



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 Outreach Process for Healthcare



Unified Outreach in a Single CRM Platform

Managing outreach doesn't have to mean juggling tools. D365 CRM centralizes the patient engagement lifecycle — scheduling, documentation, Medicaid submissions, and outreach stages — into one connected system.

Streamlined Appointment Scheduling

Schedule outreach appointments directly inside CRM with confirmations logged in real time.

Outreach Documentation & Recordkeeping

Upload call notes, forms, and consent documents directly into patient records.

Centralized Medical Records & Contracts

Store, tag, and manage medical files and contracts in one secure, accessible place.

Configurable Outreach Forms

Capture outreach interactions with structured forms tied to the patient timeline.

Intelligent Contact Creation & Management

Capture demographics and eligibility in guided forms, auto-linked to downstream workflows.

Escalation, Flagging & Case Prioritization

Escalate complex cases with urgency levels and reason codes, tracked end-to-end.

Structured Pre-Enrollment Handoff

Route patient files internally with responsibility tracking and review notes.

Service Area Validation

Instantly validate ZIP code eligibility and flag unsupported regions at intake.

Simplified Task Assignment & Tracking

Assign and monitor tasks from dashboards with ownership and deadlines clearly defined.

Integrated Medicaid Application Submission

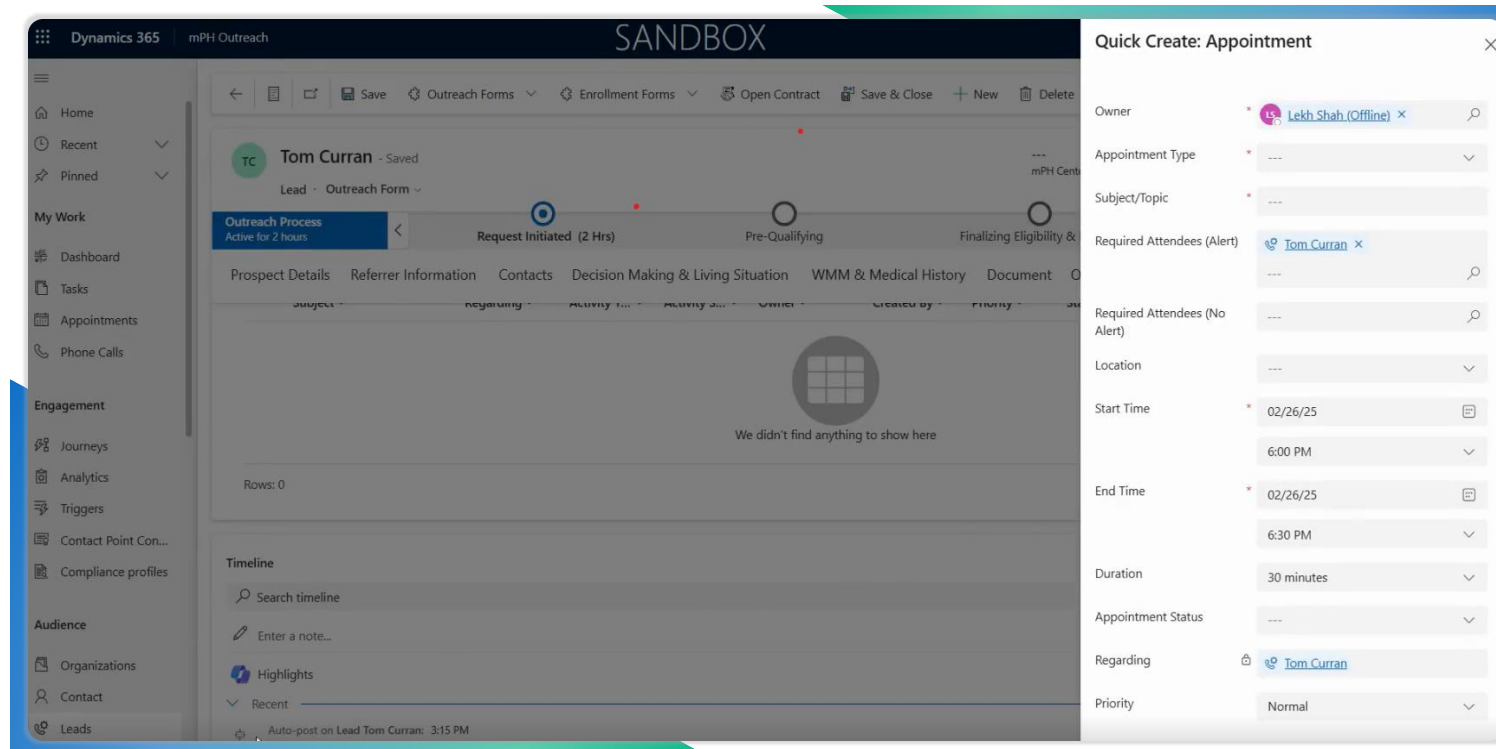
Capture, verify, and submit Medicaid applications securely without leaving CRM.

