

# HubSpot for Healthcare

*A Guide + Use Cases*

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# HubSpot for Healthcare

From Medical Clinics, Therapy & Psychology, and Chiropractors to Home Health, Med Spas and Dentistry more, the healthcare industry is diverse, each subset having different business models and unique operational needs that require tailored solutions to thrive. With HubSpot's new HIPAA compliance and robust ability to be customized to fit specific needs, HubSpot is now a great option for the medical world.

Whether it's managing patient relationships, streamlining administrative tasks, or optimizing communication, HubSpot provides a comprehensive suite of tools that can be tailored to enhance the efficiency and effectiveness of any healthcare practice.





HIPAA-Protected Data Set-Up

## **HIPAA-Protected Sensitive Data**

Once you've opted in to the beta, you'll need to navigate to your Privacy & Consent settings to accept the related terms and conditions.

From there, specify the categories of sensitive data you'll be storing including Health/Medical Data. This enables the creation of properties specifically for PHI. Once you have this set up, you can create and manage these sensitive properties.

They behave like other sensitive data properties but are marked to indicate they store HIPAA-protected data.

# HIPAA-Protected Sensitive Data

### Enable sensitive data

INFO STORAGE

#### What type of information will you store?

You can select more than one option

- Personal Sensitive Data  
Data such as ethnicity, gender, age, religion, sexual orientation, last 4 digits of government issued identification documents (passport, driver's license, etc.).
- Financial Data  
Financial data that's entered partially or with limited details (the last four digits of bank account or credit/debit card numbers, limited payment history, and similar).
- Health/Medical Data  
Health Data such as fitness information, wellness information and sensitive health information of individuals subject to GDPR.
- We are a HIPAA-covered entity or business associate **BETA**  
You can store Protected Health Information (PHI). This includes health information such as patient information, provider information, medical history, etc. A Business Associate Agreement is included in the Sensitive Data Terms and will apply.  
[What is HIPAA?](#)

**Next >**

### Create a new property

BASIC INFO SENSITIVE DATA FIELD TYPE RULES

#### Sensitive data protection

Protect sensitive data in your account such as passport numbers, financial and medical information, and more.

#### How sensitive is this data?

This setting affects tool access, settings access, and visibility. [Learn more](#)

- Not sensitive  
This data doesn't need additional protection
- Sensitive data  
This data needs protection, but can be used in most tools and doesn't need to be masked.

#### Will this property store HIPAA Protected Health Information (PHI)?

Categorizing this property helps HubSpot protect your data. [Learn more](#)

- Yes, this data contains Protected Health Information (PHI)

#### Who should have access to view and edit this data?

You can customize access after the property is created. [Learn more](#)

- Everyone
- Super admins only

**< Back** **Cancel** **Next >**

Build a Platform That Suits Your Business Model

# Building A Healthcare Data Model

HubSpot has built a strong reputation for its customizability and extensibility. With the introduction of the new HIPAA-protected sensitive data beta, the healthcare industry can now harness HubSpot's comprehensive suite of tools to create a tailored platform that meets their specific needs.

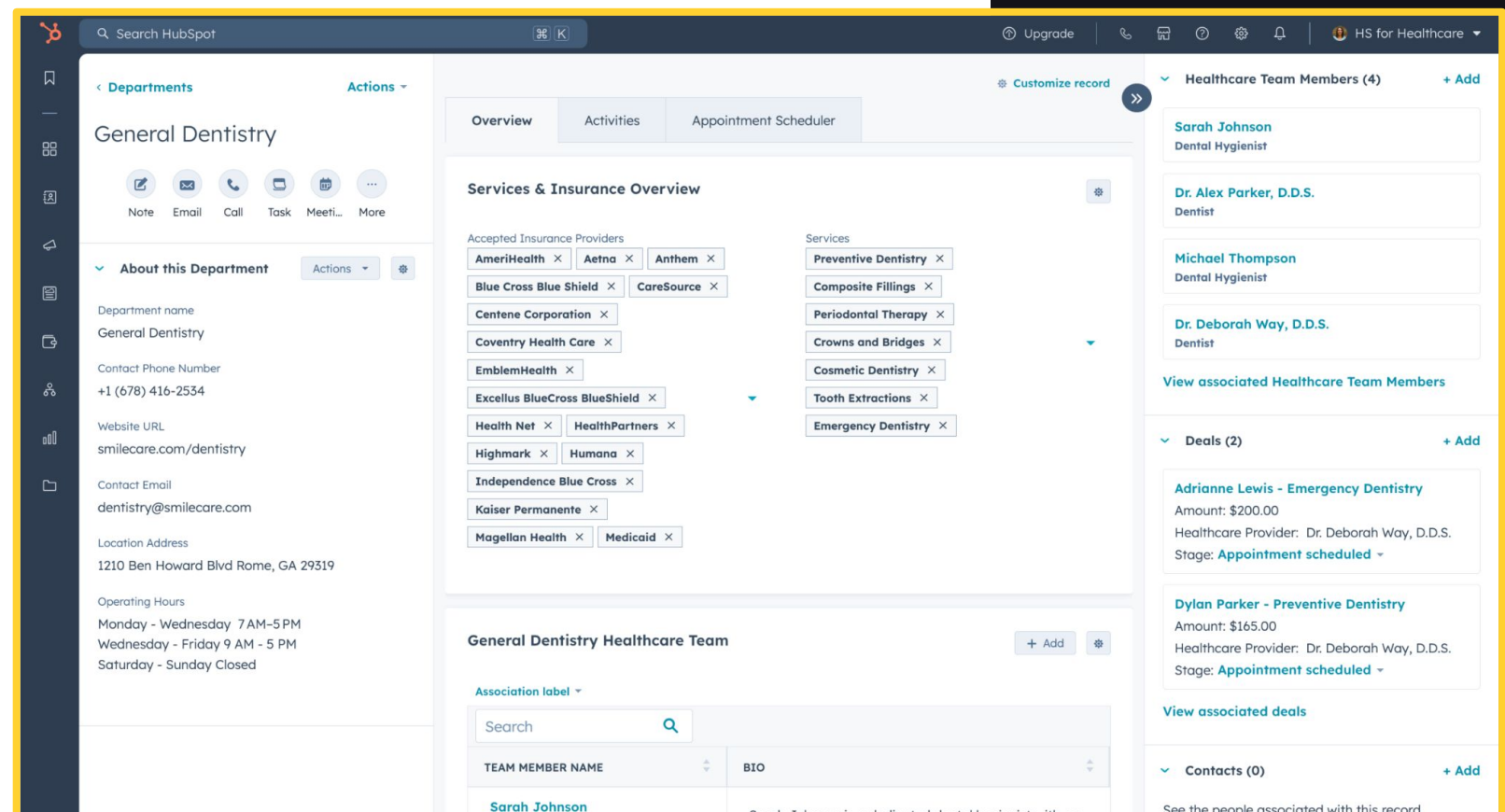
Users can create Custom Objects such as Healthcare Departments, Patients, Tests and more as well as utilize the OOTB objects in a way that works for their team like:

Contacts ➤ Contact Types (Patients, Doctor, Nurse etc.)

