




Clients for Life in CRM


Quick Reference Guide

Viewing Clients

1. Click **Mail**, expand **Microsoft Dynamics CRM** ▶ **Clients for Life** ▶ **Contract Information** ▶ **Clients**.
2. Browse or search and double-click the client.

 To access CRM clients through your browser, go to <http://corp-CRM> and click **Clients for Life**, and click **Clients**.


Creating Favorites

 To create a shortcut to any CRM folder in the Favorites area at the top of the Outlook sidebar, right-click a CRM folder and click **Show in Favorites**.

- **Clients.** View your clients. Click **Mail**, expand **Microsoft Dynamics CRM** ▶ **Clients for Life** ▶ **Contract Information** ▶ **Clients**
- **Activities.** View upcoming and closed activities, view reminders about meetings that are due, status updates, and scheduled FERs. Click **Mail**, expand **Microsoft Dynamics CRM** ▶ **Clients for Life** ▶ **Workplace** ▶ **My Work** ▶ **Activities**
- **CFL Announcements.** Updated to include quick tips, CRM process information, and system issues. Click **Mail**, expand **Microsoft Dynamics CRM** ▶ **Clients for Life** ▶ **Customers** ▶ **CFL Announcements**

Tracking E-Mail

1. Click **New E-mail**.
2. Click **To:** and select recipient(s). You can use personal contacts as well as the CRM Contact address book.
3. Click **Track in CRM**, click **Set Regarding**, and select or search for an appropriate client.
4. Click **Send**.

 To track a received message, select the message and follow step 3.

To track an email to multiple clients


Currently, CRM cannot track a single email message against multiple clients. However, you can copy the message, and each copy can be tracked against a different client.


1. Forward the email to yourself so you have another copy of the email. Repeat as many times as needed.
2. Once you receive the forwarded message, select a copy, click **Track in CRM**, click **Set Regarding**, and select the client. Repeat with a separate copy for each client.


Tracking Appointments


To track an appointment from Outlook

1. Click **New Item** ▶ **New Appointment**.
2. Click **Invite Attendees**, Click **To:**, and select recipient(s). You can use personal contacts as well as the CRM Contact address book.
3. Click **Track in CRM**, click **Set Regarding**, and select or search for an appropriate client.
4. Click **Save and Close** (appointment) or **Send** (meeting).
5. Click **View in CRM** and **specify the meeting type (Goals Progress, MCI, Expectations, etc.)**. Meetings without a meeting type will not be reflected on TeamHealth reports.
6. Once the activity is complete, view the activity in CRM, click **Save as Completed** icon or **Actions** ▶ **Close Activity**, and indicate the outcome (Completed, Canceled). Only completed and closed meetings will be reflected on TeamHealth reports.

 Activity attachments do not synchronize to CRM. To add an attachment, click **View in CRM**, and click **Attach a File**.

 **Do not** enter private meeting notes in the meeting description (visible to Outlook invitees). Instead record private notes using the Notes tab of the Appointment form in CRM.


 To track a past meeting past or a received invitation, follow steps 3 - 5.

 If assistants track an email or appointment from a VP, CS calendar, then it will not synchronize until the VP logs into Outlook. An interim solution is for assistants to copy and track the email or appointment from their own computer and it will synchronize immediately.


To track recurring appointments from Outlook


Currently, CRM cannot track recurring appointments from Outlook. However, you can duplicate individual occurrences, and these can be tracked like any other appointment.

- Select the occurrence, hold **Ctrl**, and drag the occurrence beside itself. That will create a copy of the meeting occurrence, which you can track in CRM.

 You can identify the copy, because Outlook will prefix it with the word "Copy," and the recurring icon will not appear. You can rename the copy prior to tracking it if you like.

To track a meeting from the Client form

1. Click **Actions** ▶ **Add Activity** ▶ **Appointment** or click **Activities** ▶ **New Activity** ▶ **Appointment**.
 2. Complete the meeting information (subject, attendees, CFL meeting information, scheduling information).
-  If you're unsure about a contact displayed in the search results, select the contact and click the **Properties** button to view the contact's record.
3. Once the activity is complete, click **Save as Completed** icon or **Actions** ▶ **Close Activity**, and indicate the outcome (Completed, Canceled). Only completed and closed meetings with a CFL meeting type will be reflected on TeamHealth reports.

