

# Health Care Management

## Use Case

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## Use Case Introduction

This Use Case has been developed for XYZ healthcare service for a scalable, secure, connected and interoperable platform solution to efficiently manage their revenue-cycle operations and to manage their healthcare service and related information of related entities. XYZ healthcare wants to use the results to identify deficiencies in clinical documentation and automatically recommend measures to eliminate them.

## Explanation Of Use Case Contents

**Name Of The Use Case:** Salesforce health cloud implementation for XYZ healthcare.

**Description:** The implementation gave the healthcare organization pipeline filled with the right patients at the right time and also gives them the feasibility of contracting and coordinating with patients.

**Deliverables:** High-quality data to act upon. Full patient profile and categorization 360° view of each patient's communication, w cases and omnichannel. Actionable overviews of patient enquiries (cases), prioritised by medical urgency. Empowering both First-time and Right-person Enquiry

Management. Greater operational efficiency for the patient support centre and in-clinic staff.

## Use Case Implementation

Fundamental breakdown in healthcare is coordination collaboration and communication. We connect patients and providers dealing with variety of technologies and having to look at various places for different pieces of information around a member experiencing we bring out together this community of caregivers so there is complete fluidity of information sharing the integration of HER information claim information credit information environmental information is all relevant to better patient outcomes it equips our associates with a 360-degree view of what's going on with that member. We make sure the patient is informed and engaged and provide an agile platform for regulatory compliances. Today's patients expect a faster, more personalized healthcare experience than ever before. With the consolidation of healthcare systems, new reimbursement models, and narrowing operating margins, we ensure not only the health of the patient but also the health of the business.

### 1. 360° VIEW OF PATIENT COMMUNICATION

- Service Cloud provides a 360° view of each patient's contact with everyone in the clinic, over the history of that patient.
- Surveys, linked to Person Accounts, a.o. providing insights for individual service optimisation.

- Omni-channel: Patients connect through any channel they choose: real-time Facebook or web chat conversations via LiveAgent & LiveMessage, or 1- and 2-way SMS text – all recorded. Besides Email-to-case and phone call logs.
- In 1 screen: Patients, appointments, cases and solutions.

## 2. ACTIONABLE CASE OVERVIEWS

- Measurable, Actionable Overviews: all customer questions; sorted cases by the clinic, by SLA, and how far they are in being resolved. All in 1 view.
- Insight into Actual Cases Management: easy to see exactly who is to handle and close which case.
- Easy to Manage Cases and Tasks: (re-)assign them, and so manage response time and everyone's workload.

## 3. FIRST TIME + RIGHT PERSON ENQUIRY MANAGEMENT

Best of both worlds. The client requested, we delivered a clever solution for low-cost Salesforce platform licenses, by extending Salesforce case- with task- functionality, and

- To improve First Time Resolution %: Service Cloud provides a central point of contact for patient enquiries.
- Enable Right-Person Resolution: case forwarding and sophisticated task setting capabilities enable cases and tasks to be handled timely by the most suitable person in the clinic.

## 4. GREATER EFFICIENCY

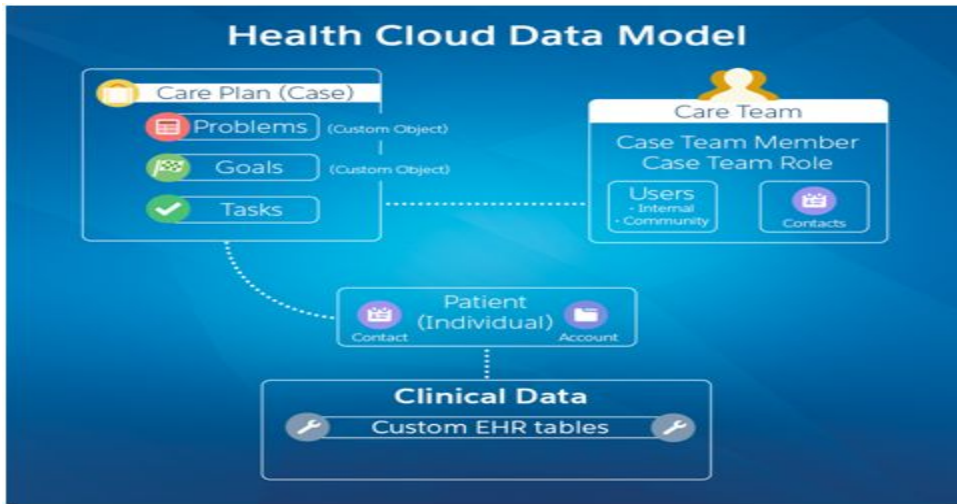
For the patient support centre and clinic staff:

- Prioritised & Reduced Case Handling Time. Service Cloud ensures patients are helped as fast, effective & efficient as possible.
- CloudAnalysts designed and delivered new business processes and Service Cloud configuration, with
  - Refined max response time by query type.
  - Flags for cases nearing response time SLA.
  - Formal complaints addressed earlier.
- No More Work Duplication or Oversight caused by Outlook distribution lists. Service Cloud assigns cases to individuals and queues.
- Triggered Emails to Patients confirm receipt of their inquiry, clinic's expected response time and case resolution. Patients feel heard and won't call 2-3 times for the same issue.

