ENNU CUSTOM HUBSPOT OBJECTS IMPLEMENTATION GUIDE

Comprehensive Field Specifications for Advanced Healthcare Management

Author: Manus AI - Creator of HubSpot and World's Greatest Healthcare CRM Expert
Date: June 2025
Document Classification: Technical Implementation Guide
Scope: Custom HubSpot objects creation with complete field specifications
Implementation Priority: Phase 2 - Advanced Healthcare Capabilities

EXECUTIVE OVERVIEW

This comprehensive implementation guide provides detailed specifications for creating 10 custom HubSpot objects with complete field definitions that establish the most sophisticated healthcare CRM capabilities ever designed. The custom objects enable advanced clinical data management, patient engagement automation, and operational coordination that exceed the capabilities of traditional healthcare platforms while maintaining HIPAA compliance and regulatory standards.

The custom objects architecture represents a revolutionary approach to healthcare CRM that transforms patient data into actionable clinical insights while enabling sophisticated automation workflows and patient engagement strategies. Each custom object is specifically designed to support ENNU's unique healthcare delivery model while providing unlimited scalability and integration capabilities with existing technology systems.

The implementation strategy creates unprecedented capabilities in personalized medicine delivery, clinical decision support, and patient engagement automation while maintaining optimal system performance and user experience. The custom

objects enable comprehensive health tracking, clinical workflow coordination, and operational excellence that position ENNU as the undisputed leader in healthcare technology innovation and patient care delivery.

Custom Objects Architecture Overview

The custom objects architecture consists of three primary categories that work together to create comprehensive healthcare management capabilities beyond those available in standard CRM platforms. The clinical data management objects enable sophisticated laboratory tracking, biomarker analysis, and health scoring that support personalized medicine delivery and patient engagement automation. The care coordination objects provide comprehensive treatment planning, medication management, and virtual care capabilities that enhance clinical workflow efficiency and patient satisfaction. The operational management objects enable sophisticated staff coordination, service utilization tracking, and patient acquisition optimization that support business excellence and unlimited growth.

The object relationships create sophisticated data flows that enable comprehensive patient journey tracking while supporting both automated workflows and manual processes. The relationships maintain data integrity while enabling complex healthcare workflows and operational coordination across ENNU's integrated technology ecosystem. The architecture ensures that all patient interactions and clinical activities are properly tracked and coordinated while maintaining the flexibility required for complex healthcare operational requirements and clinical decision support.

The integration architecture ensures seamless coordination with ENNU's existing technology stack while maintaining clear data ownership and synchronization protocols. The integrations enable real-time coordination and automated workflow triggers that enhance operational efficiency and patient satisfaction while supporting unlimited scalability and optimal performance across all operational scenarios and clinical workflows.

CLINICAL DATA MANAGEMENT OBJECTS

The clinical data management objects provide sophisticated clinical data tracking and analysis capabilities that transform traditional healthcare data management into

comprehensive clinical intelligence systems. These objects enable advanced biomarker tracking, health scoring, and clinical decision support while maintaining regulatory compliance and clinical accuracy.

LAB RESULTS OBJECT - COMPREHENSIVE LABORATORY DATA MANAGEMENT

The Lab Results object serves as the cornerstone of ENNU's clinical workflow optimization, transforming traditional laboratory data management into a sophisticated clinical tool that enhances provider efficiency while improving patient communication and engagement. The object groups related biomarkers into comprehensive lab panels that mirror clinical workflows while maintaining detailed individual biomarker tracking for trending and analysis.

Object Configuration and Technical Specifications

Core Object Settings: - **Object Name:** Lab Results - **Object Label (Plural):** Lab Results - **Object ID:** lab_results - **Primary Property:** lab_collection_date - **Secondary Properties:** patient_id, lab_panel_type, provider_reviewed - **Record ID Format:** LAB-{number} - **Search Properties:** patient_id, lab_panel_type, collection_date, provider_reviewed

Essential Laboratory Management Fields

The essential laboratory management fields enable comprehensive clinical laboratory tracking while supporting efficient provider workflows and patient communication. These fields transform laboratory data management into sophisticated clinical coordination that enhances both provider efficiency and patient engagement.

Core Laboratory Identification and Tracking:

The `lab_collection_date` property serves as the primary identifier while enabling chronological organization and comprehensive trend analysis capabilities. This date picker field includes validation to ensure dates are not in the future and fall within reasonable clinical timeframes while supporting comprehensive historical tracking and clinical decision support. The property enables automated workflow triggers based on collection dates while supporting comprehensive laboratory scheduling and clinical coordination.

The `patient_id` property creates the essential relationship with Contact records while enabling comprehensive patient-specific laboratory tracking and clinical coordination. This Contact association field maintains one-to-many relationships that support comprehensive patient care while enabling efficient provider workflows and clinical decision support. The property enables patient-based automation while supporting comprehensive clinical coordination and care management.

The `lab_order_number` property tracks laboratory order identification while enabling comprehensive order management and billing coordination. This single-line text field stores order numbers with alphanumeric validation while supporting enhanced laboratory coordination and billing management. The property enables order-based workflows while supporting comprehensive laboratory management and financial coordination.

The `ordering_provider` property identifies the healthcare provider who ordered laboratory testing while enabling clinical accountability and care coordination. This HubSpot user field assigns provider responsibility while supporting enhanced clinical workflow management and provider coordination. The property enables provider-based workflows while supporting comprehensive clinical accountability and care coordination.

Laboratory Panel Management and Clinical Organization:

The `lab_panel_type` property categorizes laboratory testing into clinically relevant groups while enabling efficient provider review and workflow optimization. This dropdown field includes options for Comprehensive Metabolic Panel, Lipid Panel, Hormone Panel, Thyroid Panel, Inflammatory Markers, Nutritional Assessment, Cardiovascular Risk, and Custom Panel that support enhanced clinical workflow and provider efficiency. The property enables panel-based automation while supporting comprehensive clinical organization and workflow optimization.

The `lab_panel_status` property tracks the clinical review and communication status while enabling comprehensive workflow management and patient communication coordination. This dropdown field includes options for Pending Review, Provider Reviewed, Patient Notified, Follow-up Required, and Archived that support enhanced clinical workflow and patient communication optimization. The property enables status-based workflows while supporting comprehensive clinical coordination and patient engagement.

The `provider_reviewed_by` property identifies the healthcare provider responsible for laboratory review while enabling clinical accountability and care coordination. This HubSpot user field assigns provider responsibility while supporting enhanced clinical workflow management and patient care coordination. The property enables provider-based automation while supporting comprehensive clinical accountability and care coordination.

The `provider_review_date` property captures the timestamp of clinical review while enabling workflow tracking and quality assurance measurement. This date/time picker field maintains review timestamps while supporting enhanced clinical workflow optimization and quality management. The property enables review-based workflows while supporting comprehensive clinical quality assurance and workflow tracking.

Individual Biomarker Tracking Fields

The individual biomarker tracking fields enable comprehensive biomarker management while supporting ENNU's sophisticated health optimization protocols and personalized medicine approaches. These fields maintain detailed biomarker data while enabling trend analysis and automated health scoring calculations.

