WellCare CRM

Digital Health Record Management System

# Problem Statement

The lack of centralized and accessible health record systems for underserved populations results in fragmented care, delays in treatment, and challenges in public health monitoring. WellCare CRM aims to bridge this gap by providing a Salesforce-powered platform that securely manages patient health records, automates care workflows, and generates actionable insights for healthcare providers, NGOs, and governments.

# Key Objectives

* Accessible Health Records: Provide a secure digital platform for storing and retrieving patient medical data.
* Workflow Automation: Streamline patient registration, appointments, referrals, and follow-ups.
* Data Analytics: Offer dashboards and reports for disease tracking, resource allocation, and preventive care.
* Interoperability: Enable integration with external hospital/NGO systems for seamless care.
* Sustainability Alignment: Support UN SDG 3 (Good Health & Well-being) and SDG 10 (Reduced Inequalities).

# Technical Implementation Flow

1. Patient Registration → Mobile/Web entry by health workers.
2. Digital Record Creation → Centralized repository with medical history, prescriptions, lab results.
3. Automated Workflows → Appointment scheduling, follow-ups, vaccination reminders.
4. Provider Access → Secure, role-based dashboards for doctors, NGOs, and government officials.
5. Analytics & Dashboards → Real-time health trend insights for public health planning.

# Real-world Impact

* Improved Care Continuity: Migrant and underserved populations retain portable health histories.
* Faster Decision-making: Automated workflows reduce manual errors and delays.
* Data-driven Policy: Governments/NGOs can allocate resources based on real-time health data.
* Equitable Access: Ensures fair treatment regardless of region, mobility, or socioeconomic background.

# Departments / Stakeholders Involved

Primary Stakeholders:

* Patients (record owners, beneficiaries)
* Healthcare Workers/Doctors (record updaters, care providers)
* NGOs & Government Health Departments (program managers, policy makers)

Secondary Stakeholders:

* Field Volunteers (assist patient onboarding)
* System Administrators (platform maintainers)
* Research & Epidemiology Units (public health data users)

# Success Metrics

* % of patients with complete digital health records.
* Reduction in missed follow-ups/appointments.
* Average resolution time for patient referrals.
* Improvement in vaccination/medicine adherence rates.
* Stakeholder satisfaction surveys (patients, providers, NGOs).

# Phase 1: Problem Understanding & Industry Analysis

## 1. Requirement Gathering

Functional Requirements:

* Patient registration with demographic + medical history data.
* Health worker dashboard for record updates.
* Doctor dashboard with prescription and treatment features.
* Appointment scheduling and reminders.
* Analytics & reporting dashboards for NGOs/government.

Non-Functional Requirements:

* Security: HIPAA-compliant storage, encrypted data.
* Scalability: Support millions of records across regions.
* Performance: Handle 5000+ concurrent users.
* Availability: 99.9% uptime for critical healthcare services.

## 2. Stakeholder Analysis

* Patients: Primary data owners needing portable and reliable records.
* Doctors/Healthcare Providers: Diagnose, prescribe, and update health records.
* NGOs/Health Departments: Manage outreach programs and resources.
* Volunteers: Assist in onboarding patients to the system.
* System Admins: Ensure uptime, configure org, and manage permissions.

## 3. Business Process Mapping

Current State (Manual):

* Patients carry paper-based reports.
* Health workers manually track vaccination/medicine status.
* Governments depend on delayed surveys for data.

Future State (Automated):

* Digital records accessible anytime, anywhere.
* Automated appointment reminders and vaccination schedules.
* Real-time dashboards for epidemic/disease trend monitoring.
* Data sharing between NGOs, hospitals, and government units.

## 4. Industry-Specific Use Case Analysis

* Global Trend: Push towards Universal Health Coverage (UHC).
* Comparable Platforms: India's Ayushman Bharat Digital Mission (ABDM), WHO-backed eHealth projects, NGO-level patient tracking systems (often fragmented).
* Gap Identified: Lack of scalable, interoperable, Salesforce-based health CRM for underserved populations.

## 5. AppExchange Exploration

* Health Cloud (Salesforce native solution) – advanced but expensive.
* Nonprofit Success Pack (NPSP) – useful for NGOs managing patients.
* Survey Force – collect patient satisfaction data.
* Salesforce Maps – map patient clusters, outbreak tracking.
* Einstein Analytics – predictive healthcare trends.

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