## Payer Features

- Care request creation
- Utilisation management
- Member care management
- Member engagement

## Health Care Data Model



Timeline

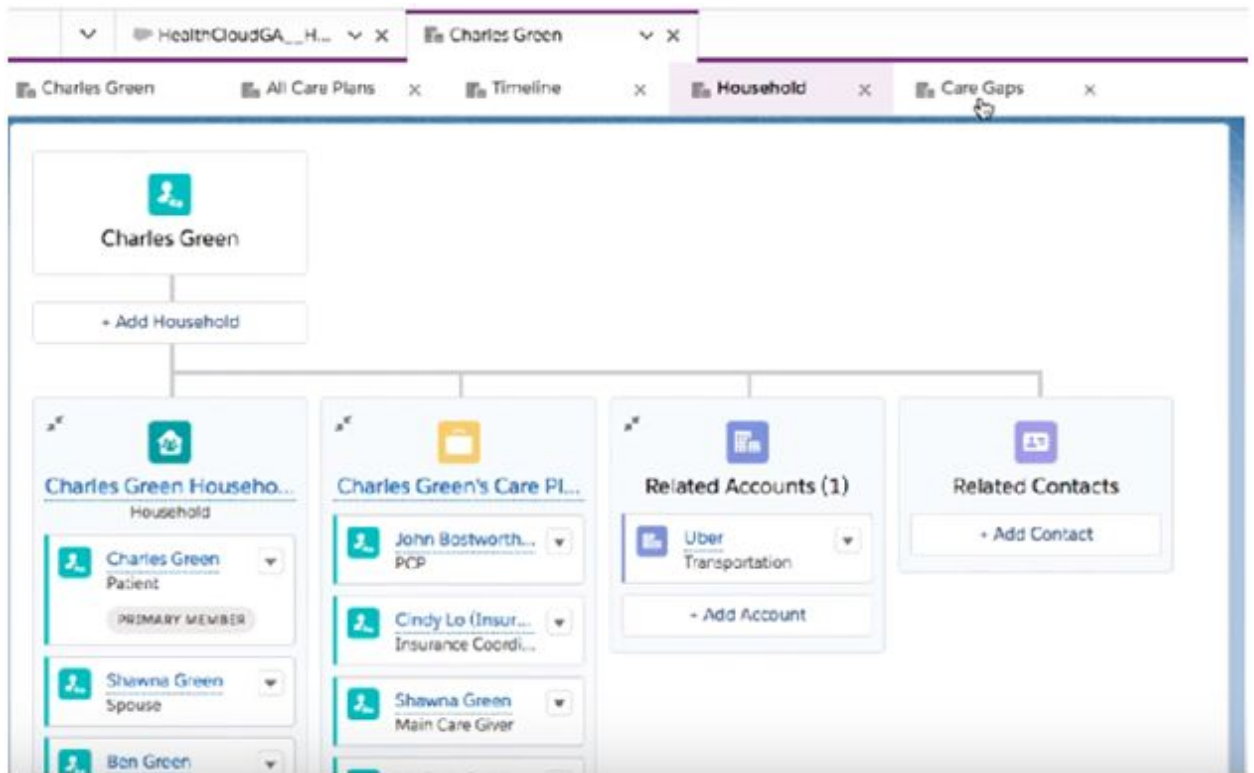
### New Timeline View Configuration

**Information**

* Timeline View Configuration Name <input type="text" value="Therapy Sessions"/>	Owner Richard Bloor
* Object Category <input type="text" value="Therapy"/>	Language <input type="text" value="English (United States)"/>
* Friendly Name <input type="text" value="Therapy sessions"/>	Show On Load <input type="checkbox"/>
* Object Name <input type="text" value="Therapy_Session__c"/>	Configuration Target ⓘ <input type="text" value="Health Cloud Console App Timeline For Health Cloud Empower"/>
* Detail Field <input type="text" value="Therapy_Type__c"/>	Filter Criterion <input type="text" value="Search Filter Criteria..."/>
* Position Field <input type="text" value="Session_Date__c"/>	Hover Field Name ⓘ <input type="text" value="Duration__c"/>
* Graphical Icon <input type="text" value="Therapy_timeline_logo"/>	
* Sort Order <input type="text" value="3"/>	
Active <input checked="" type="checkbox"/>	
Patient Account Lookup <input type="text" value="Patient__c"/>	

