

Phase 4: Process Automation (Admin)

Validation Rules

Validation rules ensure that important healthcare data is entered correctly.

- Example: A Patient record cannot be saved without a valid Email or Phone.
- Example: A Treatment cannot be created without a Start Date.

These rules guarantee data accuracy for patient care.

Setup

Home

Object Manager

Search Setup

SETUP

Object Manager

Patient__c Validation Rule

Back to Patient__c

Help for this Page

Validation Rule Detail

Edit

Clone

Rule Name

Patient_Email_Phone_Required

Active

✓

Error Condition Formula

ISBLANK(Email__c) && ISBLANK(Contact_Number__c)

Error Message

Patient must have either Email or Phone.

Error Location

Top of Page

Description

Created By

Dasam Harisaran, 9/24/2025, 11:32 AM

Modified By

Dasam Harisaran, 9/24/2025, 11:32 AM

Edit

Clone

SETUP

Object Manager

Treatment__c Validation Rule

Back to Treatment__c

Help for this Page

Validation Rule Detail

Edit

Clone

Rule Name

Patient_Email_Phone_Required

Active

✓

Error Condition Formula

ISBLANK(Email__c) && ISBLANK(Phone__c)

Error Message

Patient must have either Email or Phone.

Error Location

Top of Page

Description

Created By

Dasam Harisaran, 9/24/2025, 11:36 AM

Modified By

Dasam Harisaran, 9/24/2025, 11:36 AM

Edit

Clone

Workflow Rules

Workflow rules automate simple, rule-based actions.

- Example: When a Patient is marked as *Critical*, send an email alert to the assigned Doctor.
- Example: When an Appointment status changes to *Missed*, create a follow-up Task automatically.

The screenshot shows the Salesforce Setup interface with the 'Workflow Rules' section selected in the left sidebar. The main content area displays the configuration for a rule named 'Email_or_Phone_Required'.

Workflow Rule Detail

Rule Name	Email_or_Phone_Required	Object	Patient__c
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Ensures patient record must have either an Email or a Contact Number.		
Rule Criteria	Patient__c: Status EQUALS Missed		
Created By	Dasam Harisaran, 9/24/2025, 11:46 AM	Modified By	Dasam Harisaran, 9/24/2025, 11:46 AM

Workflow Actions

Immediate Workflow Actions

No workflow actions have been added.

The screenshot shows the Salesforce Setup interface with the 'Workflow Rules' section selected in the left sidebar. The main content area displays the configuration for a rule named 'Missed_Appointment_Followup'.

Edit Rule Missed_Appointment_Followup

Step 3: Specify Workflow Actions (Step 3 of 3)

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria: Appointment__c: Status EQUALS Missed

Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

Action	Type	Description
Edit Remove	Task	Follow up with patient.

[Add Actions](#)

