

Appointment, diagnosis and invoicing system for individual clinics

<https://uts74-dev-ed.develop.my.salesforce.com/setup/forcecomHomepage.apexp?setupid=ForceCom>

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Password: 2677260Sm\$\$

Abstract

This project plans to design an application on force.com for individual clinics for a group that operates several small clinics. This small system consists of three modules: appointment, diagnosis and billing. Each module is implemented by 1-2 objects, including patient information, appointments, diagnosis, referrals, invoices and discount approvals. This small system implementation demonstrated that the benefits of PAAS in practice include low cost (no system development and hardware deployment required), usability and scalability (new modules can be added at any time to meet demand).

1 Introduction

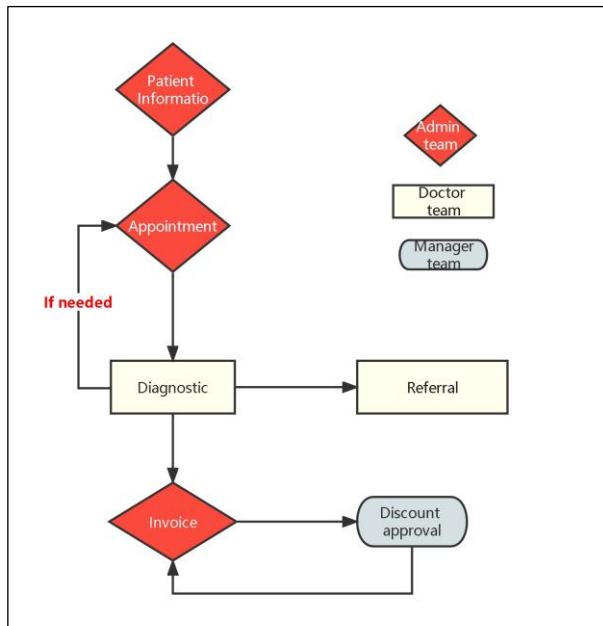
Clinic A is a small clinic in Sydney operated by a large clinic operating group. The clinic mainly provides GP consultation, treatment, and referral services. The business process involves the patient registering and entering their personal details, booking an appointment, and making a diagnosis or referral with doctors. At the end of the consultation, an invoice is issued to the patient, and a discount is given depending on the patient's circumstances. As it is one of the small clinics operated by the group, the clinic does not need to be equipped with finance and HR but is managed by the group. The clinic's daily staff (system users) are admins, doctors, and managers.

Admin is responsible for entering or assisting in entering patient information confirming and modifying appointments. At the end of the consultation, Admin issues invoices and applies discounts for patients.

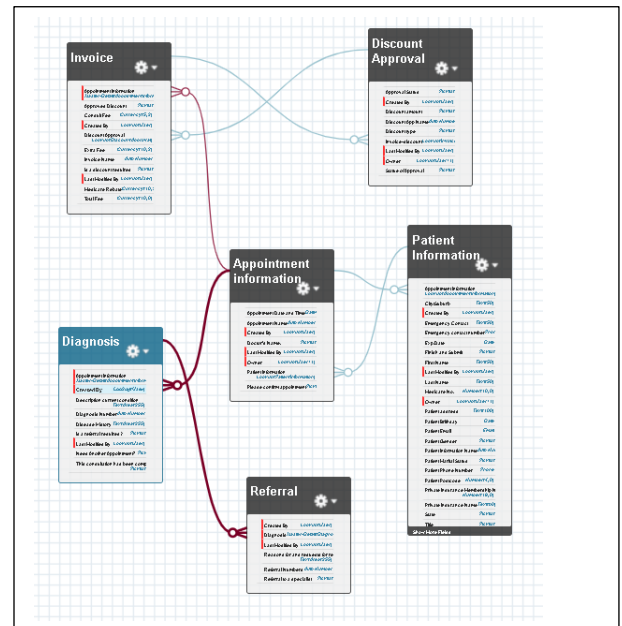
Doctors provide consultation and diagnosis based on appointments and make referrals for patients who need them.

Duty Managers are the on-site managers of the clinic and are responsible for the day-to-day management of the clinic, reviewing information, and approving discounts.

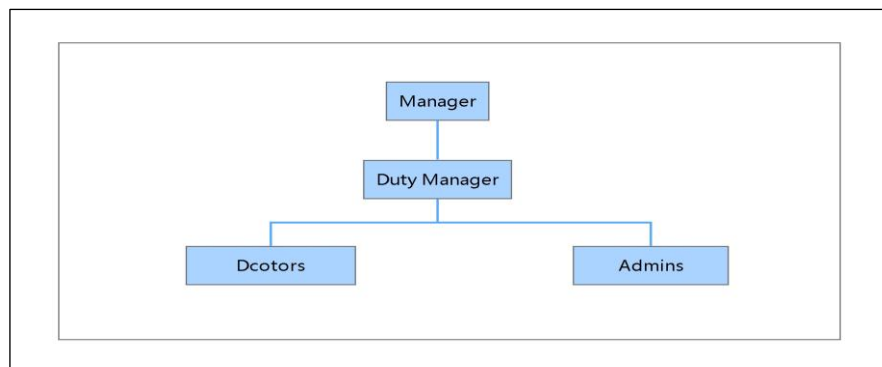
Managers are group administrators and are responsible for the management of several clinics. They have the highest authority over the clinics and are responsible for approving 100% discounts.