Household

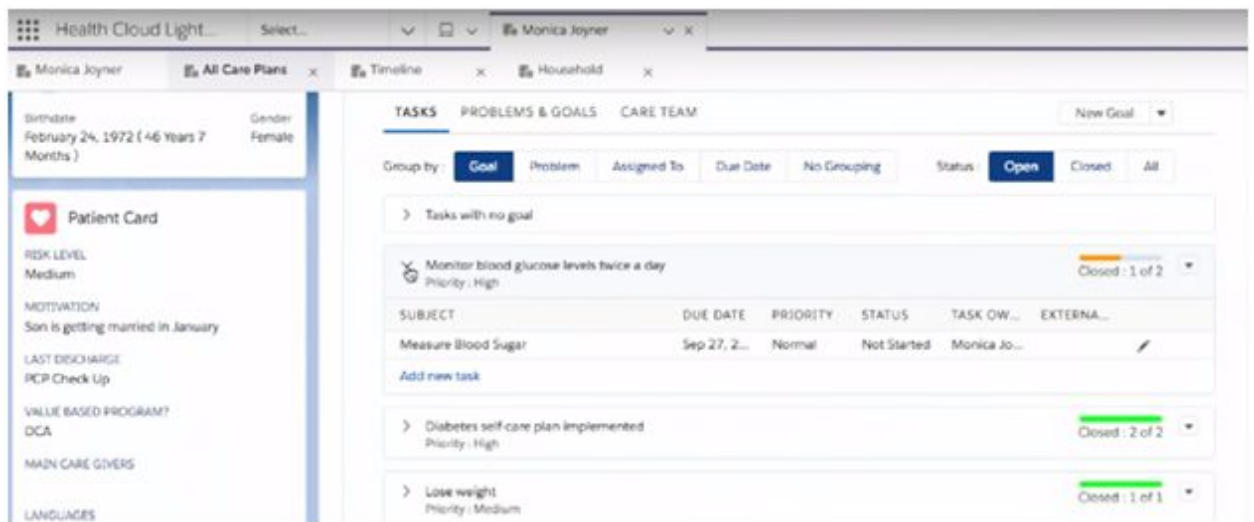




The screenshot shows the 'Household' tab for Charles Green. It displays a family tree structure with the following details:

- Charles Green Household:**
  - Charles Green (Patient, PRIMARY MEMBER)
  - Shawna Green (Spouse)
  - Bon Green
- Charles Green's Care Plans:**
  - John Bostworth... (PCP)
  - Cindy Lo (Insurance Coord...)
  - Shawna Green (Main Care Giver)
- Related Accounts (1):**
  - Uber Transportation
- Related Contacts:**
  - + Add Contact

## Patient Card



The screenshot shows the 'Patient Card' for Monica Joyner. The card includes demographic information and a list of tasks.

**Demographic Information:**

- Birthdate: February 24, 1972 (46 Years 7 Months)
- Gender: Female

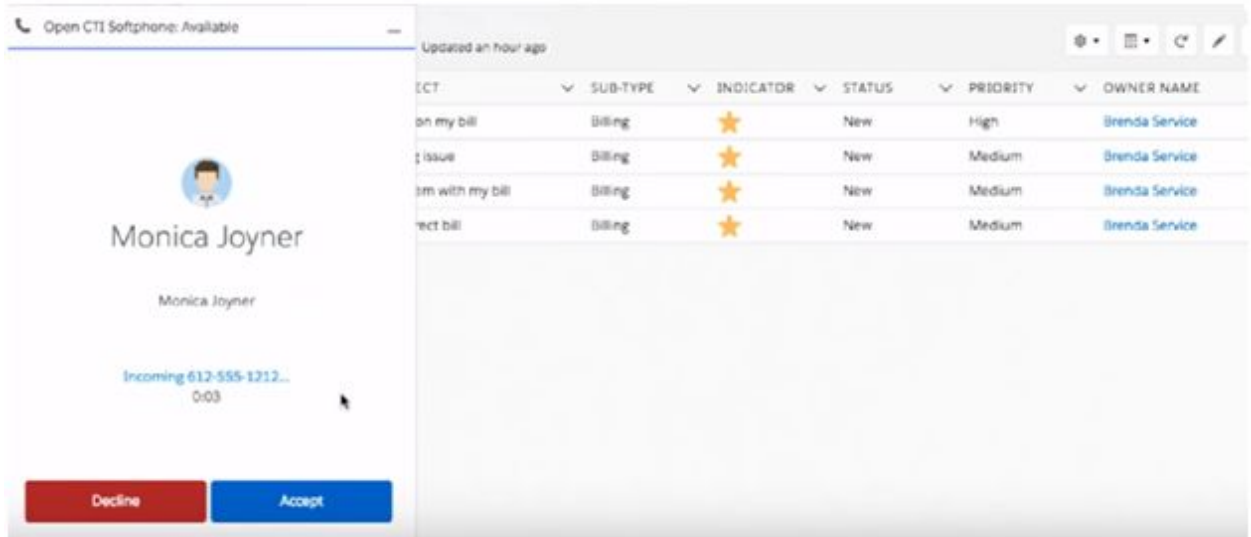
**Other Information:**

- RISK LEVEL:** Medium
- MOTIVATION:** Son is getting married in January
- LAST DISCHARGE:** PCP Check Up
- VALUE BASED PROGRAM?:** DCA
- MAIN CARE GIVERS:**
- LANGUAGES:**