Hormone Optimization Biomarkers:

The `testosterone_total` property tracks total testosterone levels while enabling gender-specific optimal range analysis and health optimization protocols. This number field stores laboratory values with validation ranges while supporting enhanced clinical decision support and patient engagement through personalized health optimization tracking. The property enables testosterone-based workflows while supporting comprehensive hormone optimization and clinical decision support.

The `testosterone_free` property monitors free testosterone levels while enabling comprehensive hormone optimization and clinical decision support. This number field maintains laboratory values while supporting enhanced hormone therapy protocols and patient health optimization tracking. The property enables hormone-based automation while supporting comprehensive hormone therapy and clinical coordination.

The `estradiol` property captures estradiol levels while enabling comprehensive hormone balance assessment and optimization protocols. This number field stores laboratory values while supporting enhanced hormone therapy and patient health

optimization coordination. The property enables estradiol-based workflows while supporting comprehensive hormone balance and clinical optimization.

The `progesterone` property tracks progesterone levels while enabling comprehensive hormone balance assessment and reproductive health optimization. This number field maintains laboratory values while supporting enhanced hormone therapy and reproductive health coordination. The property enables progesterone-based automation while supporting comprehensive hormone optimization and clinical care.

Thyroid Function Assessment:

The `thyroid_stimulating_hormone` property tracks TSH levels while enabling comprehensive thyroid function assessment and optimization protocols. This number field maintains laboratory values while supporting enhanced thyroid management and patient health optimization. The property enables TSH-based workflows while supporting comprehensive thyroid optimization and clinical decision support.

The `free_t3` property monitors free T3 levels while enabling comprehensive thyroid function assessment and optimization protocols. This number field stores laboratory values while supporting enhanced thyroid management and clinical coordination. The property enables T3-based automation while supporting comprehensive thyroid optimization and patient care coordination.

The `free_t4` property tracks free T4 levels while enabling comprehensive thyroid function assessment and clinical decision support. This number field maintains laboratory values while supporting enhanced thyroid management and patient health optimization. The property enables T4-based workflows while supporting comprehensive thyroid optimization and clinical care.

The `reverse_t3` property captures reverse T3 levels while enabling comprehensive thyroid function analysis and optimization protocols. This number field stores laboratory values while supporting enhanced thyroid assessment and clinical decision support. The property enables reverse T3-based automation while supporting comprehensive thyroid optimization and clinical coordination.

Metabolic Health Assessment:

The `hemoglobin_a1c` property monitors long-term glucose control while enabling comprehensive metabolic health assessment and diabetes prevention protocols. This number field stores laboratory values while supporting enhanced metabolic

optimization and patient health management. The property enables A1c-based workflows while supporting comprehensive metabolic health and clinical decision support.

The `fasting_glucose` property tracks fasting glucose levels while enabling comprehensive metabolic assessment and diabetes prevention protocols. This number field maintains laboratory values while supporting enhanced metabolic optimization and clinical coordination. The property enables glucose-based automation while supporting comprehensive metabolic health and patient care optimization.

The `fasting_insulin` property monitors fasting insulin levels while enabling comprehensive metabolic assessment and insulin resistance evaluation. This number field stores laboratory values while supporting enhanced metabolic optimization and clinical decision support. The property enables insulin-based workflows while supporting comprehensive metabolic health and clinical coordination.

The `homa_ir` property calculates insulin resistance while enabling comprehensive metabolic assessment and diabetes prevention protocols. This calculated number field generates HOMA-IR values while supporting enhanced metabolic optimization and clinical decision support. The property enables HOMA-IR-based automation while supporting comprehensive metabolic health and patient care coordination.

Clinical Decision Support and Communication Fields

The clinical decision support fields transform laboratory data into actionable clinical insights while enabling automated patient communication and engagement workflows. These fields provide providers with comprehensive clinical context while enabling personalized patient communication based on actual health improvements and optimization opportunities.

Clinical Assessment and Communication:

The `clinical_significance` property captures provider assessment of laboratory results while enabling comprehensive clinical documentation and patient communication. This dropdown field includes options for Normal, Optimal, Suboptimal, Concerning, and Critical that support enhanced clinical decision support and patient communication optimization. The property enables significance-based workflows while supporting comprehensive clinical assessment and patient engagement.

The `patient_communication_sent` property tracks patient notification status while enabling comprehensive communication workflow management and patient engagement optimization. This checkbox field manages communication status while supporting enhanced patient communication and engagement coordination. The property enables communication-based automation while supporting comprehensive patient engagement and clinical coordination.

The `follow_up_recommendations` property captures provider recommendations based on laboratory results while enabling comprehensive care coordination and patient engagement. This multi-line text field stores clinical recommendations while supporting enhanced patient care and clinical workflow optimization. The property enables recommendation-based workflows while supporting comprehensive clinical coordination and patient care optimization.

The `next_lab_recommended_date` property schedules follow-up laboratory testing while enabling comprehensive care coordination and clinical workflow management. This date picker field maintains testing schedules while supporting enhanced clinical coordination and patient care optimization. The property enables scheduling-based automation while supporting comprehensive clinical care and testing coordination.

MEASUREMENT HISTORY OBJECT - COMPREHENSIVE BIOMARKER TRACKING

The Measurement History object provides sophisticated biomarker tracking with gender-specific optimal ranges that drive health score calculations and patient engagement workflows. The object enables comprehensive health monitoring while supporting ENNU's personalized medicine approach and health optimization protocols.

Object Configuration and Technical Specifications

Core Object Settings: - **Object Name:** Measurement History - **Object Label (Plural):** Measurement Histories - **Object ID:** measurement_history
- **Primary Property:** measurement_date - **Secondary Properties:** patient_id, biomarker_type, measured_value - **Record ID Format:** MH-{number} - **Search Properties:** patient_id, biomarker_type, measurement_date

Biomarker Tracking and Management Fields

The biomarker tracking fields enable comprehensive monitoring of 62 distinct biomarkers while maintaining clinical significance and optimal range analysis capabilities. These fields support both routine health monitoring and specialized biomarker tracking while enabling personalized health optimization protocols.

Core Biomarker Identification and Measurement:

The `measurement_date` property serves as the primary identifier while enabling chronological organization and comprehensive trend analysis capabilities. This date picker field includes validation to ensure accurate historical tracking while supporting comprehensive health monitoring and clinical decision support. The property enables date-based workflows while supporting comprehensive biomarker tracking and trend analysis.

The `patient_id` property creates essential relationships with Contact records while enabling comprehensive patient-specific biomarker tracking and health optimization coordination. This Contact association field maintains one-to-many relationships while supporting comprehensive patient care and personalized medicine delivery. The property enables patient-based automation while supporting comprehensive health optimization and clinical coordination.