1.1 Dataflow



1.2 Schema



1.3 Clinic Organisation Structure

2 System Modelling Section:

a) Data Model for the PaaS Application

The data model is relatively simple as this small practice only has GP consultation, diagnosis and referral services. As shown in Figure 1.2, the patient's personal information is entered into the system. Necessary information is collected to ensure future services. In the patient's personal information, the patient's birthday and medicare number are verified by setting validation rules to ensure the correct data. Patient information is connected to the appointment information through lookup-relationship. It allows the patient's appointment history to be looked up in the patient information.

Patient Information Validation Rule
[Back to Patient Information](#)

Validation Rule Detail Edit Clone

Rule Name: Medicare_Exp_Date_Rule

Error Condition Formula: Exp_Date__c <= TODAY()

Error Message: Your card has expired.

Description:

Created By: Zheng Wang, 9/10/2023, 8:52 am Edit Clone

Patient Information Validation Rule
[Back to Patient Information](#)

Validation Rule Detail Edit Clone

Rule Name: patient_date_brth_rule

Error Condition Formula: Patient_Birthday__c <= TODAY()

Error Message: Please enter your correct birthday.

Description:

Created By: Zheng Wang, 9/10/2023, 8:27 am Edit Clone

Patient Information

P-00001

Back to List: Profiles

Customize Page | Edit Layout | P

Open Activities (0) | Activity History (0) | Appointment Information (0)

Patient Information Detail

EditDeleteCloneSharing

Patient Information

Title	Mr	Patient Gender	Male
First Name	Zheng	Patient Birthday	13/10/2009
Last Name	Wang	Patient Marital Status	married

Patient Address

Patient address	18 Russell St	State	NSW
City/Suburb	Vaucluse	Patient Postcode	

Contact Details

Patient Phone Number	041506987	Patient Email	zheng.wang001@gmail.com
Emergency Contact	Ying	Emergency contact number	0487999381

Medicare And Insurance

Medicare No.	1,234,456,789	Exp.Date	9/10/2042
Private Insurance Name	medibank	Private Insurance Membership Number	123,456,789

Finish and Submit

Finish and Submit

Appointment Information

Appointment Information	AP-00001	Owner	Zheng Wang (Change)
Patient Information Name	P-00001	Last Modified By	Zheng Wang, 9/10/2023, 9:08 am
Created By	Zheng Wang, 9/10/2023, 9:08 am		

EditDeleteCloneSharing

The Appointment Information module allows you to select a doctor and an appointment time and get patient information through lookup relationships. Finally, all information must be selected through a checklist to confirm the appointment. A validation rule verifies the appointment time, and the appointment time must be after the registration of the appointment. After completing all workflows, appointment Information displays completed invoice and diagnosis information through the Master-Detail Relationship.

Appointment information Validation Rule

Back to Appointment information

Validation Rule Detail

EditClone

Rule Name	Appointment_Validation_Rule	Active	✓
Error Condition Formula	Appointment_Date_and_Time__c >= NOW()		
Error Message	Please enter the correct appointment time.	Error Location	Top of Page
Description	Appointment Information Validation Rule		
Created By	Zheng Wang, 9/10/2023, 8:34 am	Modified By	Zheng Wang, 22/10/2023, 8:24 pm

EditClone

Appointment Information

AP-00001

Back to List: Custom Object Definitions

Customize

Open Activities (0) | Activity History (0) | Patient Information (1) | Invoice (1) | Diagnosis (1)

Appointment information Detail

EditDeleteCloneSharing

Appointment

Doctor's Name	Allen Brown	Appointment Date and Time	7/12/2023, 12:00 pm
Patient Information	P-00001		

confirmation

Please confirm appointment	Yes, confirmed.	Owner	Zheng Wang (Change)
Appointment Name	AP-00001	Last Modified By	Zheng Wang, 22/10/2023, 7:53 pm
Created By	Zheng Wang, 9/10/2023, 9:08 am		

EditDeleteCloneSharing

Open Activities

New TaskNew Event

No records to display

Activity History

Log a CallMail MergeSend an Email

No records to display

Patient Information

New Patient Information

Action	Patient Information Name
Edit Del	P-00001

Invoice

New Invoice


Action	Invoice Name
Edit Del	Invoice-000001

Diagnosis

New Diagnosis

Action	Diagnosis Number
Edit Del	DiA-000001

The referral module will be accessed if a referral is required at the end of the GP consultation and diagnosis. The referral module requires the doctor to select a specialist and fill in the reason and referral request. In the referral module, all the information about the previous diagnosis can be reviewed directly through the Master-Detail relationship.

