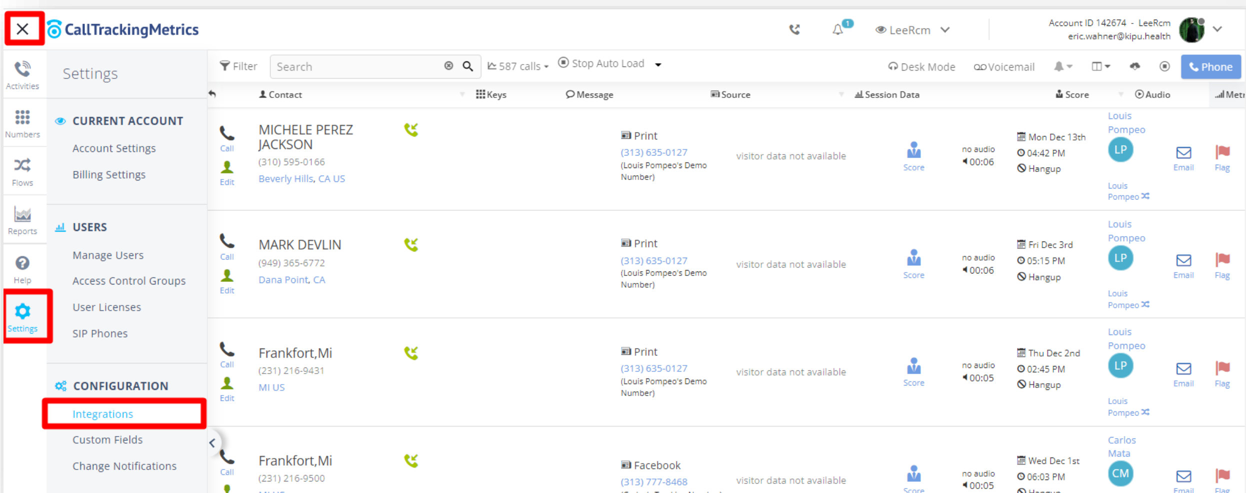
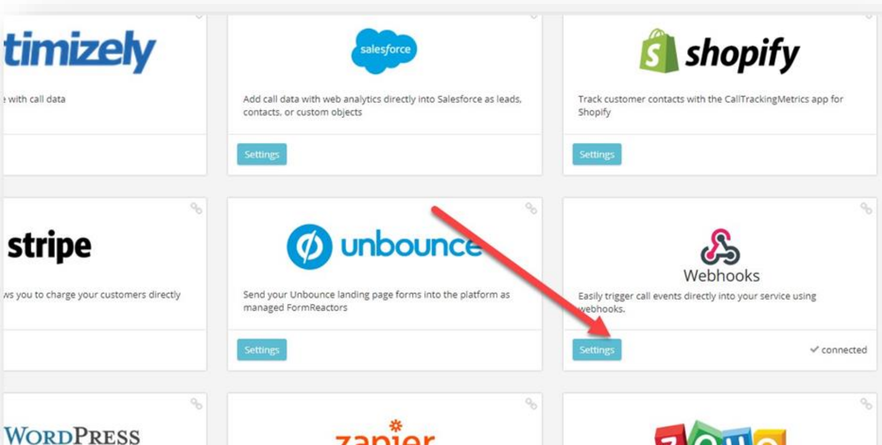
CTM Integration

In Call Tracking Metrics

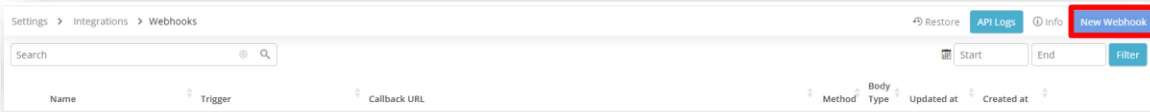
1. Login to the Call Tracking Metrics Portal
2. Click on Settings > Integrations

