Non-Traditional Care.

LATEETUD

MICROSOFT AI PARTNER
DYNAMICS 365 · POWER PLATFORM
PLATFORM OVERVIEW · AUGUST 2026

One operational foundation for every specialty service line.

One Microsoft Dynamics 365 platform for Executive Health, Concierge Medicine, Occupational Health, International Patients and the Longevity Clinic, bringing every service line that bills outside the EHR onto one shared data model, integrated bi-directionally with Epic. Each program keeps its own workflows, but none of them runs on its own island, and none of them keeps a second copy of the patient record.

THE GAP IT FILLS

Because these lines bill outside the EHR, they never attracted any of the EHR investment. Executive Health, Concierge Medicine and the rest run on spreadsheets, disconnected point tools and manual re-keying. The same problem, four times over, with no enterprise view of any of it. One shared platform ends the islands.

80%
Less time spent on scheduling

2×
Scheduler capacity, same headcount

0%
Manual Epic data entry

THE FOUNDATION · ONE DATA MODEL, ONE OPERATING PATTERN

The same seven-step loop, every program

01	02	03	04	05	06	07 ↻
Relationship	Contract	Onboard	Coordinate & schedule	Deliver & document	Bill & collect	Retain & grow

Because the loop is the same everywhere, the platform underneath it can be too, configured for each program rather than rebuilt for each program.

THE NINE CAPABILITIES

Relationship & Account Management One record for every employer, sponsor, and member relationship.	**Contract & Agreement Management** Every commitment, deliverable, and renewal date visible in one place.	**Membership & Subscription** Panel size, renewals, and fee collection, managed and visible.
Intake & Onboarding One structured process, with no inbox-driven coordination.	**Scheduling & Care Coordination** Automated handoffs, with no manual re-keying.	**Billing & Revenue Management** Connected to scheduling and to Epic, with no manual transfer.
Reporting & Enterprise Analytics Real-time visibility across every program, one dashboard.	**Compliance & Governance** Role-based, audited, HIPAA-safe by design.	**Epic Integration** Verified bi-directional sync. Epic stays the record; nothing is duplicated.

The last six are universal to every program; the first three flex by whether a program is relationship-, contract-, or membership-based.

AGENTIC-READY, ON YOUR TIMELINE

Agents switch on when you're ready, and they are not a requirement for getting value from the platform.

Scheduling, intake/triage, outreach, and reporting agents are ready the day you want them. Mature the foundation now and add agentic capability whenever it suits you. It is already live across four service lines at an 11-hospital academic medical system.

WHERE TO START

Pawan Jadhav
Chief Executive Officer

pawan.jadhav@lateetud.com
lateetud.com