



Medical Device Solutions  
Powered by Experience

## Medical Implant Device Management Solution Provider Cuts Costs, Increases Business Volume

### Overview

**Country or Region:** United States

**Industry:** Medical device—Patient care devices

### Customer Profile

Headquartered in Lake Mary, Florida, Access MediQuip provides implantable medical devices services. With 190 employees, the company serves 175 device manufacturers and more than 2,500 healthcare providers.

### Business Situation

Access MediQuip needed better systems to coordinate orders for medical implants with healthcare providers, device manufacturers, and insurance carriers that pay for the devices and procedures.

### Solution

The company implemented Microsoft Dynamics GP and the xRM application development platform included in Microsoft Dynamics CRM to track requests and orders for device surgeries; complex, rule-driven payment processing; and customer histories.

### Benefits

- Reduce costs and increase business volume
- Accelerate development of workflows and integrations
- Empower executives and improve customer service

“We increased our volume of business by more than 150 percent. We did this with a less than 50 percent increase in our overall operations staff. And, our unit cost of processing a referral has fallen by 30 percent.”

Bill Elliott, President and Chief Operating Officer, Access MediQuip

Access MediQuip manages medical device costs related to implantable devices, linking healthcare providers, device manufacturers, and the insurance carriers that pay for the implant procedures. To build its business and more effectively support the companies using its services, the company built its business management solution on Microsoft Dynamics GP and the xRM application development platform included in Microsoft Dynamics CRM. With this solution, the company has the flexibility to create automated workflows and extensive customizations to provide faster customer service. Now, customers can track the status of orders online and executives can manage more effectively with up-to-date information. As a result, Access MediQuip has increased its business by 150 percent while expanding its operations staff by only 50 percent, substantially lowering its operational costs per order processed.



Microsoft Dynamics®

## Situation

Access MediQuip, in business since 1997, provides the healthcare industry with solutions for managing the costs pertaining to implantable medical devices, such as orthopedic and spinal implants. The company connects doctors, hospitals, and surgery centers with the manufacturers of implantable medical devices and the insurance companies that provide payments for the devices.

With an operations center in Houston, Texas, and corporate headquarters in Lake Mary, Florida, Access MediQuip receives referrals from more than 2,500 healthcare facilities or physicians. Following each of those referrals, company employees create a purchase order from a product catalog of more than 17,000 products from 175 different manufacturers. The company then manages the process of billing and receiving payment from the insurance companies that have contract arrangements with patients, healthcare providers, and device manufacturers.

"We provide almost every device that can be implanted in the body during a medical procedure," explains Jason Rosenberg, Vice President of Information Technology and Application Development at Access MediQuip. "That includes artificial hips, knees, stents, pacemakers, and spinal implants. Our product catalog lists 17,000 entries, including human tissue components required in some operations."

### **Exacting Standards for Service Delivery**

Access MediQuip needs to serve all parties involved in the medical process: the doctors who initiate the request for a medical procedure, the companies that manufacture the implantable devices, the

insurance carriers that pay the bills, and the patients who undergo the implant procedure. The company must also comply with stringent rules for healthcare confidentiality and provide auditable records of every transaction.

"All of our customers—the healthcare facilities, the device manufacturers, and the insurance carriers—are all concerned about the patient. The timeliness, accuracy, and quality of our business processes are critical to the satisfaction of not just our direct customers but also the patient having the medical procedure," says Kendra Obrist, Senior Vice President of Marketing and Product Development at Access MediQuip. "We need to have the exact information available in the case of product recalls or safety bulletins. Our responsiveness and accuracy can be a matter of life or death."

### **Manual Processes and Increased Operational Complexity**

Orders come to Access MediQuip as referrals from doctors or hospitals in the form of secured fax messages. Employees had to key in the information from the faxed messages to create purchase orders. However, the manual processes and resulting silos of information made it difficult to operate efficiently.

Access MediQuip has a complex pricing model, with volume tiers, discounts, and rebates depending on the different contracts between device manufacturers, healthcare providers, and insurance carriers. A patient may receive partial payment from one insurance company and the balance from a second company. "Before, all of that information was in people's heads or in Microsoft Office Excel spreadsheets on their desktops,"

“In my experience, we simply could not have accomplished our goals in such a limited time frame with Oracle or SAP. To accomplish that, we needed to shift to the Microsoft technology platform.”

Jason Rosenberg, Vice President of Information Technology and Application Development, Access MediQuip

says Rosenberg. “Imagine preparing a bill for an insurance company and having to look up and apply terms of a contract to every item on the bill.” Processing orders were time consuming, and opportunities for error crept up at almost every step.

#### **Limited Access to Management Information**

The paper-based information flow made it difficult for company employees and executives to obtain up-to-date information about company operations. “Information about the state of the business was difficult to retrieve, and we could only give our customers limited information about order status, usage rates, and cost comparisons,” says Rosenberg. “We knew we needed to automate those processes and add workflows if we wanted to grow the business.”

