Project HealthConnect 360

Phase 4: Process Automation

A Unified Patient Relationship & Clinic Management System

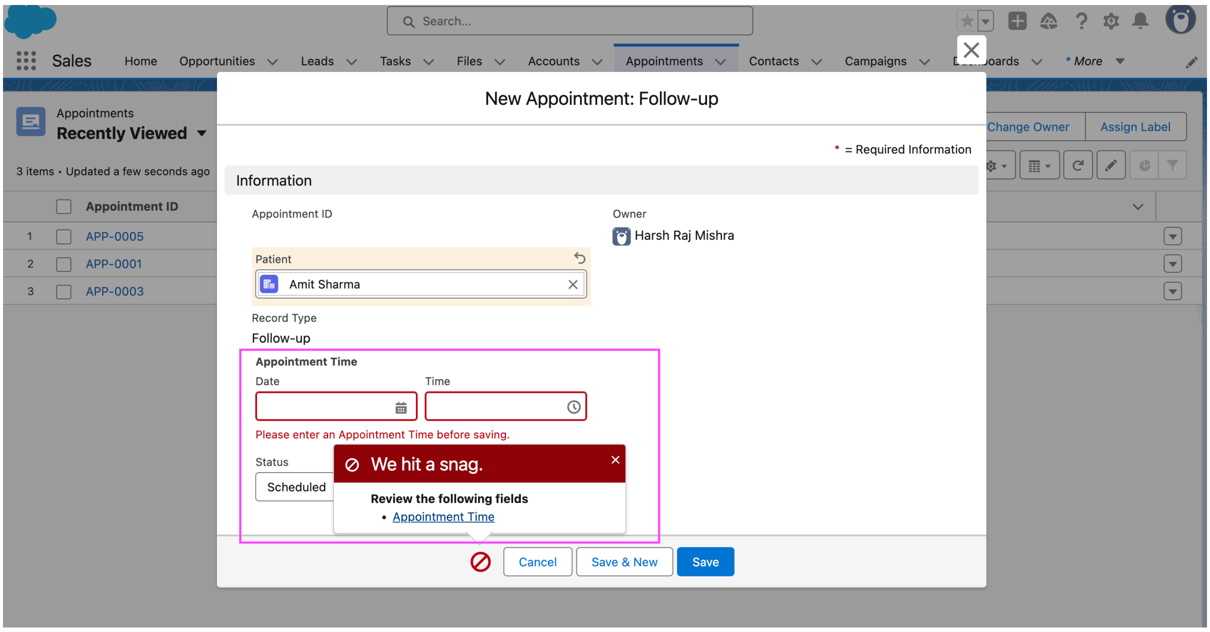
Prepared by: Harsh Raj Mishra

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

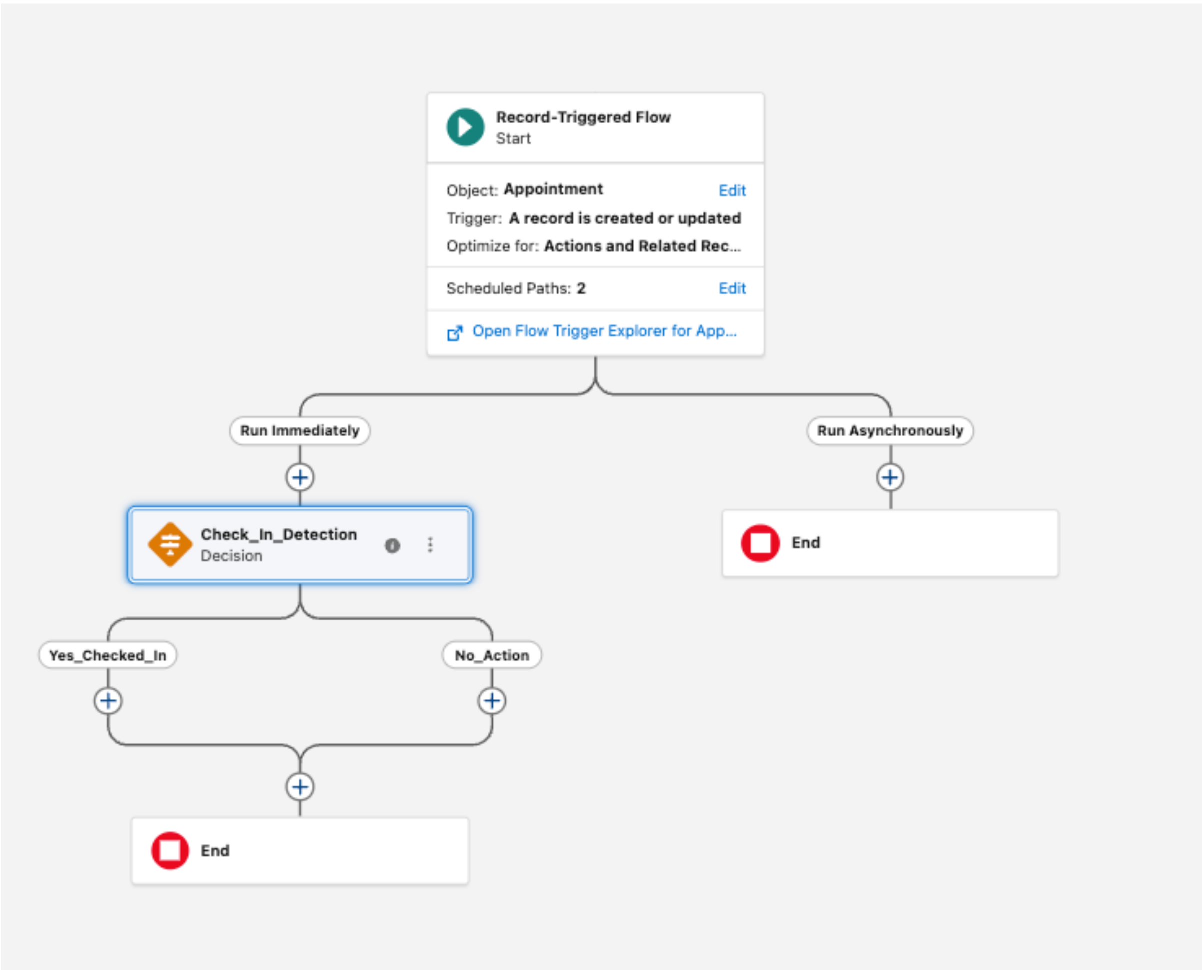
We implemented validation rules to ensure data integrity. A key validation rule requires entering an Appointment Time before the record can be saved. This prevents incomplete appointment scheduling, reducing errors and missed appointments.



