Medicare Cloud — Phase 4: Process Automation

1.Validation Rules

Purpose: Prevent users from saving incorrect or incomplete data. **Examples (Medicare Cloud):**
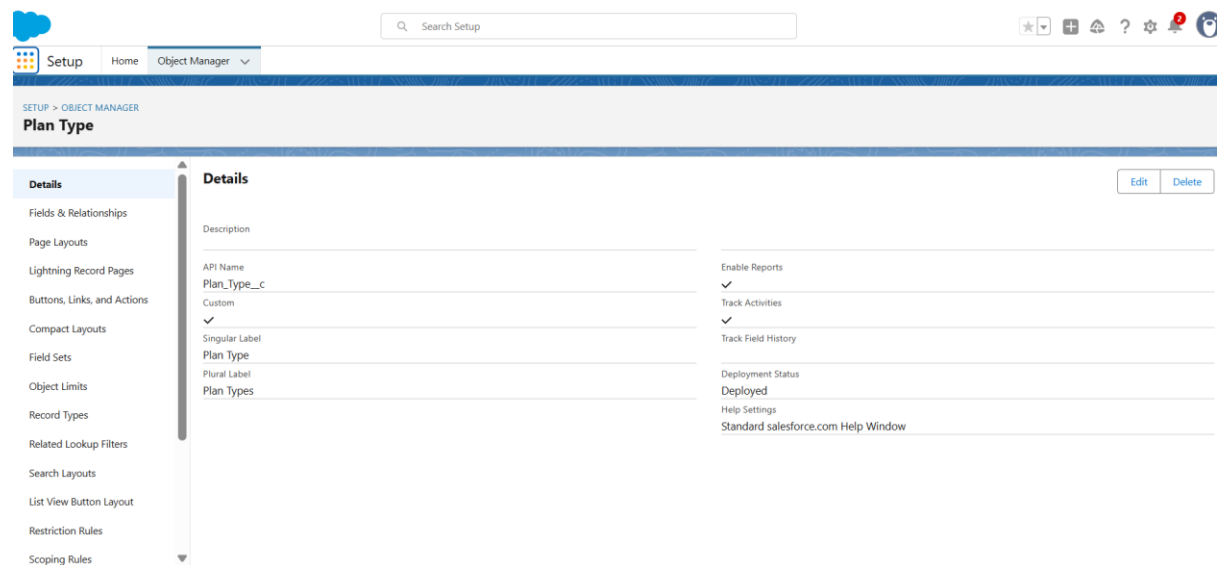
DOB not in future: Birthdate__c > TODAY()

Policy number format: Must be 8–12 uppercase letters/numbers using REGEX().

Consent required: Block submission if Consent__c is not checked.

Claim date limit: Block claims older than 365 days.

Appointment

Details

Edit | Delete

Description
Store doctor appointments, schedule, status

API Name
Appointment__c

Custom
✓

Singular Label
Appointment

Plural Label
Appointments

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Insurance Claim

Details

Edit | Delete

Description
Stores insurance claim details

API Name
Insurance_Claim__c

Custom
✓

Singular Label
Insurance Claim

Plural Label
Insurance Claim

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Patient

Details

Edit | Delete

Description
Stores patient personal & medical info

API Name
Patient__c

Custom
✓

Singular Label
Patient

Plural Label
patients

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Key Benefit: Improves data quality and enforces business rules.

2.Workflow Rules

Purpose: Automate **immediate or time-based actions** when a record meets criteria.
Example (Medicare Cloud):

When Claim__c.Status__c = Under Review

    Immediate: Send email, update Escalation_Flag__c = TRUE.

    Time-Dependent: After 3 days, create follow-up task.

Key Benefit: Quick, low-complexity automation.
Note: Salesforce recommends migrating to **Flows** for new implementations.

3.Process Builder

Purpose: Automate multiple related actions on record changes.
Example (Medicare Cloud):

- When Patient__c.Diagnosis__c changes:
  - Create a Care_Plan__c record.
  - Send an email to the care manager.
  - Submit the request for approval.

Key Benefit: Combines multiple actions in one process.
Note: Process Builder is also being phased out — use **Flows** for new builds.

4.Approval Processes

Purpose: Route records for managerial or compliance approval.
Example (Medicare Cloud):

- **Entry Criteria:** Amount__c > 50,000 OR Urgent__c = TRUE
- **Steps:**
  1. First approver = Requestor's Manager

