

## QuickCare - Automated Patient Triage & Appointment Booking System

### Project Overview

**\*\*Industry:\*\*** Healthcare

**\*\*Project Type:\*\*** B2C Salesforce Health Cloud & Community Cloud Implementation

**\*\*Target Users:\*\*** Clinic Staff, Doctors, and Patients

### Problem Statement

A mid-sized healthcare clinic is facing challenges with managing patient appointments and intake:

- High call volumes for appointment booking
- Long patient wait times
- Manual intake processes causing errors
- Inefficient staff utilization and poor patient experience

The clinic needs a Salesforce CRM solution to:

- Automate patient appointment booking and reminders
- Streamline patient intake and triage processes
- Improve case management for patient issues
- Provide real-time visibility into clinic operations

### Use Cases

#### 1. Appointment Management

- Allow patients to book, reschedule, or cancel appointments via a self-service portal (Community Cloud).
- Automate appointment reminders via SMS or email.
- Sync appointment schedules with doctor calendars.

#### 2. Patient Intake & Triage

- Automatically capture patient information from online forms.
- Use Salesforce Flows to ask preliminary health questions and route patients to the right specialist.
- Create a Health Cloud patient record for every new patient.

#### 3. Case Management

- Log patient inquiries and issues as cases.
- Assign cases to the appropriate clinic staff member for follow-up.
- Track case status, resolution progress, and communication history.

#### 4. Reporting & Dashboards

- Daily dashboard for appointment schedules and doctor availability.
- Reports on patient wait times, most common reasons for visits, and case resolution efficiency.

### Outcome

This system will reduce manual errors, improve patient satisfaction with faster booking, optimize doctor schedules, and provide the clinic with data-driven insights for better decision-making.