**Tasks List:**

SUBJECT	DUE DATE	PRIORITY	STATUS	TASK OW...	EXTERNA...
Monitor blood glucose levels twice a day		Priority: High	Closed	1 of 2	
Measure Blood Sugar	Sep 27, 2...	Normal	Not Started	Monica Jo...	
Diabetes self-care plan implemented		Priority: High	Closed	2 of 2	
Lose weight		Priority: Medium	Closed	1 of 1	

## Lightning Dialer



Open CTI Softphone: Available

Updated an hour ago

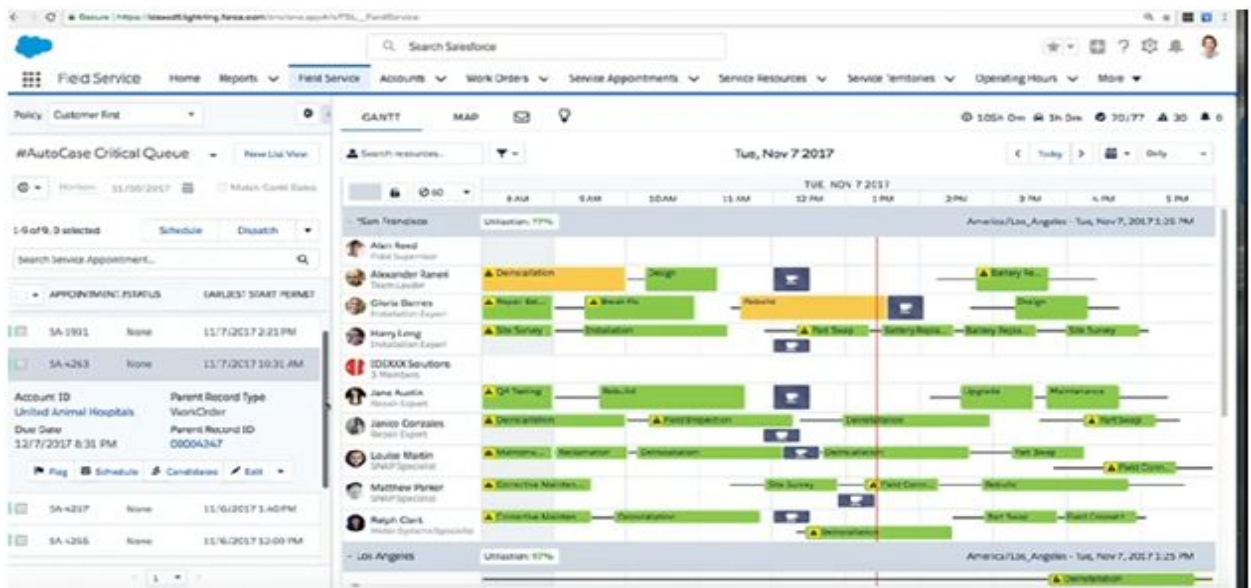
Monica Joyner  
Monica Joyner

Incoming 617-555-1212...  
0:03

Decline Accept

ICT	SUB-TYPE	INDICATOR	STATUS	PRIORITY	OWNER NAME
on my bill	Billing	★	New	High	Brenda Service
issue	Billing	★	New	Medium	Brenda Service
on my bill	Billing	★	New	Medium	Brenda Service
on my bill	Billing	★	New	Medium	Brenda Service

## Field Service Lightning



Field Service Lightning

Search Salesforce

Field Service Accounts Work Orders Service Appointments Service Resources Service Territories Operating Hours More

Policy: Customer First

#AutoCase Critical Queue

1-5 of 9, 9 selected

Search Service Appointment...