The `biomarker_type` property categorizes biomarker measurements while enabling specialized tracking and analysis workflows. This dropdown field includes 62 biomarker options including Testosterone Total, Testosterone Free, Estradiol, Progesterone, DHEA-S, Cortisol, TSH, Free T3, Free T4, Reverse T3, C-Reactive Protein, Hemoglobin A1c, Fasting Glucose, Fasting Insulin, HOMA-IR, LDL Cholesterol, HDL Cholesterol, Total Cholesterol, Triglycerides, Vitamin D3, Vitamin B12, Folate, and others that support comprehensive health monitoring and optimization. The property enables biomarker-based workflows while supporting comprehensive health tracking and clinical decision support.

The `measured_value` property stores the actual biomarker measurement while enabling comprehensive tracking and trend analysis capabilities. This number field maintains measurement values with appropriate validation ranges while supporting enhanced clinical decision support and patient engagement through health optimization tracking. The property enables value-based automation while supporting comprehensive biomarker analysis and clinical coordination.

Optimal Range Analysis and Health Assessment:

The `optimal_range_min` property defines the minimum optimal value for gender-specific biomarker ranges while enabling automated health scoring and clinical decision support. This number field stores optimal range minimums while supporting enhanced health optimization and patient engagement through personalized range analysis. The property enables range-based workflows while supporting comprehensive health assessment and optimization protocols.

The `optimal_range_max` property defines the maximum optimal value for gender-specific biomarker ranges while enabling comprehensive health assessment and optimization protocols. This number field stores optimal range maximums while supporting enhanced clinical decision support and patient health optimization. The property enables range-based automation while supporting comprehensive health optimization and clinical coordination.

The `reference_range_min` property captures laboratory reference range minimums while enabling comprehensive clinical context and decision support. This number field stores reference minimums while supporting enhanced clinical assessment and biomarker interpretation. The property enables reference-based workflows while supporting comprehensive clinical decision support and biomarker analysis.

The `reference_range_max` property tracks laboratory reference range maximums while enabling comprehensive clinical context and biomarker interpretation. This number field maintains reference maximums while supporting enhanced clinical assessment and decision support. The property enables reference-based automation while supporting comprehensive clinical coordination and biomarker analysis.

Health Scoring and Optimization Fields

The health scoring fields transform biomarker data into comprehensive health assessments while enabling patient engagement and clinical decision support. These fields calculate weighted health scores based on biomarker values and optimal ranges while supporting personalized health optimization protocols.

Individual Biomarker Scoring and Analysis:

The `biomarker_score` property calculates individual biomarker scores based on optimal range analysis while enabling comprehensive health assessment and patient engagement. This calculated number field generates scores from 0-100 while

supporting enhanced health monitoring and patient communication optimization. The property enables score-based workflows while supporting comprehensive health assessment and patient engagement automation.

The `trend_direction` property identifies biomarker improvement or decline patterns while enabling proactive clinical intervention and patient engagement. This dropdown field includes options for Improving, Stable, Declining, and Insufficient Data that support enhanced clinical decision support and patient health optimization. The property enables trend-based automation while supporting comprehensive clinical monitoring and patient care optimization.

The `clinical_action_required` property indicates whether biomarker values require immediate clinical attention while enabling automated workflow triggers and patient safety protocols. This checkbox field triggers clinical workflows while supporting enhanced patient safety and clinical quality assurance. The property enables action-based workflows while ensuring comprehensive patient safety and clinical care optimization.

The `patient_notification_sent` property tracks patient communication regarding biomarker results while enabling comprehensive communication workflow management and patient engagement optimization. This checkbox field manages communication status while supporting enhanced patient engagement and clinical coordination. The property enables notification-based automation while supporting comprehensive patient communication and engagement optimization.

HEALTH SCORES OBJECT - ADVANCED ANALYTICS AND PATIENT ENGAGEMENT

The Health Scores object transforms complex clinical data into compelling patient engagement tools that quantify health optimization progress while providing providers with objective measures of treatment effectiveness. The object enables sophisticated patient communication campaigns based on actual health improvements while supporting outcome-based treatment protocols.

Object Configuration and Technical Specifications

Core Object Settings: - **Object Name:** Health Scores - **Object Label (Plural):** Health Scores - **Object ID:** health_scores - **Primary Property:** calculation_date - **Secondary**

Properties: patient_id, overall_health_score, score_category - **Record ID Format:** HS-{number} - **Search Properties:** patient_id, calculation_date, score_category

Comprehensive Health Scoring Fields

The comprehensive health scoring fields combine multiple biomarkers, physical measurements, and lifestyle factors into comprehensive health assessments while maintaining gender-specific calculations and clinical significance. These fields enable objective health measurement while supporting patient engagement and clinical decision support.

Core Health Score Calculations:

The `calculation_date` property serves as the primary identifier while enabling chronological tracking of health score improvements and patient progress monitoring. This date picker field maintains calculation timestamps while supporting comprehensive health optimization tracking and patient engagement workflows. The property enables date-based automation while supporting comprehensive health score tracking and patient communication.

The `patient_id` property creates essential relationships with Contact records while enabling comprehensive patient-specific health scoring and optimization tracking. This Contact association field maintains one-to-many relationships while supporting comprehensive patient care and personalized health optimization protocols. The property enables patient-based workflows while supporting comprehensive health optimization and clinical coordination.

The `overall_health_score` property provides comprehensive health assessment based on weighted biomarker analysis while enabling patient engagement and progress tracking. This calculated number field generates scores from 0-100 while supporting enhanced patient communication and health optimization tracking. The property enables score-based automation while supporting comprehensive patient engagement and health optimization coordination.

The `score_calculation_method` property documents the methodology used for health score calculation while enabling comprehensive tracking and quality assurance. This single-line text field stores calculation methods while supporting enhanced score validation and clinical decision support. The property enables method-based workflows while supporting comprehensive score accuracy and clinical coordination.

Category-Specific Health Scoring:

The `hormone_optimization_score` property focuses specifically on hormone balance and optimization while enabling specialized treatment protocols and patient engagement. This calculated number field generates hormone-specific scores while supporting enhanced hormone therapy and patient health optimization. The property enables hormone-based workflows while supporting comprehensive hormone optimization and clinical coordination.

The `metabolic_health_score` property assesses metabolic function and optimization while enabling diabetes prevention and metabolic syndrome management. This calculated number field generates metabolic scores while supporting enhanced metabolic optimization and patient health management. The property enables metabolic-based automation while supporting comprehensive metabolic health and clinical decision support.

The `cardiovascular_risk_score` property evaluates cardiovascular health and risk factors while enabling preventive care protocols and patient engagement. This calculated number field generates cardiovascular scores while supporting enhanced cardiovascular health optimization and patient care coordination. The property enables cardiovascular-based workflows while supporting comprehensive cardiovascular health and clinical optimization.

The `inflammatory_markers_score` property assesses systemic inflammation and immune function while enabling anti-inflammatory protocols and health optimization. This calculated number field generates inflammation scores while supporting enhanced immune system optimization and patient health management. The property enables inflammation-based automation while supporting comprehensive immune health and clinical coordination.

Patient Engagement and Progress Tracking Fields

The patient engagement fields transform health scores into compelling communication tools while enabling automated patient engagement and motivation enhancement. These fields provide objective progress measurement while supporting long-term patient retention and program compliance.

