



**Progressive Home Care Leveraged Nintex Forms and Workflow, on top of SharePoint Online, for Automation of Intake Process**

# Progressive Home Care Leveraged Nintex Forms and Workflow, on top of SharePoint Online, for Automation of Intake Process

## Quick Facts

**Industry:** Healthcare

**Location:** USA

**Employees:** 10

**Revenue Range:** \$1 million - \$5 million

## About the Client

From assisted daily living and personal continuous care to respite and hospice care, the caregivers at Progressive Home Care are trained in all facets of home care services.

## Background

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A paper-based intake process rendered lost paperwork and lost clientele. With manual processes, administrators were unable to track the status of client requests and did not have full visibility into the tasks of staff members.

Progressive Home Care sought to migrate all of its intake process related forms to an electronic method via Nintex Forms, and automate the intake process with Nintex Workflow.

### Solution

Microexcel was selected to automate the intake process, and numerous deliverables were developed using Nintex Forms and Workflows on top of SharePoint Online.

After go-live, Microexcel ensured complete customer satisfaction by conducting a demo that addressed all the customer's questions. Additionally, Microexcel assisted the client with post production issues to ensure a smooth transition to the new solution.

### Benefits

- ▶ Administrator's dashboard provided visibility into all tasks assigned to staff members
- ▶ Elimination of paper-based processes has significantly streamlined operations
- ▶ Staff members are now able to track their own individual tasks for each of their clients in one location
- ▶ Increased customer satisfaction has led to better customer retention
- ▶ Eliminated delays in issue resolution time for client's requests

Quick Facts

Background

Solution

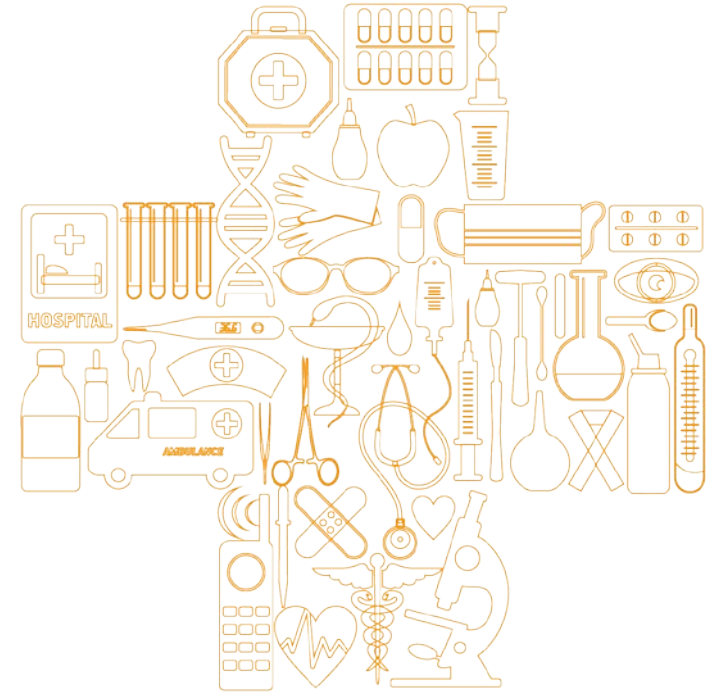
Benefits

## Background

The intake process at Progressive Home Care, Inc. was paper-based and executed manually, and the client noticed that the lack of an automated process had rendered lost paperwork and lost clientele. With manual processes, administrators were unable to track the status of client requests and did not have full visibility into the tasks of staff member who were handling the clients. Additionally, due to the delays in processing client requests, customer satisfaction suffered.

Not only did the administrators at Progressive Home Care utilize paper-based processes to keep track of new and existing clients, the nurses that would visit the clients' home did as well, meaning each home visit required significant amount of paperwork to be filled out.

As a result, Progressive Home Care sought to migrate all of its intake process related forms to an electronic method via Nintex Forms, and automate the intake process with Nintex Workflow. A dashboard was required that would allow administrators to see the tasks assigned to staff members so that the progress of different clients could be tracked and delays in the process could be pinpointed if necessary. A dashboard would enable the client to address any issues and expedite the process for that specific client, as well as retain its clientele with increased customer satisfaction.



## Solution

As a Nintex certified partner, Microexcel was selected by Progressive Home Care to assist in the automation of the intake process. After a thorough review, Microexcel supported the client's decision to utilize Nintex Forms and Workflows for Office365, but suggested this be executed on top of SharePoint Online.

This suggestion was based on SharePoint being the best tool for collaboration and business process automation. The Nintex Forms and Workflows technology would make it simpler to develop such Forms and Workflows. Progressive Home Care already had the Office365 subscription, so the client went ahead with SharePoint online. This implementation would benefit the nurses, administrators, and IT departments.

Microexcel installed and configured Nintex Forms and Nintex Workflow App within SharePoint Online Site Collections. The following deliverables were also developed:

- ▶ 11 Nintex Forms
- ▶ One Nintex workflow to automate business process
- ▶ One dashboard for administrators and one dashboard for staff members
- ▶ One Workflow History page where users can see the history of a client's request for auditing purpose
- ▶ One document library where additional PDF forms can be uploaded and stored

To ensure complete customer satisfaction, after the go-live of SharePoint Online, Microexcel provided a demo and addressed all of the client's questions. Additionally, Microexcel addressed and corrected post-production issues to provide a smooth transition to the new application.

## Benefits

Quick Facts

Background

Solution

Benefits

Dashboard for Administrators provided visibility into all tasks assigned to staff members for all of the clients

Elimination of paper-based processes has significantly streamlined operations

Increased customer satisfaction has lead to better customer retention

Staff members are now able to track their own individual tasks for each of their clients in one location within their dashboard

Eliminated delays in issue resolution time for client's requests

**"I am extremely satisfied with the services I have received from Microexcel and will absolutely use them in the future."**

*- Danny Smith, Director of Operations, Progressive Home Care, Inc.*

For more information,  
please visit [www.microexcel.com](http://www.microexcel.com) or email [info@microexcel.com](mailto:info@microexcel.com)

### About Microexcel

Microexcel Inc., is a global leader in providing innovative and comprehensive software solutions and services. Founded in 2001, Microexcel merges people and technology to deliver the most value and return on investment for customers. With headquarters in Secaucus, NJ, and offices worldwide, Microexcel provides full services and support to clients in the areas of Microsoft, SAP, Quality Assurance and Testing, IT Infrastructure, Open Source/Liferay, Staffing, and Interactive Services. Microexcel is ISO 27001:2013 and ISO 9001:2015 certified and is also a New York and New Jersey state Certified Minority Owned Business Enterprise.



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