Companies ➤ Office Locations

Tickets ➤ Patient Support Requests

Deals ➤ Appointments & Billing





Enhance the Patient Experience with Patient Portals

# Patient Portals

Using HubSpot CMS providers can offer secure portals allowing patients 24/7 access to their health information, which is dynamically populated from the CRM.

Secure portals allow patients to:

- View health records and lab results
- Book, reschedule, or cancel appointments
- Access test results promptly online
- Request copies of medical records effortlessly

healthcare

Welcome, Ted Ranger

Logout

TR

Patient Summary Notifications Appointments Health Records Account

Upcoming Visit  
Oct 30, Wednesday  
Starts at 12:30 PM CT  
In Home Visit  
with Rachel Right, B.S.N.

Check-In  
View Details

Notifications  
View All Notifications

Healthcare Team Member  
Alan Adams, C.N.A.  
Home Health Aide  
Rachel Right, B.S.N.  
Clinical Nurse Manager  
Emily Stone  
Supervising Physician  
View associated Healthcare Team Members

Patient Documents  
Care Plan Ted Ranger + Add  
Patient Care Form Ted Ranger + Add  
Initial Assessment Ted Ranger + Add

Insurance  
Insurance Provider Name: Aetna  
Insurance Plan Type: Aetna PPO  
Policyholder Name: Hilary Ranger  
Member ID: 1234567890  
Group Number: G987654321  
Coverage Start Date: 02/06/2024  
Coverage End Date: 12/31/2024  
Policy Number: HC1234567890

Enhance Care with Easy Scheduling

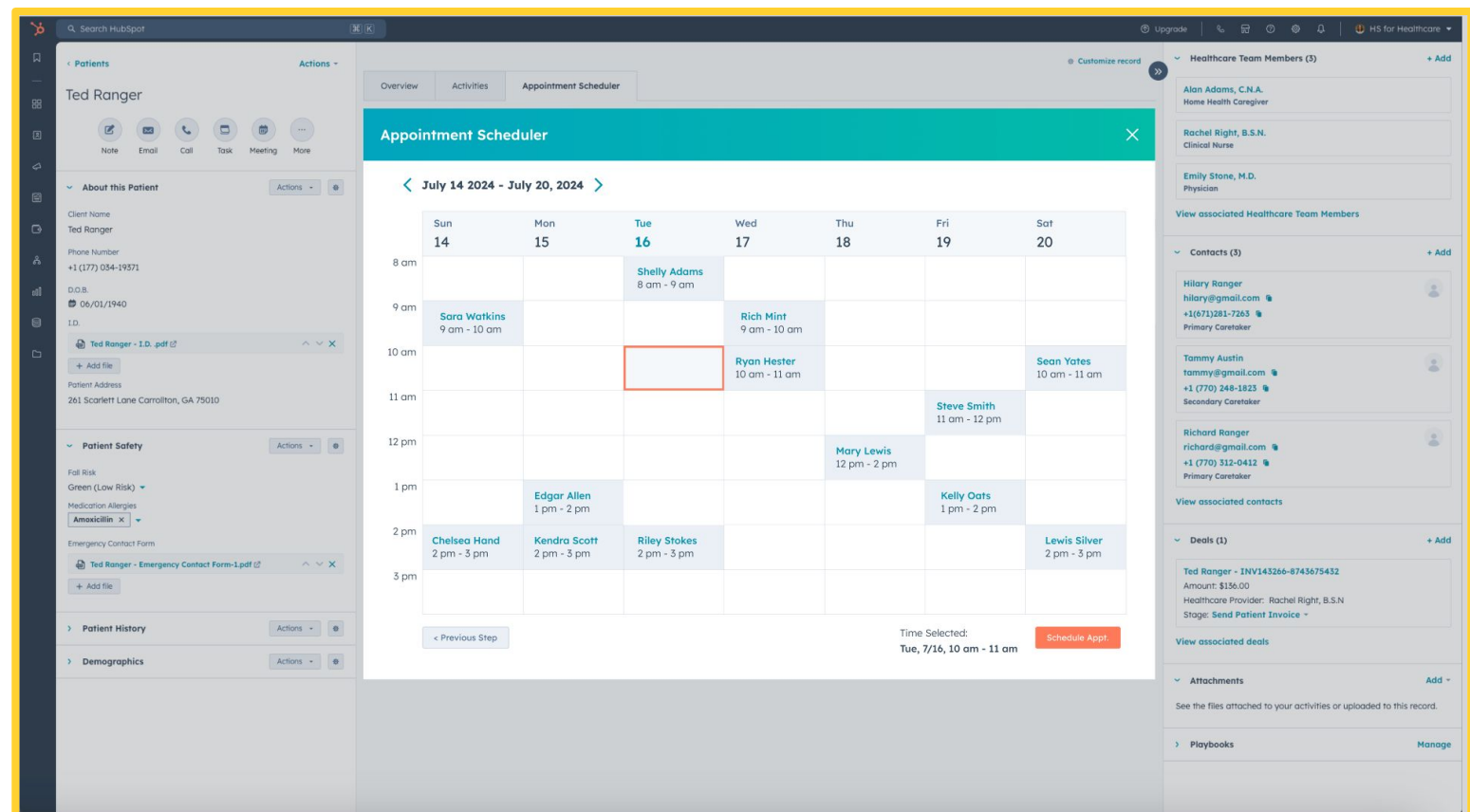
# Appointment Scheduling

By leveraging HubSpot's automation, deal pipelines and a custom CRM Card, you can ensure your patients always have access to convenient appointment options and are well informed about their care. In this section, we're going to look at few ways how.

## Easy Scheduling with a Custom CRM Card

Your team can efficiently book appointments for patients who call the office, with the Custom Appointment Scheduling CRM Card right on the patient record.

With a patient portal built on HubSpot CMS, patients can also quickly and easily schedule their own appointments at any time.





