



Accelerate Business

What Sets Us Apart

DynaTech's Competitive Advantage

Backed by years of expertise and a team of skilled professionals, DynaTech Systems stands at the forefront of the IT services industry. Our extensive portfolio includes cutting-edge solutions in cloud, ERP and CRM implementation, data analytics, artificial intelligence, and more.

We prioritize long-term partnerships built on collaboration and trust, delivering innovative, scalable, and secure solutions to keep our clients ahead in a rapidly evolving landscape.



150+

Global Projects

100+

Happy Clients

450+

Expert Minds

Microsoft Cloud Capabilities



Cloud



Azure
Infra



Azure
Services



Logic
Apps



Service
Bus



Functions



Event
Grid



API
Management



Synapse
Analytics



Load
Testing



Data
Factory



Business Applications



Marketing



Sales



Finance



SCM



Commerce



Customer
Service



Field
Service



Finance &
Operations



Project
Operations



Human
Resources



Low Code



Power
Pages



AI
Builder



Power
Apps



Power
Automate



Copilot
Studio



Data & BI



Fabric



Dataverse



Power BI



Customer
Insights



OneLake



Data
Engineering



Copilot



Data
Lake



Data
Factory



Data
Science



Data
Warehouse



Lakehouse



Microsoft
Purview



Real-Time
Intelligence

D365 CRM Enrollment Process for Healthcare



Unified Enrollment in One CRM

Enrollment in healthcare isn't just about forms — it's about getting every detail right. With DynaTech's D365 CRM, teams streamline assessments, documents, eligibility, and transitions in one intelligent platform.

Comprehensive Assessments for Enrollment

Capture Level of Care, DME, Behavioral Health, and Home Safety evaluations in one guided workflow.

Real-Time Eligibility Checks

Verify insurance eligibility instantly, without disrupting the workflow.

Smooth Pre-Enrollment Handoff

Trigger tasks and flags early so teams prepare before enrollment begins.

Automated DHCS Form Capture

Complete and validate DHCS forms within CRM through compliant, guided processes.

Enrollment Process Tracking

Track every step from first touch to final approval with timestamped visibility.

TLC Meeting Coordination

Collaborate with up-to-date patient context, shared details, and aligned next steps.

Centralized Document Upload

Attach and organize all enrollment documents securely with instant record access.