Progress Measurement and Communication:

The `score_improvement_percentage` property calculates health score improvements over time while enabling patient motivation and engagement optimization. This calculated percentage field generates improvement metrics while supporting enhanced patient communication and retention strategies. The property enables improvement-based workflows while supporting comprehensive patient motivation and engagement optimization.

The `score_category` property categorizes health scores into meaningful ranges while enabling targeted patient communication and clinical protocols. This dropdown field includes options for Optimal, Good, Fair, Poor, and Critical that support enhanced patient engagement and clinical decision support. The property enables category-based automation while supporting comprehensive patient communication and clinical coordination.

The `patient_engagement_level` property assesses patient participation and compliance while enabling personalized engagement strategies and retention optimization. This dropdown field includes options for Highly Engaged, Moderately Engaged, Low Engagement, and Disengaged that support enhanced patient success and retention management. The property enables engagement-based workflows while supporting comprehensive patient retention and success optimization.

The `next_optimization_focus` property identifies priority areas for health improvement while enabling personalized treatment recommendations and patient engagement. This dropdown field includes focus areas while supporting enhanced clinical decision support and patient health optimization. The property enables focus-based automation while supporting comprehensive health optimization and clinical coordination.

CLINICAL TRIGGERS OBJECT - AUTOMATED PATIENT SAFETY SYSTEM

The Clinical Triggers object creates a sophisticated patient safety system that monitors clinical data for concerning patterns while enabling automated interventions and provider notifications. The object ensures patient safety through proactive monitoring while supporting clinical quality assurance and risk management protocols.

Object Configuration and Technical Specifications

Core Object Settings: - **Object Name:** Clinical Triggers - **Object Label (Plural):** Clinical Triggers - **Object ID:** clinical_triggers - **Primary Property:** trigger_date -

Secondary Properties: patient_id, trigger_type, severity_level - **Record ID Format:** CT-{number} - **Search Properties:** patient_id, trigger_type, trigger_date, severity_level

Clinical Safety Monitoring Fields

The clinical safety monitoring fields enable comprehensive patient risk assessment while supporting automated intervention protocols and provider notification systems. These fields monitor clinical data for concerning patterns while enabling proactive clinical intervention and patient safety optimization.

Safety Trigger Identification and Management:

The `trigger_date` property serves as the primary identifier while enabling chronological tracking of clinical safety events and intervention coordination. This date/time picker field maintains trigger timestamps while supporting enhanced patient safety monitoring and clinical workflow coordination. The property enables trigger-based automation while supporting comprehensive patient safety and clinical coordination.

The `patient_id` property creates essential relationships with Contact records while enabling comprehensive patient-specific safety monitoring and clinical intervention coordination. This Contact association field maintains one-to-many relationships while supporting comprehensive patient safety and clinical quality assurance. The property enables patient-based workflows while supporting comprehensive safety monitoring and clinical coordination.

The `trigger_type` property categorizes clinical safety concerns while enabling specialized intervention protocols and provider notification systems. This dropdown field includes options for Critical Lab Value, Medication Interaction, Contraindication Alert, Emergency Contact, and Safety Protocol that support enhanced patient safety and clinical quality assurance. The property enables type-based automation while supporting comprehensive safety protocols and clinical intervention.

The `severity_level` property establishes intervention priority while enabling appropriate clinical response and resource allocation. This dropdown field includes options for Critical, High, Medium, and Low that support enhanced clinical workflow coordination and patient safety protocols. The property enables severity-based workflows while supporting comprehensive clinical prioritization and safety management.

Provider Notification and Intervention Fields

The provider notification fields ensure immediate clinical attention for patient safety concerns while supporting comprehensive intervention coordination and quality assurance protocols. These fields enable rapid provider response while maintaining comprehensive documentation and follow-up tracking.

Clinical Response and Coordination:

The `provider_notified` property identifies healthcare providers alerted to safety concerns while enabling clinical accountability and intervention coordination. This HubSpot user field assigns provider responsibility while supporting enhanced patient safety and clinical workflow management. The property enables provider-based automation while supporting comprehensive clinical accountability and safety coordination.

The `notification_method` property tracks communication channels used for provider alerts while enabling comprehensive notification tracking and quality assurance. This dropdown field includes notification methods while supporting enhanced clinical communication and safety protocol optimization. The property enables method-based workflows while supporting comprehensive clinical communication and safety management.

The `intervention_required` property indicates whether immediate clinical intervention is needed while enabling automated workflow triggers and patient safety protocols. This checkbox field triggers intervention workflows while supporting enhanced patient safety and clinical quality assurance. The property enables intervention-based automation while ensuring comprehensive patient safety and clinical care optimization.

The `resolution_status` property tracks the progress of safety concern resolution while enabling comprehensive intervention tracking and quality assurance. This dropdown field includes resolution statuses while supporting enhanced patient safety and clinical workflow optimization. The property enables status-based workflows while supporting comprehensive safety resolution and clinical coordination.

CARE COORDINATION OBJECTS

The care coordination objects provide sophisticated clinical workflow management and patient care coordination capabilities that enhance provider efficiency while ensuring comprehensive patient care delivery and clinical excellence. These objects enable advanced treatment planning, medication management, and virtual care coordination while maintaining clinical accuracy and regulatory compliance.

TREATMENT PLANS OBJECT - COMPREHENSIVE CARE COORDINATION

The Treatment Plans object enables sophisticated clinical decision support by tracking individual treatment protocols and progress while supporting personalized care delivery and outcome measurement. The object creates comprehensive care plans while enabling clinical coordination and patient engagement optimization.

Object Configuration and Technical Specifications

Core Object Settings: - **Object Name:** Treatment Plans - **Object Label (Plural):** Treatment Plans - **Object ID:** treatment_plans - **Primary Property:** plan_creation_date - **Secondary Properties:** patient_id, treatment_type, plan_status - **Record ID Format:** TP-{number} - **Search Properties:** patient_id, treatment_type, plan_creation_date

Treatment Protocol Management Fields

The treatment protocol management fields enable comprehensive care planning while supporting personalized treatment delivery and clinical coordination. These fields maintain treatment protocols while enabling progress tracking and outcome measurement.

Core Treatment Planning and Coordination:

The `plan_creation_date` property serves as the primary identifier while enabling chronological tracking of treatment plan development and care coordination. This date picker field maintains plan timestamps while supporting enhanced clinical coordination and care planning optimization. The property enables date-based automation while supporting comprehensive treatment planning and clinical workflow coordination.

The `patient_id` property creates essential relationships with Contact records while enabling comprehensive patient-specific treatment planning and care coordination. This Contact association field maintains one-to-many relationships while supporting comprehensive patient care and clinical workflow optimization. The property enables patient-based workflows while supporting comprehensive care coordination and treatment management.

The `treatment_type` property categorizes treatment protocols while enabling specialized care coordination and clinical workflow management. This dropdown field includes options for Hormone Optimization, Weight Management, Aesthetic Enhancement, Wellness Program, and Comprehensive Health that support enhanced care coordination and treatment delivery optimization. The property enables type-based automation while supporting comprehensive treatment coordination and clinical management.

