

Project HealthConnect 360

Phase 4: Process Automation

A Unified Patient Relationship & Clinic Management System

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Phase 4: Process Automation

This phase focuses on automating key business processes in the clinic using Salesforce Flows, Validation Rules, Email Alerts, Tasks, and Field Updates to improve efficiency and reduce manual work.

Validation Rules

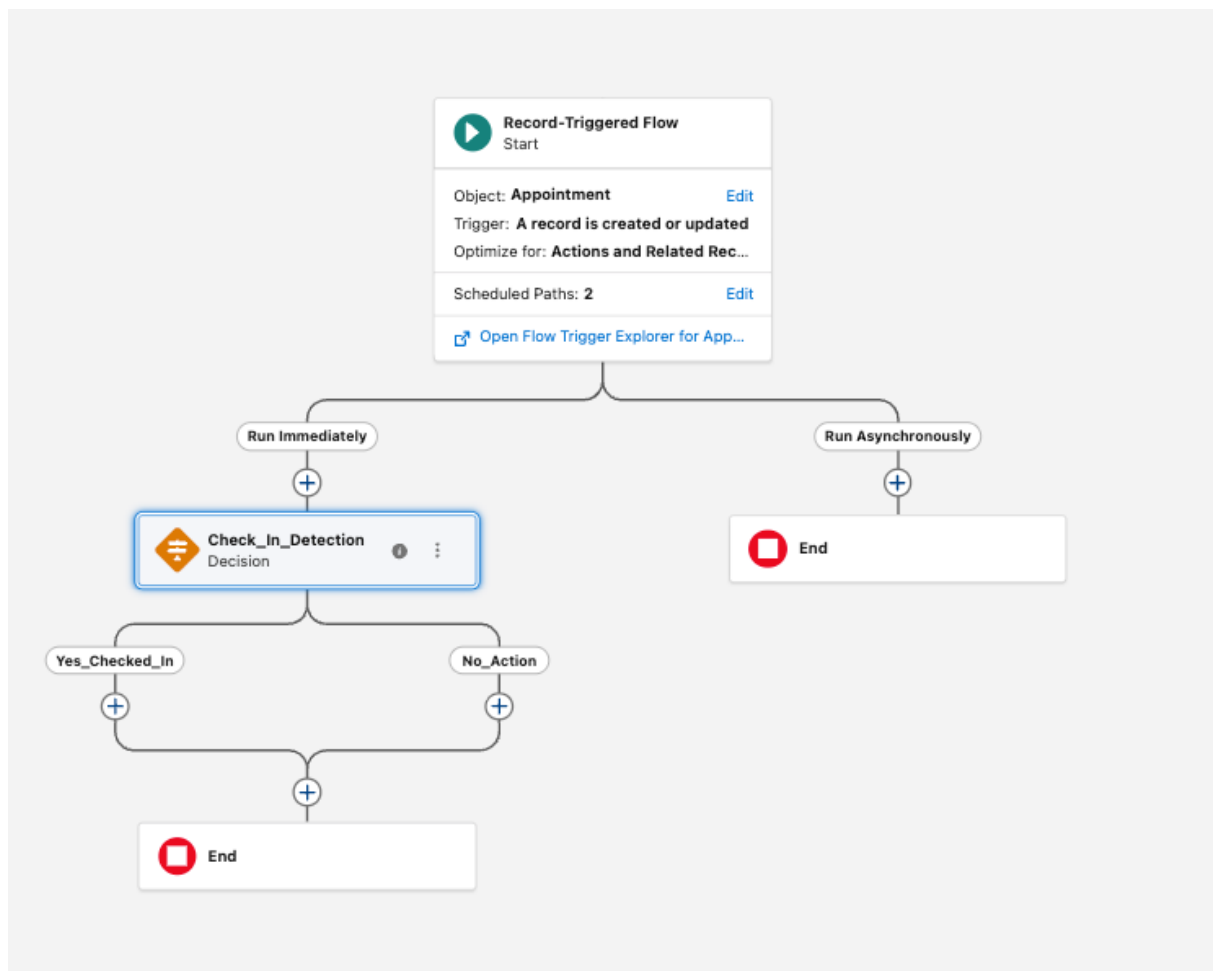
We implemented validation rules to ensure data integrity. A key validation rule requires entering an Appointment Time before the record can be saved. This prevents incomplete appointment scheduling, reducing errors and missed appointments.