**Referral**

Ref-000001

[Back to List: Custom Object Definitions](#)

Open Activities (0) | Activity History (0)

Referral Detail

Referral Numbers

Ref-000001

Referral to a specialist

Dr. Sarah Smith (Cardiologist)

Reasons for and requests for referrals

for

Diagnosis

DIA-000001

Created By

Zheng Wang, 22/10/2023, 7:41 pm

Save

Cancel


Last Modified By

Zheng Wang, 22/10/2023, 7:41 p

Save

Cancel

After the diagnosis and consultation are completed, the invoice object obtains the information about the appointment according to the Master-Detail relationship. It fills in the relevant information by the Admin team, and the invoice object selects whether it is necessary to apply for a discount and obtains the information about the post-discount approval from the Discount Approval object. The amount in the invoice object is validated according to the validation rules to ensure the data is correct.

**Invoice**

Invoice-000001

[Back to List: Custom Object Definitions](#)

Open Activities (0) | Activity History (0) | Discounts Approval (1)

Invoice Detail

Edit

Delete

Clone

Fees

Consult Fee

\$130.00

Extra Fee

\$20.00

Is a discount required

Yes

Medicare Rebate

Medicare Rebate

\$80.00

Discount

Approved Discount

\$20

Discount Approval

Dia-000001

Total Fee Paid By Patient

Total Fee

\$30

Invoice Name

Invoice-000001

Appointment information

AP-000001

Created By

Zheng Wang, 9/10/2023, 9:14 pm

Last Modified By

Zheng Wang, 22/10/2023, 9:12 pm

Open Activities

New Task

New Event

No records to display

Activity History

Log a Call

Mail Merge

Send an Email

No records to display

Discounts Approval

New Discount Approval


Action

Discount App Name

Edit

Delete

Dia-000001

**Invoice Validation Rule**

[Back to Invoice](#)

Validation Rule Detail

Edit

Clone

Rule Name

Fee_Rule_Consult

Active

✓

Error Condition Formula

Consult_Fee_c = 0

Error Location

Consult Fee

Error Message

Please enter the correct amount.

Description

Created By


Zheng Wang, 9/10/2023, 8:39 am

Modified By

Zheng Wang, 22/10/2023, 9:42 pm

Edit

Clone

**Invoice Validation Rule**

[Back to Invoice](#)

Validation Rule Detail

Edit

Clone

Rule Name

Fee_Rule_Extra

Active

✓

Error Condition Formula

Extra_Fee_c = 0

Error Location

Top of Page

Error Message

Please enter the correct amount.

Description

Created By


Zheng Wang, 9/10/2023, 8:40 am

Modified By

Zheng Wang, 22/10/2023, 9:43 pm

Edit

Clone

**Invoice Validation Rule**

[Back to Invoice](#)

Validation Rule Detail

Edit

Clone

Rule Name

Fee_Rule_Medicare_Rebate

Active

✓

Error Condition Formula

Medicare_Rebate_c = (Consult_Fee_c + Extra_Fee_c) && Medicare_Rebate_c = 0

Error Location

Top of Page

Error Message

Please enter the correct amount.

Description

Created By


Zheng Wang, 9/10/2023, 8:42 am

Modified By

Zheng Wang, 22/10/2023, 10:03 p

Edit

Clone

**Invoice Validation Rule**

[Back to Invoice](#)

Validation Rule Detail

Edit

Clone

Rule Name

Total_Fee

Active

✓

Error Condition Formula

Total_c = (Consult_Fee_c + Extra_Fee_c - Medicare_Rebate_c)

Error Location

Top of Page

Error Message

Total Fee can be negative.

Description

Created By

Zheng Wang, 22/10/2023, 9:43 pm

Modified By

Zheng Wang, 22/10/2023, 9:50 pm

Edit

Clone

Discount Approval object approves modules for discounts. Approving discounts is the responsibility of the Manager team. All discounts can be approved by the manager on duty, except for Totally Free, which requires manager approval. Discount types are differentiated by concession card, senior card, student card and others, and discounts range from \$10 to free.

Discount Approval

Dis-000001

[Back to List: Workflow Rules](#)

Open Activities (0) | Activity History (0) | Approval History (0) | Invoice (1)

Discount Approval Detail

SaveCancel

▼ Discount

Discount type

Concession card

Discount amount

\$20

Invoice-discount

Invoice-000001

▼ Status

Approval Status

Approved

Status of Approval

Finish

Discount App No.

Dis-000001

▼ Information

Created By

Zheng Wang, 22/10/2023, 9:10 pm

Owner

Zheng Wang (Change)

Last Modified By

Zheng Wang, 22/10/2023, 9:10 pm

SaveCancel

The discount approval process is divided into two steps. When there is a discount amount, but it does not reach 100% free, it is approved by the manager on duty, and after approval, the task is assigned to the Admin team and the related field is updated. If the discount is free, it requires manager approval. After approval, the task will also be assigned to the Admin team, and the relevant field will be updated.

