

Phase 4 – Process Automation (Admin)

Project: *NeuroWell – Intelligent Mental Wellness & Early Detection CRM*

1. Validation Rules

Use Case: Maintain data integrity for stress scores.

Description: A validation rule was configured on the *Wellness Record* object to ensure that the `Stress_Score__c` value always remains between 0 and 100. This prevents entry of invalid stress readings and guarantees reliable analytics.

Business Impact: Eliminates data entry errors and keeps wellness calculations accurate.

2. Workflow Rules

Use Case: Automate patient activation on enrollment.

Description: A workflow rule on the *Patient* object automatically updates `Enrollment_Status__c` to “Active” when a new record is created.

Business Impact: Reduces manual updating and ensures consistent status across the system.

3. Process Builder

Use Case: Notify counselors of new patients.

Description: A Process Builder flow triggers whenever a Patient record is created. It sends an email alert to the assigned Primary Counselor, informing them about the new assignment.

Business Impact: Improves communication and ensures faster follow-ups.

4. Approval Process

Use Case: Control counselor session cancellations.

Description: An Approval Process on the *Counselor Session* object routes records to the Admin when `Status` = “Cancelled.” The Admin reviews and approves before final update.

Business Impact: Prevents unauthorized session cancellations and maintains service quality.

5. Flow Builder (Screen, Record-Triggered, Scheduled, Auto-Launched)

Use Case: Handle high-risk patients automatically.

Description: A Record-Triggered Flow on the *Wellness Record* object executes when `Risk_Level__c` = 'High'.

- Creates a Task for the assigned counselor.
- Sends an email alert and custom notification for follow-up.

Business Impact: Guarantees timely attention to critical patients without manual effort.

6. Email Alerts

Use Case: Inform counselors of critical stress levels.

Description: Email templates and alerts were configured to notify counselors instantly whenever a patient's record is flagged as High Risk.

Business Impact: Enables immediate awareness and faster response times.

7. Field Updates

Use Case: Mark critical patients automatically.

Description: A Field Update action changes Critical_Status__c to "Yes" when Average_Stress__c > 70.

Business Impact: Simplifies tracking of critical patients for administrators and counselors.

8. Tasks

Use Case: Assign follow-up work to counselors.

Description: Tasks are automatically created via Flow when a patient is categorized as High Risk. The task includes subject, due date, and link to the patient record.

Business Impact: Ensures no high-risk case is missed for review or follow-up.

9. Custom Notifications

Use Case: Provide real-time alerts inside Salesforce.

Description: A Custom Notification named "High Risk Patient Alert" was created and triggered via Flow. Counselors receive instant bell notifications in Salesforce UI whenever a patient is flagged critical.

Business Impact: Improves user engagement and reduces reliance on emails for urgent cases.

Outcome

All process automation features were successfully implemented. The combination of validation rules, workflows, approvals, and flows ensures accurate data, timely notifications, and seamless

coordination among counselors and administrators. NeuroWell now functions as a self-driven CRM capable of managing patients and alerts with minimal manual effort.