

Medicare Cloud — Phase 4: Process Automation

1.Validation Rules

Purpose: Prevent users from saving incorrect or incomplete data.

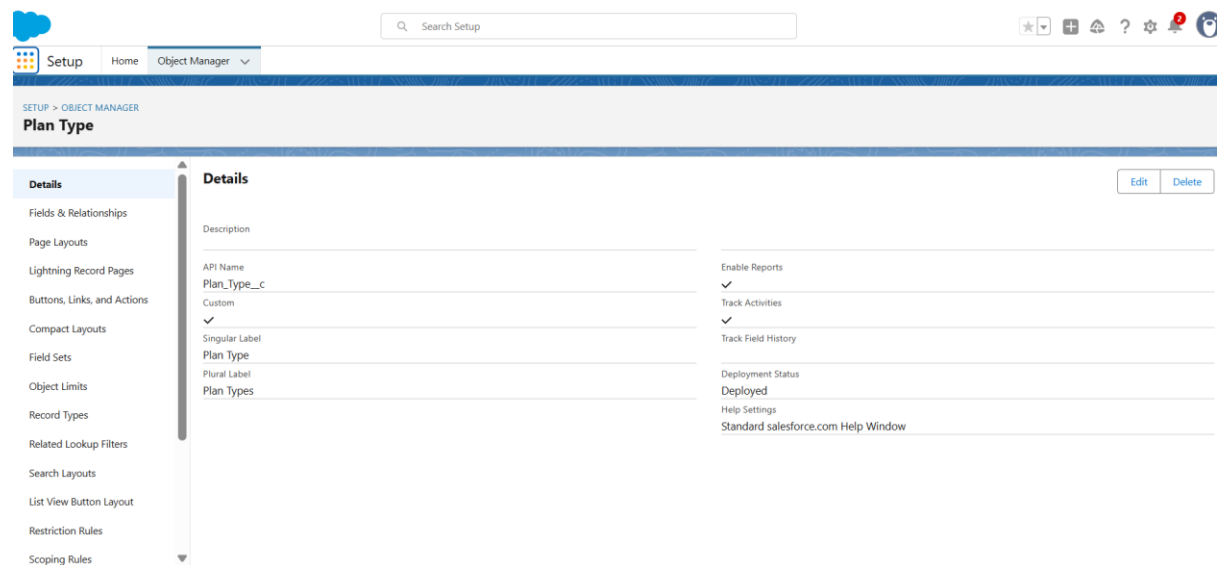
Examples (Medicare Cloud):

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.



Setup Home Object Manager Appointment

SETUP > OBJECT MANAGER

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

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

mc://nrofarm-80770fb963-daw-ed develop lightning force.com/one/one-ann#/setup/ObjectManager/01f000000rFA9/FieldsAndRelationships/view

Setup Home Object Manager Insurance Claim

SETUP > OBJECT MANAGER

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

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Restriction Rules

Scoping Rules

Setup Home Object Manager Patient

SETUP > OBJECT MANAGER

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
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Restriction Rules

Scoping Rules

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.

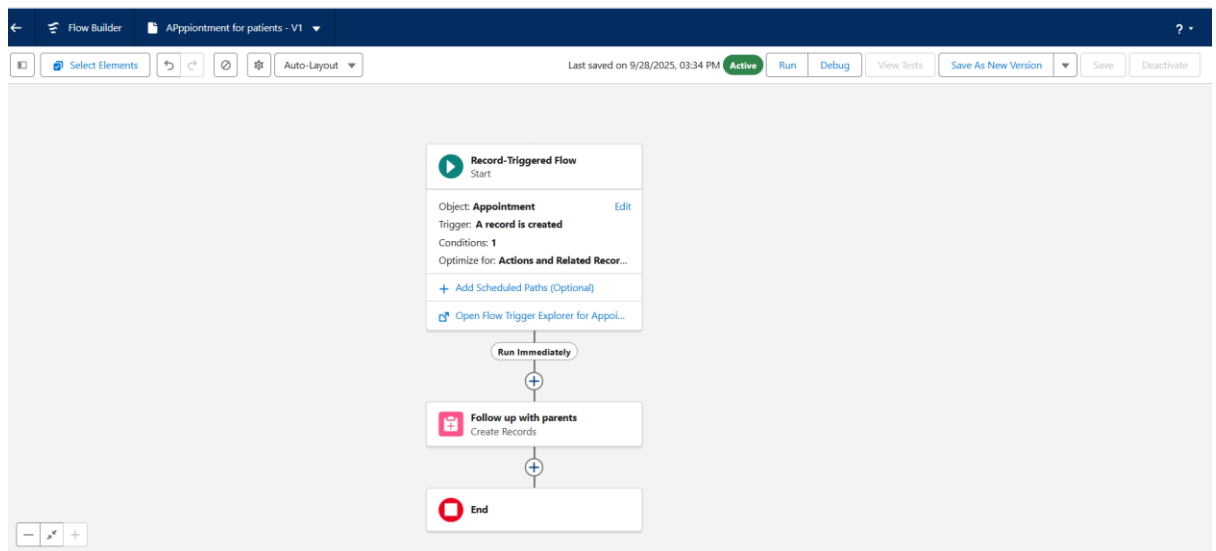
Key Benefit: Enforces governance and compliance for high-value transactions.

