



EHR Integration with Healthcare CRM to Optimize Patient Care



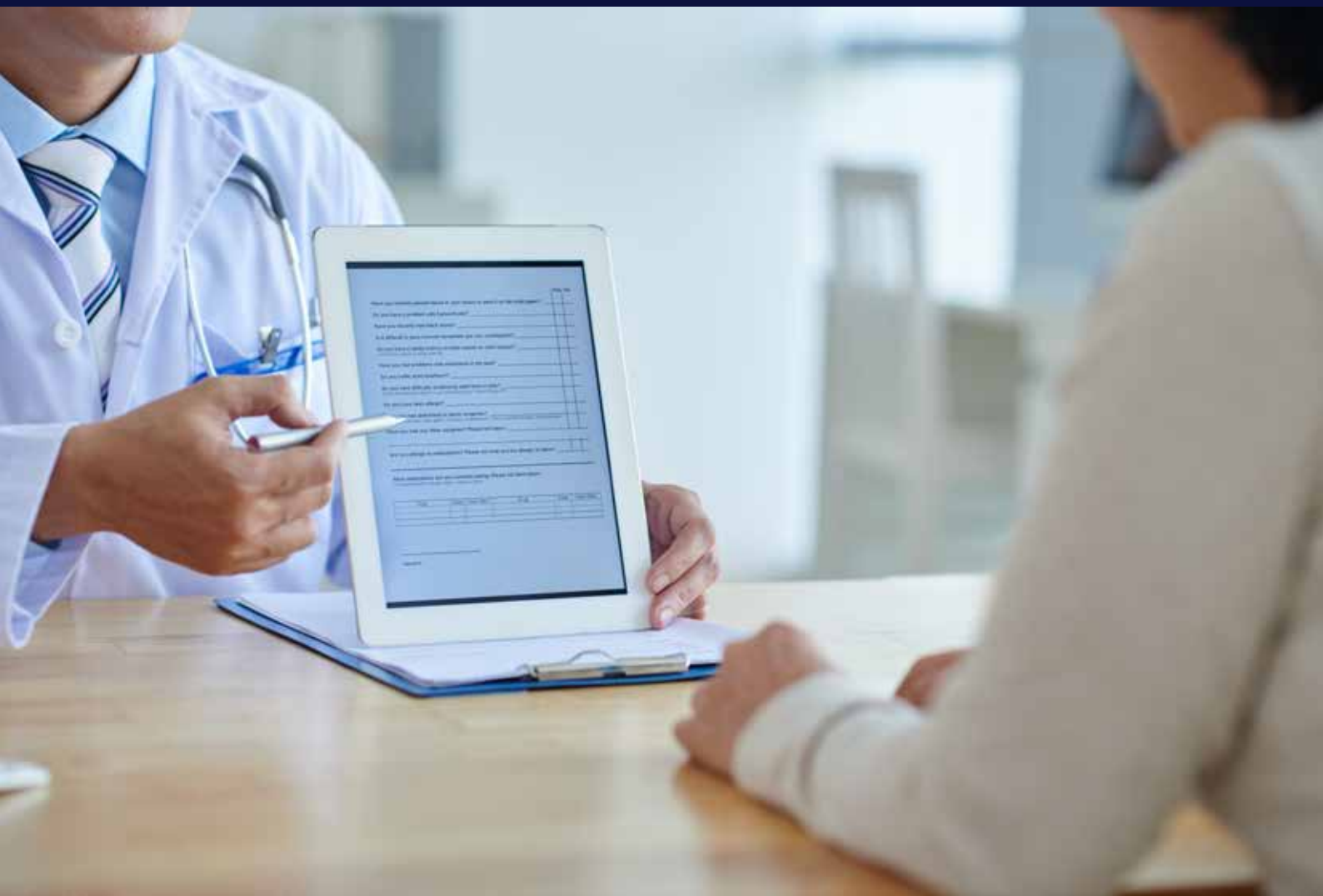
What EHR can (and cannot) do

An EHR or electronic health record, is a class of systems built for securely storing patients health records in a digital format and ensuring the shareability of patient records across the healthcare ecosystem.