Approval Steps

New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior																								
Hide Actions Edit Del	1	Approval from Manager	(Discount Approval: Discount amount NOT EQUAL TO 0) AND (Discount Approval: Discount amount NOT EQUAL TO Free), else Approve	User:Zheng Wang	Final Rejection																									
<div><div>Approval Actions</div><div>Add ExistingAdd New</div><table><thead><tr><th>Action</th><th>Type</th><th>Description</th></tr></thead><tbody><tr><td>Edit Remove</td><td>Task</td><td>Discount approved</td></tr><tr><td>Edit Remove</td><td>Field Update</td><td>Discount approved</td></tr></tbody></table></div> <div><div>Rejection Actions</div><div>Add ExistingAdd New</div><table><thead><tr><th>Action</th><th>Type</th><th>Description</th></tr></thead><tbody><tr><td>Edit Remove</td><td>Task</td><td>Discounts not approved</td></tr><tr><td>Edit Remove</td><td>Field Update</td><td>Discounts not approved</td></tr></tbody></table></div>							Action	Type	Description	Edit Remove	Task	Discount approved	Edit Remove	Field Update	Discount approved	Action	Type	Description	Edit Remove	Task	Discounts not approved	Edit Remove	Field Update	Discounts not approved						
Action	Type	Description																												
Edit Remove	Task	Discount approved																												
Edit Remove	Field Update	Discount approved																												
Action	Type	Description																												
Edit Remove	Task	Discounts not approved																												
Edit Remove	Field Update	Discounts not approved																												
Hide Actions Edit Del	2	100%Discount approval	Discount Approval: Discount amount EQUALS Free	User:Zheng Wang	Final Rejection																									
<div><div>Approval Actions</div><div>Add ExistingAdd New</div><table><thead><tr><th>Action</th><th>Type</th><th>Description</th></tr></thead><tbody><tr><td>Edit Remove</td><td>Task</td><td>Discount finalized and approved</td></tr><tr><td>Edit Remove</td><td>Field Update</td><td>Discount approved</td></tr><tr><td>Edit Remove</td><td>Field Update</td><td>Final approval</td></tr></tbody></table></div> <div><div>Rejection Actions</div><div>Add ExistingAdd New</div><table><thead><tr><th>Action</th><th>Type</th><th>Description</th></tr></thead><tbody><tr><td>Edit Remove</td><td>Field Update</td><td>Discounts not approved</td></tr><tr><td>Edit Remove</td><td>Field Update</td><td>Final not approval</td></tr><tr><td>Edit Remove</td><td>Task</td><td>Final Discount not Approval</td></tr></tbody></table></div>							Action	Type	Description	Edit Remove	Task	Discount finalized and approved	Edit Remove	Field Update	Discount approved	Edit Remove	Field Update	Final approval	Action	Type	Description	Edit Remove	Field Update	Discounts not approved	Edit Remove	Field Update	Final not approval	Edit Remove	Task	Final Discount not Approval
Action	Type	Description																												
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Edit Remove	Field Update	Discount approved																												
Edit Remove	Field Update	Final approval																												
Action	Type	Description																												
Edit Remove	Field Update	Discounts not approved																												
Edit Remove	Field Update	Final not approval																												
Edit Remove	Task	Final Discount not Approval																												

b) Custom User Profile/s with descriptions of each profile

As previously stated, this system has four users. Manager, Duty Manager, Admin, and Doctor. Being a system used by a small clinic, all tabs appear on each user's page and are not hidden for easy access to information.

Manager

Edit | Del | Assign

Add Role

Duty Manager

Edit | Del | Assign

Add Role

Administration

Edit | Del | Assign

Add Role

Doctor

Edit | Del | Assign

Add Role

The admin team is responsible for patient information, patient appointments and invoices and reading discount approvals.

Custom Object Permissions

Read Access

Read

Create

Edit

Delete

View All

Modify All

Appointment Information

☒

☒

☒

☐

☐

☐

Diagnosis

☐

☐

☐

☐

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Discount Approval

☒

☒

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☐

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☐

Data Administration

Read

Create

Edit

Delete

View All

Modify All

Invoice

☒

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Patient Information

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Referrals

☐

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Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

Password Policies

their passwords expire in

One year

Enforce password history

3 passwords remembered

Minimum password length

8

Password complexity requirement

Must include alpha and numeric characters

Password question requirement

Cannot contain password

Maximum invalid login attempts

10

Lockout effective period

15 minutes

Obscure secret answer for password resets

☐

Require a minimum 1 day password lifetime

☐

Don't immediately expire links in forgot password emails

☐

Edit

Clone

Delete

View Users

The doctor team is responsible for diagnosing and referring objects and needs to read patient information and appointment information. The doctor needs to create the next appointment for the patient if needed.