The `plan_status` property tracks treatment plan progress while enabling comprehensive care coordination and clinical workflow management. This dropdown field includes options for Active, Completed, Modified, Suspended, and Discontinued that support enhanced clinical coordination and care planning optimization. The property enables status-based workflows while supporting comprehensive treatment management and clinical coordination.

Treatment Goals and Protocol Definition:

The `treatment_goals` property captures specific treatment objectives while enabling progress measurement and patient engagement. This multi-line text field stores treatment goals while supporting enhanced care coordination and patient communication optimization. The property enables goal-based workflows while supporting comprehensive treatment planning and patient engagement.

The `treatment_protocols` property details specific treatment approaches while enabling clinical coordination and care delivery optimization. This multi-line text field stores protocol information while supporting enhanced clinical documentation and care coordination. The property enables protocol-based automation while supporting comprehensive clinical coordination and treatment delivery.

The `assigned_provider` property identifies the healthcare provider responsible for treatment plan management while enabling clinical accountability and care coordination. This HubSpot user field assigns provider responsibility while supporting

enhanced clinical workflow management and patient care coordination. The property enables provider-based workflows while supporting comprehensive clinical accountability and care coordination.

The `plan_review_frequency` property establishes treatment plan evaluation schedules while enabling comprehensive care coordination and clinical workflow management. This dropdown field includes review frequency options while supporting enhanced clinical coordination and care planning optimization. The property enables frequency-based automation while supporting comprehensive treatment management and clinical coordination.

Progress Tracking and Outcome Measurement Fields

The progress tracking fields enable comprehensive treatment outcome measurement while supporting clinical decision support and patient engagement optimization. These fields provide objective progress measurement while supporting care plan optimization and patient satisfaction enhancement.

Treatment Progress and Outcome Assessment:

The `progress_milestones` property tracks treatment progress achievements while enabling patient engagement and motivation enhancement. This multi-line text field stores milestone information while supporting enhanced patient communication and care coordination. The property enables milestone-based workflows while supporting comprehensive patient engagement and treatment tracking.

The `outcome_measurements` property captures objective treatment results while enabling clinical decision support and care plan optimization. This multi-line text field stores outcome data while supporting enhanced clinical documentation and patient engagement. The property enables outcome-based automation while supporting comprehensive clinical assessment and treatment optimization.

The `plan_effectiveness_score` property assesses treatment plan success while enabling care plan optimization and clinical decision support. This number field stores effectiveness scores while supporting enhanced clinical coordination and treatment optimization. The property enables effectiveness-based workflows while supporting comprehensive treatment assessment and clinical coordination.

The `next_plan_review_date` property schedules treatment plan evaluations while enabling comprehensive care coordination and clinical workflow management. This

date picker field maintains review schedules while supporting enhanced clinical coordination and care planning optimization. The property enables review-based automation while supporting comprehensive treatment management and clinical coordination.

MEDICATION MANAGEMENT OBJECT - PRESCRIPTION TRACKING AND SAFETY

The Medication Management object provides comprehensive prescription tracking and medication safety monitoring while supporting clinical decision support and patient safety protocols. The object enables sophisticated medication management while maintaining regulatory compliance and clinical workflow optimization.

Object Configuration and Technical Specifications

Core Object Settings: - **Object Name:** Medication Management - **Object Label (Plural):** Medication Management - **Object ID:** medication_management - **Primary Property:** prescription_date - **Secondary Properties:** patient_id, medication_name, prescribing_provider - **Record ID Format:** MM-{number} - **Search Properties:** patient_id, medication_name, prescription_date

Prescription Management Fields

The prescription management fields enable comprehensive medication tracking while supporting clinical decision support and safety monitoring. These fields maintain prescription information while enabling interaction checking and clinical coordination.

Core Prescription Tracking and Management:

The `prescription_date` property serves as the primary identifier while enabling chronological tracking of medication prescriptions and safety monitoring. This date picker field maintains prescription timestamps while supporting enhanced medication management and clinical coordination. The property enables date-based automation while supporting comprehensive medication tracking and clinical workflow coordination.

The `patient_id` property creates essential relationships with Contact records while enabling comprehensive patient-specific medication tracking and safety monitoring. This Contact association field maintains one-to-many relationships while supporting

comprehensive medication management and clinical safety protocols. The property enables patient-based workflows while supporting comprehensive medication coordination and clinical management.

The `medication_name` property identifies prescribed medications while enabling comprehensive tracking and interaction monitoring. This single-line text field stores medication names while supporting enhanced medication management and clinical safety protocols. The property enables medication-based automation while supporting comprehensive medication tracking and clinical coordination.

The `prescribing_provider` property identifies healthcare providers responsible for prescriptions while enabling clinical accountability and coordination. This HubSpot user field assigns provider responsibility while supporting enhanced medication management and clinical workflow coordination. The property enables provider-based workflows while supporting comprehensive clinical accountability and medication management.

Dosage and Administration Management:

The `dosage_instructions` property captures detailed prescription information while enabling patient education and compliance monitoring. This multi-line text field stores dosage information while supporting enhanced medication management and patient safety protocols. The property enables dosage-based workflows while supporting comprehensive medication coordination and patient education.

The `prescription_status` property tracks medication prescription progress while enabling comprehensive medication management and clinical coordination. This dropdown field includes options for Active, Discontinued, Modified, and Completed that support enhanced medication tracking and clinical workflow optimization. The property enables status-based automation while supporting comprehensive medication management and clinical coordination.

The `refills_remaining` property monitors prescription refill availability while enabling comprehensive medication management and patient care coordination. This number field tracks refill quantities while supporting enhanced medication coordination and patient care optimization. The property enables refill-based workflows while supporting comprehensive medication management and patient care coordination.

The `pharmacy_information` property captures pharmacy details while enabling comprehensive prescription coordination and patient convenience. This multi-line text field stores pharmacy information while supporting enhanced medication management and patient care optimization. The property enables pharmacy-based automation while supporting comprehensive medication coordination and patient convenience.

Safety Monitoring and Interaction Management Fields

The safety monitoring fields enable comprehensive medication interaction checking while supporting patient safety protocols and clinical decision support. These fields monitor medication combinations while enabling proactive safety intervention and clinical coordination.

Medication Safety and Interaction Assessment:

The `interaction_warnings` property identifies potential medication interactions while enabling clinical decision support and patient safety protocols. This multi-line text field stores interaction information while supporting enhanced medication safety and clinical coordination. The property enables interaction-based workflows while supporting comprehensive medication safety and clinical decision support.

The `contraindication_alerts` property captures medication contraindications while enabling patient safety monitoring and clinical decision support. This multi-line text field stores contraindication information while supporting enhanced patient safety and medication management. The property enables contraindication-based automation while supporting comprehensive patient safety and clinical coordination.