However, the actual use of the EHR system comes into play only after a successful appointment. That is, you will use your EHR system when a patient shows up for an appointment.













But what happens to the inquiries that haven't booked an appointment yet?

That's where a Healthcare CRM system comes into play. Think of it as a bridge between an inquiry and a patient.



Here's a run-down on what each platform delivers:

| Functions | EHR system | LeadSquared Healthcare CRM |
|---|---|---|
| Inquiry capture |  |  Easily capture inquiries from website, social media, and ads and track their journey henceforth. |
| Auto qualification |  |  Automatically qualify patient inquiries based on the services you provide. |
| Lead management and Task management |  |  Helps you capture leads from several different sources, organize lead information, and manage interactions with them. Also helps manage operational tasks, such as insurance documentation collection and payment follow-ups. |
| Patient profile management across different services/ departments |  |  Provides a 360-degree view of patients, their interactions, services used, and transactions. |
| Marketing communication |  |  Personalize every communication. Send SMS, WhatsApp messages, Emails to your inquiry/patient list for health camps and more. |

| Functions | EHR system | LeadSquared Healthcare CRM |
|-----------------------------------|---|---|
| Built-in-dialer/ Cloud calling |  |  Call your patients from the CRM portal for follow-ups. LeadSquared seamlessly integrates with RingCentral and other cloud telephony solutions. |
| Appointment scheduling |  |  Along with appointment scheduling, you can also create appointment reminders to reduce no-shows. |
| Patient portal |  |  LeadSquared provides self-serve patient portal for appointments, lab test request, and more. |
| Patient onboarding |  |  With CRM, you need not collect physical documents for address proof, insurance forms, consent letters, etc. It allows you to create e-forms, which patients can fill and submit at their convenience. |
| Doctor onboarding |  |  |
| Referral management |  |  |
| Medical templates and forms |  |  |

| Functions | EHR system | LeadSquared Healthcare CRM |
|--------------------------------------|------------|---|
| Tools to ensure patient satisfaction | ✗ | ✓ Automatically sends request for reviews via text or email to each patient after their appointment. |
| Automated reports | ✗ | ✓ Fetch patient satisfaction, team efficiency, and revenue attribution reports in just a few clicks. |

How does healthcare CRM help with patient engagement?

A healthcare CRM is a patient relationship management tool that optimizes every aspect of patient acquisition, management, and retention. It makes your intake managers and supervisors more efficient. It enables you to:

- Capture inquiries from your website, ads, social media, chats, and referral sites
- Respond fast to inquiries through automated response and lead distribution
- Take advantage of omnichannel communication by sending appointment reminders and other crucial information through email, SMS, WhatsApp, and phone call

- Capture inquiries from your website, ads, social media, chats, and referral sites
- Respond fast to inquiries through automated response and lead distribution
- Automate waitlisting and rescheduling
- Provide links to book self-scheduled appointments
- Automate the patient intake process with hassle-free electronic forms
- Provide a self-serve patient portal
- Integrate with EMR/EHR system and other tools for a singular patient view
- Request feedback/reviews via text or email after the appointment

EHR integration with CRM: Get the best of both worlds

If patient engagement and relationship management are the strengths of CRM, storing medical records and interoperability are the core functions of EHR systems.

The benefits of integrating your EHR system with CRM include:

- **Reduce double entry**

When a repeat patient books an appointment, CRM and EHR communicate, store and organize new records.

- **Cut down on clicks**

You can fetch the patient history, past appointment details, etc. in just a few clicks. There's no need to sift through your EHR to find historical records.

- **Improve patient experience**

Make your intake process faster; meet patient needs through real-time data and insights.

- **Automate patient and doctor onboarding**

- **Track patient journey**

Understand how your patient discovers your practice and plan your marketing strategy based on the data.

- **Streamline marketing**

Create automated responses for marketing campaigns.

- **Automated reporting**

Fetch useful data in ready-to-use actionable reports.

**Schedule a free demo to
see how our patient-first
platform can power your
practice.**

[Book a demo](#)

