**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.