Custom Object Permissions

Read Access

Read

Create

Edit

Delete

View All

Modify All

Appointment Information

☒

☒

☐

☐

☐

☐

Diagnosis

☒

☒

☒

☐

☐

☐

Discount Approval

☐

☐

☐

☐

☐

☐

Data Administration

Read

Create

Edit

Delete

View All

Modify All

Invoice

☐

☐

☐

☐

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Patient Information

☒

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Referrals

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Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

Password Policies

their passwords expire in

One year

Enforce password history

3 passwords remembered

Minimum password length

8

Password complexity requirement

Must include alpha and numeric characters

Password question requirement

Cannot contain password

Maximum invalid login attempts

10

Lockout effective period

15 minutes

Obscure secret answer for password resets

☐

Require a minimum 1 day password lifetime

☐

Don't immediately expire links in forgot password emails

☐

Edit

Clone

Delete

View Users

The Duty Manager is responsible for the clinic's day-to-day running, needs de-reading access to all information, and can complete all tasks except diagnosis and referrals.

Custom Object Permissions

Read Access

Read

Create

Edit

Delete

View All

Modify All

Appointment Information

☒

☒

☒

☒

☒

☒

Diagnosis

☒

☐

☐

☐

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☐

Discount Approval

☒

☒

☒

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☐

Data Administration

Read

Create

Edit

Delete

View All

Modify All

Invoice

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Patient Information

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Referrals

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Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

Password Policies

their passwords expire in

One year

Enforce password history

3 passwords remembered

Minimum password length

8

Password complexity requirement

Must include alpha and numeric characters

Password question requirement

Cannot contain password

Maximum invalid login attempts

10

Lockout effective period

15 minutes

Obscure secret answer for password resets

☐

Require a minimum 1 day password lifetime

☐

Don't immediately expire links in forgot password emails

☐

Edit

Clone

Delete

View Users

The manager has the highest level of access to the clinic and can read, create, edit, and delete information except for diagnoses and referrals.

Custom Object Permissions

Read Access

Read

Create

Edit

Delete

View All

Modify All

Appointment Information

☒

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Diagnosis

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Discount Approval

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Data Administration

Read

Create

Edit

Delete

View All

Modify All

Invoice

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Patient Information

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Referrals

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Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

None

Password Policies

their passwords expire in

60 days

Enforce password history

5 passwords remembered

Minimum password length

8

Password complexity requirement

Must include alpha and numeric characters

Password question requirement

Cannot contain password

Maximum invalid login attempts

10

Lockout effective period

15 minutes

Obscure secret answer for password resets

☐

Require a minimum 1 day password lifetime

☐

Don't immediately expire links in forgot password emails

☐

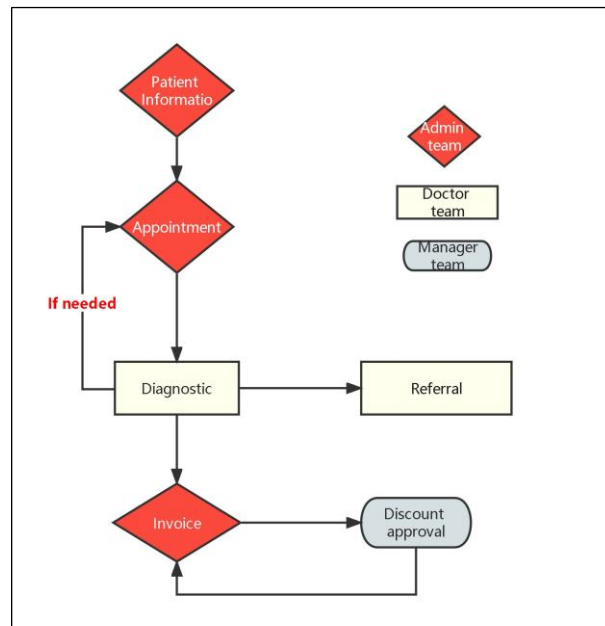
Edit

Clone

Delete

View Users

c) The workflow diagrams



When new patient information is entered, the system automatically sends a work target to the Admin team requesting team members to review the new patient information. And an email is sent to the patient using the email address in the patient information to confirm that the information has been uploaded into the system.

Workflow Rule Detail				
Rule Name	New Patient Information		Object	Patient Information
Active	<input type="checkbox"/>		Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	New Patient Information submit			
Rule Criteria	Patient Information: Finish and Submit EQUALS Yes			
Created By	Zhang Wang, 9/10/2023, 11:19 pm		Modified By	Zhang Wang, 23/10/2023, 12:15 am

Workflow Actions	
Edit	
Immediate Workflow Actions	
Type	Description
Task	New Patient Information
Email Alert	New patient information has been submitted.
Time-Dependent Workflow Actions See an example	
1 Hour After Patient Information: Created Date	
Type	Description
Task	New Patient Information

Workflow Rule Detail				
Rule Name	New Patient Information		Object	Patient Information
Active	<input type="checkbox"/>		Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	New Patient Information submit			
Rule Criteria	Patient Information: Finish and Submit EQUALS Yes			
Created By	Zhang Wang, 9/10/2023, 11:19 pm		Modified By	Zhang Wang, 23/10/2023, 12:15 am

Workflow Actions	
Edit	
Immediate Workflow Actions	
Type	Description
Task	New Patient Information
Email Alert	New patient information has been submitted.
Time-Dependent Workflow Actions See an example	
1 Hour After Patient Information: Created Date	
Type	Description
Task	New Patient Information

Text Email Template

New Patient Information

[Back to List: Email Templates](#)

Preview your email template below.