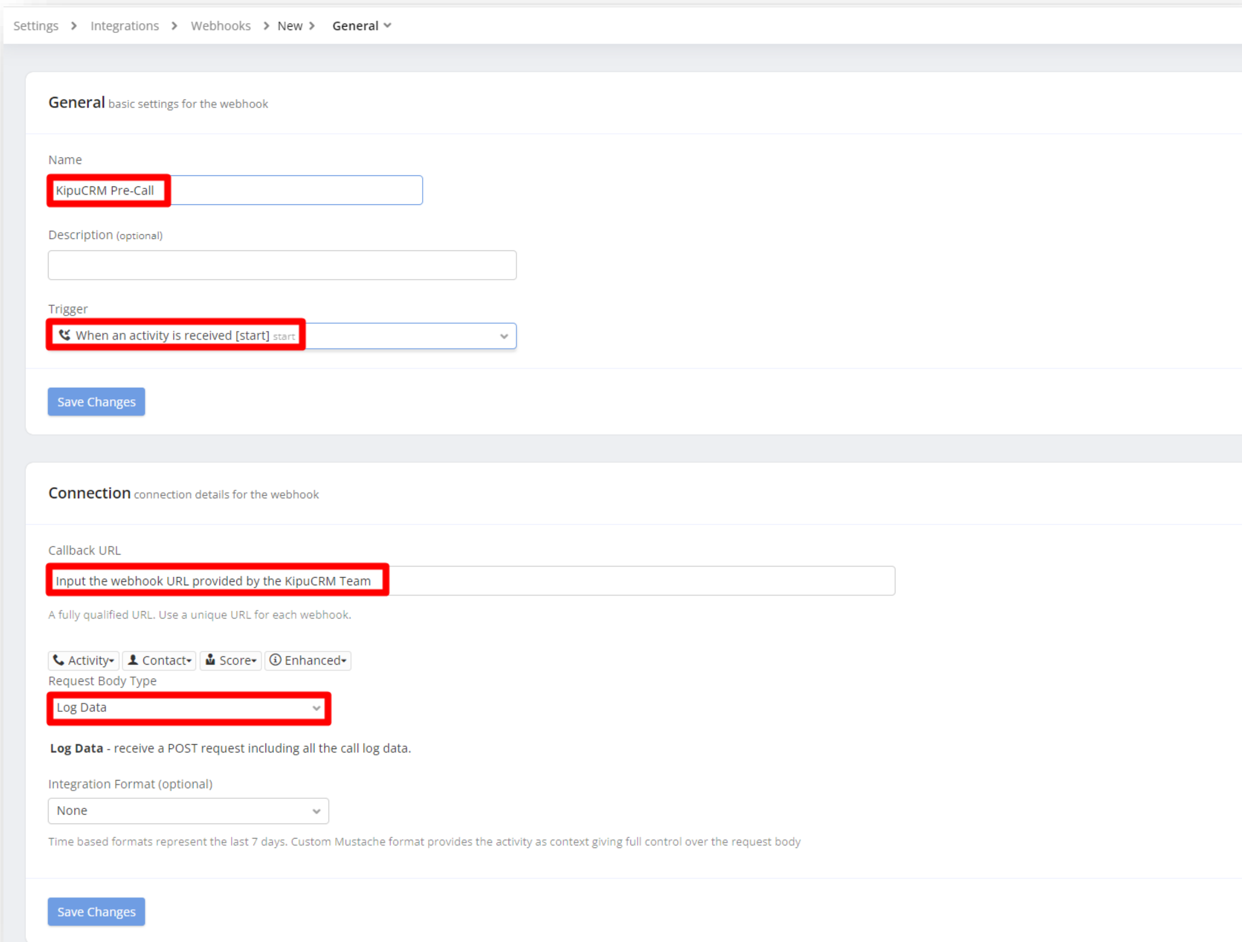


3. Click on Settings for Webhooks



4. Click on “New Webhook” to create the first of two Webhooks required for this integration
   a. Label this webhook as: “***KipuCRM Pre-call***”
   b. Set the trigger to “***When an activity is received***”
   c. Input the webhook URL into the Callback URL field
   d. In the Request Body Type select: ***Log Data***
   e. ***Save your changes***

