

# Service Portal Turns Thousands of Calls Into Efficient Service Desk

## Background

FirstHealth of the Carolinas is a private, not-for-profit health care network headquartered in Pinehurst, North Carolina. FirstHealth is one of the premier health systems in the southeast, serving 15 counties in the mid-Carolinas. FirstHealth is comprised of four hospitals, primary and convenient care clinics, dental clinics, home health, hospice and palliative care, fitness centers, numerous medical specialties and sub-specialties as well as a robust philanthropic foundation.

## Challenges

As one of the fastest growing and most successful health care providers in the southeast, FirstHealth faced the daunting task of updating its electronic health record (EHR) system. Moving all of their data into Epic Systems EHR (electronic health record) projected as a major strain on the help desk. The organization's day-to-day depends on this constantly-evolving patient health data, and the move to Epic would introduce new software to the entire organization, which would include an influx of questions and incidents.

Prior to using Samanage, help desk personnel handled day-to-day incidents primarily over the phone, taking approximately 200 calls a day. Susan Bonville, Director of Customer Support and Operations, believed that strategy was not sustainable with the upcoming EHR software change.

"The team from Epic told us we would get thousands of calls on the first day," said Bonville. "Nobody likes to wait on a help line, but doctors and nurses particularly can't afford to wait. It delays them when they're trying to provide patient care. We wanted to get them another avenue to reach the help desk."

As the responsibility of the help desk had grown over the years, Bonville said the team was requesting additional staff to meet the demand of the phone lines, and they had wanted a comprehensive service portal for some time. With the impending switch to Epic, they knew the time was right.

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### Susan Bonville

Director of Customer Support and Operations

The key for Bonville and her team was to relieve the pressure on the help desk phone line with effective incident management, while incorporating features like asset and contract management, and ensuring it was a platform that people would want to use.

"The ease of use was an important factor. I wanted an application that our IS team felt was critical, that they could depend on to do their work rather than just opening it when absolutely necessary," said Bonville. "We were really looking for the full service desk concept in addition to a place for tickets."with both the customers and the service desk staff."

## Industry

Healthcare

## Business Size:

Large

## Location:

Pinehurst, NC

## Customer Since:

2016

## Replaced:

Internal Help Desk Phone Line

## Use Case:

ITSM, Incident Management

## Favorite Feature:

User Friendly

## Solution

FirstHealth of the Carolinas cast a wide net in search of a full service desk. Bonville had previously considered a separate asset tracking or contract management system, but was pleased to find she could actually meet these needs with the same platform that would assist in managing the large influx of incidents on the way.

But, what ultimately stood out to the FirstHealth team was the experience working with the Samanage team.

"The people who came on-site to do the demos during that evaluation process seemed genuinely interested in our business," said Bonville. "The fact that Samanage was continuing in a development mode made us feel like they would put more time and effort to make the product what we needed, as well."

With the Samanage team's ability to meet their needs, FirstHealth formulated a plan to use their new solution to ease the rollout of Epic Systems.

Portal adoption across such a large organization can be a difficult cultural shift. There were thousands of employees accustomed to calling the help line and speaking directly with a help desk support member. Luckily, FirstHealth anticipated this hurdle, and came up with some creative ways to drive employees to the Samanage Service Portal. Before Epic Systems went live, Bonville and her team rolled out the Samanage Service Platform.

"We put a notice on our electronic bulletin board. We printed off a poster telling people to go to what we call FirstWeb (our intranet), and they could access the service portal from there," said Bonville. "We had the posters in hospitals and clinics. We had our help desk staff suggesting the portal to people who called. We put the link to the service portal prominently in the corner of our intranet page, so it wasn't buried."

Finally, remember those 200 daily help desk calls that were about to turn into thousands? They could no longer leave voicemails, and they received a new message while they were holding.

"Instead of waiting, you may also visit the help desk portal on FirstWeb to submit your incident online," said Bonville, adding that the message is still the same today.

Although it was a change from normal habits within the organization, Bonville says users appreciated a new option.

"I didn't feel any resistance to it whatsoever," she said. "It felt like we were past due for a self-service alternative."

## Benefits

The move to Epic, while beneficial to the organization, brought thousands more help desk tickets. But, where these issues would have jammed up the helpline under the previous support strategy, FirstHealth of the Carolinas kept help desk services running smoothly through the release of a new EHR system.

"If we didn't have a service portal, we would have had to increase our staff, otherwise people would be on hold for too long," said Bonville. "Even when you look at personal habits, I'd much rather go and enter a request into a system than wait on the phone for 20 minutes."

The benefit to the users was quickly evident. They were able to communicate any issues via the service portal and could check the status of steps taken to resolve their issues. For the help desk staff, they were opening tickets that already had information about the incident, rather than returning voicemails, then creating a ticket from scratch.

FirstHealth is now in the process of integrating IT asset management and contract management into their new incident management and service portal strategy.

There was an unexpected early benefit as well.

"We had the misfortune of getting a virus in October," said Bonville. "But, Samanage is cloud-based, so we could still safely access everything in there. Our network team would give us a tag number for a device, and we could search Samanage to identify the device and the user to help us remediate the virus."

The virus could have been disastrous, she added.

"I don't think any organization would realize the impact of a virus until you're shutting down parts of your network and you're not allowing people access to your servers, so having Samanage in the cloud was extremely valuable," she said.

In the end, FirstHealth of the Carolinas had addressed two major concerns: the natural influx of issues that come with a new EHR system rollout, as well as the need to bring the organization together through an effective IT service management platform.

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