Email Template Detail

Unified Public Classic Email Templates

Email Template Name

New Patient Information

Available For Use

✓

Template Unique Name

New_Patient_Information

Last Used Date

Encoding

Unicode (UTF-8)

Times Used

Author

Zheng Wang (Change)

Description

Created By

Zheng Wang, 10/10/2023, 12:40 am

Modified By

Zheng Wang, 23/10/2023, 12:26 am

Email Template

Send Test and Verify Merge Fields

Subject

Your information has been successfully submitted.

Plain Text Preview

Dear Clinic Customer,

I hope you and your family are doing well. We greatly appreciate your continued support and trust in our clinic.

We are happy to let you know that we have successfully uploaded the information of new customers into our system. This means you can now conveniently schedule your medical appointments using various methods, including our website, mobile app, phone, or email.

Thank you!

Best wishes.

Duty Manager team

When a patient appointment is created, the system assigns the task to the Admin team and Doctors, respectively. The system will directly inform the new appointment that is created.

Workflow Rule Detail

Appointment confirmed

Edit

Delete

Clone

Activate

Rule Name

Appointment confirmed

Object

Appointment information

Active

☐

Evaluation Criteria

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

Description

When an appointment confirmed

Rule Criteria

Appointment information: Please confirm appointment EQUALS "Yes, confirmed"

Created By

Zheng Wang, 10/10/2023, 1:01 am

Modified By

Zheng Wang, 10/10/2023, 1:01 am

Workflow Actions

Edit

Immediate Workflow Actions

Type

Description

Task

New appointment confirmed

Task

New appointments have been created

Time-Dependent Workflow Actions

[See an example](#)

Task

New appointment confirmed

[Printable View](#) | [Help for this Page](#)

[Back to List: Workflow Rules](#)

Rules Using This Task (1)

Approval Processes Using This Task (0)

Entitlement Processes Using This Task (0)

Workflow Task Detail

Appointment information

Edit

Delete

Clone

Object

Appointment information

Status

In Progress

Assigned To

Role: Administration

Priority

High

Subject

New appointment confirmed

Unique Name

New_appointment_confirmed

Due Date

Rule Trigger Date

Comments

A new appointment has been confirmed in the system.

Created By

Zheng Wang, 10/10/2023, 1:04 am

Modified By

Zheng Wang, 10/10/2023, 1:04 am

Rules Using This Task

Rules Using This Task Help

Action

Rule Name

Description

Object

Active

Edit

Del

Activate

Appointment confirmed

When an appointment confirmed

Appointment information

☐

Task

New appointments have been created

Printable View | Help for this Page

[Back to List: Workflow Rules](#)

[Rules Using This Task \(1\)](#) | [Approval Processes Using This Task \(0\)](#) | [Entitlement Processes Using This Task \(0\)](#)

Workflow Task Detail

Edit

Delete

Clone

Object	Appointment information	Status	In Progress
Assigned To	Role: Doctor	Priority	High
Subject	New appointments have been created		
Unique Name	New_appointments_have_been_created		
Due Date	Rule Trigger Date		
Comments	A new appointment has been created in the system.		
Created By	Zheng Wang, 10/10/2023, 1:06 am	Modified By	Zheng Wang, 23/10/2023, 8:19 am

Edit

Delete

Clone

Rules Using This Task

Rules Using This Task Help

Action	Rule Name	Description	Object	Active
Edit Del Activate	Appointment confirmed	When an appointment confirmed	Appointment information	<input type="checkbox"/>

If a patient needs to create a new appointment after the diagnosis is completed, the system automatically assigns a task to the admin team after the physician selects "Need New Appointment". The task will require the admin team to assist the patient in completing the new appointment.