#### **Solution**

Access MediQuip considered business management solutions from Oracle and SAP, but the cost of implementation was high, and the solutions would have required time-consuming and expensive customizations. The company decided to convert its proprietary business management systems to Microsoft Dynamics GP. Then, the company implemented Microsoft Dynamics CRM to manage its customer and order history.

“Microsoft Dynamics CRM gave us the ability to manage all the different entities we interact with, such as patients, physician, manufacturers, hospitals, and surgery centers, and it gave us a way to structure that information,” says Rosenberg.

#### **Specialized Integration**

The company initially used the Smart Connect tool from eOne, an independent software vendor and Microsoft partner, to connect Microsoft Dynamics CRM to the financial management capabilities of Microsoft Dynamics GP. However, Access MediQuip needed more advanced information management for efficiently managing the flow of information from hospital and doctor referrals to the company’s catalog of implantable devices and to the insurance contracts that might apply to a particular purchase.

To achieve this, Access MediQuip sought specialized customization to create more powerful, more flexible links between its financial and operational systems. To create these customized integrations, the company recently began taking advantage of the xRM application development platform.

The company asked two Microsoft Gold Certified Partner companies, Idea Integration (formerly known as Enterlogix) and CRM Accelerators, to provide the customizations and integrations between the multiple components of Microsoft Dynamics GP, Microsoft Dynamics CRM, and the company’s database information stored in Microsoft SQL Server.

Says Tracy Knutson, Director of Delivery for Idea Integration, “Access MediQuip wanted a complete case management life cycle for every referral it receives from a physician. So, we extended the capabilities of Microsoft Dynamics GP to make it work the way the company wanted it to.” Idea Integration built subledgers for each case, with records for each insurance company, and created a custom transfer-of-responsibility window so that the correct balance for

Connecting referrals to medical device manufacturers and insurance companies.

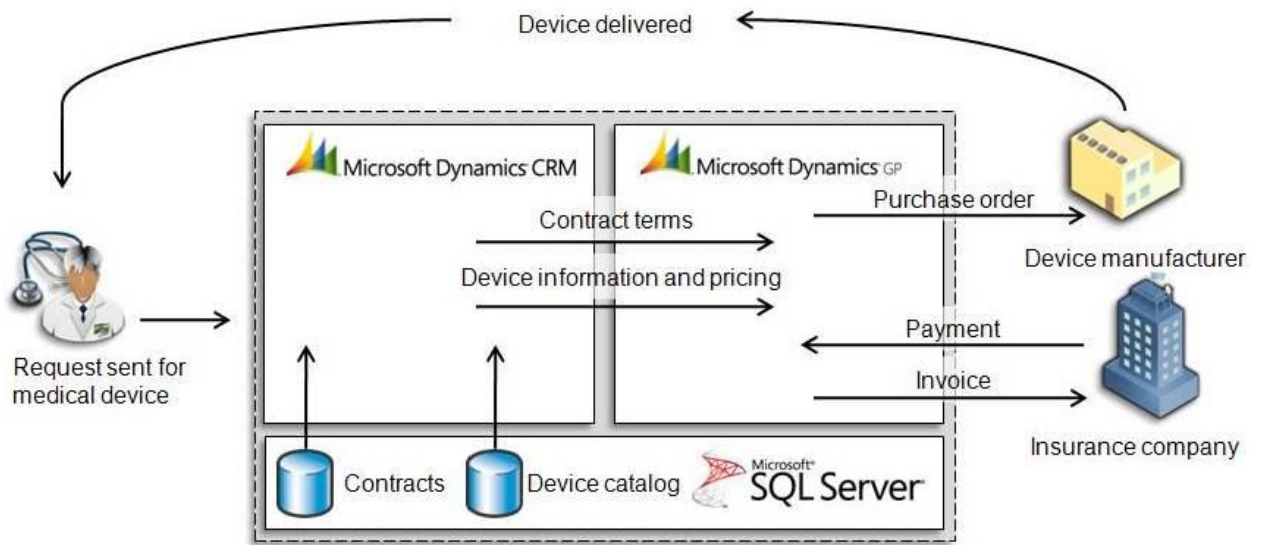
each insurance company was calculated and passed on correctly. Now if anything changes, the correct information has to be processed for all the payers.

**Advanced Business Logic and Automation**

Working with the two partners, Access MediQuip used automation software from InRule Technology to guard against invalid or missing data by validating data in referral requests against a predefined set of business rules. Rosenberg notes that the InRule software supports even complex rules that require queries

Idea Integration built links between Microsoft Dynamics CRM, Microsoft Dynamics GP, and the company's databases by using the eConnect module and other data integration tools from Scribe Software. Orders generated in Microsoft Dynamics CRM now flow automatically to Microsoft Dynamics GP to generate the required purchase orders, invoicing, and claim forms that go to the insurance company.

