# HealthEase: A Salesforce Healthcare Management System

## PHASE 1

### *1. Requirement Gathering*

**Goal:** Understand what each healthcare stakeholder needs from the system.

- **Patients:** Easy appointment booking, access to medical history, prescriptions, treatment plans, billing info, and insurance claim status.
- **Doctors:** Manage patient records, update prescriptions, create treatment plans, review medical history, and track progress.
- **Healthcare Admins/Managers:** Monitor appointments, revenue, doctor performance, patient satisfaction, and insurance processing in one place.
- **Insurance Team:** Verify claims, process reimbursements, and manage insurance-related queries.
- **Pharmacy Team**: Access prescriptions, update medicine stock, and track dispensing.

### *2. Stakeholder Analysis*

**Goal:** Identify roles and responsibilities in the healthcare ecosystem.

**Primary Stakeholders:**

- **Patients** → Book appointments, access records, track bills, and claim insurance.
- **Doctors** → Manage patient profiles, prescribe medicines, create/update treatment plans.
- **Healthcare Admins/Managers** → Oversee performance, billing, appointments, and overall patient care.

**Secondary Stakeholders:**

- **Insurance Officers** → Validate and process insurance claims.
- **Pharmacy Staff** → Dispense prescribed medicines and manage stock.
- **Finance/Accounts** → Track billing, payments, and settlements.

### *3. Business Process Mapping*

**Goal:** Compare current healthcare management practices vs. Salesforce-enabled improvements.

**Current Process (Manual/Traditional):**

- Records stored on paper/files → difficult to track.
- Appointments booked via calls/walk-ins → prone to double-booking.
- Billing & insurance handled manually → delays and errors.
- Patient follow-up often missed → poor continuity of care.

**Proposed Process (Salesforce Enabled):**

- Patient records (history, prescriptions, treatment plans) stored in Salesforce Health Records (Custom Objects).
- Automated appointment booking & reminders via Flows + Email/SMS Alerts.
- Billing & Insurance claims tracked via integrated dashboards.
- Pharmacy integration for real-time prescription fulfillment.
- Post-treatment feedback surveys for continuous improvement.

## *4. Industry-Specific Use Case Analysis*

**Goal:** Benchmark CRM use cases for hospitals & clinics.

**Patient Record Management**

Problem: Medical history scattered across files.
Solution: Centralized Salesforce Health Records with past treatments & prescriptions.

**Appointment Scheduling**

Problem: Overlapping or missed appointments.
Solution: Automated appointment booking & reminders.

**Prescription & Treatment Plans**

Problem: Prescriptions not tracked digitally.
Solution: Custom Prescription Object linked with patients & doctors.

**Billing & Insurance Claims**

Problem: Manual claims cause errors & delays.
Solution: Automated billing dashboards & insurance claim workflows.

**Patient Feedback**

Problem: No structured post-treatment feedback.
Solution: Salesforce Surveys for care quality assessment.

### *5. AppExchange Exploration*

**Goal:** Identify Salesforce apps to accelerate healthcare management development.

- **Notification Apps** → SMS/Email appointment & prescription reminders.
- **Survey Apps** → Post-treatment feedback collection.
- **Payment Gateway Connectors** → Stripe, Razorpay for billing & payments.
- **Insurance Management Tools** → Insurance claim automation apps.
- **Healthcare Analytics Tools** → Patient outcomes & doctor performance dashboards.

## PHASE 2 : Org Setup &configuration

Goal: Prepare Salesforce environment for Healthcare Management System.

### Salesforce Editions

- Use Developer Edition (free dev org) or Health Cloud trial org.

### 2. Company Profile

Setup - Go to Company Settings → Add healthcare organization info, local time zone. - Set currency to INR/USD depending on project.

### 3. Business Hours & Holidays - Define hospital/clinic

working hours (e.g., 24x7 for emergency, 9am–6pm for OPD). - Add public holidays.

### 4. Fiscal Year

Settings - Standard (Jan–Dec) or custom fiscal year as required for reporting.

### 5. User Setup &Licenses - Create users:

Doctor, Nurse, Receptionist, Admin. - Assign Salesforce/Health Cloud licenses.

### 6. Profiles - Receptionist:

Can create appointments but limited access to patient data. -
Doctor: Full access to patient medical records. - Nurse: Access to treatment and medication updates. - Admin: Full system control.

7. Roles - Admin on top → Doctors → Nurses Receptionists.

- Ensures record visibility flows correctly.

8. Permission Sets - Assign extra access

like “Reports” or “Telehealth Integration” without modifying profile.

9. Org-Wide Defaults (OWD) -

Patient Records: Private (only assigned doctor/nurse can view). - Appointment Records: Controlled
by parent patient record.

10. Sharing Rules

- Allow care teams to access shared patient records
when required.

11. Login Access Policies

- Restrict login hours for non-emergency staff (e.g.,
9am–6pm for reception).

12. Sandbox Usage

In real hospitals/clinics, build in Sandbox → deploy to Production.

13. Deployment Basics

- Move config/code from Sandbox → Production using Change Sets.

## PHACE 3 :

Goal: Build data structure for Healthcare Management System.

## 1 Standard & Custom Objects

StandardContact (patients), Case (for medical cases), User (doctors, nurses). - Custom: Appointment, Medical Record, Prescription, Lab Report, Billing.

## 2 Fields - Appointment:

Date,Time, Doctor, Patient, Status. - Medical Record: Diagnosis, Treatment, Allergies, Past History. -
Prescription: Medicine Name, Dosage, Duration, Notes. - Lab Report: Test Type, Test Date, Results, Status. - Billing: Service, Cost, Payment Method, Status.

## 3. Record Types

- Appointment
→ “OPD Visit” vs “Emergency Visit”. - Medical Record → “Inpatient” vs “Outpatient.” - Billing → “Insurance” vs “Self-Pay.”

## 4. Page Layouts

- Patient (Contact) page shows Appointments, Medical
Records, Prescriptions. - Appointment page shows related Doctor, Patient, Lab Reports. - Billing page shows Patient and Service details.

## 5. Compact Layouts

- Appointment → Date, Time,
Doctor, Status (for quick view on mobile). - Patient → Name, Age, Blood Group, Primary Doctor.

## 6.Schema Builder

- Use schema builder to visualize patient → appointment → medical record
relationships.

## 7. Lookup vs Master-Detail

- Appointment ↔ Patient → Lookup (patient can have
many appointments). - Appointment ↔ Doctor → Lookup. - Medical Record ↔ Patient → Master-Detail (records owned by patient). - Prescription ↔ Medical Record → Master-Detail.

## 8.Junction Objects –

Care Team (junction between Patient and multiple Doctors/Nurses).

## 9.External Objects –

For external healthcare systems (e.g., Insurance DB, Lab systems) using Salesforce Connect.