5.Flow Builder

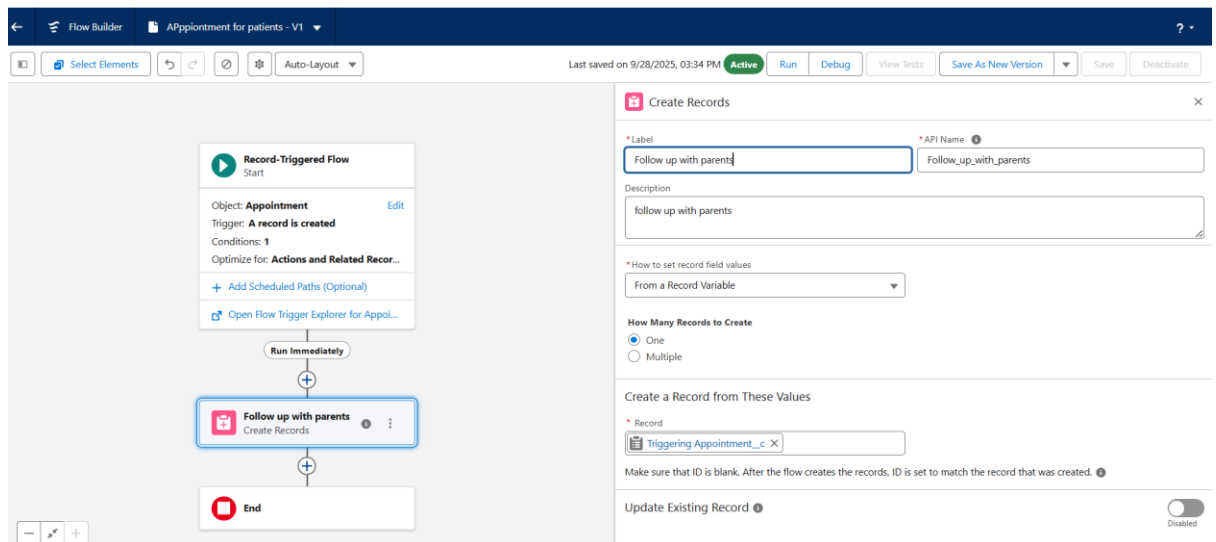
Purpose: Build powerful automations with a drag-and-drop interface.

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.

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**.

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.