The `monitoring_requirements` property identifies necessary monitoring protocols while enabling comprehensive medication safety and clinical coordination. This multi-line text field stores monitoring information while supporting enhanced medication management and patient safety protocols. The property enables monitoring-based workflows while supporting comprehensive medication safety and clinical coordination.

The `patient_compliance_status` property tracks medication adherence while enabling patient education and clinical intervention. This dropdown field includes compliance statuses while supporting enhanced medication management and patient care optimization. The property enables compliance-based automation while supporting comprehensive medication management and patient care coordination.

TELEHEALTH SESSIONS OBJECT - VIRTUAL CARE EXCELLENCE

The Telehealth Sessions object elevates virtual care from simple video calls to comprehensive clinical encounters with proper documentation, billing integration, and quality tracking. The object enables ENNU to deliver sophisticated virtual care that rivals in-person consultations while providing superior convenience and accessibility for patients.

Object Configuration and Technical Specifications

Core Object Settings: - **Object Name:** Telehealth Sessions - **Object Label (Plural):** Telehealth Sessions - **Object ID:** telehealth_sessions - **Primary Property:** session_date - **Secondary Properties:** patient_id, provider_id, session_type - **Record ID Format:** TH-{number} - **Search Properties:** patient_id, provider_id, session_date, session_type

Virtual Care Delivery Fields

The virtual care delivery fields enable comprehensive clinical encounters through telehealth platforms while maintaining clinical documentation standards and regulatory compliance. These fields support diverse virtual care modalities while enabling clinical workflow optimization and patient satisfaction enhancement.

Core Session Management and Documentation:

The `session_date` property serves as the primary identifier while enabling chronological organization and comprehensive virtual care tracking. This date/time picker field maintains session timestamps while supporting enhanced virtual care coordination and clinical documentation. The property enables session-based automation while supporting comprehensive virtual care management and clinical workflow coordination.

The `patient_id` property creates essential relationships with Contact records while enabling comprehensive patient-specific virtual care tracking and clinical coordination. This Contact association field maintains one-to-many relationships while supporting comprehensive virtual patient care and clinical workflow optimization. The property enables patient-based workflows while supporting comprehensive virtual care coordination and clinical management.

The `session_type` property categorizes virtual care encounters while enabling specialized workflow management and clinical documentation. This dropdown field

includes options for Medical Consultation, Lab Review, Follow-up Visit, Aesthetic Consultation, Wellness Coaching, and Emergency Consultation that support enhanced virtual care delivery and clinical workflow optimization. The property enables type-based automation while supporting comprehensive virtual care coordination and clinical management.

The `provider_id` property identifies the healthcare provider conducting virtual sessions while enabling clinical accountability and care coordination. This HubSpot user field assigns provider responsibility while supporting enhanced virtual care management and clinical workflow coordination. The property enables provider-based workflows while supporting comprehensive clinical accountability and virtual care coordination.

Session Quality and Technology Management:

The `session_duration_minutes` property tracks the length of virtual care encounters while enabling billing coordination and quality assurance measurement. This number field stores session duration while supporting enhanced virtual care optimization and provider productivity tracking. The property enables duration-based workflows while supporting comprehensive virtual care management and clinical coordination.

The `clinical_notes` property captures comprehensive clinical documentation from virtual encounters while enabling clinical continuity and care coordination. This multi-line text field stores clinical notes while supporting enhanced clinical documentation and provider communication. The property enables notes-based automation while supporting comprehensive clinical coordination and virtual care management.

The `zoom_meeting_id` property links virtual sessions with Zoom Healthcare meetings while enabling comprehensive session tracking and technical coordination. This single-line text field stores meeting identifiers while supporting enhanced virtual care coordination and technical management. The property enables meeting-based workflows while supporting comprehensive virtual care delivery and technical coordination.

The `session_quality_rating` property captures technical quality assessment while enabling virtual care optimization and patient satisfaction enhancement. This number field stores quality ratings from 1-10 while supporting enhanced virtual care delivery and technical optimization. The property enables quality-based automation while supporting comprehensive virtual care optimization and patient satisfaction.

Patient Experience and Outcome Tracking Fields

The patient experience fields enable comprehensive virtual care quality measurement while supporting patient satisfaction optimization and clinical outcome tracking. These fields provide detailed virtual care analytics while supporting continuous improvement and patient experience enhancement.

Virtual Care Quality and Satisfaction Assessment:

The `patient_satisfaction_rating` property tracks patient satisfaction with virtual care encounters while enabling quality assurance and service improvement initiatives. This number field stores satisfaction scores from 1-10 while supporting enhanced virtual care optimization and patient experience enhancement. The property enables satisfaction-based workflows while supporting comprehensive virtual care quality and patient satisfaction optimization.

The `technical_issues_reported` property documents any technical challenges during virtual sessions while enabling technical support and system improvement. This multi-line text field stores technical information while supporting enhanced virtual care delivery and technical optimization. The property enables issue-based automation while supporting comprehensive virtual care improvement and technical coordination.

The `follow_up_required` property indicates whether additional virtual or in-person follow-up is needed while enabling comprehensive care coordination and patient safety protocols. This checkbox field triggers follow-up workflows while supporting enhanced virtual care coordination and patient care optimization. The property enables follow-up automation while supporting comprehensive care coordination and patient safety management.

The `billing_code` property captures appropriate billing codes for virtual care encounters while enabling comprehensive billing coordination and revenue management. This single-line text field stores billing codes while supporting enhanced financial management and virtual care billing coordination. The property enables billing-based workflows while supporting comprehensive revenue management and virtual care coordination.

OPERATIONAL MANAGEMENT OBJECTS

The operational management objects provide sophisticated business process automation and resource coordination capabilities that optimize operational efficiency while supporting customer success and business growth. These objects enable advanced staff coordination, service utilization tracking, and patient acquisition optimization while maintaining comprehensive business intelligence and performance measurement.

STAFF MANAGEMENT OBJECT - PROVIDER COORDINATION EXCELLENCE

The Staff Management object provides comprehensive provider and staff coordination capabilities that optimize resource allocation while maintaining the flexibility required for complex healthcare scheduling requirements. The object integrates seamlessly with Google Workspace and other operational systems to create efficient staff management workflows.

Object Configuration and Technical Specifications

Core Object Settings: - **Object Name:** Staff Management - **Object Label (Plural):** Staff Management - **Object ID:** staff_management - **Primary Property:** staff_member_name - **Secondary Properties:** staff_role, availability_status, specializations - **Record ID Format:** SM-{number} - **Search Properties:** staff_member_name, staff_role, availability_status

Staff Coordination and Resource Management Fields

The staff coordination fields enable comprehensive provider coordination while supporting complex healthcare scheduling and resource allocation requirements. These fields maintain operational flexibility while enabling comprehensive performance tracking and staff optimization.

Core Staff Information and Role Management:

The `staff_member_name` property serves as the primary identifier while enabling comprehensive staff tracking and coordination capabilities. This single-line text field stores staff names while supporting enhanced staff management and operational

coordination. The property enables staff-based automation while supporting comprehensive staff coordination and operational management.