The screenshot displays the 'New Appointment: Follow-up' form in a Salesforce interface. The form includes fields for Appointment ID, Patient (Amit Sharma), Owner (Harsh Raj Mishra), Record Type (Follow-up), and Appointment Time (Date and Time). A red error message is visible: 'We hit a snag. Review the following fields: Appointment Time'. Below the error message, a red box highlights the 'Appointment Time' section, which contains the Date and Time input fields. The Date field is empty, and the Time field is also empty. The Status is set to 'Scheduled'. The form has buttons for 'Cancel', 'Save & New', and 'Save'. The background shows the Salesforce navigation bar and a list of recently viewed appointments.

Record-Triggered Flow

Created a record-triggered flow on the Appointment object to automate appointment lifecycle events. The flow uses a decision node to detect when an appointment status is "Checked In."

- If Checked In, the flow updates the status to "Confirmed" automatically (Field Update).
- Asynchronously, the flow sends an email confirmation to the patient using our custom email alert.
- It also creates a follow-up task for clinic staff to ensure timely patient engagement and next steps.



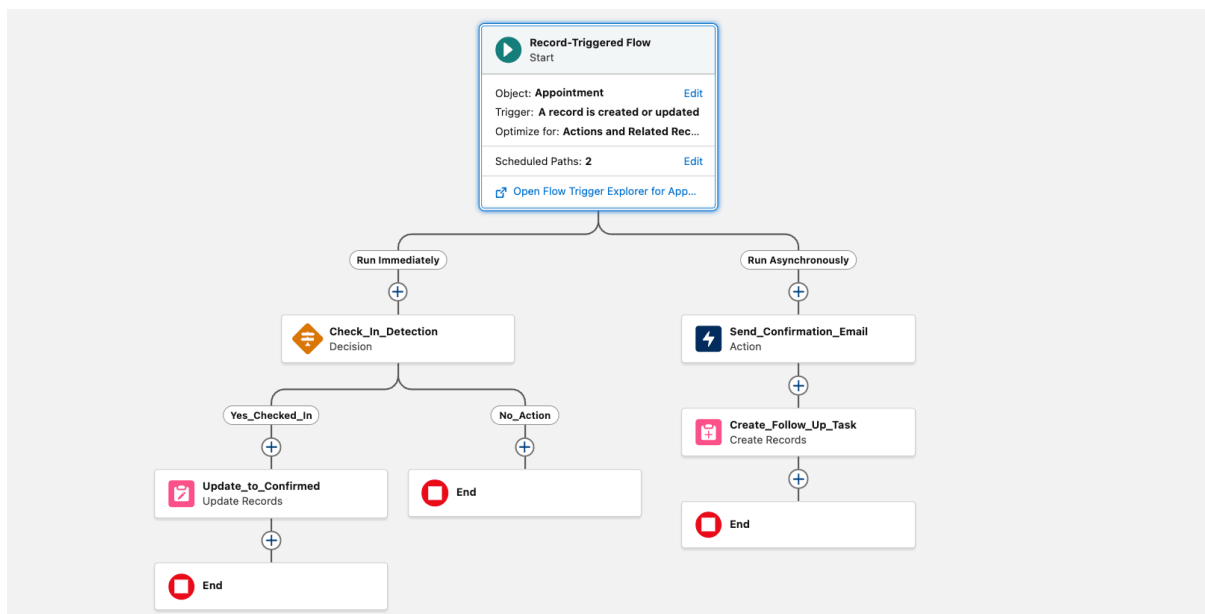
Email Alerts

An email alert was configured with a custom Appointment Confirmation email template. This alert triggers when an appointment is checked in to notify patients of their confirmed appointment status.

Email Alert Detail	
Description	Sends confirmation email to patients when checked in.
Unique Name	Appointment_Confirmation_Alert
From Email Address	Current User's email address
Recipients	User: Harsh Raj Mishra User: Test Patient harshrajmishra.hrm@gmail.com
Additional Emails	harshrajmishra.hrm@gmail.com
Created By	Harsh Raj Mishra, 9/24/2025, 7:39 AM
Email Template	Appointment_Confirmation_Template
Object	Appointment
Modified By	Harsh Raj Mishra, 9/24/2025, 7:39 AM

Tasks Automation

The flow creates follow-up tasks automatically upon patient check-in. These tasks are assigned to the appropriate clinic staff to follow up on patient care, improving patient experience and staff accountability.



Field Updates

We automated key field updates in the flow, such as setting the appointment status to

"Confirmed" after check-in. This reduces manual record updates and ensures real-time accuracy of appointment status.

Current Status and Next Steps

- All flow elements are created and tested. Screenshots document successful configuration.
- Flow activation is pending; once active, automation will run fully.
- Verification and testing will continue to ensure all steps seamlessly automate patient appointment management.

This completes Phase 4 Process Automation for HealthConnect 360. This phase lays a foundation for improved clinic workflows, supporting the clinic staff and enhancing patient communication.