 If you click on **New Activity** ▶ **Appointment** from All Activities or All History, the Regarding field will not automatically populate with the current client, and you will have to click **Look Up** or use the Form Assistant to select the client for the Regarding field. The client name will auto-populate from All Activities and All History in a future CFL/CRM release.

CFL meeting type improvements

- The CFL Meeting type is now a required field when the appointment is associated with a CFL client and must be selected before the appointment can be saved.
- The CFL Meeting type is now displayed as the last column in the All History or All Activities.
 - The All History and All Activities tabs are custom views and take a few extra seconds to load.
 - These views differ from Activities or History because they show attachments added to appointments and now include the CFL Meeting Type (located on the far right side).

To mark an appointment as canceled

1. In the Client form, click **Actions** ▶ **Add Activity** ▶ **Appointment**.
2. Enter the basic meeting information and click **Save** (do not click **Save as Completed**).


- In the Appointment form, click **Actions** ▶ **Close Appointment**, and select a status of **Canceled** from the drop-down list.
- Click **OK**.


Managing Activities and History

- Click **Mail**, expand **Microsoft Dynamics CRM** ▶ **Clients for Life** ▶ **Workplace** ▶ **My Work** ▶ **Activities**. Your upcoming CFL activities for all clients are displayed.

- To filter activities, click **Due**, **Type**, or **View** (My Activities, My Closed Activities, My CSV's Activities, etc.).

- Browse or search and double-click the activity.


 Check your activities often. Some follow-up activities are created automatically, based on CFL standards.

 To view client-specific activities and history, open the Client form in CRM and click **All Activities** or **All History** (closed activities).

Using Contacts


Contacts already entered by the Business Development team are available to CFL users. FMDs, and RMDs already have contact records. CSVs and division leaders are entered as CRM users and **do not** need a contact record.

- Open the Client form in CRM.
- Click **Contacts**. The contact list is displayed.
- Click **Add Existing Contact**. The Look Up Records form is displayed.
- Search for the contact. A list of matching contacts is displayed on the left.
- Select each matching contact and click >> to send the contact to the right.
- When finished, click **OK**. The selected contacts are added to the client's contact list.

 If you're unsure about a contact displayed in the search results, select the contact and click the **Properties** button to view the contact's record.


To add a new contact:

- Open the Client form in CRM.
- Click **Contacts**. The contact list is displayed.
- Click **Add Existing Contact**. The Look Up Records form is displayed.


- In the Look Up Records window (bottom left of window), click **New**. The Contact: New form is displayed.
 - Complete all required fields (marked with **red *** or **blue +**):
 - Select Facility/Other to link the contact to the account record.
 - Indicate whether contact is involved in CFL WOI (e-mail address is required).
 - Enter additional information on Details and Preferences tabs as appropriate.
 - Click **Save and Close**. The new contact is automatically added to the selected list. When you click **OK** to close the Look Up Records window, the new contact is added to the client.
-  Contact records can be synced to your Outlook Contacts folder using Local Data Group criteria.

Clients vs. Accounts






Clients are used by CFL to represent our relationship with a hospital by service line (EM, HM). *Accounts* are used by Business Development to track all TeamHealth-related organizations (hospitals, systems, competitors, consultants). An account is the "parent" to a client.

- Open the Client form in CRM.
 - To access the parent account, click the **Facility Name** link. The Account form is displayed.
 - View and update account information as appropriate.
-  The Service Line tab provides CFL related fields (MSE for EM clients, and Awards/ Presentations for all service lines).