Seamless IDT Team Handoff

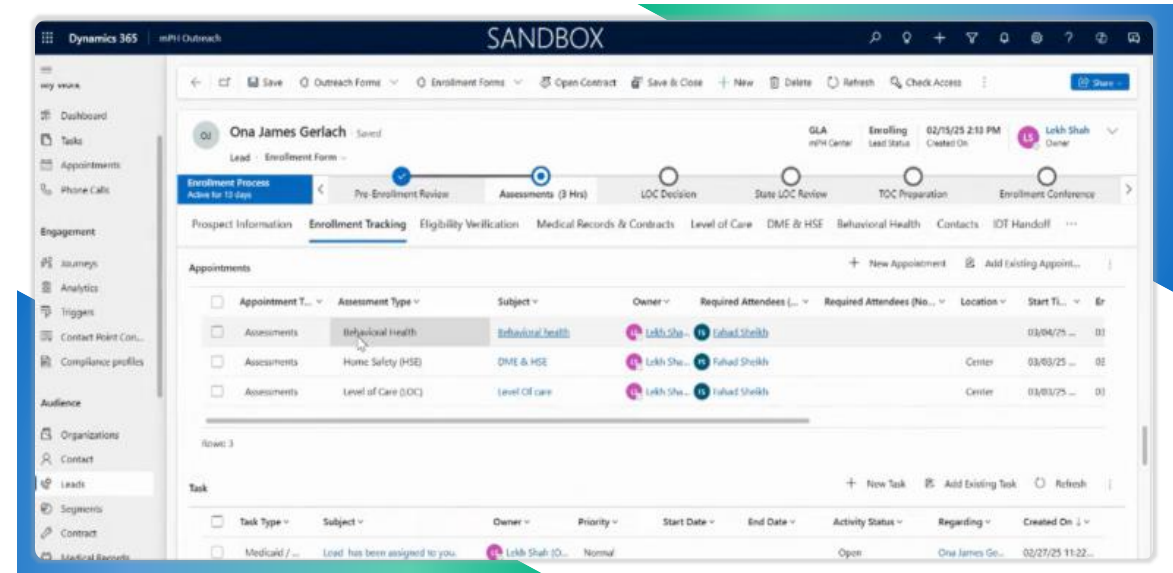
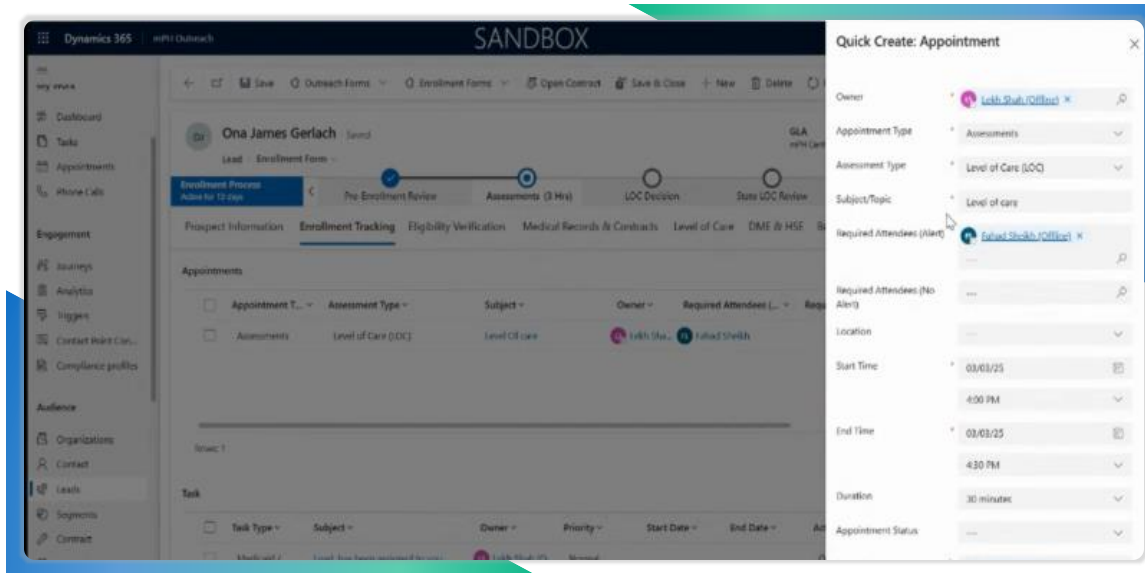
Pass full records, assessments, and meeting schedules to IDT teams in one click.

Instant Transition of Care

Activate care transitions instantly, routing cases to the right team without delay.

One Platform for All Assessments

- ◆ Conduct Level of Care, DME, Behavioral Health, and Home Safety evaluations
- ◆ Schedule intake appointments directly within CRM
- ◆ Link assessments to the patient's enrollment record automatically



Simplify Regulatory Form Workflows

- ◆ Complete DHCS forms with guided CRM workflows
- ◆ Validate entries to ensure compliance before submission
- ◆ Submit securely without switching systems

The screenshot displays the Dynamics 365 mPH Outreach interface in a 'SANDBOX' environment. The left sidebar shows navigation options: Home, Recent, Pinned, My Work (Dashboard, Tasks, Appointments, Phone Calls), Engagement (Journeys, Analytics, Triggers, Contact Point Con..., Compliance profiles), and Audience (Organizations, Contact). The main content area shows the 'Enrollment Process' for 'Ona James Gerlach', which is 'Unsaved'. A progress bar indicates the current stage is 'TOC Preparation (56 Hrs)', with previous stages like 'Pre-Enrollment Review', 'Assessments', 'LOC Decision', and 'State LOC Review' completed. Below the progress bar, there are tabs for 'Prospect Information', 'Enrollment Tracking', 'Eligibility Verification', 'Medical Records & Contracts', 'Level of Care', 'DME & HSE', 'Behavioral Health', 'Contacts', and 'DHCS'. The 'DHCS' tab is active, showing a 'New Section' for 'Profile' with various form fields. The fields are organized into two columns: 'Candidate's Name' (Ona James Gerlach), 'Date of Birth' (02/17/86), 'Home Phone' (3234648543), 'Where is the candidate currently residing' (Assisted Living Facility), 'Age' (58), 'Gender' (Female), 'Street Address' (6380 Hollywood Blvd), 'Mailing Address' (empty), 'Street City' (Los Angeles), and 'City' (empty). The 'Street State' field is set to 'California'.

