🏥 Salesforce CRM Project – Patient Engagement & Care Coordination

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Phase 1: Problem Understanding & Industry Analysis

Goal: Identify why healthcare providers need this CRM.

- **Problem Statement:**
  Patient data is fragmented across multiple systems. Appointment scheduling is manual, causing overlaps and inefficiencies. Follow-up reminders are inconsistent, leading to missed care opportunities and lower patient satisfaction.
- **Solution:**
  Salesforce Health Cloud will centralize patient records, automate scheduling, and streamline follow-ups to ensure better patient engagement and care coordination.
- **Stakeholders:**
  - Patients → Book appointments, view prescriptions, receive reminders.
  - Doctors → Access medical history, manage appointments, track follow-ups.
  - Nurses → Coordinate care plans, track patient recovery.
  - Admins → Oversee hospital operations, reports, and compliance.
- **KPIs:** Appointment attendance %, Patient satisfaction scores, Follow-up compliance %, No-show reduction %.

Phase 2: Org Setup & Configuration

Goal: Prepare Salesforce environment for healthcare workflows.

- **Profiles:** Patient, Doctor, Nurse, Admin.
- **Roles:** Hospital → Department → Doctor → Patient.
- **Permissions:**
  - Patients → Limited self-access (own records & appointments).
  - Doctors → Access assigned patients & medical records.
  - Nurses → Shared access for care coordination.
  - Admins → Full control.
- **Settings:** Hospital working hours, Fiscal year (Jan–Dec), Holidays (non-clinic days).

Phase 3: Data Modeling & Relationships

Goal: Create patient-centered data structure.

- **Custom Objects:**
  - Patient__c → Name, Age, Gender, Medical History, Insurance.
  - Appointment__c → Patient, Doctor, Date, Time, Status.
  - Prescription__c → Medication, Dosage, Duration, Linked to Appointment.
  - FollowUp__c → Type (call, visit, lab), Date, Outcome.
- **Relationships:**
  - Patient ↔ Appointment (Master-Detail).
  - Appointment ↔ Prescription (Lookup).
  - Appointment ↔ FollowUp (Lookup).

Phase 4: Process Automation (Admin)

Goal: Automate scheduling & reminders.

- **Validation Rules:** Appointment date must be ≥ Today.
- **Flows:**
  - Auto-assign doctor based on specialty & availability.
  - Trigger SMS/Email reminder 24 hrs before appointment.
- **Approval Process:** Expensive treatments require Admin approval.

Phase 5: Apex Development (Developer)

Goal: Add advanced automation.

- **Triggers:**
  - Prevent overlapping appointments for the same doctor.
  - Update Patient record after each consultation.
- **Batch Apex:** Weekly scan → Generate report of missed appointments.
- **Queueable Apex:** Send follow-up reminders post-treatment.
- **Scheduled Apex:** Daily morning → Email doctors with their patient list.

Phase 6: User Interface Development

Goal: Provide easy-to-use portals and dashboards.

- **Lightning Record Pages:**
    - Patient Portal → Appointments, Prescriptions, Reminders.
    - Doctor Dashboard → Daily schedule, Pending follow-ups.
- **LWC Components:**
    - Appointment Calendar.
    - Prescription Viewer.
    - Patient Risk/Recovery Gauge.

Phase 7: Integration & External Access

Goal: Connect Salesforce to external healthcare systems.

- **SMS/Email Gateway:** Send reminders for appointments & follow-ups.
- **EHR/EMR Integration:** Sync medical history & lab results.
- **Payment Gateway:** Online billing for consultations or telemedicine.

Phase 8: Data Management & Deployment

Goal: Manage and protect sensitive healthcare data.

- **Data Import:** Migrate patient records from legacy systems.
- **Duplicate Rules:** Prevent duplicate patient records.
- **Data Export/Backup:** Weekly encrypted backup.
- **Deployment:** Sandbox → Production via Change Sets.

Phase 9: Reporting & Dashboards

Goal: Deliver insights for decision-making.

- **Reports:**
    - Appointment No-Shows by Department.
    - Patient Satisfaction Surveys.
    - Follow-up Completion Rate.
- **Dashboards:**

- Patient Engagement Dashboard → Attendance, reminders, satisfaction.
- Doctor Dashboard → Active patients, missed appointments.
- Admin Dashboard → Overall hospital performance & resource utilization.

Phase 10: Final Demo & Presentation

Goal: Demonstrate the full healthcare CRM flow.

- **Demo Walkthrough:**
  Patient books appointment → Doctor auto-assigned → Patient receives SMS → Appointment confirmed → Post-visit follow-up scheduled → Dashboard updates for doctor and admin.
- **Pitch Line:**
  "With Salesforce Health Cloud, we reduce no-shows, improve patient satisfaction, and ensure coordinated care across the healthcare team."

✅ Solution

A **Salesforce-based Healthcare CRM** that:

1. **Centralizes Patient Records**
   - Unified 360° Patient Profile (demographics, medical history, prescriptions, visit history).
   - HIPAA-compliant access control for doctors, nurses, and admins.
2. **Automates Appointment Scheduling**
   - Patients can request appointments via portal or call center.
   - Salesforce Flows auto-assign doctors based on specialty & availability.
   - Prevents double-booking with conflict detection.
3. **Enhances Follow-up Care**
   - Automated SMS/Email reminders for upcoming visits.
   - Post-visit follow-ups for prescriptions, lab reports, and recovery tracking.
4. **Improves Care Coordination**
   - Care team dashboards → Doctors, nurses, and support staff aligned on patient progress.

- Alerts for missed appointments or abnormal test results.

5. **Delivers Analytics & Insights**
    - Reports on appointment no-shows, treatment compliance, and patient satisfaction.
    - Dashboards for hospital administrators to optimize resources.