TASKS MENU

Medical & Healthcare

Medical & Healthcare industry most commonly outsourced tasks.

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Medical & Healthcare industry companies have requested the following detailed tasks:

Page

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General Admin Support

01

Improve and organize the documents library, which includes a variety of documents, questionnaires, templates, etc.

Manage online documents, including editing/labelling documents correctly as needed, and/or changing document names.

Keep referrals and partners up-to-date regarding what happened to their referred clients .

Help the company develop, create, and document the company's SOPs (standard operating procedures).

Online competitor's research.

Search for supplier/vendors information to contact

Online research for events for the client to attend or participate.

Help with flight/travel research & online booking

Lead Generation / List Building 02

Look for new prospects/leads.

Find new leads by using social media by following hashtags, "check-ins" on Facebook/ Instagram, etc.

Keep track of how many people have been reached out to, sent messages, etc.

Create Google Sheets documents to keep track of everything.

Keep track of analytics and dates to understand conversion metrics.

Find people within the target audience of the client.

Social Media Outreach & Management

03

- Help with Social Media content organization, scheduling & management.
- Publish posts on different social media channels (Facebook, Instagram, LinkedIn, etc).
- Basic content writing and also create simple graphics.
- Create a social media calendar to post X times a week.
- Monitor & respond to messages/inboxes on any social media channel.
- Find ideal contacts/leads/clients and reach out to them via DM (Direct Message).
- Send and receive DM messages from/to leads through the client's social media accounts (Facebook, Instagram, etc.).
- Reach out to prospects (ideal clients) through social media and get them to book an appointment with a sales expert and engage with people within the same industry who can send referrals to the client.

- Qualify leads into the client's CRM system .
- The research focused on the client's buyer persona (ideal client for the company) through hashtags or other accounts.
- Send and receive DM messages from/to leads through the client's social media accounts (Facebook, Instagram, etc.).
- Reach out privately pretending to be the client, and then connect with them, and find out if they need help with anything
- Pre-qualify the person to see if they're a good fit to work with the client.

Book Appointments & Calendar Management

04

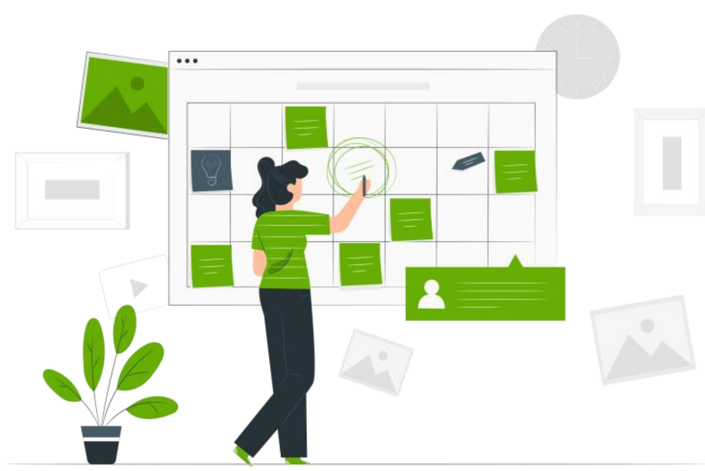
- Send DMs to get the potential client (the lead), to book a call with the client's company to learn more about their services.
- Send more information on how to schedule and book a call/appointment with the company's owner or representatives .
- Use call booking software to handle sales calls.
- Manage the physician's calendar, plan, and schedule appointments, conferences, and medical shifts.
- Make calls and follow-up calls as needed
- Continue the DM conversations, with the goal of getting the lead interested in learning more..
- Book appointments into Calendly, Practice fusion, High-level, or any other EMR (Electronic Medical Records) systems.
- Confirm and schedule patient appointments over the phone, email, or text as necessary.
- Call injury attorney's offices to set appointments for patient referrals (if relevant).

Patient Onboarding

05

- Welcome patients by greeting them over the telephone.
- Call to check up on patients that are running late for their appointments.
- Support patient onboarding by creating and submitting patient visits.
- Follow-up on insurance claims and appeals.

- Schedule and allocate patients to the doctor..
- Build rapport with clients and become a trusted main point of contact.
- Call to confirm appointments of the day and register cancelled appointments.
- Track and label patient appointments.



Follow Up with Leads & Potential Clients

06

Create follow-up email templates.

A follow-up to ensure people show up to the appointment.

Follow up with potential customers to answer questions and set up demos.

Follow-up by email or text messages.

Follow up with leads/clients an infinite number of times until they reply.

Follow up with prospects /leads that did not show up to an appointment to make sure they reschedule.

Follow up with potential clients if they don't book an appointment to find out what happened.

Keep track of all future calls, follow up one hour before the appointment, and send a message such as "I'm ready and excited to speak with you later on today".