2. Second approver (if Amount__c > 2,00,000) = Director

- **Actions:** Lock record, send email to approvers, create task, update status after approval/rejection.
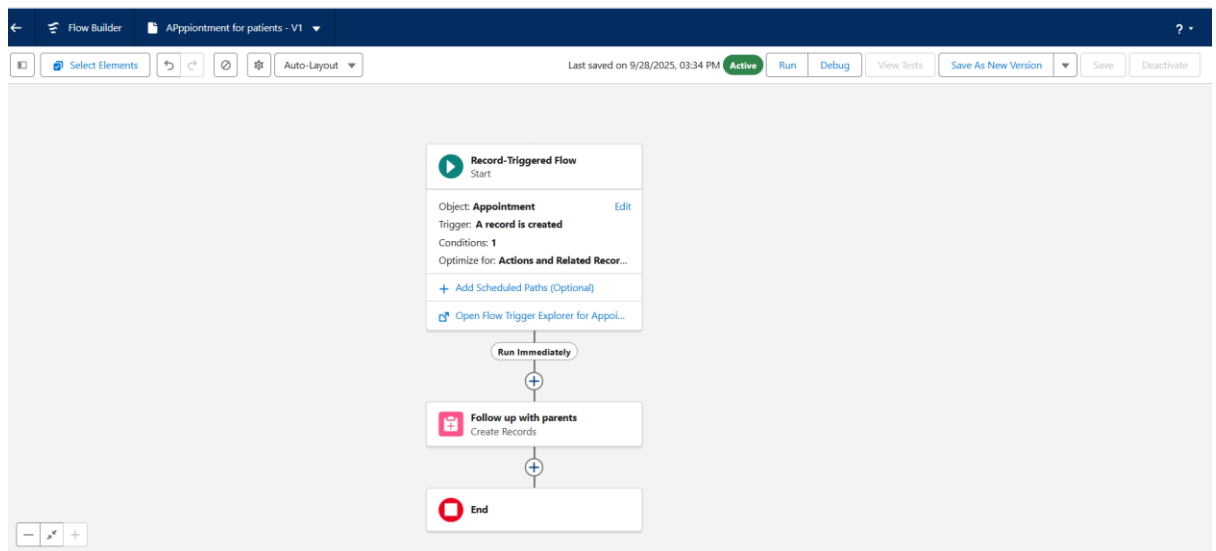
Key Benefit: Enforces governance and compliance for high-value transactions.
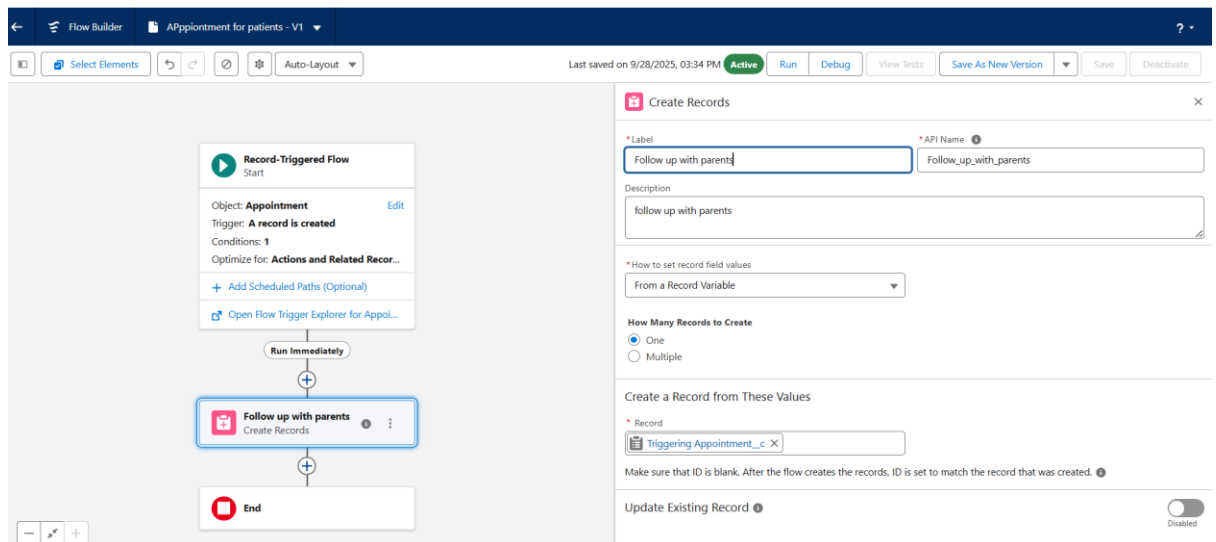

5.Flow Builder

Purpose: Build powerful automations with a drag-and-drop interface.
Types:

- **Screen Flows:** User-guided data input screens (e.g., patient intake wizard)

- **Record-Triggered Flows:** Auto-run on create/update/delete (e.g., auto-create Care Plan)

- **Scheduled Flows:** Run at specific times (e.g., send reminders daily)
- **Auto-Launched Flows:** Called by other processes or Apex

Key Benefit: Preferred tool for all new automations — more flexible and future-proof.

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6. Email Alerts

Purpose: Automatically send emails to users, roles, or external recipients based on automation.

Example (Medicare Cloud):
When a Claim__c status changes to **Under Review**, send an email to the **Care Manager**.

Admin Steps:

1. Go to **Setup → Email Alerts → New →** Choose object, email template, recipients.
2. Call the Email Alert from **Workflow Rule, Process Builder, or Flow**.

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7. Field Updates

Purpose: Automatically change the value of a field when criteria are met.

Example (Medicare Cloud):
When a Claim__c is marked Urgent, set **Escalation_Flag__c = TRUE** automatically.

Admin Steps:

1. Go to **Setup → Workflow Rules → Field Updates → New**.
2. Select the field to update, and set the new value or formula.
3. Attach this Field Update action to Workflow Rule or Process Builder.