APPROXIMATE STATUS EARLIEST START PERMIT

Account ID	Parent Record Type	Work Order
SA-1901	United Animal Hospitals	Parent Record ID: 00004367
SA-263		
SA-237		
SA-265		

Tue, Nov 7 2017

8 AM 9 AM 10 AM 11 AM 12 PM 1 PM 2 PM 3 PM 4 PM 5 PM

San Francisco Utilization: 77%

Los Angeles Utilization: 17%

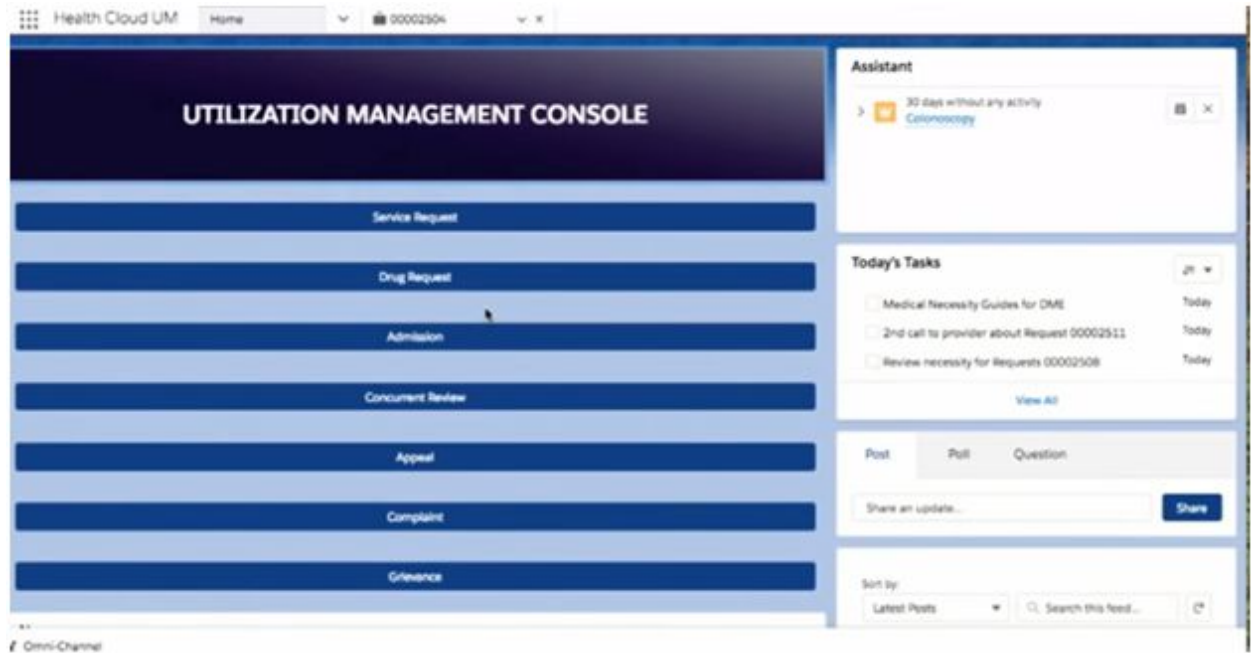
Service Resources:

- Alan Reed (Field Supervisor)
- Alexander Ramel (Technician)
- Clara Barnes (Installation Expert)
- Henry Long (Installation Expert)
- IDXXX Solutions (3 Members)
- Jane Austin (Research Expert)
- James Gonzalez (Senior Expert)
- Luis Martin (SWIFT Specialist)
- Matthew Piner (SWIFT Specialist)
- Ralph Clark (Water Systems Specialist)

Activities include: Design, Delivery, Installation, Site Survey, Calibration, Field Control, and Maintenance.

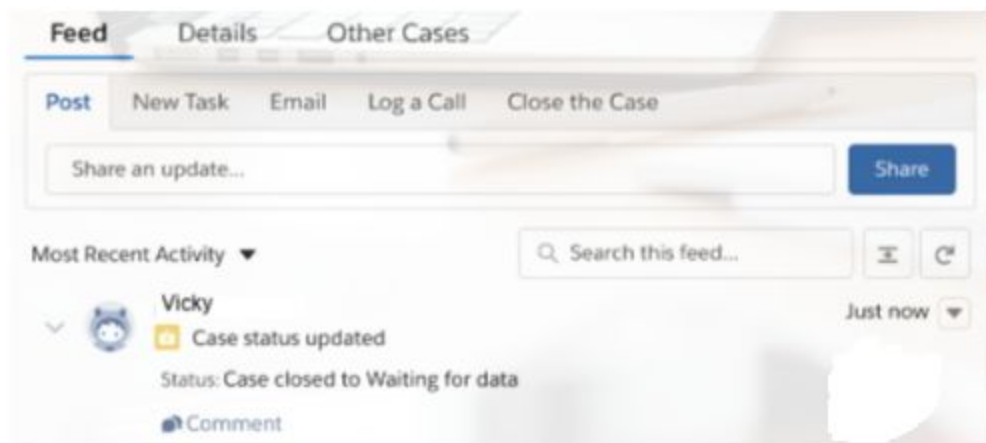


## Utilisation Console



The screenshot shows the 'UTILIZATION MANAGEMENT CONSOLE' interface. The main menu on the left includes: Service Request, Drug Request, Admission, Concurrent Review, Appeal, Complaint, and Grievance. The right sidebar contains an 'Assistant' section with a notification for '30 days without any activity' for 'Colonoscopy'. Below that is a 'Today's Tasks' section with three tasks: 'Medical Necessity Guides for DME', '2nd call to provider about Request 00002511', and 'Review necessity for Requests 00002508'. At the bottom of the sidebar, there is a 'Post' section with a 'Share an update...' field and a 'Share' button, and a 'Sort by' dropdown set to 'Latest Posts' with a search field for the feed.