Workflow Rule Detail

Edit

Delete

Clone

Activate

Rule Name	Diagnosis-New Appointment	Object	Diagnosis
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	When patients need to make an appointment for their next consultation.		
Rule Criteria	Diagnosis: Need Another Appointment? EQUALS YES		
Created By	Zheng Wang, 10/10/2023, 1:38 am	Modified By	Zheng Wang, 23/10/2023, 8:37 am

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Task	Assist customers with new appointments

Task

Assist customers with new appointments

Help for this Page

[Back to List: Workflow Rules](#)

[Rules Using This Task \(1\)](#) | [Approval Processes Using This Task \(0\)](#) | [Entitlement Processes Using This Task \(0\)](#)

Workflow Task Detail

Edit

Delete

Clone

Object	Diagnosis	Status	In Progress
Assigned To	Role: Administration	Priority	High
Subject	Assist customers with new appointments		
Unique Name	Assist_customers_with_new_appointments		
Due Date	Rule Trigger Date		
Comments	This customer needs to confirm their next appointment before leaving. Please assist in completing the appointment.		
Created By	Zheng Wang, 10/10/2023, 1:44 am	Modified By	Zheng Wang, 10/10/2023, 1:44 am

Edit

Delete

Clone

When the doctor selects "yes" for the referral needed option in the Diagnostics module, the task will be assigned to the Information Owner, prompting the need to complete the referral record.

Workflow Rule: Diagnosis-referral

Help for this Page

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Go with the flow With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

Edit

Delete

Clone

Activate

Rule Name	Diagnosis-referral	Object	Diagnosis
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	When a patient needs to be referred.		
Rule Criteria	Diagnosis: Is a referral required? EQUALS YES		
Created By	Zheng Wang, 10/10/2023, 1:20 am	Modified By	Zheng Wang, 11/10/2023, 9:52 am

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Task	New referral needs have been created

Task

New referral needs have been created

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[Rules Using This Task \(1\)](#) | [Approval Processes Using This Task \(0\)](#) | [Entitlement Processes Using This Task \(0\)](#)

Workflow Task Detail

EditDeleteClone

Object	Diagnosis	Status	In Progress
Assigned To	Appointment Information Owner	Priority	High
Subject	New referral needs have been created		
Unique Name	New_referral_needs_have_been_created		
Due Date	Rule Trigger Date		
Comments	Please complete the referral record.		
Created By	Zheng Wang, 10/10/2023, 1:28 am	Modified By	Zheng Wang, 23/10/2023, 8:44 am

EditDeleteClone

Rules Using This Task

[Rules Using This Task Help](#)

Action	Rule Name	Description	Object	Active
Edit Del Activate	Diagnosis-referral	When a patient needs to be referred.	Diagnosis	<input type="checkbox"/>

When the physician chooses to complete the current diagnosis, requesting an invoice to be issued to the patient is assigned to the admin team.

Workflow Rule Detail

EditCloneDeactivate

Rule Name	Diagnosis-invoice	Object	Diagnosis
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created
Description			
Rule Criteria	Diagnosis: This consultation has been completed EQUALS Yes		
Created By	Zheng Wang, 10/10/2023, 1:32 am	Modified By	Zheng Wang, 23/10/2023, 8:53 am

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Task	Diagnosis-Invoice

Task

Diagnosis-Invoice

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[Rules Using This Task \(1\)](#) | [Approval Processes Using This Task \(0\)](#) | [Entitlement Processes Using This Task \(0\)](#)

Workflow Task Detail

EditDeleteClone

Object	Diagnosis	Status	In Progress
Assigned To	Role - Administration	Priority	High
Subject	Diagnosis-Invoice		
Unique Name	Diagnosis_Invoice		
Due Date	Rule Trigger Date		
Comments	This consultation has been completed, please generate an invoice and complete payment before the customer leaves.		
Created By	Zheng Wang, 10/10/2023, 1:37 am	Modified By	Zheng Wang, 10/10/2023, 7:36 pm

EditDeleteClone

Rules Using This Task

[Rules Using This Task Help](#)

Action	Rule Name	Description	Object	Active
Edit Del Deactivate	Diagnosis-Invoice		Diagnosis	<input checked="" type="checkbox"/>

Approval Processes Using This Task

[Approval Processes Using This Task Help](#)

This task is currently not used by any approval processes

When a discount is selected as required in the invoice module, the system assigns two tasks directly to the Duty Manager, reminding the Duty Manager to complete the Discount Approval module for completion and review. At the same time, an email will be sent to the Duty Manager and Manager, alerting them that a new discount request needs to be reviewed.

Workflow Rule Detail

EditCloneDeactivate

Rule Name	Invoice-DiscountApproval	Object	Invoice
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	When a discount request is created		
Rule Criteria	Invoice: Is a discount required EQUALS Yes		
Created By	Zheng Wang, 10/10/2023, 9:09 pm	Modified By	Zheng Wang, 23/10/2023, 8:55 am

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Task	discount request
Task	Discount approval
Email Alert	A new discount application needs to be reviewed

Email Alert

A new discount application needs to be reviewed

Printable View | Help for this Page

Back to List: Workflow Rules

Rules Using This Email Alert (3)

Approval Processes Using This Email Alert (0)

Enrollment Processes Using This Email Alert (0)