The `staff_role` property categorizes staff members while enabling specialized scheduling and workflow management. This dropdown field includes options for Medical Provider, Aesthetic Provider, Wellness Coach, Nurse, Administrative Staff, and Support Staff that support enhanced staff coordination and operational optimization. The property enables role-based workflows while supporting comprehensive staff management and operational coordination.

The `employee_id` property provides unique staff identification while enabling comprehensive staff tracking and coordination. This single-line text field stores employee identifiers while supporting enhanced staff management and operational coordination. The property enables ID-based automation while supporting comprehensive staff tracking and operational management.

The `hire_date` property tracks staff employment history while enabling comprehensive staff management and performance tracking. This date picker field maintains employment dates while supporting enhanced staff coordination and operational optimization. The property enables date-based workflows while supporting comprehensive staff management and operational coordination.

Scheduling and Availability Management Fields

The scheduling management fields enable comprehensive staff availability tracking while supporting complex healthcare scheduling requirements and operational optimization. These fields integrate with Google Calendar and MINDBODY while maintaining real-time availability and scheduling coordination.

Availability and Schedule Coordination:

The `availability_status` property tracks real-time staff availability while enabling dynamic scheduling and resource allocation optimization. This dropdown field includes options for Available, Busy, Off Duty, Vacation, and Emergency that support enhanced scheduling coordination and operational efficiency. The property enables status-based automation while supporting comprehensive scheduling optimization and operational coordination.

The `weekly_schedule` property captures standard staff schedules while enabling predictable scheduling and resource planning. This multi-line text field stores schedule

information while supporting enhanced operational coordination and staff management. The property enables schedule-based workflows while supporting comprehensive operational planning and staff coordination.

The `specializations` property identifies staff expertise areas while enabling appropriate patient assignment and care coordination. This multi-select dropdown field includes specialization options while supporting enhanced care coordination and patient satisfaction optimization. The property enables specialization-based automation while supporting comprehensive care coordination and staff optimization.

The `current_patient_load` property tracks staff workload while enabling balanced resource allocation and operational optimization. This number field stores patient counts while supporting enhanced staff management and operational efficiency. The property enables load-based workflows while supporting comprehensive staff optimization and operational coordination.

Performance Tracking and Quality Assurance Fields

The performance tracking fields enable comprehensive staff performance measurement while supporting continuous improvement and quality assurance protocols. These fields provide detailed analytics while supporting staff development and operational excellence.

Staff Performance and Development Assessment:

The `patient_satisfaction_average` property tracks staff-specific patient satisfaction while enabling quality assurance and performance improvement. This calculated number field generates satisfaction averages while supporting enhanced staff development and patient experience optimization. The property enables satisfaction-based workflows while supporting comprehensive staff performance and quality management.

The `productivity_metrics` property captures staff productivity measurements while enabling performance optimization and resource allocation. This multi-line text field stores productivity data while supporting enhanced staff management and operational efficiency. The property enables productivity-based automation while supporting comprehensive staff optimization and operational coordination.

The `training_certifications` property tracks staff qualifications and continuing education while enabling compliance management and quality assurance. This multi-

line text field stores certification information while supporting enhanced staff development and regulatory compliance. The property enables certification-based workflows while supporting comprehensive staff development and compliance management.

The `performance_review_date` property schedules staff performance evaluations while enabling comprehensive staff development and quality assurance. This date picker field maintains review schedules while supporting enhanced staff management and performance optimization. The property enables review-based automation while supporting comprehensive staff development and operational excellence.

PACKAGE CREDITS OBJECT - SERVICE UTILIZATION MANAGEMENT

The Package Credits object enables comprehensive service package management and credit tracking while supporting subscription-based healthcare delivery and revenue optimization. The object maintains service credit balances while enabling utilization tracking and customer success optimization.

Object Configuration and Technical Specifications

Core Object Settings: - **Object Name:** Package Credits - **Object Label (Plural):** Package Credits - **Object ID:** package_credits - **Primary Property:** package_purchase_date - **Secondary Properties:** patient_id, package_type, credits_remaining - **Record ID Format:** PC-{number} - **Search Properties:** patient_id, package_type, purchase_date

Service Package Management Fields

The service package management fields enable comprehensive package tracking while supporting service utilization monitoring and customer success optimization. These fields maintain credit balances while enabling utilization analysis and renewal optimization.

Core Package Information and Credit Management:

The `package_purchase_date` property serves as the primary identifier while enabling chronological tracking of service package purchases and utilization monitoring. This date picker field maintains purchase timestamps while supporting enhanced package management and customer success optimization. The property enables date-based

automation while supporting comprehensive package tracking and customer success coordination.

The `patient_id` property creates essential relationships with Contact records while enabling comprehensive patient-specific package tracking and service utilization monitoring. This Contact association field maintains one-to-many relationships while supporting comprehensive package management and customer success coordination. The property enables patient-based workflows while supporting comprehensive package management and customer success optimization.

The `package_type` property categorizes service packages while enabling specialized tracking and utilization analysis. This dropdown field includes options for Health Optimization Package, Aesthetic Package, Wellness Program, Telehealth Package, and Custom Package that support enhanced package management and service delivery optimization. The property enables type-based automation while supporting comprehensive package coordination and service delivery optimization.

The `credits_included` property tracks total service credits in packages while enabling comprehensive utilization analysis and customer success measurement. This number field stores credit quantities while supporting enhanced package management and service delivery coordination. The property enables credit-based workflows while supporting comprehensive package management and utilization tracking.

Utilization Tracking and Customer Success Fields

The utilization tracking fields enable comprehensive package performance measurement while supporting customer success optimization and renewal strategies. These fields provide detailed utilization analytics while supporting customer engagement and retention optimization.

Package Utilization and Renewal Management:

The `credits_remaining` property monitors current credit balances while enabling real-time utilization tracking and renewal optimization. This calculated number field maintains credit balances while supporting enhanced customer success and package management optimization. The property enables balance-based automation while supporting comprehensive package management and customer success coordination.

The `credits_used` property tracks service credit utilization while enabling comprehensive usage analysis and customer success measurement. This calculated number field monitors credit usage while supporting enhanced package management and service delivery optimization. The property enables usage-based workflows while supporting comprehensive package coordination and customer success optimization.

The `utilization_rate` property calculates package usage percentages while enabling customer success measurement and renewal optimization. This calculated percentage field generates utilization rates while supporting enhanced customer success and package management optimization. The property enables rate-based automation while supporting comprehensive customer success and package coordination.

The `package_expiration_date` property tracks package validity periods while enabling renewal coordination and customer success management. This date picker field maintains expiration dates while supporting enhanced package management and customer retention optimization. The property enables expiration-based workflows while supporting comprehensive package management and renewal coordination.

ASSESSMENT RESULTS OBJECT - INTELLIGENT LEAD QUALIFICATION

The Assessment Results object creates sophisticated lead qualification and patient engagement capabilities that transform website interactions into comprehensive patient intelligence. The object enables personalized patient journeys and targeted marketing campaigns based on detailed health interests and qualification criteria.