## Case



The screenshot shows the 'Case' management interface. At the top, there are tabs for 'Feed', 'Details', and 'Other Cases'. Below the tabs is a navigation bar with buttons for 'Post', 'New Task', 'Email', 'Log a Call', and 'Close the Case'. A 'Share an update...' field with a 'Share' button is present. Below this is a 'Most Recent Activity' section with a search field 'Search this feed...'. The activity feed shows a post from 'Vicky' with a status update: 'Case status updated' and 'Status: Case closed to Waiting for data'. There is a 'Just now' timestamp and a 'Comment' button.

Clinic Mgt Cases

Cases  
**All Open Cases - Urgent**

Sorted by Time to solve the Case-Instant • Filtered by all cases - Status, SLA • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	↑	CASE OWNER	PATIE	DATE/TIME O	SLA	CASE N	CONTA	STATUS
<input type="checkbox"/>	🚩	jlee	Liberty...	18/05/2018 ...	Urgent(3 hours)	00001034	TestDrive ...	New
<input type="checkbox"/>	🚩	emano	Joann ...	18/05/2018 ...	Urgent(3 hours)	00001036	DannyTes...	New
<input type="checkbox"/>	🚩	rtalw	Joann ...	24/05/2018 ...	Urgent(3 hours)	00001080	Test acco...	Fully_resolved
<input type="checkbox"/>	🚩	vadep	Liberty...	19/06/2018 ...	Urgent(3 hours)	00001135	Mom2 To...	Open

## Sales Console

Sales Console Opportunities Engagement Mana...

