

Quick Care

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 was struggling with appointment management and patient intake due to:

- Excessive phone calls for booking appointments
- Extended waiting times for patients
- Errors arising from manual data entry
- Inefficient use of staff time leading to poor patient experiences

The clinic required a Salesforce-powered solution to:

- Automate appointment scheduling and send reminders
- Simplify patient intake and initial health assessments
- Enhance case tracking and management
- ✓ Offer real-time insights into clinic performance

✓ **Use Cases**

1. **Appointment Scheduling**

- Enable patients to book, change, or cancel appointments via a self-service portal using Community Cloud
- Send automated reminders through SMS or email
- Align appointment data with doctors' schedules for seamless coordination

2. **Patient Intake & Triage**

- Capture patient details automatically through online forms
- Use Salesforce Flows to collect initial health information and direct patients to the right care provider
- Create new patient records in Health Cloud for every registration

3. **Case Tracking & Resolution**

- Record patient queries and concerns as cases
- Assign cases to appropriate staff members for timely action
- Monitor case progress, resolution timelines, and patient communication

4. **Analytics & Reporting**

- Provide daily dashboards showing appointments and doctor availability
- Generate reports on patient waiting times, common visit reasons, and resolution performance

➤ **Outcome**

This solution reduced manual processes, minimized errors, improved patient satisfaction with faster appointments, optimized doctor workflows, and empowered the clinic with actionable data for better service delivery.

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Phase 1: Problem Understanding & Industry Analysis

Goal: Understand the clinic's challenges and how the solution improves patient care and operations.

1. Requirement Gathering :

Talk to stakeholders such as clinic staff, doctors, and patients to identify pain points and expectations.

Example requirements:

- ✓ Allow patients to book, reschedule, or cancel appointments via a self-service portal.
- ✓ Send automated SMS/email reminders for upcoming appointments.
- ✓ Capture patient information through online forms to reduce manual data entry.
- ✓ Provide doctors with real-time appointment schedules.
- ✓ Track patient cases and concerns for faster resolution.
- ✓ Generate reports on patient flow and waiting times.

2. Stakeholder Analysis :

Admin (System Manager):

- Configure workflows, manage user access, and set up automation rules.

Doctors:

- Access schedules, view patient histories, and respond to cases.

Clinic Staff:

- Assist with patient intake, coordinate appointments, and resolve patient issues.

Patients:

- Book appointments, update personal information, and track treatment progress.

3. **Business Process Mapping** :

Map the flow of patient interaction and internal workflows:

Flow Diagram Example:

Patient accesses portal → Selects appointment → System verifies availability → Appointment is scheduled → Reminder is sent → Patient arrives → Intake form auto-filled → Health data captured → Case created if issues arise → Doctor responds → Follow-up scheduled.

4. **Industry-specific Use Case Analysis** :

In healthcare clinics:

- ✓ High call volumes lead to staff burnout.
- ✓ Patients face long waiting times and inconsistent data handling.
- ✓ Tracking patient concerns manually results in delays and poor communication.
- ✓ Doctors need accurate, updated schedules for efficient care.

Key challenges addressed:

- Automating appointment booking to reduce call traffic.
- Ensuring accurate patient data collection.
- Streamlining case management and improving patient engagement.
- Delivering actionable insights for better decision-making.

5. **App Exchange Exploration** :

- Research existing healthcare solutions:
Some patient management apps are available, but they may be costly or overly complex for mid-sized clinics.
- We'll build a tailored solution that integrates Salesforce Health Cloud and Community Cloud, focusing on appointment automation, patient triage, case tracking, and reporting to deliver immediate value with scalability.