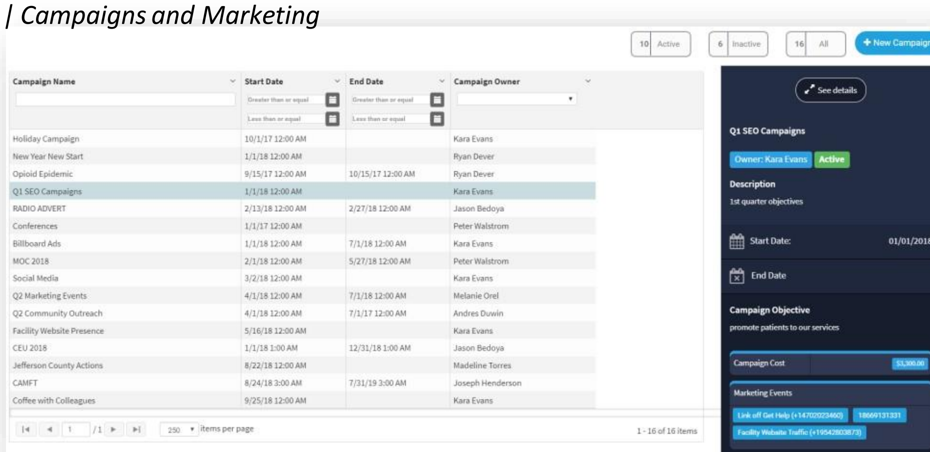




5. Repeat Step 4 in order to create the 2nd webhook required for this integration:
    a. Label this webhook as: "***KipuCRM Post-Call***"
    b. Set the trigger to "***At the end of a call/form/chat, once all data has been captured***"
    c. Input the webhook URL into the Callback URL field
    d. In the Request Body Type select: ***Log Data***
    e. Save your changes

In the CRM:

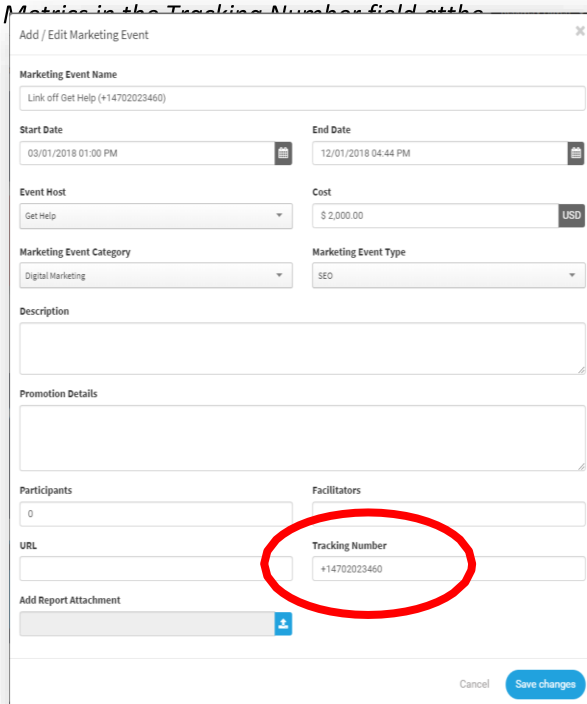
1. *Go to Business Development | Campaigns and Marketing*



2. *Create a Campaign if one is not established for your Activities or update/add a Marketing Event to an existing campaign. For example, in the screen shot at right, I have all SEO activities grouped by Quarter, you can establish anyway you see fit and they do not have to be grouped together. <u>You must enter an end date for the marketing event for the queue to work.</u>*

   I also used the number in my Marketing Event name to make it easier to identify in reporting, again, completely optional and up to you and your team.