Guided Outreach Stages

Move patients through structured outreach stages for consistency and compliance.

Book Appointments in Seconds

- ◆ Schedule directly in CRM, no external systems needed
- ◆ Configure appointment types and update patient records instantly
- ◆ Track confirmations and log every interaction automatically



Create Patient Profiles Accurately

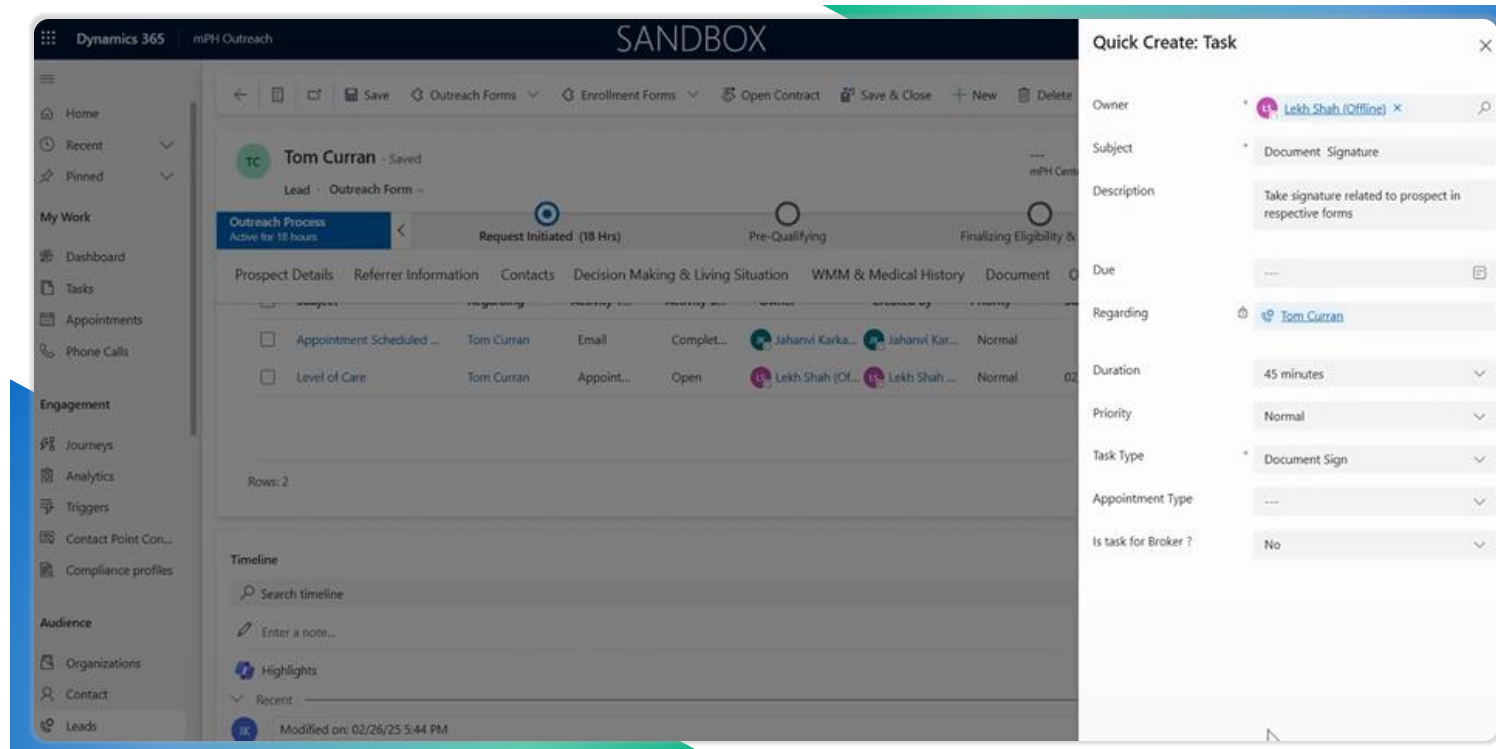
- ◆ Guided forms capture demographics, eligibility, and relationships
- ◆ Contacts automatically flow into outreach workflows
- ◆ Verified data ensures continuity from the start