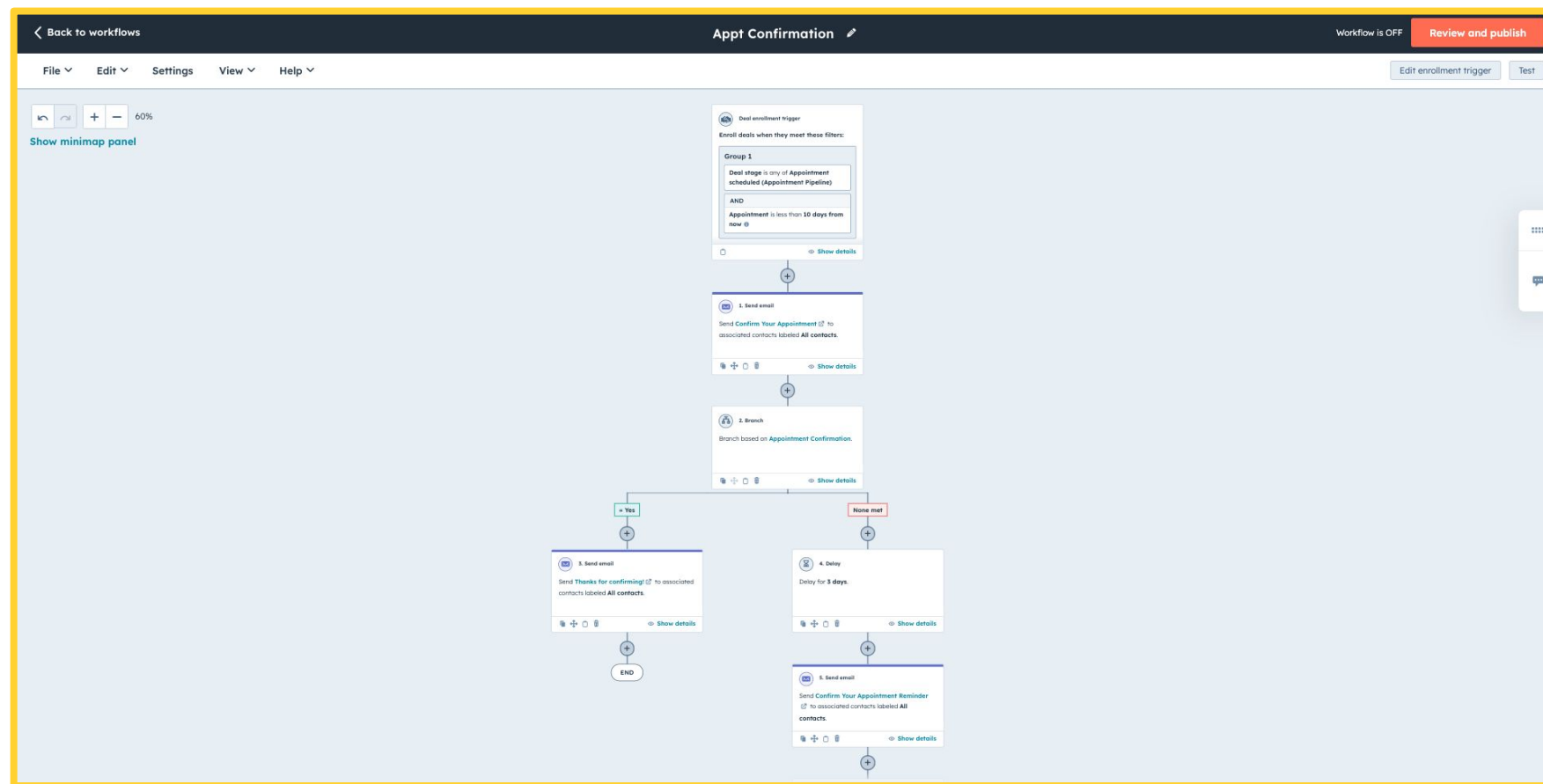
Enhance Care with Easy Scheduling

# Appointment Scheduling

## Automation for Timely Appointment Confirmation & Reminders

Clinics can send patients automated SMS and email reminders to confirm and remind patients about upcoming appointments.

This can help reduce no-shows and expedite appointment cancellations, allowing for quicker filling of open slots.







# Maintain Strong Patient Relationships with HubSpot **Communications**

## **Unified Patient Records for Enhanced Care & Visibility**

Consolidate all patient communications and information into HubSpot to provide a comprehensive view of each patient.

This can help enhance the quality of patient care and improving communication among all members of the care team.

The screenshot displays the HubSpot CRM interface for a patient named Ted Ranger. The interface is organized into several sections:

- Contact Information:** Includes first name (Ted), last name (Ranger), phone number (+1 (770) 341-9371), and client address (261 Scarlett Lane Carrollton, GA 75010).
- Patient Documents:** Lists documents such as Care Plan, Patient Consent Form, and Initial Assessment, each with an "Add file" button.
- Insurance:** Displays details like Insurance Provider Name (Aetna), Insurance Plan Type (Aetna PPO), Policyholder Name (Hilary Ranger), Member ID (123456789), Group Number (G987654321), Coverage Start Date (02/06/2024), Coverage End Date (12/31/2024), and Policy Number (HC1234567890).
- Patient Safety:** Shows Fall Risk (Green (Low Risk)) and Medication Allergies (Amoxicillin).
- Healthcare Team Members (3):** Lists team members including Alan Adams (Home Health Aide), Rachel Right (Clinical Nurse Manager), and Emily Stone (Supervising Physician).
- Contacts (3):** Lists other contacts including Hilary Ranger (Primary Caregiver), Tammy Austin (Secondary Caregiver), and Richard Ranger (Primary Caregiver).