Email Alert Detail

EditDeleteClone

Description	A new discount application needs to be reviewed	Email Template	A new discount request needs to be reviewed
Unique Name	A_new_discount_application_needs_to_be_reviewed	Object	Invoice
From Email Address	Current User's email address		
Recipients	Role Manager Role: Dub Manager		
Additional Emails			
Created By	Zheng Wang, 23/10/2023, 12:30 am	Modified By	Zheng Wang, 23/10/2023, 12:30 am

EditDeleteClone

Rules Using This Email Alert

Rules Using This Email Alert Help

Action	Rule Name	Description	Object	Active
<div>EditDeactivate</div>	Invoice-DiscountApproval	When a discount request is created.	Invoice	✓

Email Template Detail

Edit PropertiesEdit HTML VersionEdit Text VersionDeleteClone

Email Templates from Salesforce	Unified Public Classic Email Templates	Available For Use	✓
Email Template Name	A new discount request needs to be reviewed	Last Used Date	
Template Unique Name	A_new_discount_request_needs_to_be_reviewed	Times Used	
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)		
Author	salesforce.com Chatter		
Description	A new discount request needs to be reviewed	Modified By	Zheng Wang, 10/10/2023, 9:54 pm
Created By	salesforce.com, 4/10/2023, 5:56 am		

Edit PropertiesEdit HTML VersionEdit Text VersionDeleteClone

Email Template

Send Text and Verify Merge Fields

Subject

A new discount request needs to be reviewed

HTML Preview

Dear Manager Team A new discount request has been created in the system. Please review it as soon as possible and decide whether to approve it or not. Thank you. Admin Team

Plain Text Preview

Dear Manager Team

A new discount request has been created in the system. Please review it as soon as possible and decide whether to approve it or not.

Thank you.

Admin Team

d) Prototype System Screens

The original interface begins with the inclusion of Home and all tabs. As previously mentioned, the system can restrict job permissions in a small clinic work environment. Use 'Customize My Tabs' to select the Tabs on the home page.

Customize My Tabs

Choose the tabs that will display in each of your apps.

Custom App: Map-5911

Available Tabs

Accounts

Alternative Payment Methods

App Launcher

Asset Actions

Asset Action Sources

Assets

Asset State Periods

Asset Operation Logs

Authorization Form

Authorization Form Consent

Authorization Form Data Use

Selected Tabs

Home (default)

Patient Information

Appointment Information

Diagnosis

Referrals

Invoice

Discounts Approval

Save

Cancel

On the left side of the screen are 'Create New', 'Recent Items', 'Messages and Alerts' and 'Custom Links'. The main screen displays Calendar, My Tasks, Dashboard, Pause Flow Interviews and Items to Approve. Use 'Home Page Components' in 'Customize' to select the desired components. Furthermore, set the position of each component in 'Home Page Layouts'.

Home Page Components

This page allows you to create and edit components that may be shown on one or more home page layouts.

Action	Name	Component Type	Available in Column
	Create New...	Create New...	LeftNarrow
	Recent Items	Recent Items	LeftNarrow
Edit	Messages & Alerts	Note	LeftNarrow
Edit	Custom Links	Links	LeftNarrow
	Dashboard Snapshot 1	Dashboard	RightWide
	Items to Approve 1	Items to Approve	RightWide
	Calendar	Calendar	RightWide
	Tasks	Tasks	RightWide

Edit Home Layout

Step 1. Select the components to show

Choose the components to include on your home page layout.

Layout Name: **Mac0811**

Select Wide Components to Show

Component	Selected
Items to Approve	<input checked="" type="checkbox"/>
Tasks	<input checked="" type="checkbox"/>
Paused Flow Interviews	<input checked="" type="checkbox"/>
Calendar	<input checked="" type="checkbox"/>
Dashboard Snapshot	<input checked="" type="checkbox"/>

Select Narrow Components to Show

Component	Selected
Create New...	<input checked="" type="checkbox"/>
Messages & Alerts	<input checked="" type="checkbox"/>
Tags	<input checked="" type="checkbox"/>
Recent Items	<input checked="" type="checkbox"/>
Custom Links	<input checked="" type="checkbox"/>

[Next](#) [Cancel](#)

Edit Home Layout

Step 2. Order the components

Arrange the components on your home page.

Narrow (Left) Column

- Create New...
- Tags
- Recent Items
- Messages & Alerts
- Custom Links

Wide (Right) Column

- Calendar
- Tasks
- Dashboard Snapshot
- Paused Flow Interviews
- Items to Approve

Top

- Up
- Down
- Bottom

[Previous](#) [Save & Assign](#) [Save](#) [Preview](#) [Cancel](#)

So the resulting page is as follows.

The screenshot shows a patient's home page for Zheng Wang. The left sidebar contains navigation links: Create New..., Recent Items, Messages and Alerts, Custom Links, and Recycle Bin. The main content area displays a 'Wide Feed' with a 'Post' section, a 'Calendar' section, a 'My Tasks' section, a 'Dashboard' section, a 'Paused Flow Interviews' section, and an 'Items to Approve' section. The right sidebar shows a 'Calendar Help' section and a 'Calendar' section.

