

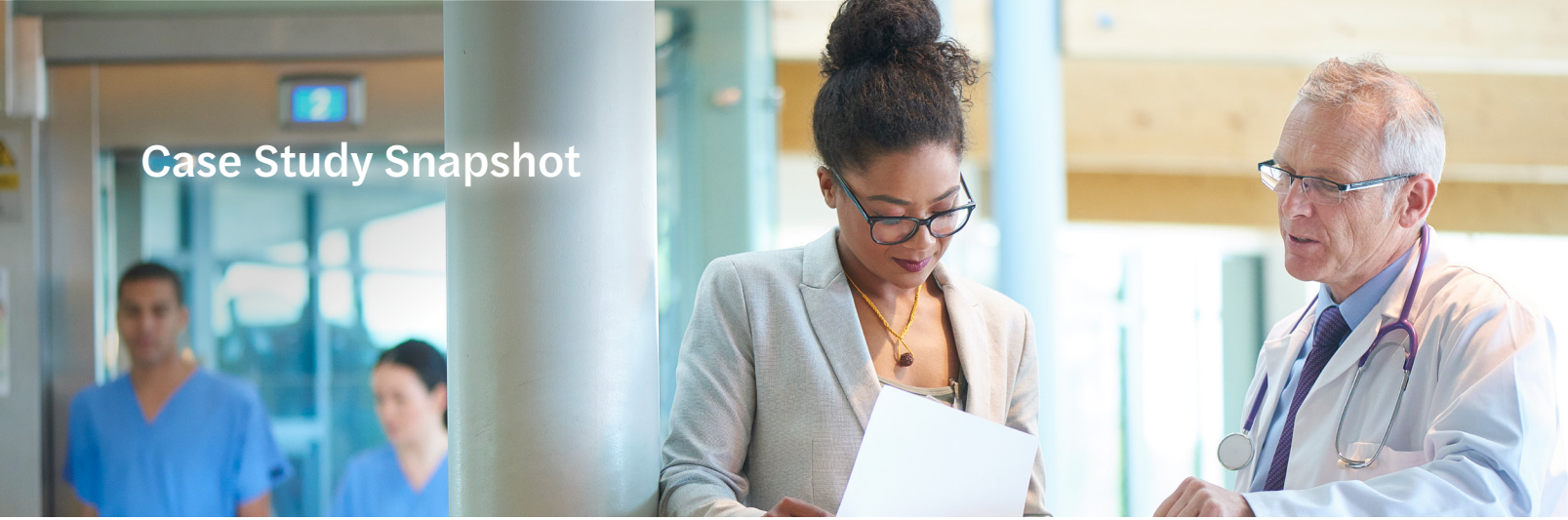


# Medrina

System Enhancements Provide  
Efficiencies in Healthcare

**forv/s**  
**mazars**

## Case Study Snapshot



**Medrina's implementation of Microsoft Dynamics 365 not only streamlined the organization's processes, but also assisted with HIPAA compliance due to stricter access codes, helping guard protected health information (PHI).**

### The Situation

Medrina, a leading psychiatry-owned group, needed a more efficient way to manage case submissions from doctors and administrative staff while following HIPAA compliance for data security. The group also sought to streamline its internal IT service management and drive interest from other departments like human resources for onboarding and offboarding processes.

### The Solution

To address these challenges, Medrina turned to Microsoft Dynamics 365. The Dynamics 365 service application was implemented to help gain efficiencies throughout the organization. The system was customized to automate workflows for onboarding and offboarding, helping employees complete necessary tasks in a timely manner.

### The Benefits

Medrina's successful implementation of Microsoft Dynamics 365 showed the power of technology to bring improvements to healthcare operations. By leveraging the capabilities of Dynamics 365 customer relationship management (CRM) tools, Medrina streamlined business processes, helping enhance post-acute care and improve operational efficiency.



**“The integration of SharePoint with Dynamics allows easy access to information and maintains security across the Microsoft platform without needing third-party applications.”**

– Eric Spencer, Director of IT, Medrina





## The Full Story

Headquartered in Chicago, Medrina is the nation's largest group of physiatrists—physical medicine and rehabilitation (PM&R) physicians who treat a wide variety of medical conditions—within post-acute rehabilitation settings. With an operations, recruiting, and business development team specific to PM&R, Medrina connects providers with high-quality facilities and manages daily business operations, allowing physicians and clinicians to focus on patients. The organization works to address some of the unique challenges in post-acute rehabilitation, including readmission rates, length of stay, and Patient-Driven Payment Model reimbursement.

Despite its success, Medrina faced growing pains with systems that weren't keeping up. Eric Spencer, Medrina's director of IT, fortified the organization's IT department and implemented the Dynamics 365 CRM solution. He initiated a project with Forvis Mazars to help improve internal IT service management and create a system that other departments in the organization could adopt.

Spencer noted that his previous experience with deploying a similar solution at another healthcare organization prompted this project. "One of the biggest wins has been re-engaging with professionals at Forvis Mazars, whom we consider an extension of our own team. Their support has provided us with the confidence to deliver great results," said Spencer.

### Implementation & Integration

Medrina uses Dynamics 365 for internal IT service management. IT staff monitor the CRM system for case submissions through emails from doctors and administrative staff. The submissions get converted into cases to address technical assistance matters, software or device requests, and other various

projects. With the assistance of professionals at Forvis Mazars, the system was tailored to help the IT team at Medrina manage cases efficiently.

Workflow automations, especially for onboarding and offboarding team members, typically involve a large number of tasks. Automated follow-ups have proven helpful for support agents, decreasing the time needed to manage these specific cases by about half.

The system also was configured to provide added security through role-based access controls and audit logs. Medrina uses Microsoft 365 E5 and Microsoft Defender. With help from technology consultants at Forvis Mazars, security policies were set up to be maintained across Medrina's technology stack, reducing the need for separate security policies for different applications.

An integration with Microsoft SharePoint further enhanced the CRM system by providing quick access to information without third-party applications.

Microsoft technology helps Medrina comply with HIPAA by providing strict access controls to help confirm that only authorized personnel can access PHI. The organization can track access and modifications to PHI in the Dynamics 365 system, regularly reviewing audit logs to detect and respond to any unauthorized or suspicious activity.

Dynamics 365 provides robust analytics and reporting tools, enabling Medrina leadership to track performance, identify trends, and make data-driven decisions. The CRM system facilitates seamless information exchange and collaboration. Furthermore, the IT team is working closely with the HR department to develop an onboarding/offboarding dashboard within the system for additional insights.

# The Full Story

## The Results

Since implementing the new system, Medrina has improved efficiency, including reducing the time to manage onboarding and offboarding cases by about half. The team from Forvis Mazars provided the organization with the support and technical experience needed to help it achieve its goals.







Business Technology Services at Forvis Mazars can help support your organization with enterprise resource planning (ERP), customer relationship management (CRM), advanced technology, and managed service solutions. Our end-to-end services include technology assessments, design, implementation, upgrades, training, monitoring, and support to help clients achieve their digital transformation goals.

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