Enrollment Documents at Your Fingertips

- ◆ Upload and attach enrollment documents in seconds
- ◆ Store securely in the patient's enrollment record
- ◆ Enable audit-ready documentation for compliance

Documentation

All SharePoint Documents

☐	Name	Process Type	Document Type	Uploaded By	Uploaded On	Document Sign
☐	mPSI-Use-5	Other	Medical Records	Unknown	2/18/2025, 3:19:56 PM	
☐	MPH02249_SignedDocument_AR_Form_2025-02-19T06_36_37.5911669Z	Outreach	Authorized Representative Form MC382	Unknown	2/19/2025, 12:06:38 PM	Yes
☐	MPH02249_SignedDocument_AR_Form_2025-02-20T08_18_37.9055667Z	Outreach	Authorized Representative Form MC382	Unknown	2/20/2025, 1:48:39 PM	Yes
☐	MPH02249_SignedDocument_Auth_Tp_Obtain_PHI_2025-02-20T08_19_58.7132789Z	Outreach	Authorization to Obtain PHI	Unknown	2/20/2025, 1:49:59 PM	Yes

Instant Insurance Verification

- ◆ Verify eligibility directly in the enrollment workflow
- ◆ Provide real-time results without delays
- ◆ Prevent errors and ensure smooth intake

Dynamics 365 | mPH Outreach | SANDBOX

Ona James Gerlach - Saved

GLA mPH Center | Enrolled Lead Status | 02/15/25 2:13 PM | Lekh Shah Owner

Enrollment Process: Active for 13 days

Pre-Enrollment Review | **Assessments (5 Hrs)** | LOC Decision | State LOC Review | TOC Preparation | Enrollment Conference

Prospect Information | Enrollment Tracking | **Eligibility Verification** | Medical Records & Contracts | Level of Care | DME & HSE | Behavioral Health | Contacts | IDT Handoff | ...

Status of Eligibility Checks: Active

Aid Codes: 01, 10

Prospect moved to their current residence: Yes

Has the prospect recently moved (< 1 year) to their current residence? Shifted 6 Months Back in the present residence

Is prospect receiving "In-home Supportive Services" / IHSS?

Yes	No	Unknown

IHSS Disenrollment Status

Complete	In Progress	Not Started

Visibility Across the Journey

- ◆ Track every step from intake to approval in real time
- ◆ Timestamp and log all key actions
- ◆ Ensure accountability with transparent progress tracking

The screenshot displays the Dynamics 365 mPH Outreach interface for a lead named Ona James Gerlach. The interface is titled "SANDBOX" and includes a navigation pane on the left with sections like Engagement, Audience, and Channels. The main content area shows the "Enrollment Process" for the lead, which is active for 13 days. The process is visualized as a horizontal timeline with steps: Pre-Enrollment Review, Assessments (4 Hrs), LOC Decision, State LOC Review, TOC Preparation, and Enrollment Conference. The "Enrollment Tracking" tab is selected, showing a list of tabs: Prospect Information, Enrollment Tracking, Eligibility Verification, Medical Records & Contracts, Level of Care, DME B HSE, Behavioral Health, Contacts, and IDT Handoff. Below the timeline, there are sections for "Enrollment Team Notes" and "Manager Notes", each with a text area and a rich text editor toolbar. The "Enrollment Team Notes" section shows a list of notes: "All Good", "All Good", and "All Good". The "Manager Notes" section shows a text area with the placeholder "Enter text...".

Effortless Care Team Collaboration

- ◆ Share full records, assessments, and status with IDT teams
- ◆ Include scheduled meeting times for continuity
- ◆ Provide secure, role-based record access

The screenshot displays the Dynamics 365 mPH Outreach interface in a 'SANDBOX' environment. The main record is for 'Ona James Gerlach', a lead in the 'Enrollment Form' stage, with a status of 'Enrolled but Pending Final State Approval'. The interface includes a left-hand navigation pane with sections for Audience, Channels, and Assists. The main content area shows the 'Enrollment Process' with tabs for Prospect Information, Enrollment Tracking, Eligibility Verification, and Medical Records. A modal window titled 'State Final Submission & IDT Hand-Off (9 Min)' is open, showing a checklist of tasks: State Final Submission Status (Submitted), State Final Submission Decision (Approved), State Final Approval Date (02/24/25), IDT Presentation Date (02/20/25), IDT Handoff Status (Scheduled), and Documents Uploaded to EMR (Yes). The modal also includes a 'Finish' button. The background record shows the 'IDT Handoff' section with a table listing the lead and the scheduled handoff date.