Record-Triggered Flow

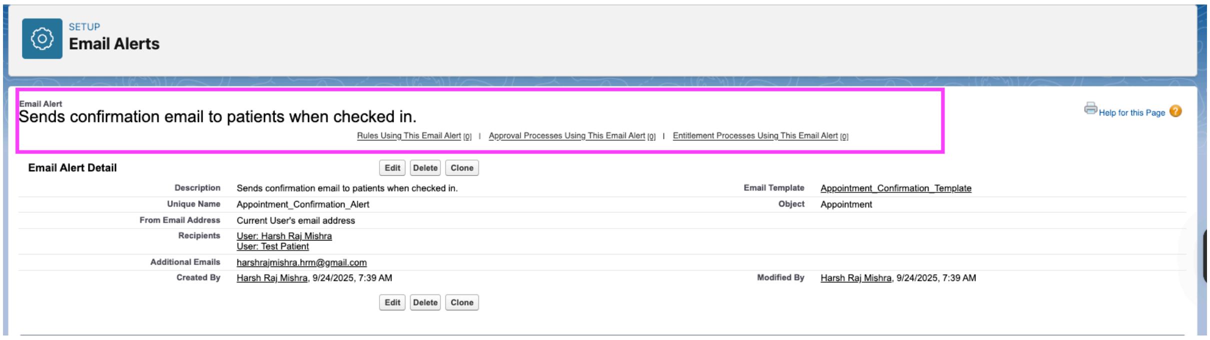
Created a record-triggered flow on the Appointment object to automate appointment lifecycle events. The flow uses a decision node to detect when an appointment status is "Checked In."

- 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.



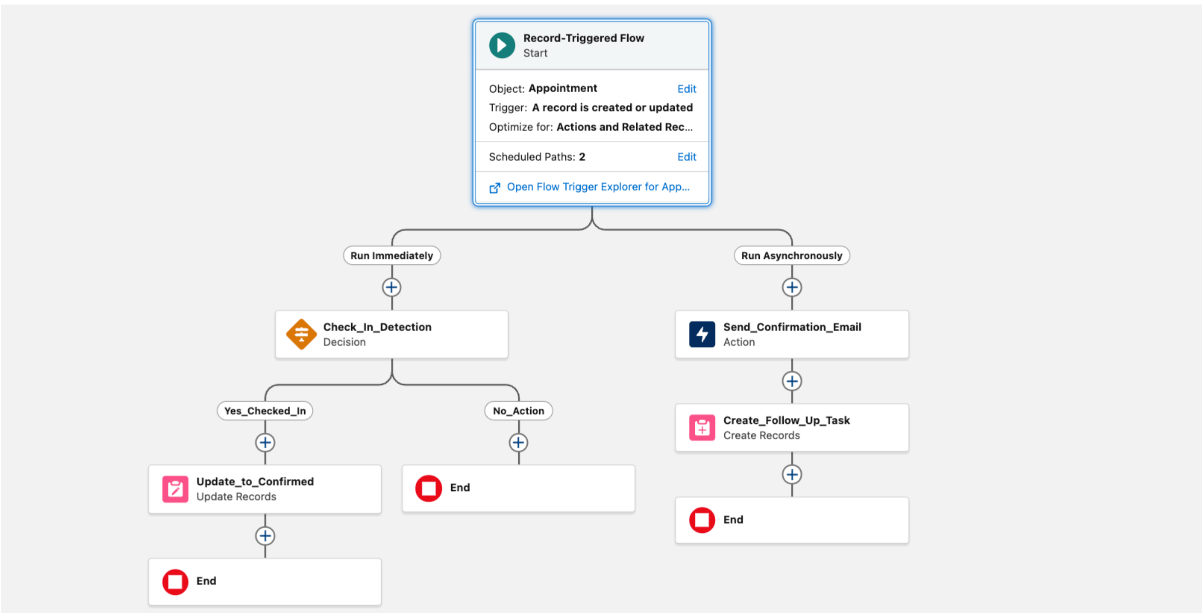
Email Alerts

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.



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.