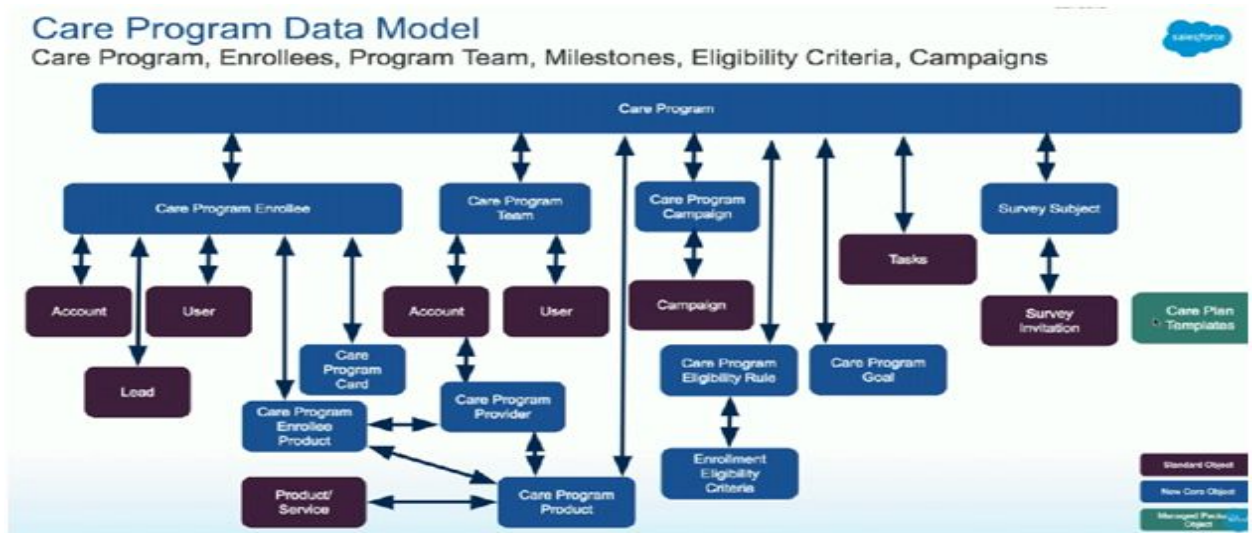
Opportunities \*AUTO REPLENISH

8 Items - Sorted by Amount - Updated an hour ago

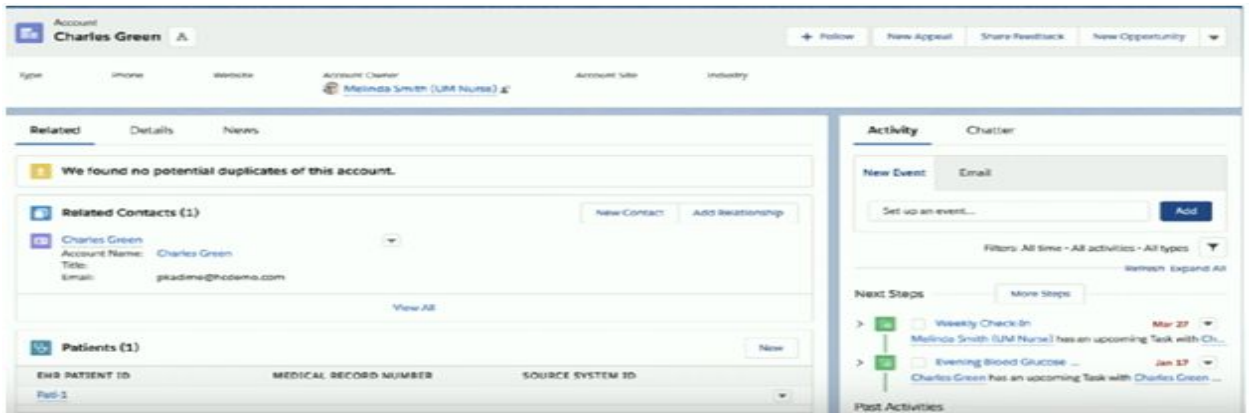
Qualification (1)	Discovery (3)	Proposal/Quote (2)	Negotiation (2)
\$70,000	\$298,499	\$68,000	\$102,700
#AUTOREORDER 200 SNAP Test Kits - United Animal Hospitals \$70,000.00 United Animal Hospitals Qualification	Delta Animal Hospital - New Business... Delta Animal Hospital Discovery North Animal Hospitals - Add-On Bu... \$61,550.00 North Animal Hospitals Discovery United Hospital - Add-On Business - ... \$128,249.00 United Animal Hospitals Discovery	Delta Animal Hospital - Services - 14K \$14,000.00 Delta Animal Hospital Proposal/Quote San Francisco Pet Hospital - Add-On ... \$54,000.00 San Francisco Pet Hospital Proposal/Quote	Delta Animal Hospital - New Busines... \$25,000.00 Delta Animal Hospital Negotiation VCA Animal Hospitals - Services - 76K \$77,700.00 VCA Animal Hospitals Negotiation

