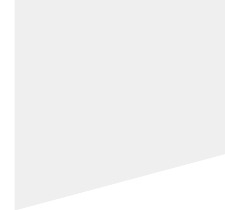


Case Study

Carle Health tames complex scheduling challenges with Upland Panviva



INDUSTRY
Healthcare

COMPANY
Carle Health
Urbana, IL
carle.org

Carle Health serves the needs of more than 265 primary care providers across different office locations and patient care routines.

Carle Health used Upland Software's Panviva to modernize scheduling for their multi-location hospital system. Changes in speed, visibility, and flexibility have simplified the lives of everyone across the Carle system, but the biggest beneficiary is the patients.



How can 55 schedulers manage more than 265 primary care providers?

Contact centers are a provider's right hand.

Serving the needs of 260+ primary care providers, different office locations, and various patient care routines is daunting enough. Couple that with the need to drive operational efficiencies using a centralized call center when many physicians would prefer a direct connection to their scheduler and you'll have the challenge facing the Carle Patient Care Contact Center.

"All of our providers have unique needs. That causes a concern that a call center located miles away from their office might not be able to keep up with their daily demands," explains Angela Beitelman, Director, Patient Care Contact Center. But the size and demands of the multi-location hospital system simply made that practice unsustainable.

Mastering complexity with Panviva.

By building (and improving) scheduling rules in Panviva, Carle has been able to reduce scheduling complexity and maintain up-to-date schedules across all physicians. Reps are also now equipped with detailed decision trees that allow them to confidently take symptom-based calls to ensure patients immediately get the care they need.

"Panviva gives us the dynamic ability to meet the needs of our large physician network with speed, accuracy and flexibility."

– Angela Beitelman

Director, Patient Contact Center,
Carle Health

Schedulers provide proficient patient care with Panviva

Building new, better processes.

The first step in mastering the complexity that comes with hundreds of providers and thousands of patients was getting all the scheduling rules into Panviva. That change alone provided the immediate benefits of increased documentation, plus access and visibility to daily operations that included frequent scheduling changes. With better documentation, both doctors and schedulers could see what and when changes were made, eliminating confusion.

The second step was to create structure and workflow processes. Getting these right meant starting from the beginning: tearing down Carle's old processes and building them back up using workflow rules and decision trees. Despite the complexity,

Panviva was up and running within four months.

With better systems, reps feel like they're saving lives—literally.

Taming complex scheduling was only half the reason Carle chose Panviva. The other, more critical, was the ability to handle complex symptom-based calls. With Panviva, schedulers have access to a clinical decision-tree workflow that allows them to ask callers specific questions about their symptoms using decision trees designed so that someone with no medical training can confidently schedule a patient or transfer to a nurse for triage.

"It's been lifesaving. These decision trees allow our scheduling staff to get our patients to the right level of care. Working

with our clinical leadership; we feel like we are saving lives, literally, every day," says Beitelman. "As a rep, you are entrusted with patient health and safety. Panviva is the equivalent of having an electronic mentor sitting beside you, every day."

These benefits—plus the enthusiasm of both the providers and the contact center staff using Panviva—have encouraged Carle to extend Panviva across their multi-location enterprise.

**50%
reduction**

In time required to update changes

**Improved
morale**

Among doctors and call center agents

**Higher
quality**

Patient care with decision trees that helps reps handle symptom-based calls

Upland helps global businesses accelerate digital transformation with a powerful cloud software library that provides choice, flexibility, and value. Our growing library of products delivers the "last mile" plug-in processes, reporting, and job specific workflows that major cloud platforms and homegrown systems don't provide. We focus on specific business challenges and support every corner of the organization, operating at scale and delivering quick time to value for our 1,700+ enterprise customers. To learn more, visit www.uplandsoftware.com.