**Medi Book Hub – 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

1. **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

1. **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

1. **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.AppExchange 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.