Action Plans - Adding Goals

- Open the Client form in CRM.
 - On the General tab, click **Add New Goal**. The goal worksheet is displayed.
 - Select a metric from the drop-down list (choose **Other** if the goal is not listed) and customize the goal description (remember goals should be **Specific**, **Measurable**, **Attainable**, **Realistic**, **Time-bound**).
 - Click **Internal** to exclude the goal from the client Action Plan report.
 - For Patient Satisfaction goals, select the vendor.
-  There can only be one Patient Satisfaction (Overall) goal, which is the only goal that appears on TH reports. Please enter a Patient Satisfaction (Overall) goal and metrics for

every client and update monthly. You can enter multiple physician Patient Satisfaction and Hospital Focus scores. At this time, these scores do not populate on TH reports.

- Choose the data source (Hospital, TeamHealth Manual, TeamHealth Auto-populated).
 -  Changing the data source will erase all metric data.
 -  The TeamHealth Auto-populated data source is available only for LOS (all, discharged, admitted), LPMSE, and Door to Doc metrics.
- Enter Hospital Goal information (Goal Value Limits, Goal Value, Goal Value Measurement).
 -  Goal value must be a number.
- For Patient Satisfaction goals, select Mean or Percentile as Goal Value Type.
- Select or enter persons responsible, key dates, and status as appropriate.
- Enter metrics as appropriate, including initial baseline and monthly values.
 -  For quarterly results, enter the same value for each month of the quarter (Q1 = Jan - Mar).
- Click **Save** at the bottom of the form. The action plan is updated.
 -  To edit a goal, click the Goal Description link (under Goals/Action column of the Action Plan) or click **Goals** (in the sidebar of the Client form).


Action Plan Improvements


- A sort index has been added to the Goal/Actions column of the action plan in order to sort how goals are displayed.
 - All goals have been assigned a default sort index of 100.
 - Order the goals as you would like them to appear on the screen with the lowest number for the goal that will be displayed first.
 - The printed action plans will not reflect the sort order at this time, but the ordering feature will be added soon to printed action plans.
- The action plan view will now remain on the current goal the user is editing.
 - It will no longer default to the top of the screen after saving a goal, and you will no longer need to scroll down to return to the last edited goal.

- The action plan uses a Save button at the bottom of the form.
 - You will receive a warning message if you try to save an action plan by clicking Save at the top of the screen.

Action Plans - Adding Actions


1. Open the Client form in CRM.
2. Under a goal in the Action Plan, click **Add New Action Item**.
3. Select action presets from the drop-down list or enter the action description in the textbox.
4. Select or enter persons responsible, key dates, status, and updates as appropriate.
5. Click **Save**. The action plan is updated.

 To edit an action, click the Action Description link (under Goals/Action column of the Action Plan) or click **Goals** in the sidebar of the Client form and click Actions in the sidebar of the Goal form.


 Every goal should have an action item and action items should be updated when making action plan updates.

Action Plans - Reports


1. Open the Client form in CRM.
2. Click **Reports** ► **CFL Action Plan** report.
3. Select the client and report options (Internal vs. Hospital, Metrics at End).
4. Click **View Report**.
5. Select Acrobat (PDF) from the drop-down list and click **Export**.

 Reports can also be accessed via the Microsoft Dynamics CRM folders by clicking **Workplace** ► **My Work** ► **Reports**.

Information - Demographics


1. Open the Client form in CRM.
2. Click the Demographics tab.
 -  Several fields contain read-only information, including System Affiliation, Address, WOI Survey, Contracts by Service Line, and Medical Directors.
3. Complete the editable fields under Facility Demographics to indicate volume and bed count information.
4. Select persons responsible. These individuals will be displayed on TeamHealth reports.


5. Click **Save and Close**. The client record is updated.

 The Demographics page can also be used to create status changes and manage value added services.

Status Changes

1. Open the Client form in CRM.
2. In the sidebar of the Client form, click **Status**. The status list is displayed.
3. Click **Change Status**. The New Status Change form is displayed.
4. Choose a new status (Green, Yellow, Red, Pending Term, or Black).
5. For all status colors except Green, select reasons for change (or click **Other Reason for Change** and enter a custom value).
6. Enter specific comments and recovery efforts.
7. Click **Save and Close**.

 For pending terms, enter additional documentation, click **Save**, and click **Attach a File** to attach the term letter document.