The screenshot displays the Dynamics 365 Sandbox interface. The main window shows a contact profile for 'Ona James Gerlach' with a 'Lead' role and 'Outreach Form' status. A 'Quick Create: Contact' dialog is open on the right, showing fields for 'Contact Type' (Family Member), 'Family Member Type' (Sibling), 'First Name' (Rony), 'Last Name' (James), 'Email' (jamesrony@gmail.com), 'Mobile Phone' (8889767890), and 'Does Contact Need to be Included in Enrollment Process?' (Yes). The 'Address' section is also visible, with 'Same As Applicant Address?' set to 'Yes'. The background shows a list of contacts with columns for Full Name, Email, Mobile ph., Fax Number, Contact Ty., Sub Contact T., and Sub Cat.

	Full Name	Email	Mobile ph.	Fax Number	Contact Ty.	Sub Contact T.	Sub Cat
☐	Sally Madhwa	sally.mad@outlook.com	(111) 256-42...	789-987-789	Family Mem...		
☐	Percy Jackson	Percy.Jack123@gmail.com	(123) 889-15...	96743578	Medical Co...		
☐	Maulik Mohi	mohi@ghu.com	8790888011		Medical Co...		
☐	Charity Ryan	charityryan123@gmail.com	(123) 467-23...	562-98-9673	Medical Co...		
☐	Rex Carroll MD	Rex.Carroll123@gmail.com	123456	(123) 903-6066	Decision Ma...		
☐	Ona Gerlach J	gerlach.ona345@gmail.co...	(111) 623-33...		Care Manag...		
☐	Ram Shah				Medical Co...		
☐	Test Medical Cont...	test1@mail.com	123456		Medical Co...		

Stay on Top of Every Task

- ◆ Assign tasks directly inside CRM workflows
- ◆ Define owners, deadlines, and categories for clarity
- ◆ Tasks sync with dashboards for visibility across teams



Audit-Ready Documentation

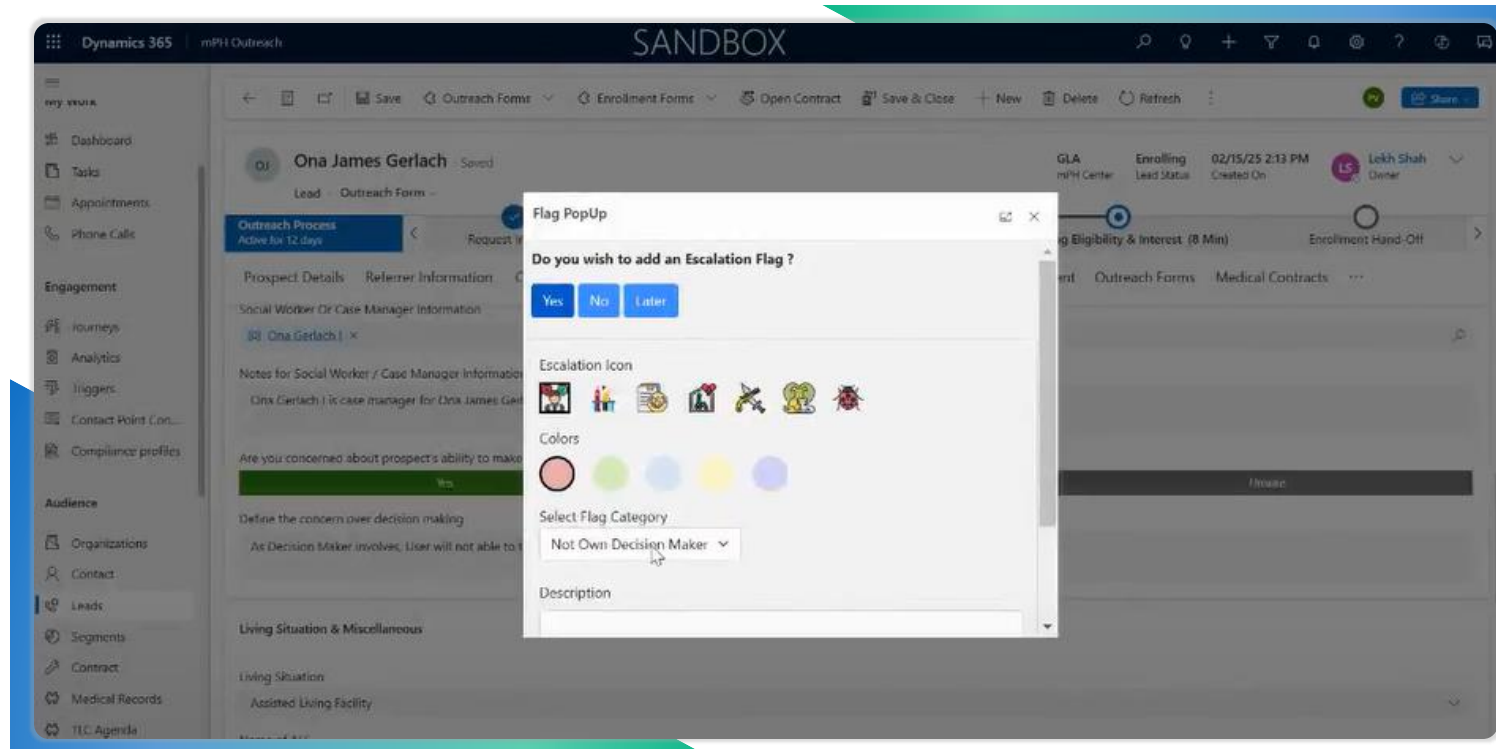
- ◆ Upload outreach documents into patient records
- ◆ Store consent forms, notes, and attachments securely
- ◆ Maintain compliance with traceable documentation

