

## Microsoft Dynamics CRM for Prison Healthcare Appeals Management

The California Department of Corrections and Rehabilitation-California Prison Health Care Services (CPHCS) selected Microsoft Dynamics Customer Relationship Management (CRM) software to manage and track inmate appeals and requests for healthcare services. CPHCS desired an enterprise wide system that is web based to consolidate all information and communications associated with managing and tracking health care appeals across all 33 prison facilities within California.

Using CRM, CPHCS is able to develop a systematic approach for receiving, tracking, assigning, and responding to inmate appeals, inquiries and requests. Whether the appeal arrives via phone, mail, email or in person, originates at a prison location or headquarters, the appeal will be captured and tracked within CRM. Appeals are routed as needed to various individuals and/or departments within the CPHCS headquarters or institutions, without the risk that the appeal will get lost or misplaced. This reduces the incidence of individuals or departments manually logging and classifying appeals, and will help to streamline and standardize the appeals management process with in CPHCS.

Appeals can be better managed using CRM, as they will be captured within the single system database, and custom views, workflows, and reports can be established to ensure that appeals do not fall through the cracks. Standardized turn-around times can be established within the CRM system, and alerts can be set up when requests or appeals are not satisfied within the standard timeframes. As necessary, different timeframes, or high priority status can be set up to ensure that certain appeals or requests are expedited. This saves staff time that was spent escalating and researching responses to appeals.

Using activities and workflow within CRM will enable CPHCS to share information among the various departments that may be involved in an appeal without losing track of the appeal's status. Various data querying tools with in CRM and SQL Reporting Services are used to quickly gain access to critical data, aggregate information about appeals, and report on those to executives and management.

In addition, CRM is integrated with other systems within the California prison system to further provide a single point of access to key information stored in those databases through the interface of CRM.

The following are the key project objectives:

- Consolidate existing Access databases into a single SQL database repository
- Leverage the familiar user interface of Microsoft Outlook for easy access to system information in CRM
- Gain access to appeals data in a timely manner
- Provide field level security to ensure information can only be accessed by appropriate user.
- Automate appeals management process
- Reduce manual re-keying of data
- Identify and remedy duplicate information
- Improve data verification
- Improve reporting and auditing functionality
- Increase accountability