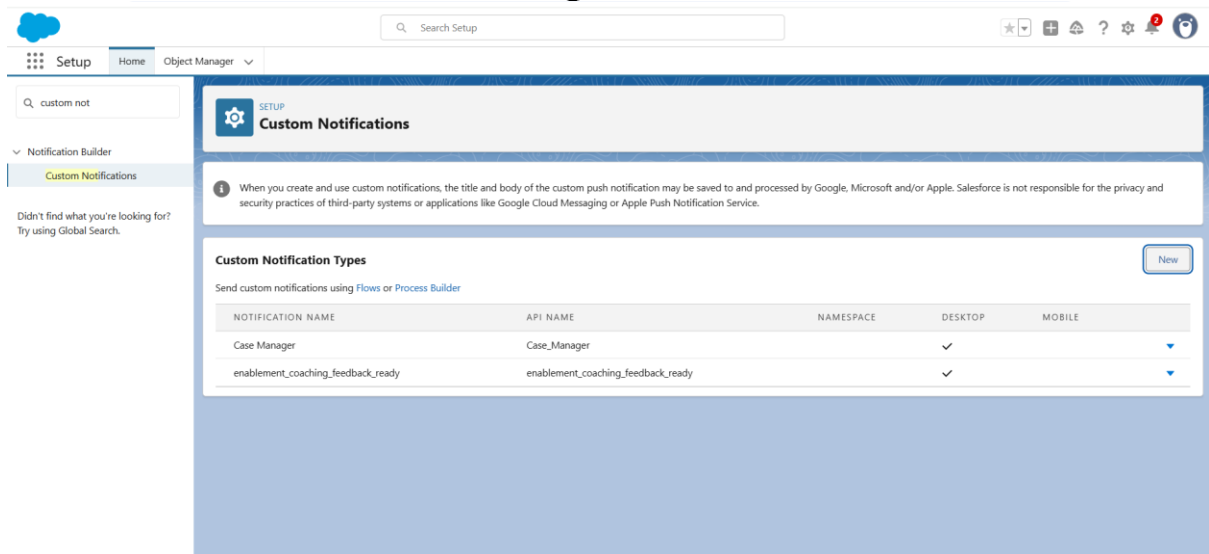
Example (Medicare Cloud):

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.
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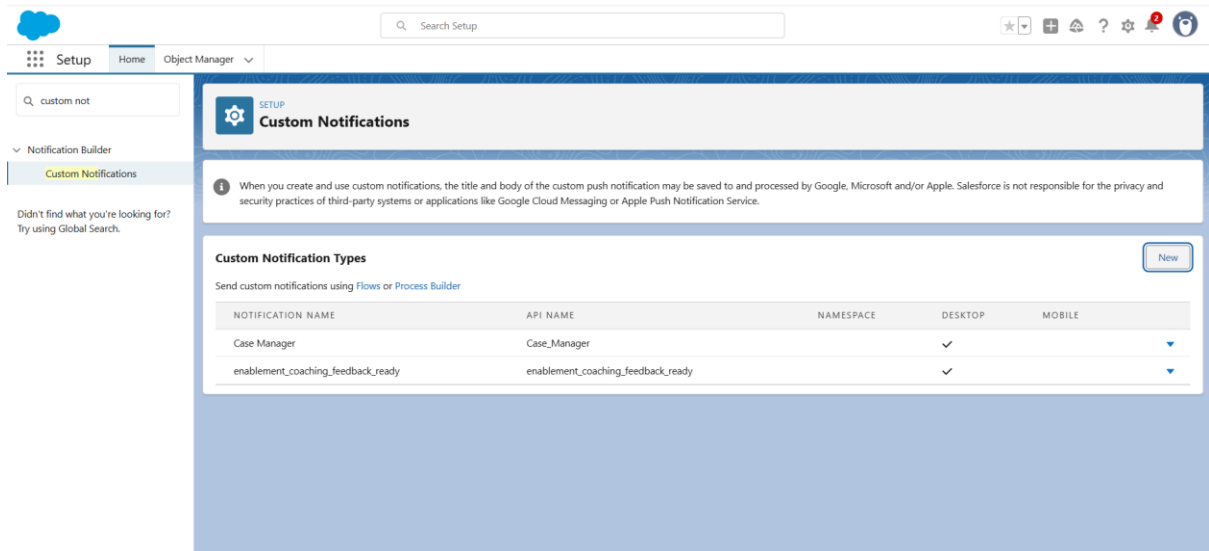
9. Custom Notifications Purpose:



The screenshot shows the Salesforce Setup interface for Custom Notifications. The left sidebar includes a search bar with "custom not" and a "Notification Builder" section with a "Custom Notifications" link. The main content area has a "Custom Notifications" header with a "New" button. Below the header is an information box stating that notification titles and bodies may be processed by third-party services like Google Cloud Messaging or Apple Push Notification Service. The "Custom Notification Types" section includes a table with columns for Notification Name, API Name, Namespace, Desktop, and Mobile. Two notification types are listed: "Case Manager" and "enablement_coaching_feedback_ready".

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Case Manager	Case_Manager		✓	▼
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	▼

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



This is a duplicate of the screenshot above, showing the Salesforce Setup interface for Custom Notifications. It includes the same sidebar, header, information box, and table of notification types.

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Case Manager	Case_Manager		✓	▼
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	▼

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