The screenshot displays the Dynamics 365 mPH Outreach interface. The top navigation bar includes 'Dynamics 365' and 'mPH Outreach'. The main header shows the patient name 'Ona James Gerlach' and a 'Lead - Outreach Form' dropdown. A progress bar indicates the 'Outreach Process' with steps: Request Initiated, Pre-Qualifying, Medical Application, Finalizing Eligibility & Interest (40 Min), and Enrollment Hand-Off. Below the progress bar, tabs for 'Prospect Details', 'Referrer Information', 'Contacts', 'Decision Making & Living Situation', 'WMM & Medical History', 'Document', 'Outreach Forms', and 'Medical Contracts' are visible. The 'Document' tab is active, showing a table titled 'All SharePoint Documents'. The table has columns for Name, Process Type, Document Type, Uploaded By, Uploaded On, and Document Sign. The table lists several documents, including medical records and authorized representative forms.

Name	Process Type	Document Type	Uploaded By	Uploaded On	Document Sign
mPH-Use-5	Other	Medical Records	Unknown	2/18/2025, 3:19:56 PM	
MPH02249_SignedDocument_AR_Form_2025-02-19T06_36_37.5941669Z	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_To_Obtain_PHI_2025-02-20T08_19_58.7132780Z	Outreach	Authorization to Obtain PHI	Unknown	2/20/2025, 1:49:59 PM	Yes
MPH02249_SignedDocument_Auth_To_Obtain_PHI_2025-02-20T14_22_07.9904703Z	Outreach	Authorization to Obtain PHI	Unknown	2/20/2025, 7:52:08 PM	Yes
MPH02249_SignedDocument_Authorized_Organization_MC383_2025-02-		Authorized Organization		2/21/2025, 8:39:30	

Ensure Timely Resolution

- ◆ Instantly escalate complex cases within CRM
- ◆ Add urgency levels, reasons, and notes for context
- ◆ Track escalation trails for quality and governance



Streamline Enrollment

- ◆ Submit Medicaid applications directly inside CRM
- ◆ Capture and verify all relevant details securely
- ◆ Eliminate duplication and speed up reviews

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 options like Home, Recent, Pinned, My Work, Engagement, and Audience. The main content area shows the "Outreach Process" for the lead, which is currently in the "Medicaid Application (10 Min)" step. The process flow includes Request Initiated, Pre-Qualifying, Medicaid Application (10 Min), Finalizing Eligibility & Interest, and Enrollment Hand-Off. Below the process flow, there are tabs for Prospect Details, Referrer Information, Contacts, Decision Making & Living Situation, WMM & Medical History, Document, Outreach Forms, and Medical Contracts. The "Prospect Details" tab is active, showing various fields for financial and eligibility information. The "Financial" section includes Aid Codes (01, 10), Eligibility Type (Medicare Only), and a question "Does prospect have Medicaid / Medi-Cal?" with a "No" button selected. The "Medicaid / Medi-Cal Number" field contains "APMC-MP-88970". The "Medicaid / Medi-Cal Verified and Active" section has a "Yes" button selected. The "Does prospect want to apply for Medi-Cal?" section has a "Yes" button selected. The "Prospect willing and able to private pay" section has a "Yes" button selected. The "Share of Cost" section has a "Yes" button selected. The "Share of Cost Amount" field is empty.

