HEALTHCARE CALL CENTER

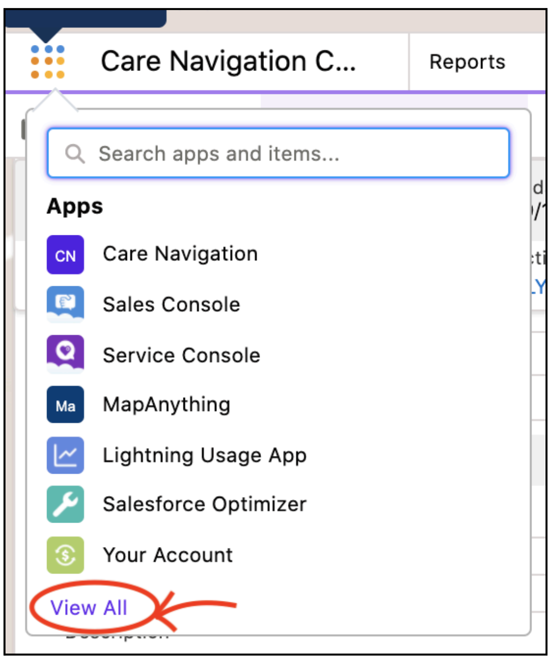
WellNest CRM Workflow Training & Reference Guide

What is WellNest?

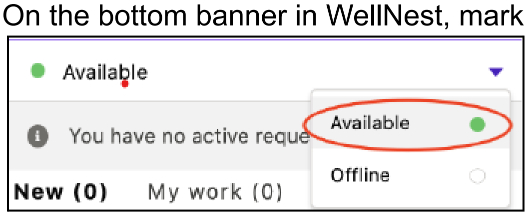
WellNest is the CRM software that houses patient information. We create new cases, log calls, set next actions, and add notes related to the patients' case and care journey.

First Steps

1. Care Navigators must mark themselves as "available" to receive new cases.
2. Navigate to Care Navigation Console
3. Click the 9 box dots in the top right corner of your WellNest window.



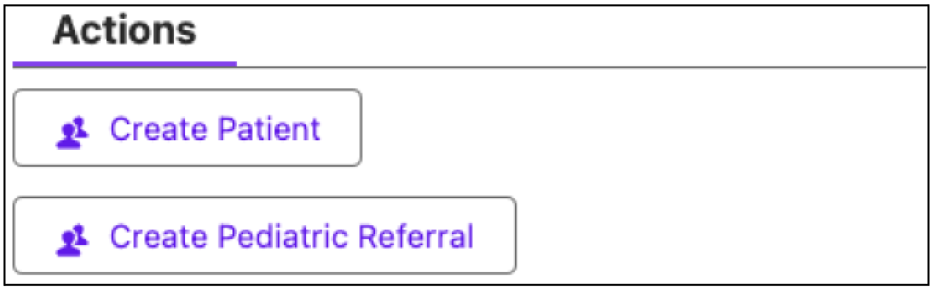
4. Click "View All"
5. Click Care Navigation Console
6. On the bottom banner in WellNest, mark yourself as "Available."



Creating a New Patient in WellNest

1. Ensure the patient is not already in WellNest.

2. Obtain the patient's PCP to see if the PCP is in our network.
    - Self Referrals may not have a PCP.
3. For adult patients 18 and older, use the "Create Patient" Button.
4. For patients under 18, use the "Create Pediatric Referral" button.



5. Fill in these required fields. (All required fields will have an asterisk.)

Demographics	First & Last Name, Birthdate, Gender, Address
Communication	Primary Phone Number, Email, Text (Y/N),
HIPAA Proxy & Emergency Contact	Check the box if the Emergency Contact is also a HIPAA approved contact
PCP Name	If PCP is not in our system, toggle to "PCP Platform" and enter the PCP information.
Insurance Plan	Refer to the [Healthcare Call Center Insurance Guide] to ensure we accept this patient's insurance. If not, explain our self-pay option. (Patient may file it themselves as "Out of Network.")
Preferences	- Preferred time for visits (Days of Week, Morning or Afternoon) - In-person or Telehealth Only

Logging a Call

1. Log a call after every patient outreach. Include any information that will be helpful regarding the patient's care journey in the comments section.
    - *Ex: Patient stated she is not able to be seen on Tuesdays and Thursdays due to her dialysis schedule.*
2. To Log a call, select "Log a Call."
3. Choose "Add."
4. Select the appropriate result. (connected, left voicemail, voicemail full)
5. Document details of the call in the comment section.