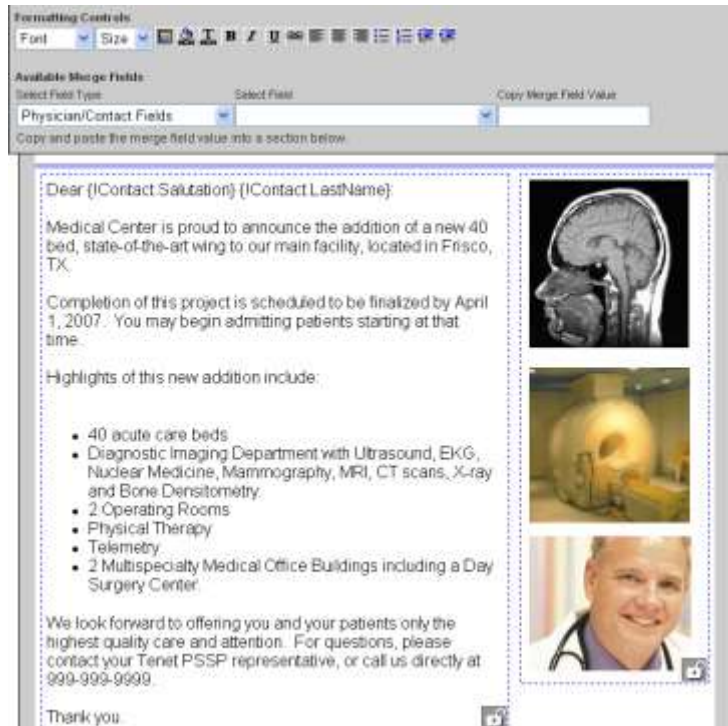
Action	Referral Forecast Period	Period Ending Date	Forecasted	Actual	%Change	Flag
Edit Del	September, 2006	5/12/2007	8	6	-25.00	🔴
Edit Del	October, 2006	6/12/2007	9	10	-11.11	🔴
Edit Del	November, 2006	7/12/2007	12	15	-16.67	🔴
Edit Del	December, 2006	8/12/2007	14	13	-7.14	🔴
Edit Del	January, 2007	9/12/2007	16	17	6.25	🟢

[Show 4 more >](#) | [Go to list \(9\) >](#)

W#	Susan Smith - FHX332	Languages supported	English, Spanish
Years of Experience	9	Health Plans Accepted	Cigna, Blue Cross and Blue Shield
Education	OSU School of Medicine	Medicare/Medicaid Accepted	✓
Graduation Date	12/31/1998	Physician Specialty	Cardiology, Internal Medicine

1. Referral forecast provides a quick view on activities with each physician.
2. Set goals for referral activities and track over time.
3. Monitor Forecast versus actual amounts and use **colored indicators** to track changes over time.

Communication Platform



Centralized communication Platform

- Send mass emails
- Track communications
- Send surveys

Relationships

Physician Relationships		Hosp					
Record	Physician Receiving Service	Physician Performing Service	Relationship Category	Relationship Type	Hospital	Start Date	End Date
00000	Paul Jackson	Susan Smith	Co-Worker	Business	Doctors Hospital of Dallas	9/1/2007	2/29/2008

Track Physician Relationships as views of physician “associations” to better understand the manner in which **physicians relate and work with one another** a key to fully understanding the **physician referral dynamic**.

Hospital Relationships		Me			
Record	Contact	Hospital	Relationship Category	Admitting Privileges	Comments
00001	Susan Smith	Centennial Medical Center	Admitting Physician	✓	

The **Hospital Relationships** provides a list view of physician relationships and affiliations with specific hospitals.

Medical Practices Tab

Physician Relationship Management by Avankia LLC

Setup · Help & Training · Logout

Appexchange Physician Relationship Manager

Home Physicians/Contacts Physician Relationships Hospital Relationships **Medical Practices** Hospitals Referral Forecasts Physician Referrals Issues Documents Dashboards Reports

Medical Practices Home [Tell me more!](#) [Help for this Page](#)

Search
Search All
Go!
☐ Limit to items I own
[Advanced Search...](#)
[Create New...](#)

View: All Accounts Go! Edit | Create New View

Recent Medical Practices New Recently Viewed

Medical Practice Name	Billing City	Billing State/Province	Number of Physicians	Practice Specialty	On-site lab facility	On-site minor surgery	On-site pharmacy
Cancer Center	Nashville	Tn	11	Oncology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Medical Practice Detail Edit Delete Sharing

Medical Practice Owner: Admin User (Change)
Medical Practice Name: Cancer Center (New Hierarchy)
Billing Address: 136 Main St, Nashville, TN 37211
Phone: (615) 335-4480
Fax:
Website: <http://www.medicareweb.com>
Shipping Address: 136 Main St, Nashville, TN 37211

Number of Physicians: 11
Employees: 31
Practice Specialty: Oncology
Languages Supported:

On-site minor surgery
On-site radiology
On-site pharmacy
On-site lab facility
On-site child care facility

Useful Links

Created By: Admin User 7/27/2007 7:25 AM
Last Modified By: Admin User 8/19/2007 11:30 AM

1. Medical Practices provides a view of your medical practices, along with specific profile information, including back office personnel and other practice contacts who need to be notified of things like new capacity at one of your facilities or changes in billing procedures.
2. Detailed profile information for each medical practice can be displayed.
3. Quickly “drill down” into specific medical practices to view more detailed information.