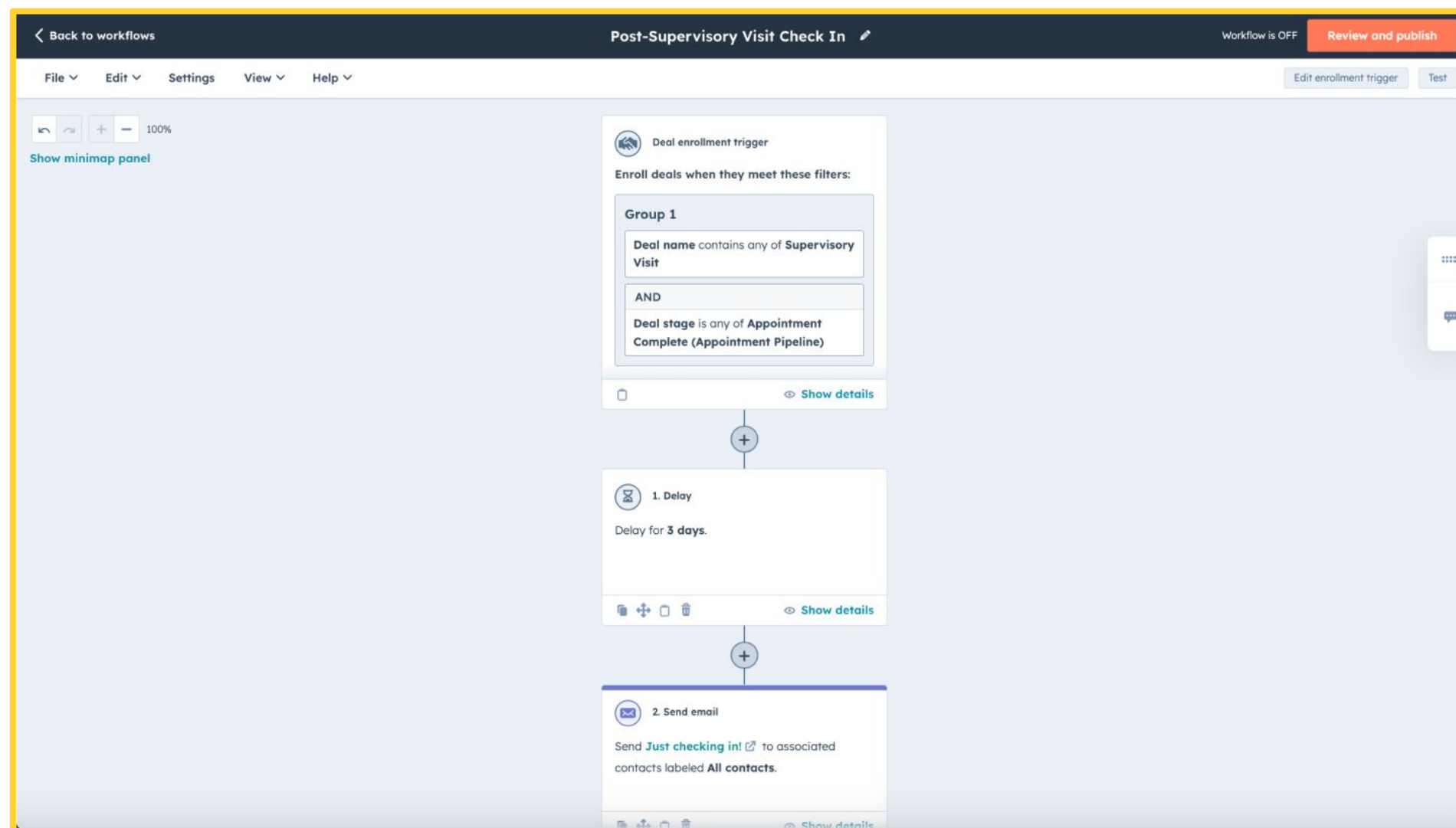
Maintain Strong Patient Relationships with HubSpot

# Communications

## Automated Patient Check-Ins and Personalized Follow-Ups

Automate regular patient engagement by sending check-in messages and customized follow-up communications tailored to the patient's history and preferences.

This helps ensure continuous and personalized patient interaction.

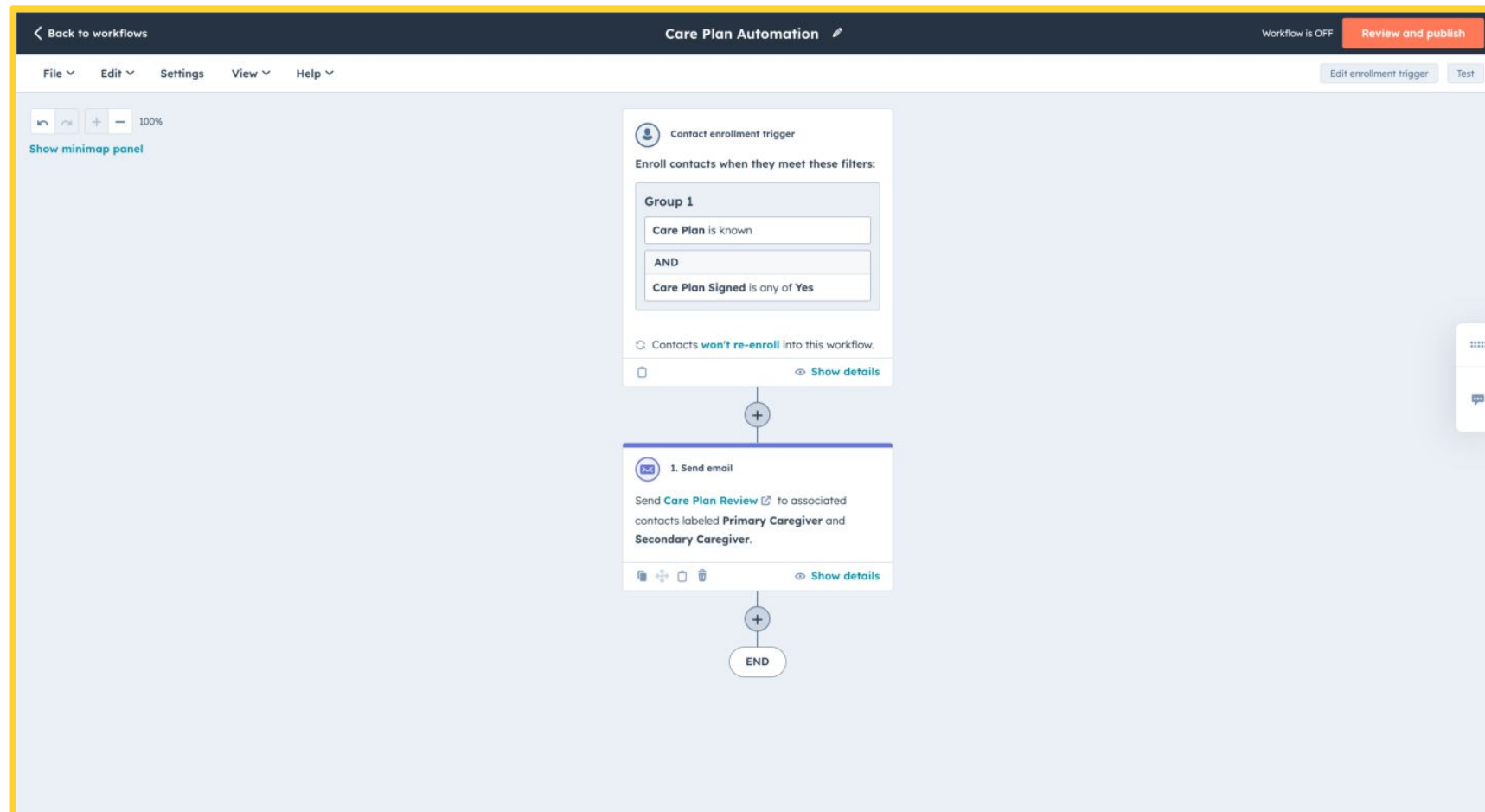


# Maintain Strong Patient Relationships with HubSpot Communications

## Automated Updates for the Care Team

In the healthcare industry it is not uncommon to have many people involved in the care of patient ranging from the doctor to the nurses, the nurse's aids and even family members.