All Records in One Place

- ◆ Upload and tag medical records and contracts
- ◆ Store securely within patient profiles
- ◆ Ensure stakeholders access accurate data quickly

The screenshot displays the Dynamics 365 mPH Outreach interface in a 'SANDBOX' environment. The left sidebar shows navigation options: Dashboard, Tasks, Appointments, Phone Calls, Engagement (Journeys, Analytics, Triggers, Contact Point Con..., Compliance profiles), Audience (Organizations, Contact, Leads, Segments, Contract, Medical Records), and Leads. The main content area shows a patient profile for 'Ona James Gerlach' with a 'Lead - Enrollment Form' status. A progress bar indicates the 'Enrollment Process' is active for 13 days, with steps: Pre-Enrollment Review, Assessments (3 Hrs), LOC Decision, State LOC Review, TOC Preparation, and Enrollment Conference. Below the progress bar, a tabbed interface shows 'Medical Records & Contracts' selected. A table titled 'Medical Contracts' lists two contracts:

Case Number	Contract Type	Description	Medical Contact	Priority	Urgency	Manager Review
CAS-01092-H7L1C0	Single Case Agr...	Required for Future Reference	Dr. Emily Carter	Not Require...	Medium	
CAS-01092-S4T5K4	Single Case Agr...	Required for future Reference	Bony James	Not Require...	Medium	

Smooth Internal Transitions

- ◆ Route patient records for pre-enrollment review
- ◆ Assign reviewers and responsibilities clearly
- ◆ Verify transfers and track updates automatically

The screenshot displays the Dynamics 365 mPH Outreach interface in a 'SANDBOX' environment. The left sidebar shows navigation options: my work, Dashboard, Tasks, Appointments, Phone Calls, Engagement (Journeys, Analytics, Triggers, Contact Point Con..., Compliance profiles), Audience (Organizations, Contact, Leads, Segments, Contract, Medical Records, TLC Agenda), and Leads. The main content area shows a record for 'Tom Curran' with a 'Lead - Outreach Form' and a 'Pre-Enrollment' status. A progress bar indicates the process stages: Request Initiated, Pre-Qualifying, Finalizing Eligibility & Interest, and Enrollment Hand-Off (34 Min). Below the progress bar, there are tabs for Prospect Details, Referrer Information, Contacts, Decision Making & Living Situation, WMM & Medical History, Document, and Pre Enrollment Review. The 'Pre Enrollment Review' tab is active, showing a table with columns: Process Type, Section Name, Type, Enroll..., Question Notes, Answer Notes, \$..., Owner, Created..., and Status Updated... The table contains one row with 'Outreach...', 'Prospect Details', 'T...', 'Yes', 'Meal Arrangement', and 'Lekh Shah' as the owner. Below the table, there are sections for 'Assessments Activities' and 'Assessment Appointments'. The 'Assessment Appointments' section shows a table with columns: Appointment T..., Assessment T..., Subject, Owner, Required Attendees (...), Required Attendees (No...), Location, Start Ti..., End Time, and A). The table contains two rows: 'Center Tour' and 'Assessments', both with 'Lekh Shah' and 'Fahad Sheikh' as owners.

Stage-Driven Outreach

- ◆ Move patients through defined outreach stages
- ◆ Ensure compliance and process visibility at every step
- ◆ Reduce oversight with structured workflows

Dynamics 365 | mPH Outreach

SANDBOX

Ona James Gerlach - Unsaved

GLA mPH Center Enrolling Lead Status 02/15/25 2:13 PM Created On Puneet Verma Owner

Outreach Process Active for 11 days

Request Initiated Pre-Qualifying Finalizing Eligibility & Interest Enrollment Hand-Off (< 1 Min)

Prospect Details Referrer Information Contacts Decision Making & Living Situation WMM & Medical History Document Outreach Forms