 To update an existing status change, double-click the most current status and enter notes as appropriate.

Once complete, you'll be reminded to complete the CFL - Change Status Notification workflow, which automatically creates related activities to notify key personnel of the status change. If you do not run the workflow to send the email notification, the CRM administrator will send the email.

8. Click **Workflows** ► **Run Workflow**, select CFL - Change Status Notification, click **OK**, and click **OK** to confirm when the workflow is complete.

A new client-related email is displayed in your Activities list, which you may review before sending. Some portions of the email are not editable.

9. Select the email and click the **Send** to send the status change email notification. The email should be sent immediately after making the status change unless you need to make edits.


 To make corrections to Comments and such, please delete the email then make the corrections in the Status notes and re-run the "CFL - Change Status Notification" following these instructions again.

Managing Value Added Services (VAS)


1. On the sidebar of the Client form in CRM, click on **Value Added Service** or click **Add New Value Added Service** (under one of the goals on the action plan).

The New VAS form is displayed and the VAS is automatically linked to the client. If added under the action plan, then the VAS is also linked to the goal. Up to four goals can be linked to the VAS record.

2. Enter all required fields (type of VAS, start/end dates, frequency).
3. Add notes as appropriate.
4. Click **Save and Close**. The VAS list is updated.





 If VAS is linked to a goal, then all information will appear under the goal in the action plan.

Advanced Find

1. In the CRM section of the Outlook ribbon, click **More** ► **Advanced Find**. The Advanced Find window is displayed.
2. Build the advanced find criteria:
 - Select an entity (clients, contacts).
 - Select fields, comparison, and values as appropriate.
3. Click **Find**. The search results are displayed.
 -  Results can be exported to Excel or Word.

Tips for TeamHealth Reporting

Hospital Scorecard Report – runs on the last day of the month

-  Assign a meeting type in the CFL Meeting Information section of an appointment. Meetings with no meeting type are not counted in the Hospital Scorecard report.
-  Close all completed meetings. Meetings still listed in activities are not counted in the Hospital Scorecard report. You can still enter notes and attachments once a meeting has closed.
-  Enter a Patient Satisfaction (Overall) recent score & goal – Patient Satisfaction (Hospital Focus) & Patient Satisfaction (Physician) do **NOT** appear on the Hospital Scorecard or TeamHealth reports at this time.
-  Update the RMD in the Client form's Demographics tab. This information is not automatically pulled from TeamWorks at this time.

Red/Yellow Report – runs on the 15th of each month

- 💡 Assign a meeting type in the CFL Meeting Information section of an appointment. Meetings with no meeting type are not counted in the Red/Yellow report.
- 💡 Close all completed meetings. Meetings still listed in activities are not counted in the HS report. You can still enter notes and attachments once a meeting has closed.
- 💡 Update status notes by the 15th of each month for the Red/Yellow report. Attachments can be added for more detail, but the content in the documents will not appear on reports.
- 💡 Select one or more reasons for change when making a status change.

CFL_CRM Audits – will run real time on demand

This report will provide a scorecard based on CFL standards.

- 💡 Assign a meeting type in the CFL Meeting Information section of an appointment. Meetings with no meeting type are not counted in the CFL_CRM Audits report.
- 💡 Close all completed meetings. Meetings still listed in activities are not counted in the CFL_CRM Audits report. You can still enter notes and attachments once a meeting has closed.
- 💡 Update action plan metrics on a **monthly** basis for LOS, LPMSE, D2D, and Patient Satisfaction (Overall) goals.
- 💡 Update action items for LOS, LPMSE, D2D, and Patient Satisfaction (Overall) goals on **quarterly** basis (green status) or **monthly** basis (red/yellow status).
- 💡 Update status notes each month for red/yellow/pending termination contracts.

Action Plans – TeamHealth Auto-populated Data

This data updates on the first day of the month for the 2 months prior (e.g., August dates of service are available on October 1). Blanks in the metrics table indicate insufficient sample sizes (less than 10% of visits included).



Questions?

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