Keep everyone in the loop with automatic updates like sharing a care plan with the patient's family as soon as it's approved.





# Build Billing & Insurance Processes with HubSpot

## Billing & Insurance

### Optimize Insurance and Billing with Deal Pipelines

HubSpot's deal pipelines are great for managing and automating the insurance and billing processes for patients.

Track and automate insurance claims and billing every step of the way, reducing administrative burdens and minimizing errors.

CLAIM PREPARED	CLAIM SUBMITTED	CLAIM IN PROCESS	CLAIM APPROVED	CLAIM DENIED	INSURANCE PAYMENT RECE.	SEND PATIENT INVOICE	PATIENT PAYMENT REC.
<p>Injury Rehabilitation - Sharon Kites Amount: \$125 Close date: 06/10/2024 No activity for 6 days ! No activity scheduled</p>	<p>Postural Correction Therapy - Kenny Ratan Amount: \$175 Close date: 06/12/2024 No activity for 6 days ! No activity scheduled</p>	<p>Amanda Lee - CMS-1500-2024-5678901234 Amount: \$125 Close date: 06/04/2024 No activity for 6 days ! No activity scheduled</p>	<p>Emily Rodriguez - HCFA1500-2024-4567890123 Amount: \$210 Close date: 05/30/2024 No activity for 8 days ! No activity scheduled</p>	<p>Robert King - HCFA1500-2024-1122334455 Amount: \$175 Close date: 05/27/2024 No activity for 5 days ! No activity scheduled</p>	<p>Karen Anderson - HCFA1500-2024-2135468790 Amount: \$125 Insurance Payment Amount: \$100 Close date: 05/21/2024</p>	<p>Mia Campbell - INV129475-5239174068 Amount: \$50 Patient Balance: \$50 Close date: 05/21/2024</p>	<p>Isabella Clark - INV9516524780 Amount: \$125 Close date: 05/15/2024 No activity for 5 days ! No activity scheduled</p>
<p>Edgar Poe - Cupping Therapy Amount: \$210 Close date: 06/11/2024 No activity for 6 days ! No activity scheduled</p>	<p>Prenatal Chiropractic Care - Carlie Bruton Amount: \$225 Close date: 06/10/2024 No activity for 6 days ! No activity scheduled</p>	<p>Jason Miller - UB04-2024-9876543210 Amount: \$175 Close date: 06/04/2024 No activity for 6 days ! No activity scheduled</p>	<p>Daniel Brown - HCFA1500-2024-3456789012 Amount: \$175 Close date: 05/30/2024 No activity for 8 days ! No activity scheduled</p>	<p>Jessica Taylor - HCFA1500-2024-8765432109 Amount: \$175 Insurance Payment Amount: \$120 Close date: 05/25/2024</p>	<p>Jack Anderson - INV129475-654829017 Amount: \$225 Patient Balance: \$35 Close date: 05/24/2024</p>	<p>Liam Edwards - INV2465739801 Amount: \$210 Close date: 05/17/2024 No activity for 5 days ! No activity scheduled</p>	<p>Emma Roberts - INV129475-8923751640 Amount: \$75 Patient Balance: \$75 Close date: 05/21/2024</p>
<p>Soft Tissue Therapy - Liam Mitchell Amount: \$160 Close date: 06/10/2024 No activity for 7 days ! No activity scheduled</p>	<p>Injury Rehabilitation - Keith Dugger Amount: \$125 Close date: 06/11/2024 No activity for 6 days ! No activity scheduled</p>	<p>Michelle Davidson - HCFA1500-2024-1234567890 Amount: \$225 Close date: 06/05/2024 No activity for 7 days ! No activity scheduled</p>	<p>Jessica Patel - HCFA1500-2024-2345678901 Amount: \$225 Close date: 06/05/2024 No activity for 8 days ! No activity scheduled</p>	<p>William Davis - HCFA1500-2024-1234123412 Amount: \$125 Insurance Payment Amount: \$95 Close date: 06/14/2024</p>	<p>Emma Johnson - HCFA1500-2024-5678901234 Amount: \$225 Insurance Payment Amount: \$180 Close date: 05/30/2024</p>	<p>Oliver Thompson - INV129475-7483920156 Amount: \$210 Patient Balance: \$20 Close date: 05/21/2024</p>	<p>Ava Mitchell - INV7926418305 Amount: \$165 Close date: 05/14/2024 No activity for 5 days ! No activity scheduled</p>
<p>Kevin Wilson - HCFA1500-2024-1234567890 Amount: \$160 Close date: 05/31/2024 No activity for 8 days ! No activity scheduled</p>						<p>Ted Ranger - INV143266-8745675432 Amount: \$130 Insurance Payment Amount: \$130 Patient Balance: \$16 Close date: 06/12/2024</p>	<p>Henry Baker - INV1843756290 Amount: \$210 Close date: 05/16/2024 No activity for 5 days ! No activity scheduled</p>
Total: \$495	Total: \$525	Total: \$525	Total: \$770	Total: \$175	Total: \$650	Total: \$871	Total: \$171

# Build Billing & Insurance Processes with HubSpot

## Billing & Insurance

### Simplify Payments with HubSpot Payments and Invoices

HubSpot payments and invoices can help streamline the payment process, providing a more seamless and efficient experience for both patients and staff.

By simplifying the payment process, you enhance patient satisfaction and free up valuable time for your team to focus on delivering quality care.

The screenshot displays the HubSpot Billing & Insurance Pipeline interface. A central window shows an invoice for Ted Ranger (INV143266-8743675432) with a total amount of \$16.00. The invoice details include the bill to address, invoice date (June 10, 2024), and due date (July 10, 2024). The invoice table lists 'Companion Care' with a quantity of 1, unit price of \$136.00, and amount of \$136.00. The subtotal is \$136.00, and the total is \$16.00. The background shows a list of deals in the Billing & Insurance Pipeline, including entries for Robert King, Karen, Jessi, and Henry Baker.