3. *Embed the Call Tracking Number saved in Call Tracking Metrics in the Tracking Number field at the bottom left corner of the screen.*

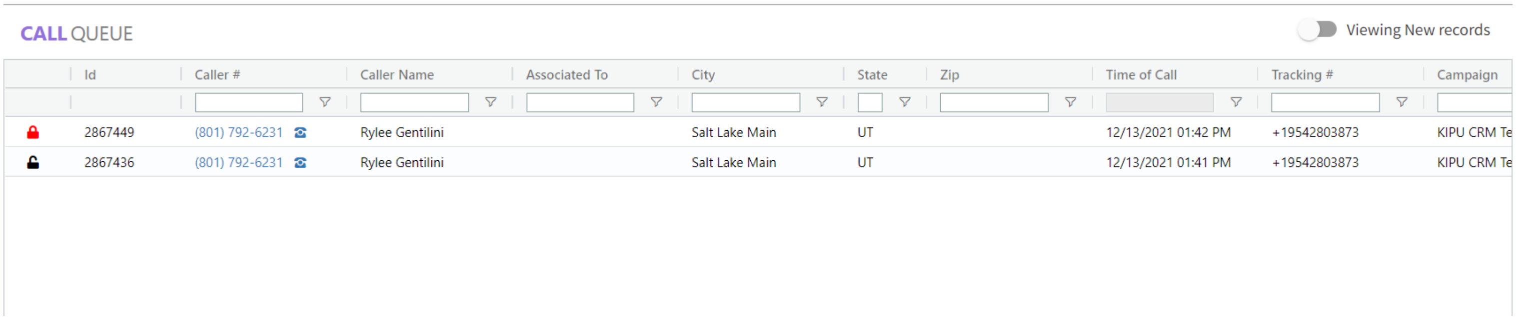


It must follow the format +1 then the number from CTM that is your target number.

The goal is to have a mirror marketing event for each CTM entry that you are tracking. If you do not set up a mirror marketing event, your admissions team will not reap the benefit of the pre-admission screen pre-populating with referent data and all connections to other patient will be lost.

Working the Call Queue

The Queue is located under **CRM | Admissions Management |Queues | Call Request Queue**



To indicate that you are taking responsibility for the call, click on the call record within the grid which will then lock down that record to ensure no other users can make any changes. Then review the other action buttons that are available for that specific call.

- If the system recognizes a name or number it will display a **VIEW CLIENT** Button in the upper right hand corner when selected the patient profile will open in another tab.
- If the system does not recognize the phone number or name, the **NEW CLIENT SEARCH** screen will appear. **It is highly recommended that you perform a manual search for the caller as Name indications are up to the caller's carrier and may not track to the existing system entries. For example, Smith, John may come up on the caller ID and that is what the system will search against, not John Smith.**

  If you decide that the caller is in fact NEW, select the **CREATE NEW PATIENT** button and proceed with entry.

  The system will auto-populate both the name and phone number that was received in the caller ID information. Be sure to verify and update as needed. KIPU CRM has no control over the data that is received in this regard.

  Additionally, upon creation of the pre-admission treatment opportunity the associated marketing data will pre-populate. If it does not, it indicates that the Tracking Number and associated marketing event need to be entered or updated.

Action Buttons

Lock – Locks a record to a user and names the agent who accepted as assigned to the call. **Terminate** – deletes the entry. Caution- if you delete a record it will not count in the dispositions.**View Patient** – Shows a record previously identified in the system by name or number

New Patient – Shows a record with no corresponding entry based on name or number

Call Dispositions

The system will tag the entry appropriately in the disposition column in both cases. If the call is notrelated to an existing or new patient, you can tag the call specifically with a disposition using the … ellipses next to the call. Please feel free to submit additional dispositions for consideration.

Seeing the Connections

After your team has used the functionality for the first time, the results will show in the Campaign and Marketing Report located in CRM Analytics. This report is parameter driven and will show the patients associated with the tagged marketing event, list the patients who were referred from the marketing event and their current place in the pipeline – Accepted (no show or admitted), In Process, Declined, orRejected.