IDT Handoff
IDT Presentation Date: 02/20/25
IDT Presentation
☐ Lead: Ona James Gerlach
IDT Handoff Status: Scheduled

Prepare Teams Before Enrollment Starts

- ◆ Flag records for pre-enrollment review
- ◆ Trigger tasks and responsibilities automatically
- ◆ Provide clarity on next steps with no gaps

The screenshot displays the Dynamics 365 mPH Outreach interface in a 'SANDBOX' environment. The main view is for a lead named 'Ona James Gerlach' (Unassigned). The 'Enrollment Process' is active for 12 steps, with the current step being 'Pre-Enrollment Review (10 Min)'. A 'Manager Review?' dialog box is open, showing a dropdown menu with 'Accepted' selected and a 'Next Stage' button. The background shows a list of review items with icons and text:

Icon	Category	Details	Action
👤	Caregiver	BRSS	✍️
📅	Upcoming Travel	Going Mexico for Next 3 Months	✍️
🏠	DMH Services	DMH Service Received	✍️
🚫	Substance Use	Substances uses	✍️
👤	Not Own Decision Maker	prospect is not own decision maker	✍️
👤	Not Own Decision Maker	Prospect need decision maker, can you verify it.	✍️

The interface includes a left sidebar with navigation options like Dashboard, Tasks, Appointments, Phone Calls, Engagement, Journeys, Analytics, Triggers, Contact Point Con..., Compliance profiles, Audience, Organizations, Contact, Leads, Segments, and Contract. The top bar shows various action buttons like Save, Outreach Forms, Enrollment Forms, Open Contract, Save & Close, New, Delete, Refresh, Check Access, and Share.

Aligned Care Team Collaboration

- ◆ Coordinate TLC meetings inside CRM
- ◆ Review patient updates and details in real time
- ◆ Ensure all participants align on next steps

Enrollment Process (Active for 12 days)

Ona James Gerlach | GLA mPH Center | Enrolling Lead Status | 02/15/25 2:13 PM | Leksh Shukh Owner

Process Flow: Pre-Enrollment Review → Assessments → LOC Decision (2 Min) → State LOC Review → TOC Preparation → Enrollment Conference

Enrollment Tracking

TLC Meeting No...	Status	Carbside To...	TLC Meeting D...	TLC Meeting Veri...	Enrollment Decision	TOC Decision	TLC Meeting No...	Enrollment Decision
TOC	Scheduled		02/26/25	First Presentation	Approved			Notes on TOC

Enrollment Process (Active for 12 days)

Ona James Gerlach | GLA mPH Center | Enrolling Lead Status | 02/15/25 2:13 PM | Leksh Shukh Owner

Process Flow: Pre-Enrollment Review → Assessments → LOC Decision (6 Min) → State LOC Review → TOC Preparation → Enrollment Conference

Enrollment Tracking

TLC Meeting No...	Status	Carbside To...	TLC Meeting D...	TLC Meeting Veri...	Enrollment Decision	TOC Decision	TLC Meeting No...	Enrollment Decision
TOC	Scheduled		02/26/25	First Presentation	Approved			Notes on TOC

Activate Transitions in Seconds

- ◆ Trigger care transitions instantly within CRM
- ◆ Route cases to the right team automatically
- ◆ Maintain clarity and confidence in patient handoffs

Enrollment That Works Smarter



Efficiency

Assessments, forms, and documents all in one CRM



Accuracy

Real-time eligibility checks and tracking



Continuity

Seamless handoffs and transitions for coordinated care

Transform Healthcare Enrollment with D365 CRM

- ◆ Deliver smarter, faster, and connected enrollment experiences with confidence.
- ◆  Contact us today to learn more.

Want to know more?

Contact Us!

DynaTech Systems has proudly served clients seeking advanced tech solutions across the globe with top-notch precision and excellence.



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