

Executive Summary

Private Health Management partnered with INRY, a Cprime company, to modernize its patient lifecycle and eliminate the operational friction caused by fragmented systems and manual processes. Through a combination of CloudCover managed services and a scalable ServiceNow architecture, PHM shifted to unified case management, automated intake and documentation, and streamlined clinical coordination. The result: faster patient engagement, stronger data accuracy, and a platform ready to scale intelligent, AI-enabled care delivery.

Client Background

Private Health Management (PHM) delivers highly personalized guidance to patients navigating complex healthcare needs. With 169 employees supporting care teams, administrators, medical records specialists, and patients, PHM manages a high volume of sensitive information. The organization wanted a coordinated, seamless way to manage intake, documentation, clinical summaries, provider vetting, and patient communications across a distributed care environment.



The Turning Point

PHM depended on disconnected systems and manual workflows that slowed onboarding and increased administrative strain. Intake forms, clinical history, medical records tasks, and referral processes lived in separate places, complicating coordination and reducing visibility. These gaps strained operations, introduced compliance risk, and weakened the overall patient experience.

PHM sought a partner with deep healthcare workflow expertise, advanced ServiceNow capabilities, and a proven record of enabling coordinated care models. INRY delivered a decade of healthcare transformation experience supported by Elite Partner certifications, award-winning workflow design, and extensive

experience modernizing HR, IT, patient services, and patient onboarding for major U.S. health networks.

The Transformation Strategy

PHM advanced from fragmented workflows to a connected, scalable system built for precision and momentum. The strategy aligned CloudCover—INRY's managed services solution—platform enhancements, and healthcare-specific workflow design to create a unified patient journey that supports faster decisions and higher-quality care.

CloudCover managed services foundation

CloudCover established the structure PHM needed to stabilize, enhance, and expand its platform. Four complementary workstreams—Ask INRY, Platform Operations, Platform Enhancements, and Platform Reliability Engineering—provided responsive support, consistent governance, and strategic improvements aligned to PHM's long-term goals.

Unified patient lifecycle management

A centralized case management model now consolidates patient data, tasks, and documentation in one connected workspace. Care teams access each patient's complete journey instantly, supporting rapid collaboration and confident decision-making.

Streamlined intake and documentation

Digitized pre-registration, clinical history, insurance, and consent forms reduced manual effort and strengthened early data integrity. Teams assist with form completion or reopen submissions when clarification is required. Automated clinical summary generation converts real-time patient information into structured PDFs that support consultations, referrals, and ongoing care.

Modernized medical records workflows

Medical records tasks were restructured into three clear categories—collection, transfer, and processing—to improve clarity and throughput. Automated form generation and pre-population accelerated documentation while supporting accuracy and regulatory readiness.

Provider vetting, scheduling, and communication

Structured workflows now guide provider identification and credential verification. Appointment scheduling integrates directly with Zoom, simplifying booking for patients and staff. Automated email handling categorizes communication at patient and case levels, while distribution group automation standardizes outreach

and reduces manual work.

Enhanced data integrity and seamless navigation

Standardized capture of medications, allergies, health history, and demographic details supports compliance and clinical decision-making. An intuitive navigation model enables care teams to move fluidly across patient information without switching between systems.

Integrated systems and legacy data transformation

Legacy records for accounts, contracts, entitlements, consumers, patients, and providers were converted into structured ServiceNow data. A HubSpot integration now creates accounts and contracts automatically at deal closure, streamlining handoffs and reinforcing operational continuity.

How Collaboration Powered The Transformation

INRY partnered closely with PHM leadership, care teams, and operational stakeholders to understand needs and shape workflows aligned to PHM's model of care. Discovery sessions clarified priorities and guided a roadmap that balanced quick wins with scalable foundations. Collaboration with Zoom and HubSpot teams ensured seamless integration across systems. Success grew from PHM's active

engagement, the automation-focused design approach, and the flexibility of the underlying ServiceNow architecture supporting future expansion.

The Outcomes That Reshaped Care Delivery

PHM now operates with faster, more structured intake and documentation processes, elevated provider efficiency, and clear visibility across cases and tasks. SLA-driven workflows support timely completion and strengthen referral accuracy.

Teams collaborate with greater ease and experience a reduced administrative load. Patients benefit from a coordinated, responsive service model supported by unified records and consistent communication. The platform strengthens PHM's compliance posture through audit-ready documentation and structured data collection.

PHMCare Workspace and the Patient Service Portal position PHM for continued innovation, including emerging AI-enabled workflows that will accelerate decision-making, elevate care experiences, and support long-term organizational growth.

If you'd like to see similar results for your healthcare organization, explore our flexible [ServiceNow solutions for the healthcare industry](#).