Make sure that all the information from potential clients is in the CRM or Google Sheets, and then create a "Follow-up" task to ensure the potential client shows up for the call.

Follow up with prospects /leads that did NOT show up to an appointment, so make sure they reschedule.

Patient Tracking & Project Management

07

Monitor patient status progress.

Keep track of all the work and activities done on a daily basis.

Medical Records and the quoted amount is communicated with the attorneys.

The VA will keep track of the whole cycle of the process for each patient and their cases with the Injury attorneys.

Maintain patient confidence by keeping patient personal information confidential

Follow-up with Insurance Companies. Keep track of all medical claims and follow-up via phone, email, or online is done whenever it is needed with the insurance company to ensure the processing and recovery of payment.

Cold Calling 08

Cold call contacts gathered by lead generation or research.

Call & qualify leads into interested or not interested, or cold, warm, hot, etc.

Add call notes to a CRM system (as needed), and/or assign hot/interested leads to another team member for additional sales follow-up.

Organize & Report DM Responses 09

Organize and keep track of well-qualified leads (those interested) and keep track of them.

Create a simple but easy-to-understand report that shows the results of social media outreach work on a weekly basis. .

Create reports that show the results of VA social media outreach work periodically.

Report how many leads were contacted (messages sent/received) during that week/month/etc., as well as the result of the responses for each of the agency's clients.

Gathering Client's Info & Obtaining Documents

10

Gather patient info over the phone & email.

Update patient files and confirm patient information including contact info, pre-existing medical conditions, allergies, prior treatments, etc.

Complete all the digital paperwork and patient information in web-based medical systems or pre-fill PDFs or online forms to help patients complete their paperwork faster.

Live Interpreting & Translation

11

Do live translations through an iPad or electronic device, or video translations.

Provide interpretation, live and document translation services.

Act as a medical transcriptionist – English/Spanish.

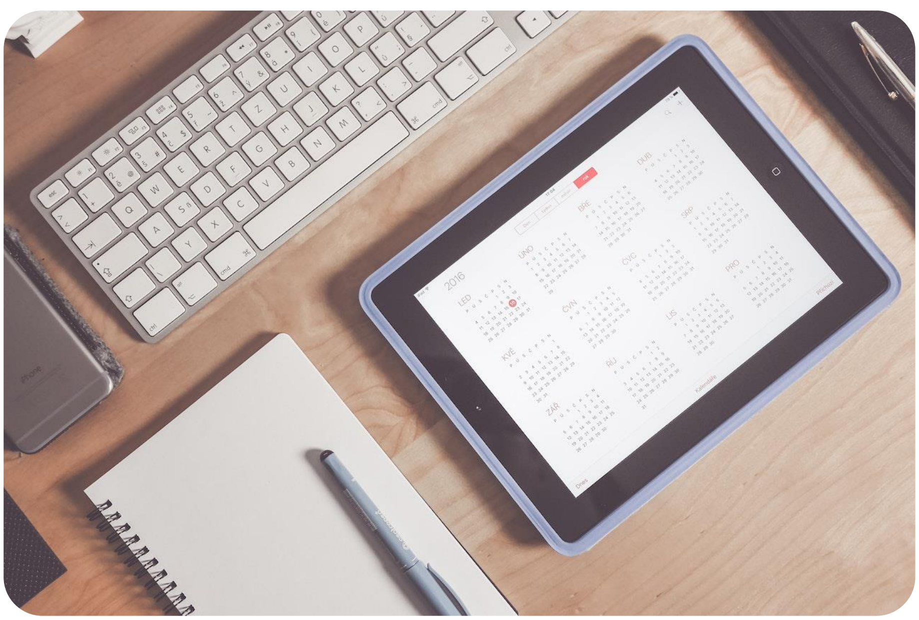
Data Entry & CRM / EMR Management

12

Manage CRM systems like Salesforce, Pipedrive, etc, or other EMR systems.

Set up telehealth accounts for each individual patient, including older patients that are not tech-savvy.

Data Entry for previous and current patient information.



Take notes and provide a summary of each client's case.

Email Marketing

- Design simple email templates for newsletters.
- Manage lists and campaigns or any other email marketing platform.
- Create an email marketing calendar for monthly campaigns.
- Share content by email that includes customer success stories, industry trends/news, product updates, etc.
- The basic setup of the email marketing automation funnel.

Bookkeeping & Financial Management

Provide estimates of the medical service cost to attorneys (if relevant).

Create reports, manage payroll & create invoices

Medical Claim Processing.

Medical Billing and Coding.

The invoices for each patient must be sent out to the attorneys.

Process payments and support medical practitioners with financial management.

Prepare invoices and track payments, manage expense reports and assist in reservations.

Book A Call

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