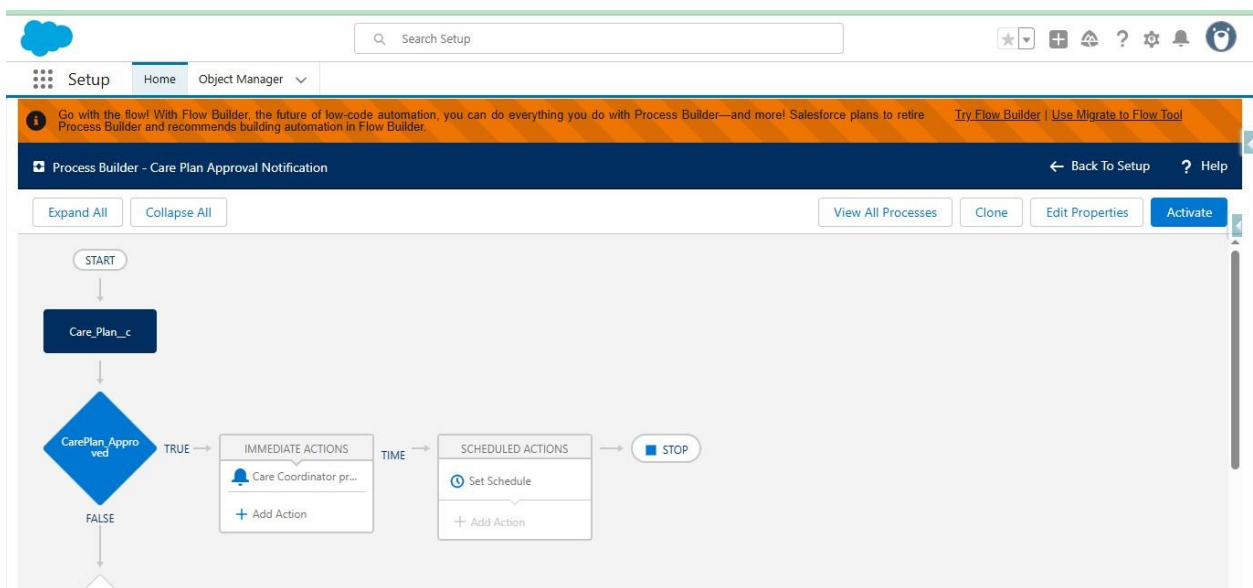
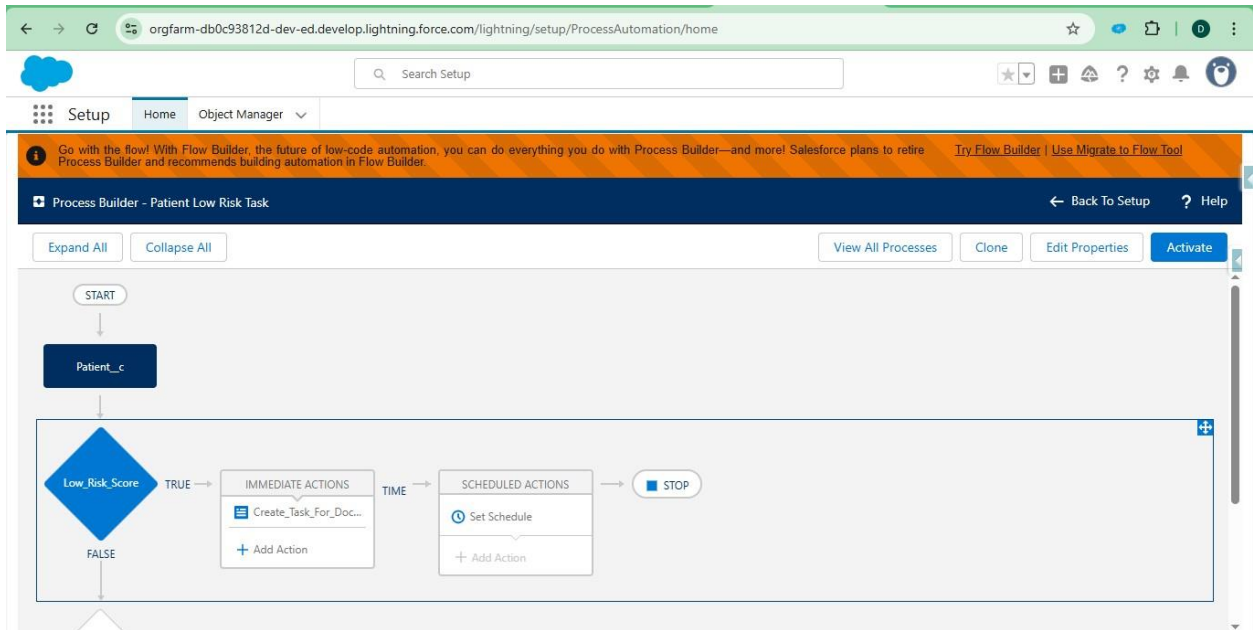
Time-Dependent Workflow Actions [See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Process Builder

Process Builder manages more advanced automation across multiple objects.

- Example: If a Patient's risk score falls below a threshold, automatically create a Task for the Doctor to review.
- Example: When a Care Plan is approved, notify the Care Coordinator to schedule follow-ups.