Easily customize to add fields as your needs

Physician Referrals Tab

The screenshot shows the 'Physician Referrals' tab selected in the Apexchange Physician Relationship Manager. The interface includes a top navigation bar with links like 'Setup', 'Help & Training', and 'Logout'. A left sidebar contains a search box and a 'Create New...' button. The main content area displays a table of 'Recent Physician Referrals' with columns for Referral Number, Hospital, Contact, Referral Date, Referral Type, Procedure Type, Amount Received, Insurance, and Flag. A red box with the number '1' highlights the 'Amount Received' column, and another red box with the number '2' highlights the 'Insurance' column. The table shows a single referral from Centennial Medical Center to Steven Barklet on 7/28/2007, with a referral type of Cardiology and a procedure type of Outpatient. The amount received is \$4,345.88, and the insurance is Medicare/Medicaid.

Physician Relationship Management by Avankia, LLC

Setup · Help & Training · Logout

Apexchange Physician Relationship Manager

Home Physicians/Contacts Physician Relationships Hospital Relationships Medical Practices Hospitals Referral Forecasts **Physician Referrals** Issues Documents Dashboards Reports

Search
Search All
Go!
☐ Limit to items I own
Advanced Search...
Create New...

Physician Referrals Home Help for this Page

View: All Physician Referrals Go! Edit | Create New View

Recent Physician Referrals New Recently Viewed

Referral Number	Hospital	Contact	Referral Date	Referral Type	Procedure Type	Amount Received	Insurance	Flag
76	Centennial Medical Center	Steven Barklet	7/28/2007	Cardiology	Outpatient	1 → \$4,345.88	Medicare/Medicaid 2 →	▼

1. Integrate non-sensitive patient data that might cause HIPPA compliance issues using “dbsync” to track ROI on referrals and display admissions and revenue trends on executive dashboards along with physician rep activities.
2. Use Payor Types as indicators to track type of insurer. Use it within analytics to improve planning of profitable referral channels.

dbsync

Integrate Salesforce.com with
your Claims Warehouse

Issues Tab

Home Physicians/Contacts Physician Relationships Hospital Relationships Medical Practices Hospitals Referral Forecasts Physician Referrals **Issues** Documents Dashboards Reports GoogleReportMapper

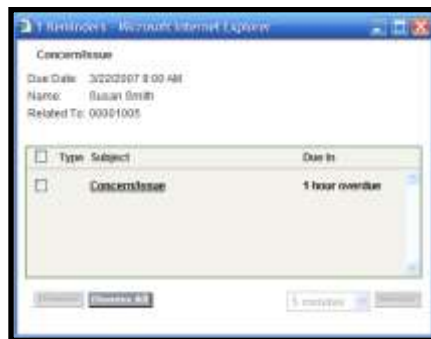
Search
Search All
Go!
☐ Limit to items I own
Advanced Search...
Create New...

Issues Home [Tell me more!](#) [Help for this Page](#)

View: Queue - Physician Support - Urgent [Go!](#) [Edit](#) | [Create New View](#)

Recent Issues [New](#) [Recently Viewed](#)

Issue Number	Subject	Date/Time Opened	Priority	Flag
00001005	Hospital Pharmacy made critical errors in filling a time sensitive prescription	12/21/2006 8:01 AM	High	
00001007	Construction around hospital is making parking very difficult for my patients	12/21/2006 8:10 AM	Low	
00001003	Nursing Staff was not responsive	12/21/2006 7:56 AM	Medium	



Task Detail [Edit](#) [Delete](#) [Create Follow Up Task](#) [Create Follow Up Event](#)

Task Information

Assigned To	Gary Stewart	Status	In Progress
Subject	Concern/Issue	Name	Susan Smith
Type	Task	Related To	00001005
Due Date	3/22/2007	Email	ptholecrm1@yahoo.com
Phone	(972) 334-5591		
Priority	Normal		

System Information

Created By	Gary Stewart 3/22/2007 9:09 AM	Last Modified By	Gary Stewart 3/22/2007 9:09 AM
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Description Information

Comments A new issue has been created for one of your key physicians. Please review the related issue details, and proceed with steps to resolve the issue. Thank you.

Track and manage issues by providers within your network.

Use indicators to track severities and monitor using reports and dashboards

Dashboards and Reports

Opportunity by PSSP Rep

Physician Referral Revenue -Type, Hosp.

Physician Referral by Physician and Type

Physician Referral Revenue - By Hospital

Physician Referral Revenue -By Ins. Type

Physician Referral Revenue -By Physician

Physician Referral Revenue -By Type

Physician Referral Revenue -Type, Date

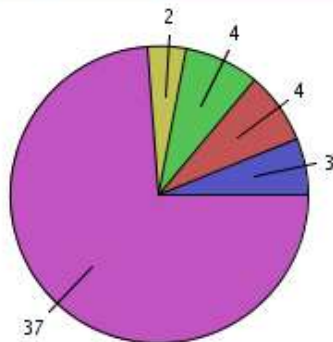
Physician Referrals

Physician Referrals by PSSP Rep

Physician Referrals by Type

Pre-built reports to quickly analyze trends and ROI on referrals

Days Since Last Activity



Quickly convert reports in Dashboard to monitor KPI's for relationship management activities and ROI

Get Started

Get started now !!!

Manage your Physician Relationships

And

Increase your Referrals Activities to your facility

Contact us

Email at crm@avankia.com

Or

Call 1-877-739-2818 for more information