PRODUCTS & SERVICES	QTY	UNIT PRICE	AMOUNT
Companion Care	1	\$136.00	\$136.00

Subtotal	\$136.00
Insurance Adjustment	(\$120.00)
<b>Total</b>	<b>\$16.00</b>

**Comments**

**Notes:**

- Please remit payment within 30 days of your service date: 6/10/2024.
- For any questions regarding this invoice, please contact our billing department at (555) 123-4567 or billing@homehealth.com.

Download

All fees are listed in USD and are subject to sales tax (as applicable).

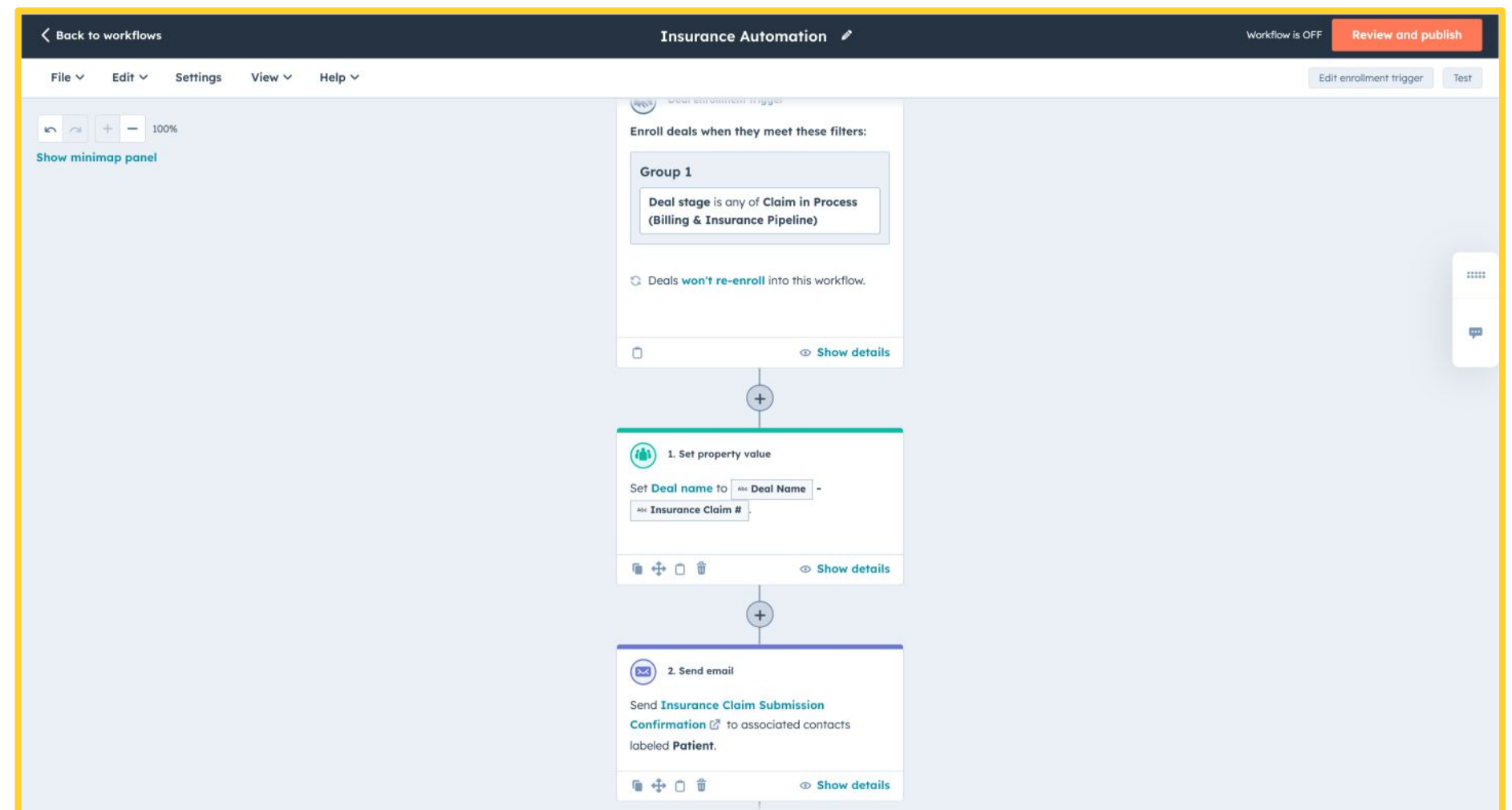
Build Billing & Insurance Processes with HubSpot

# Billing & Insurance

## Enhance Billing Communication with Automation

Utilize HubSpot's automation features to keep patients informed and engaged.

Send timely reminders about payments and streamline the payment process for a more seamless experience. This automation not only improves patient satisfaction by reducing missed payments and confusion but also enhances operational efficiency.







Drive Personalized Care

# Personalized Strategy

## Streamline Patient Data Collection with HubSpot Forms

HubSpot forms allow for seamless collection of patient intake forms, medical history, and other essential data.

By gathering detailed patient information, you can develop personalized treatment plans and tailor promotions to meet each individual's specific needs, enhancing the overall patient experience and care quality.

First name <input type="text"/>	Last name <input type="text"/>	Allergies (medications, cosmetics, latex/other): <input type="text"/>
Street address <input type="text"/>		
City <input type="text"/>	State/Region <input type="text"/>	Zip Code <input type="text"/>
Mobile phone number <input type="text"/>	Email * <input type="text"/>	Which Medical Aesthetic Services are you interested in? (check all that apply)
DOB MM / DD / YYYY	Emergency Contact <input type="text"/>	<input type="checkbox"/> Medical Aesthetic Skin Consultation <input type="checkbox"/> Botox®/ Dysport® <input type="checkbox"/> Dermal Fillers (Radiesse®/Juvederm®/Sculptra®/Voluma®) <input type="checkbox"/> Laser Hair Removal <input type="checkbox"/> Laser Skin Resurfacing & Rejuvenation <input type="checkbox"/> Microneedling (Micropen®) <input type="checkbox"/> Hydrafacial/ Microdermabrasion <input type="checkbox"/> Chemical Peels & Micropeels <input type="checkbox"/> Medical-grade Facial Treatments <input type="checkbox"/> Skin Care Products