All SharePoint Documents

	Name	Process Type	Document Type	Uploaded By			
☐	mPH-Use-5	Other	Medical Records	Unknown			
☐	MPH02249_SignedDocument_AR_Form_2025-02-19T06_36_37.5941669Z	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_To_Obtain_PHI_2025-02-20T08_19_58.7132780Z	Outreach	Authorization to Obtain PHI	Unknown	2/20/2025, 1:49:59 PM	Yes	
☐	MPH02249_SignedDocument_Auth_To_Obtain_PHI_2025-02-20T14_22_07.9904703Z	Outreach	Authorization to Obtain PHI	Unknown	2/20/2025, 7:52:08 PM	Yes	
☐	MPH02249_SignedDocument_Authorized Organization MC383_2025-02-		Authorized Organization		2/21/2025, 8:39:30		

Ready for hand-off? Yes

Request Override? No

Have legal documents been collected? Yes

mPH Center GLA

Finish

Capture Every Interaction

- ◆ Use structured outreach forms built into CRM
- ◆ Record reasons, outcomes, and notes against patient timelines
- ◆ Ensure accountability with consistent data capture

The screenshot displays the Dynamics 365 mPH Outreach interface in a 'SANDBOX' environment. The left sidebar shows navigation options: Dashboard, Tasks, Appointments, Phone Calls, Engagement (Journeys, Analytics, Triggers, Contact Point Con..., Compliance profiles), Audience (Organizations, Contact, Leads, Segments, Contract, Medical Records, ITC Agenda), and my vvera. The main content area shows a patient record for 'Ona James Gerlach - Saved'. The record includes a timeline with steps: Request Initiated, Pre-Qualifying, Finalizing Eligibility & Interest (7 Min), and Enrollment Hand-Off. Below the timeline, there are tabs for Prospect Details, Referrer Information, Contacts, Decision Making & Living Situation, WMM & Medical History, Document, Outreach Forms, and Medical Contracts. The 'Outreach Forms' tab is active, showing a form with fields for Patient Details, Application Request ID, Address, City, State/Province, ZIP/Postal Code, Date of Birth, and who is the decision maker. The form is populated with data for Ona James Gerlach, including her first and last name, mobile phone number, email, application request ID (MPH02249), address (6560 Hollywood Blvd, Los Angeles, California 90028), date of birth (02/17/66), and Medicare/Medical numbers. The decision maker is listed as Abe Carroll MD.

Template Details	
First Name	Ona James
Last Name	Gerlach
Mobile Phone	3234648543
Email	puneet.verma@dynatechconsultancy.com
Outreach template	MPH02249
Outreach Specialist	Puneet Verma (Offline)
Medicare Number	23456789
Medical Number	98765432
Have all the details been	No
Application Request ID	MPH02249
Address	6560 Hollywood Blvd
City	Los Angeles
State/Province	California
ZIP/Postal Code	90028
Date of Birth	02/17/66
who is the decision maker	Abe Carroll MD Decision Maker of Ona Gerlach

Check Eligibility Instantly

- ◆ Validate service areas based on ZIP codes
- ◆ Flag unsupported entries at point of entry
- ◆ Redirect or reroute early to avoid intake delays

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, Leads). The main content area shows a form for 'Tom Curran - Saved' (Lead - Outreach Form). The form includes a progress bar with stages: Request Initiated (19 Hrs), Pre-Qualifying, Finalizing Eligibility & Interest, and Enrollment Hand-Off. Below the progress bar are tabs for Prospect Details, Referrer Information, Contacts, Decision Making & Living Situation, WMM & Medical History, Document, Outreach Forms, and Medical Contracts. The 'Prospect Details' tab is active, showing fields for Address (Street 1, Street 2, Street 3, City, State/Province), County, Country/Region, ZIP/Postal Code, and Service Area. The values entered are: Street 1: A11 Street 68, County: ---, Country/Region: ---, ZIP/Postal Code: 90026, City: Los Angeles, State/Province: USA, and Service Area: GLA. A map is visible at the bottom of the form, and a 'Get Directions' button is present.

Smarter Outreach, Better Results



Efficiency

Schedule, document, and track in one CRM



Accuracy

Guided forms, validations, and auto-logging



Compliance

Escalations, Medicaid workflows, and audit-ready records

Transform Patient Outreach with D365 CRM

- ◆ Streamline scheduling, documentation, and compliance — all within one connected platform.
- ◆  Contact us today to get started.

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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