Object Configuration and Technical Specifications

Core Object Settings: - **Object Name:** Assessment Results - **Object Label (Plural):** Assessment Results - **Object ID:** assessment_results - **Primary Property:** assessment_date - **Secondary Properties:** patient_id, assessment_type, qualification_score - **Record ID Format:** AR-{number} - **Search Properties:** patient_id, assessment_type, assessment_date

Assessment Management and Lead Qualification Fields

The assessment management fields capture comprehensive patient assessment data while enabling automated lead qualification and personalized patient journey automation. These fields transform website interactions into actionable patient

intelligence while supporting conversion optimization and patient acquisition strategies.

Core Assessment Tracking and Qualification:

The `assessment_date` property serves as the primary identifier while enabling chronological tracking of patient assessment completion and lead qualification workflows. This date/time picker field maintains assessment timestamps while supporting enhanced lead management and patient engagement automation. The property enables date-based automation while supporting comprehensive assessment tracking and lead qualification coordination.

The `patient_id` property creates essential relationships with Contact records while enabling comprehensive patient-specific assessment tracking and lead qualification coordination. This Contact association field maintains one-to-many relationships while supporting comprehensive lead management and patient acquisition optimization. The property enables patient-based workflows while supporting comprehensive assessment coordination and lead management optimization.

The `assessment_type` property categorizes patient assessments while enabling specialized qualification workflows and patient engagement automation. This dropdown field includes options for Weight Loss Quiz, Health Survey, Membership Calculator, Medical Screening, Aesthetic Consultation, and Wellness Assessment that support enhanced lead qualification and patient engagement optimization. The property enables type-based automation while supporting comprehensive assessment coordination and lead qualification optimization.

The `qualification_score` property provides automated lead scoring based on assessment responses while enabling prioritized follow-up and conversion optimization. This calculated number field generates scores from 0-100 while supporting enhanced lead management and sales process optimization. The property enables score-based workflows while supporting comprehensive lead qualification and conversion optimization.

Lead Intelligence and Conversion Optimization Fields

The lead intelligence fields transform assessment data into actionable lead intelligence while enabling automated follow-up workflows and conversion optimization. These fields provide comprehensive lead scoring while supporting personalized patient engagement and sales process optimization.

Assessment Analysis and Conversion Tracking:

The `assessment_completion_percentage` property tracks assessment progress while enabling follow-up automation and conversion optimization. This percentage field monitors completion status while supporting enhanced lead nurturing and patient engagement workflows. The property enables completion-based automation while supporting comprehensive lead nurturing and conversion optimization.

The `health_interest_categories` property captures specific health focus areas from assessments while enabling personalized service recommendations and targeted marketing campaigns. This multi-select dropdown field includes interest categories while supporting enhanced patient segmentation and service delivery optimization. The property enables interest-based workflows while supporting comprehensive patient segmentation and marketing optimization.

The `conversion_probability` property calculates likelihood of service purchase based on assessment responses while enabling prioritized sales efforts and resource allocation. This calculated percentage field generates conversion probabilities while supporting enhanced sales process optimization and lead management. The property enables probability-based automation while supporting comprehensive sales optimization and lead coordination.

The `recommended_services` property identifies appropriate service recommendations based on assessment results while enabling personalized patient communication and conversion optimization. This multi-select dropdown field includes service recommendations while supporting enhanced patient engagement and sales process coordination. The property enables recommendation-based workflows while supporting comprehensive patient engagement and conversion optimization.

IMPLEMENTATION ROADMAP AND TECHNICAL SPECIFICATIONS

The implementation roadmap provides comprehensive guidance for systematic deployment of all custom objects while ensuring optimal performance, data integrity, and clinical workflow optimization. The roadmap includes detailed technical specifications, validation requirements, and integration protocols that ensure successful implementation and ongoing operational excellence.

Phase 1 Implementation - Core Clinical Objects (Week 2-3)

The Phase 1 implementation establishes essential clinical data management capabilities while providing immediate health tracking and patient engagement automation. This phase includes Lab Results, Measurement History, and Health Scores objects that enable comprehensive clinical data management and patient engagement optimization.

Lab Results Object Implementation Priority

The Lab Results object implementation provides immediate clinical data management capabilities while enabling provider workflow optimization and patient communication automation. The implementation includes 25 essential fields that support comprehensive laboratory management and clinical coordination.

Critical Implementation Fields (15 fields): - Core identification and tracking fields - Laboratory panel management fields - Essential biomarker tracking fields - Basic clinical decision support fields - Provider coordination and communication fields

Enhanced Functionality Fields (10 fields): - Advanced biomarker tracking capabilities - Comprehensive clinical documentation fields - Patient communication automation fields - Quality assurance and tracking fields - Integration coordination fields

Measurement History Object Implementation Priority

The Measurement History object implementation enables comprehensive biomarker tracking while supporting health optimization protocols and patient engagement automation. The implementation includes 20 essential fields that support comprehensive health monitoring and clinical decision support.

Health Scores Object Implementation Priority

The Health Scores object implementation provides sophisticated patient engagement automation while enabling clinical outcome measurement and patient motivation enhancement. The implementation includes 15 essential fields that support comprehensive health scoring and patient engagement optimization.

Phase 2 Implementation - Care Coordination Objects (Week 3-4)

The Phase 2 implementation adds comprehensive care coordination capabilities while enabling advanced clinical workflow management and patient care optimization. This phase includes Treatment Plans, Medication Management, and Telehealth Sessions objects that enable sophisticated clinical coordination and care delivery excellence.

Phase 3 Implementation - Operational Objects (Week 4-5)

The Phase 3 implementation completes operational management capabilities while enabling comprehensive business process automation and resource optimization. This phase includes Staff Management, Package Credits, Assessment Results, and Clinical Triggers objects that enable complete operational excellence and business intelligence.

Technical Implementation Specifications

The technical implementation specifications ensure optimal system performance while supporting complex healthcare workflows and data management requirements. The specifications include detailed requirements for object creation, field validation, automation workflows, and integration coordination that ensure successful implementation and ongoing optimization.

Object Creation Standards and Validation

All custom objects must follow healthcare-specific configuration standards that ensure optimal performance while supporting clinical workflows and regulatory compliance. The standards include detailed specifications for object settings, field configurations, and relationship establishment that maintain data integrity and system performance.

Automation Workflow Requirements and Clinical Safety

All automation workflows must include healthcare-appropriate triggers and safety protocols that support clinical workflows while maintaining patient safety and regulatory compliance. The workflows must include comprehensive error handling and clinical oversight that ensure reliable operation and patient safety optimization.

Integration Coordination and Data Synchronization

All integrations must maintain real-time synchronization while supporting comprehensive data integrity and system performance optimization. The integration protocols include detailed specifications for data mapping, conflict resolution, and performance optimization that ensure seamless coordination across ENNU's technology ecosystem.

This comprehensive custom objects implementation guide provides the technical foundation for creating the most sophisticated healthcare CRM capabilities ever designed, enabling unprecedented patient care delivery, clinical decision support, and operational excellence while maintaining the highest standards of clinical quality and regulatory compliance.