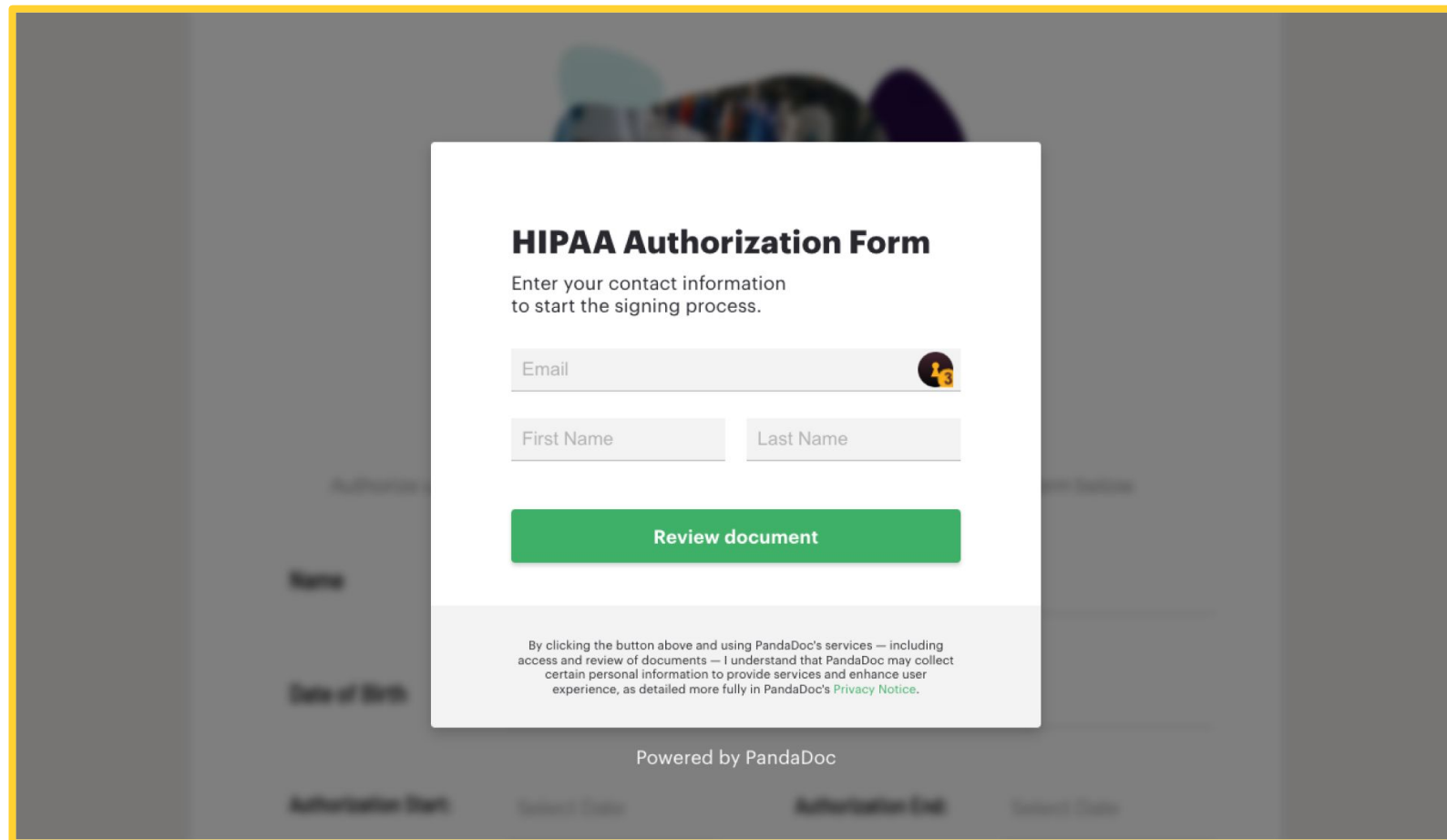
Drive Personalized Care

# Personalized Strategy


## Streamline Document Workflows with PandaDoc

Effortlessly map submitted HubSpot form data to PandaDoc documents and send them for HIPAA-compliant signatures using the integration between HubSpot and PandaDoc.

This integration ensures that every document is HIPAA-compliant, accurate and up-to-date.



**HIPAA Authorization Form**  
Enter your contact information to start the signing process.

Email 

First Name Last Name

**Review document**

By clicking the button above and using PandaDoc's services — including access and review of documents — I understand that PandaDoc may collect certain personal information to provide services and enhance user experience, as detailed more fully in PandaDoc's [Privacy Notice](#).