Phone Notes History

## Care Program Data Model

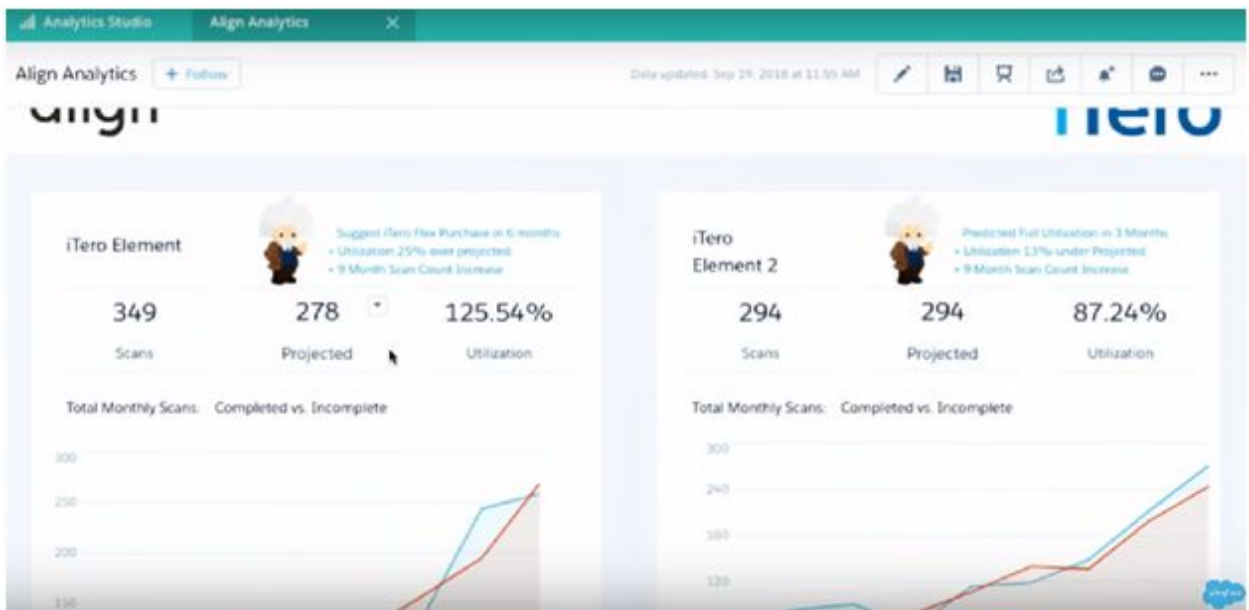


## Lightning Flow For Contact Center

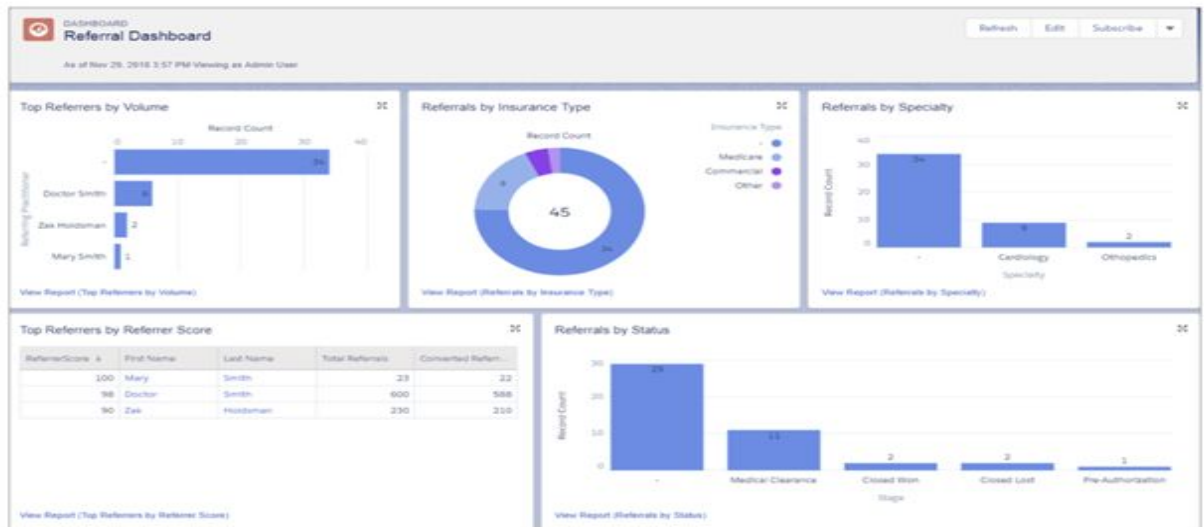


The screenshot shows a CRM interface for an account named "Charles Green". At the top, there are navigation options: "Follow", "New Appeal", "Share Feedback", and "New Opportunity". Below this, there are tabs for "Related", "Details", and "News". A message states: "We found no potential duplicates of this account." Under "Related Contacts (1)", there is a card for Charles Green with fields for Account Name, Title, and Email (pkadine@hdsama.com). Below this is a "Patients (1)" section with a table header: "EMR PATIENT ID", "MEDICAL RECORD NUMBER", and "SOURCE SYSTEM ID". On the right side, there is an "Activity" section with a "New Event" form (Email) and a "Next Steps" section with a list of tasks like "Weekly Check-In" and "Evening Blood Glucose".

## Analytics Studio



## Referral Dashboards



## Health Community

Welcome to the [REDACTED] Health Community!

Ask a question ...

Select a request type below to submit member data for authorization.

Service Request

Drug Request

Admission

**UTILIZATION MANAGEMENT**

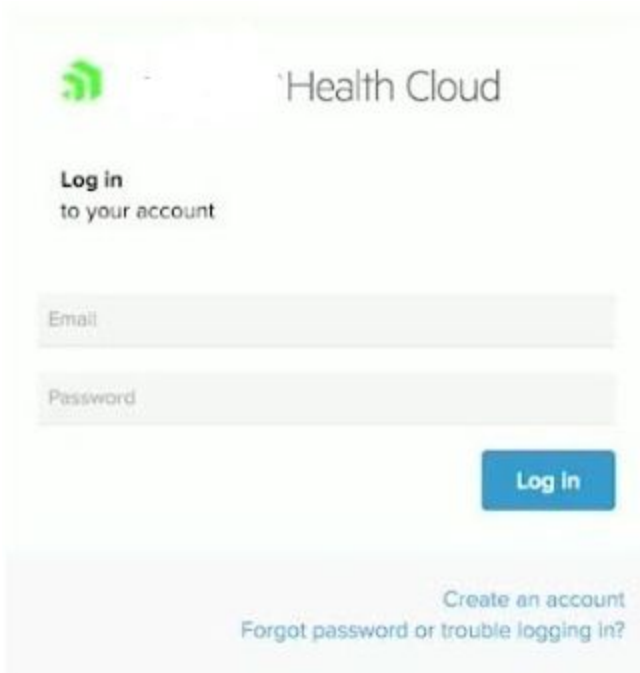
Service Request for Cardiac Imaging  
High - New - 00002504


Concurrent Review of Inpatient Admission  
Medium - New - 00002508

View All

## Custom Portal





 Health Cloud

**Log in**  
to your account

Email

Password

[Log in](#)

[Create an account](#)  
[Forgot password or trouble logging in?](#)