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8. Tasks

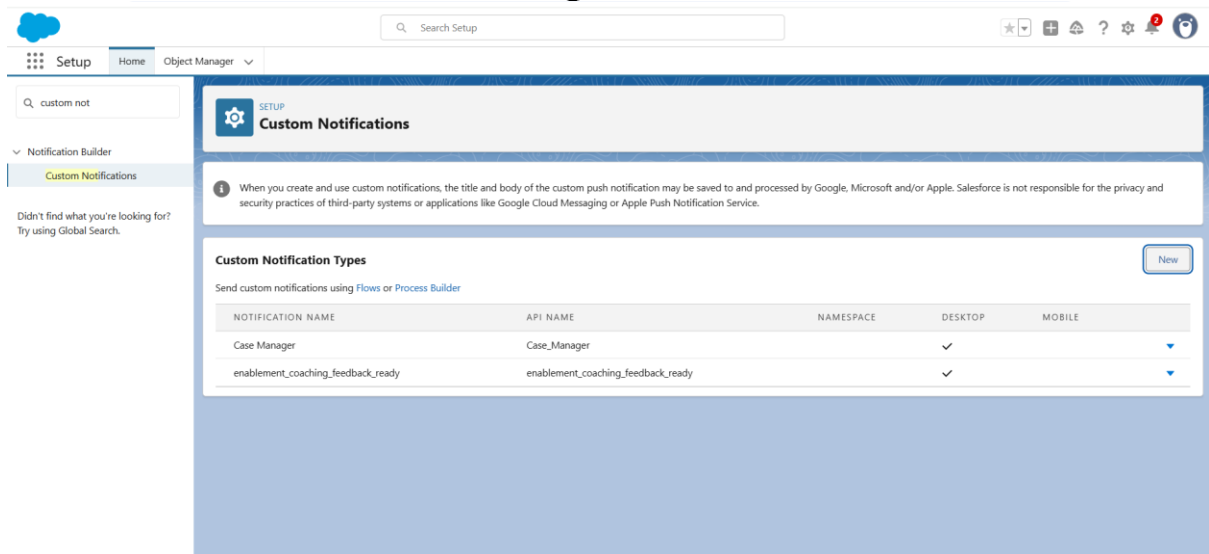**Purpose:** Automatically create follow-up activities for users.

Example (Medicare Cloud):
When a Claim__c is under review for more than 3 days, create a Task for the Care Manager to follow up.

Admin Steps:

1. Add **Workflow Action → New Task** (or use **Create Records** in Flow).
2. Set Subject, Due Date, Assigned User, and Related Record (WhatId).
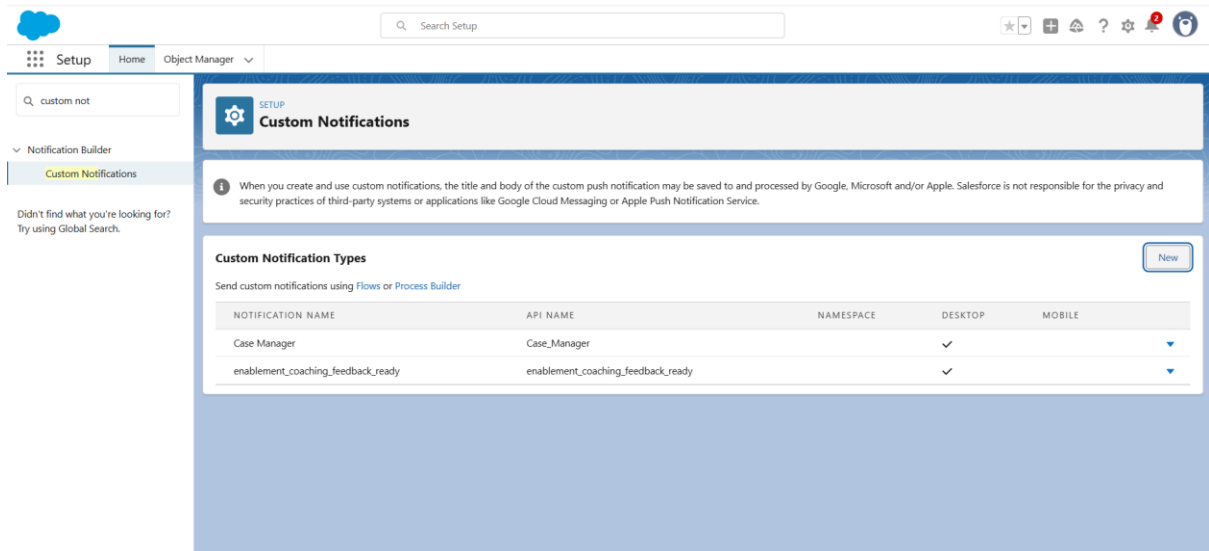3. Activate the automation — Task will appear in user's Activity list.

9.Custom Notifications Purpose:

Send real-time alerts inside Salesforce or Salesforce Mobile App.

Example: Notify Case Owner or Care Manager in-app when a high-priority claim is submitted.