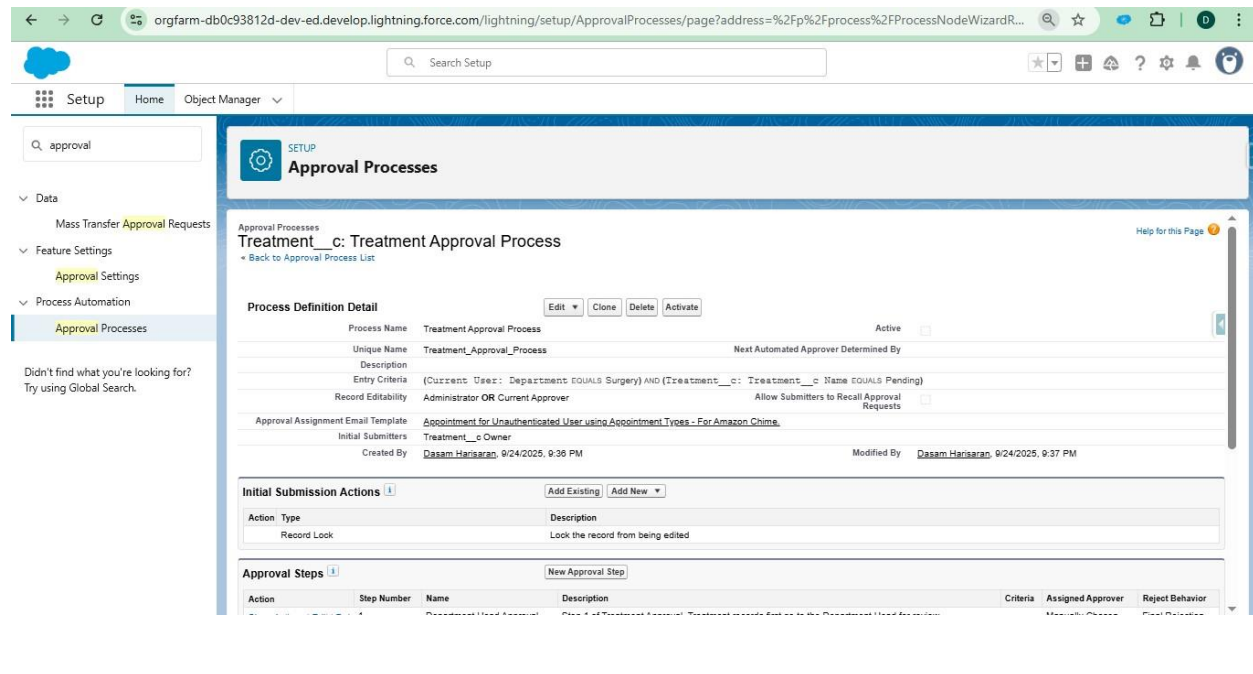


Approval Process

Approval processes help maintain clinical and administrative checks.

- Example: A Treatment Plan requires approval from the Department Head before being finalized.

- Example: Insurance claim requests go through a Doctor → Finance → Admin approval chain.



Flow Builder

Flows provide powerful, flexible automation. Different types of flows were implemented:

- **Screen Flow:** Collect patient intake information via a guided form.
- **Record-Triggered Flow:** When a Lab Result is entered as “Abnormal,” alert the assigned Doctor immediately.
- **Scheduled Flow:** Send follow-up reminders to Patients 24 hours before their appointment.
- **Auto-launched Flow:** Update risk score calculations in the background whenever patient vitals are updated.

The screenshot displays the Salesforce Flow Builder interface. The main canvas shows a flow diagram with the following steps:

- Record-Triggered Flow** (Start)
- Object: **Lab_Result_c**
- Trigger: **A record is created or updated**
- Conditions: **1**
- Optimize for: **Actions and Related Records**
- Run Immediately**
- Lab Abnormal Update Records**
- End**

The right sidebar provides configuration options for the **Update Records** step:

- How to find records to update and set their values:**
 - ☐ Use the lab_result_c record that triggered the flow
 - ☒ Update records related to the lab_result_c record that triggered the flow
 - ☐ Use the IDs and all field values from a record or record collection
 - ☐ Specify conditions to identify records, and set fields individually
- Select Related Records:**
 - * Records Related to Lab_Result_c
 - Selected: **Lab_Result_c > ParentFinanceTransactions**
- Set Filter Conditions:**
 - Condition Requirements to Update Record: **None—Update All Related Records**
- Set Field Values for the Finance Transaction Records:**

Field	Value
Finance System Integration Status	Pending

Email Alerts

Email templates are used to keep patients and staff informed.

- Example: Appointment confirmation email to Patients.
- Example: Lab Result notification email to Doctors.