Powered by PandaDoc

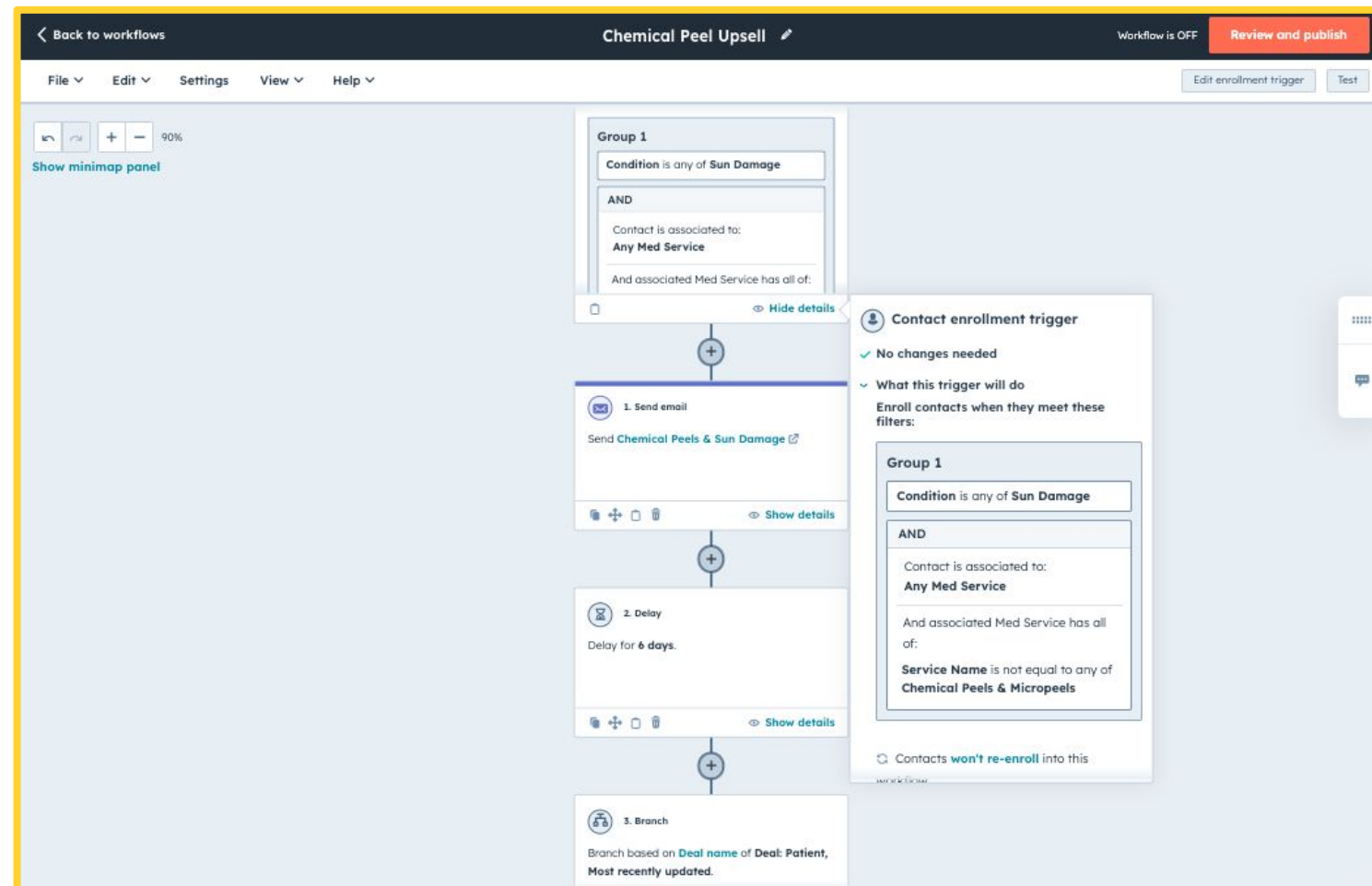
Drive Personalized Care

# Personalized Strategy

## Boost Client Retention with Special Offers and Packages

Design special offers and customized packages using HubSpot! Tailor these promotions to meet the specific needs and preferences of your clients, ensuring they feel valued and understood.

This personalized approach helps to foster stronger relationships and turn satisfied patients into loyal, returning clients.



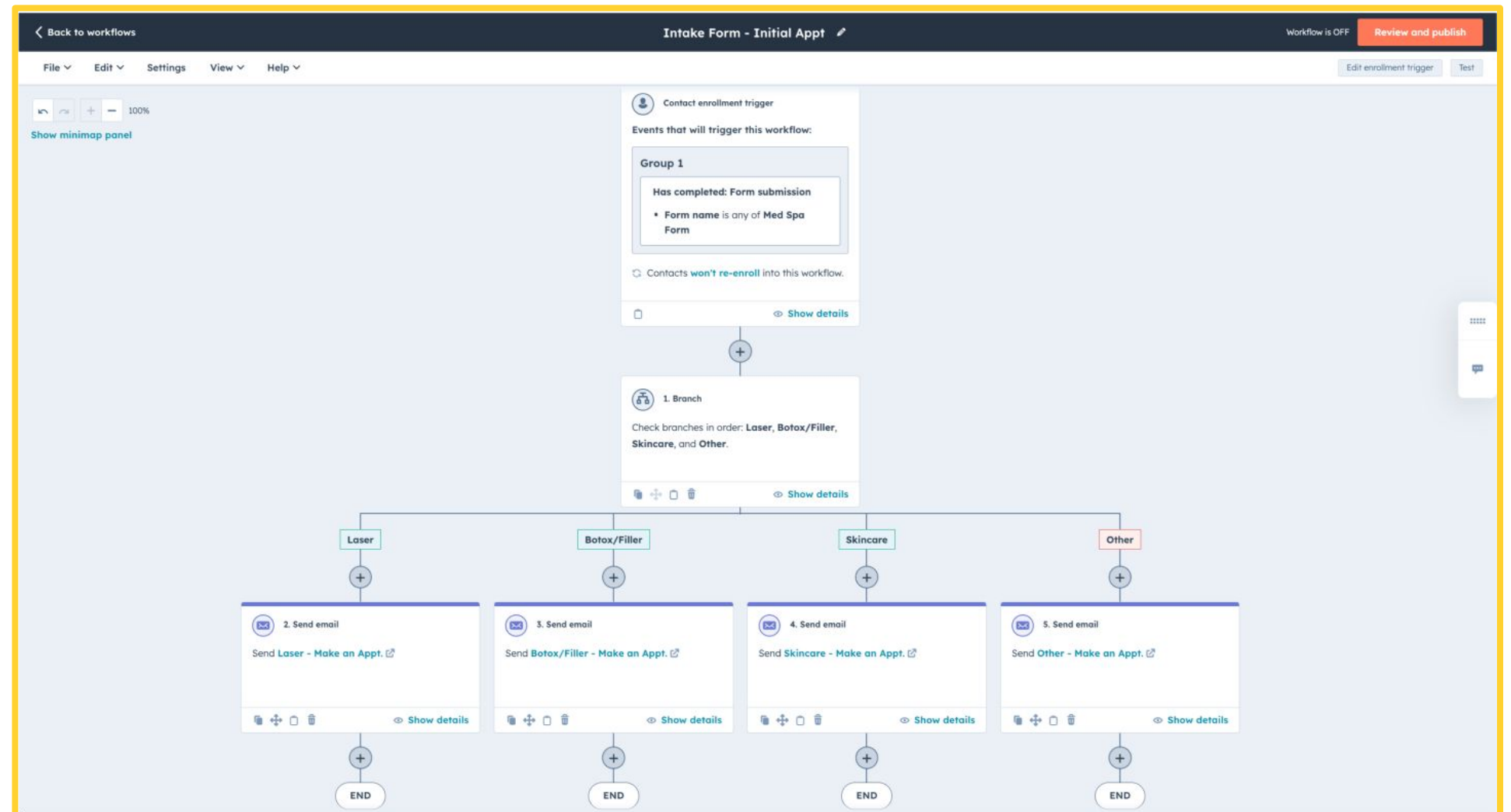
Drive Personalized Care

# Personalized Strategy

## Personalize Campaigns with Audience Segmentation

Segment your audience based on form fill responses, patient history, and individual preferences in HubSpot! This enables you to create highly targeted campaigns that resonate with each patient.

By delivering personalized messages and offers, you can significantly enhance patient engagement, satisfaction, and loyalty.



HubSpot for Healthcare

## **Ready to get started?**

Chat with our team and see if HubSpot is the right choice for you. Discover how our customized solutions can transform your healthcare practice, enhancing efficiency and patient care.

With HubSpot's HIPAA compliance and robust capabilities, your organization can streamline operations and improve communication. Connect with us today to explore the potential of HubSpot tailored to your unique needs.

Reach out at [apptitude8.com/contact-us](https://www.apptitude8.com/contact-us)