In addition, the company has connected these business management solutions to SQL Server and uses SQL Server



against multiple data sources. "Before, the only specification we could add to a window or a field was whether it was required or not," says Rosenberg. "Now, we can use the business rules engine to drive specific contract behaviors for every case we process. We can enforce specific rules, and if a problem comes up, the system provides specific information to people about what's needed to solve the problem."

Reporting Services, SQL Server Analysis Services, and Microsoft Office SharePoint Server. This connectivity helps to create both internal business intelligence reports and customer-facing portals that provide order status and usage information.

## Benefits

Access MediQuip now has a much more efficient operational process. Information from physician referrals flows automatically into Microsoft Dynamics CRM, where it is combined with information about medical devices and insurance company contracts and linked automatically into Microsoft Dynamics GP. And, summarizes Rosenberg, "Built-in business logic results in more reliable and faster processing and lower costs per referral; executives have better business insight; and the company provides valuable information to customers."

### **Reduce Costs and Increase Business Volume**

Access MediQuip's business management solutions have made the company's employees more productive and saved the company money. Employees no longer need to reenter data or look up contract terms in paper files as a case evolves from a physician referral, to a purchase order for a medical device, and to an insurance claim for reimbursement for that device. In addition, the application of sophisticated business logic to the company's operations results in fewer errors, faster processing, and lower operating costs.

Since Access MediQuip implemented the Microsoft Dynamics solutions, the company has seen a significant rise in the number of orders processed. The order-processing technology has enabled them to manage the growth of the business with only nominal increases in staffing while significantly reducing costs.

"We increased our volume of business by more than 150 percent," says Bill Elliott,

President and Chief Operating Officer of Access MediQuip. "We did this with less than a 50 percent increase in our overall operations staff. And, our unit cost of processing a referral has fallen by 30 percent."

### **Accelerate Development of Workflows and Integrations**

Access MediQuip and its partners took advantage of the xRM application development platform included with Microsoft Dynamics CRM to simplify the work of creating the integration links and automated workflows the company needed. "The Microsoft technology platform makes it easy to build and maintain these integration links," explains Knutson. "We can add windows and fields where we need to without writing extensive amounts of custom code. If we had to build these integrations from scratch, it might have taken months instead of weeks."

The company recently needed to install a separate set of business processes to meet the confidentiality requirements of a new customer, a medical device manufacturer. "We were able to build a completely firewalled application for that customer in 15 days," says Rosenberg. "We could not have done that without the speed and flexibility that the xRM application development platform gives us. Any other platform would have taken at least 60 days to meet that customer's needs. That was a huge win for us."

The speed and flexibility of the development process was a significant cost savings for Access MediQuip. Says Rosenberg, "In my experience, we simply could not have accomplished our goals in such a limited time frame with Oracle or SAP. To accomplish that, we needed to shift to the Microsoft technology

“Built-in business logic results in more reliable and faster processing and lower costs per referral; executives have better business insight; and the company provides valuable information to customers.”

Jason Rosenberg, Vice President of Information Technology and Application Development, Access MediQuip

platform. It enabled us to do things we could never have done in any other way. Keeping our technology footprint tight and concise is how we're going to continue to be successful in responding to the needs of the business.”

#### **Empower Executives and Improve Customer Service**

The management system that Access MediQuip, Idea Integration, and CRM Accelerators built now gives Access MediQuip's executives much better information about company operations, which helps them manage the business better. “We have dashboards and other tools that give us monthly, daily, and even hourly status reports on more than 100 different metrics that are important to running our business profitably,” says Elliott.

With the Microsoft Dynamics solutions, the company can provide a valuable service to the company's customers. Doctors can now track the status of purchase orders online, and both device manufacturers and insurance carriers can monitor overall trends in costs and demand.

“The integrated system that Access MediQuip now has in place helps the company track every aspect of its business,” says Mitch Milam, Chief Technologist at CRM Accelerators. “The system tracks which healthcare providers have made referrals, which medical devices came from which manufacturers, and which insurance carriers were involved. This environment gives the company tremendous institutional intelligence.” Sharing this information with customers adds value to Access MediQuip services and strengthens its position as a leader in the implantable-device benefits market.

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers in the United States and Canada who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to:

[www.microsoft.com](http://www.microsoft.com)

For more information about Access MediQuip products and services, call (877) 985-4850 or visit the Web site at:

[www.accessmediquip.com](http://www.accessmediquip.com)

For more information about Idea Integration products and services, call (713) 830-5800, send an e-mail message to [Dynamics.Sales@idea.com](mailto:Dynamics.Sales@idea.com), or visit the Web site at:

[www.idea.com](http://www.idea.com)

For more information about CRM Accelerators products and services, call (214) 707-9863 or visit the Web site at:

[www.crmaccelerators.net](http://www.crmaccelerators.net)

## Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to:

[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

### Software and Services

- Microsoft Dynamics
  - Microsoft Dynamics CRM
  - Microsoft Dynamics GP

### Partners

- CRM Accelerators
- Idea Integration