Salesforce_Project x Kolli Jagan moh x CampusConnect x Harisarandasan x Flows | Salesforce x Daily Appointment x Email Alerts | Sa x + - x

orgfarm-db0c93812d-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowEmails/page?address=%2F01WgL000000911h

Search Setup

Setup Home Object Manager

Organization-Wide Addresses
Outlook Integration and Sync
Send through External Email Services
Test Deliverability

Feature Settings
Chatter
Email Settings
Service
Email-to-Case
Process Automation
Workflow Actions
Email Alerts
Custom Code
Email Services
Environments
Logs
Email Log Files
Monitoring
Email Snapshots

SETUP
Email Alerts

Email Alert
Email Alert notifying support agents of new case at large account

Rules Using This Email Alert | Approval Processes Using This Email Alert | Entitlement Processes Using This Email Alert

Email Alert Detail

Description Email Alert notifying support agents of new case at large account Email Template Appointment for Unauthenticated User using Appointment Types - For third party

Unique Name Appointment_Confirmation Object Appointment_c

From Email Address Current User's email address

Recipients User: Dr. Smith
User: Dasam Harisaran
User: Nurse Anjali

Additional Emails

Created By Dasam Harisaran, 9/24/2025, 10:01 PM Modified By Dasam Harisaran, 9/24/2025, 10:01 PM

Rules Using This Email Alert
This alert is currently not used by any rules

Approval Processes Using This Email Alert
This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

Salesforce_Project x Kolli Jagan moh x CampusConnect x Harisarandasan x Flows | Salesforce x Daily Appointment x Email Alerts | Sa x + - x

orgfarm-db0c93812d-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowEmails/page?address=%2F01WgL000000913J

Search Setup

Setup Home Object Manager

Organization-Wide Addresses
Outlook Integration and Sync
Send through External Email Services
Test Deliverability

Feature Settings
Chatter
Email Settings
Service
Email-to-Case
Process Automation
Workflow Actions
Email Alerts
Custom Code
Email Services
Environments
Logs
Email Log Files
Monitoring
Email Snapshots

SETUP
Email Alerts

Email Alert
Email Alert notifying support agents of new case at large account

Rules Using This Email Alert | Approval Processes Using This Email Alert | Entitlement Processes Using This Email Alert

Email Alert Detail

Description Email Alert notifying support agents of new case at large account Email Template Scheduled Service Appointment Confirmation Email

Unique Name Lab_Result_Ready Object Lab_Result_c

From Email Address Current User's email address

Recipients User: Dr. Smith
User: Hospital Admin
User: Dasam Harisaran
User: Nurse Anjali

Additional Emails

Created By Dasam Harisaran, 9/24/2025, 10:03 PM Modified By Dasam Harisaran, 9/24/2025, 10:03 PM

Rules Using This Email Alert
This alert is currently not used by any rules

Approval Processes Using This Email Alert
This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

Field Updates

Automatic field updates reduce manual work.

- Example: When a Patient's Appointment is marked *Completed*, automatically set Status = "Visited."
- Example: If Treatment is approved, automatically set Status = "Active."

Tasks

Tasks ensure follow-ups and reminders are never missed.

- Example: When a Care Plan follow-up is due, create a Task for the Care Coordinator.
- Example: Assign a Task to the Nurse to check patient vitals after an Appointment.

Custom Notifications

Custom push notifications alert users in real time inside Salesforce or on mobile.

- Example: "Patient Ravi Sharma's lab results show abnormal values – review immediately."
- Example: "Telemedicine appointment scheduled with Patient Anita Verma tomorrow at 10:00 AM."

The screenshot shows the Salesforce Custom Notifications setup page. The browser address bar displays the URL: `orgfarm-db0c93812d-dev-ed.develop.lightning.force.com/lightning/setup/CustomNotifications/home`. The page header includes the Salesforce logo, a search bar, and navigation links for Setup, Home, and Object Manager. The left sidebar contains a search bar and a navigation menu with categories like Apps, Environments, and Notification Builder. The main content area is titled "Custom Notifications" and includes a warning message about third-party services. Below this, there is a section for "Custom Notification Types" with a table listing existing notification types.

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Critical Patient Alert	Critical_Patient_Alert		✓	✓
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	

✓**Final Deliverables (Phase 4):**

1. Validation Rules for key data fields.
2. Workflow Rules for automatic alerts and updates.
3. Process Builder automation for patient risk and care plans.
4. Approval Processes for treatments and insurance.
5. Flow Builder automation (Screen, Record-triggered, Scheduled, Auto-launched).
6. Email Alerts to patients and doctors.
7. Field Updates to reduce manual work.
8. Tasks assigned to staff.
9. Custom Notifications for urgent cases.