

Solution Sheet

Customer Relationship Management (CRM)

Make the smartest, fastest referral decisions. Leverage PointClickCare's fully integrated solution to drive occupancy.



Our CRM ensures skilled nursing facilities have the most complete, timely data for every lead. CRM helps your team quickly decide on suitability and risk, ensure seamless admissions and care planning, and identify strategic referral partners.

What is PointClickCare Customer Relationship Management?

PointClickCare's Customer Relationship Management solution helps to centrally manage your referral intake pipeline and eliminate the duplication of effort and manual paper-based processes. Get a unified view into every aspect of a potential resident throughout the pre-admission process.

Ensure residents are placed at a facility that matches their preferences and care delivery needs. A single, integrated platform populates patient insurance coverage, diagnosis and critical data into PointClickCare. With a 360° view of a potential resident's financial and clinical conditions (diagnosis, medications, allergies, etc.) you have more insight to identify the right patients and payment sources, helping to maintain high occupancy and deliver better outcomes.



Access to qualified leads and clinical data to drive occupancy

- Integration with Carequality providing a complete medical history for a smooth transition of care
- Avoid missed opportunities with access to referrals and clinical data via web and mobile devices



Tracking to identify key referral sources and their business impact

- Built-in reporting on referrals, account, and activity management to view referral pipeline
- Reports, dashboards, and data exporting for deeper insights on referral partners



Enhanced staff efficiency

- Seamless integration into PointClickCare core EHR, reducing duplication of data entry
- Expedited and automated admission documentation with resident specific data



Capture Leads at the Click of a Button

Key referral data from integrated partners is easily captured from web and mobile applications to quickly determine prospective resident needs and preferences. Quickly identify availability and occupancy to confidently place or hold resources in a care setting appropriate for a prospective resident's needs.



Stay on Top of Referral Sources

Analyze outreach efforts and help tailor communications to specific partners to maximize returns. Track referral sources to help build your intake pipeline and gain a better understanding of which referral relationships are most crucial to develop and strengthen.



Speed up the Pre-admission Process Through Automation

Eliminate duplicate data entry, reduce administrative overhead and improve compliance by capturing and auto-populating resident information directly within the PointClickCare platform. Streamline the pre-admission process, ensuring that relevant data is accessible at the time of admission, and improving communication and coordination among team members.



Maximize Your Efforts With Reporting and Dashboards

Fine tune your targeting and management of referral sources to drive occupancy and revenue using the CRM dashboard view, showing key metrics at a glance. Users can view filterable snapshots and reports related to open leads, referral sources, conversion rates, trending graphs, and more. Export data into a spreadsheet and drill into details to better understand which sources and activities are helping to build referral pipelines. The reporting functionality allows staff to track activity status and conversion rates, and view reports on key business metrics. These metrics can be used to forecast trends across one or multiple locations to see the whole organization's resident referral pipeline.

[Schedule Your Demo](#)

PointClickCare Technologies Inc., helps long-term and post-acute care (LTPAC) providers gain the confidence they need to navigate the new realities of value-based healthcare.

For more information on PointClickCare's software solutions, please visit www.pointclickcare.com