

Welcome to

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Dentsu Aegis Network



FINANCIALFORCE



wefox

BLACKBIRD



Better Living Through Salesforce

Health Cloud + Field Service Lightning = Home Healthcare

Chris Edwards
Mavens

Ben Duffy
Mavens

Introductions

Let's get the slides out of the way...

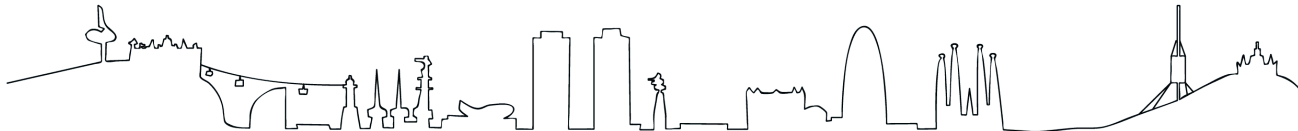


Mavens and Salesforce



Cloud software solutions that are connecting people to cures.

We design, build, and implement software that transforms the way organizations engage with healthcare professionals, patients, and consumers.



Why Home Healthcare?

Different

This is not your usual Salesforce use case. No sales or marketing; just patient support using HC and FSL.

Impactful

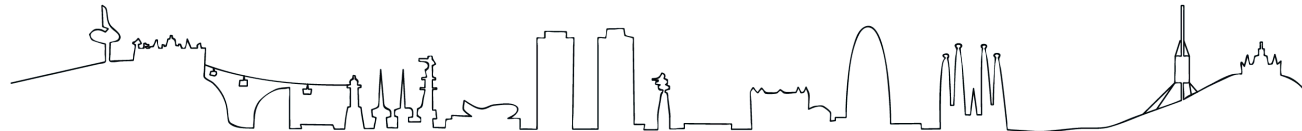
Patient support programs make a real difference to patients' lives. Education and adherence are key.

Timely

Healthcare strives for 'patient centricity' and is moving towards outcomes-based reimbursement.

Personal

We're all technologists, but we're patients too. We all get sick. We all have family members who need support.



Meet the Cast!



Care Coordinator

Adam Advisor



Field Nurses

Nicola Nurse
Sally Specialist



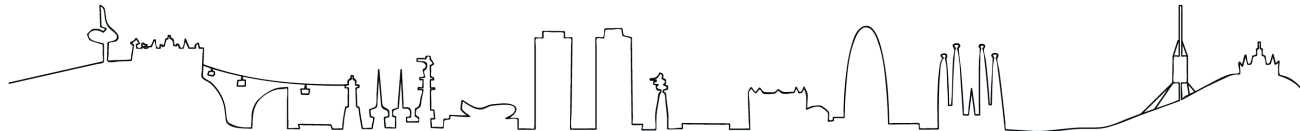
Doctor

Dr Amy Avery



Patient

[Confidential]



Demo

Lights, camera, action!



Inside an HCP's office

Scene 1



Inside Verteo's office

Scene 2



Fast forward to Monday morning

Scene 3



Out on the road with the nurse

Scene 4



Inside the changing room, Camp Nou

Scene 5



Summary

That's a wrap!



What have we learned?

Health Cloud

- HCP community
- Patient conversion
- Care console UI
 - Timeline
 - Care team
 - Care plan

Field Service Lightning

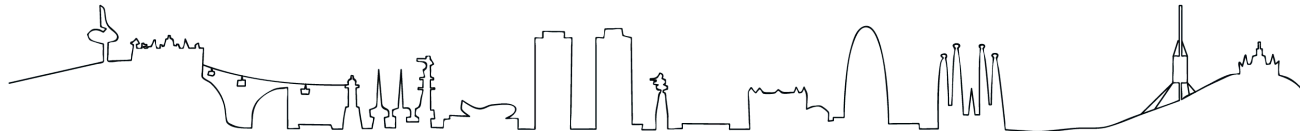
- Book appointment
- Dispatch console
- Mobile app
 - Mapping
 - Signature
 - Offline

HC + FSL

- Easy "integration"
- Both Service Cloud
- Lightning Console

= Home Healthcare

Patient management + field nursing = the care that patients need, in the place they most want to be



Q & A



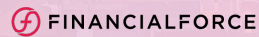
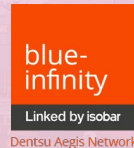
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Barcelona 2018

Appendix

If we need this section, we're in trouble



HCP Community

VERTEO BIOPHARMA

Search... Search

AMY AVE...

REFER A PATIENT

WELCOME!

Hello and welcome to the HCP Community for Verteco Home Healthcare!

FEATURED DISCUSSIONS MY FEED

ADHERENCE **CHOLECAP** **HOME HEALTH**

NEWS FLASH!

New home visit service launched across all Verteco products! Why not refer a patient today and give them the benefit of in-home care?

Thanks for visiting our HCP community! As well as letting us know of any new referrals you have, feel free to stick around to browse discussions, ask questions and read our documentation.

MY REFERRALS BY PROGRAMME AND STAGE

Programme	Record Count
Cholecap Clinic Support	~5
Cholecap Home Health	~45

MY REFERRALS BY DAY

VERTEO BIOPHARMA

AMY AVE...

New External Referral

REFER A PATIENT

External Referrals All

50+ Items • Sorted by

EXT... ↑

1 CP-0
2 CP-1
3 CP-10
4 CP-11
5 CP-12
6 CP-13
7 CP-14
8 CP-15
9 CP-16
10 CP-17
11 CP-18
12 CP-19

Salutation: Mr.

Medical Record Number: MRN-3619819

First Name: Pulga

Birth Date: 6/24/1987

Last Name: Atomica

Gender: Male

Phone: +34 93 496 36 00

Mobile: +34 93 496 36 00

Email: pulga@fcbarcelona.cat

Address

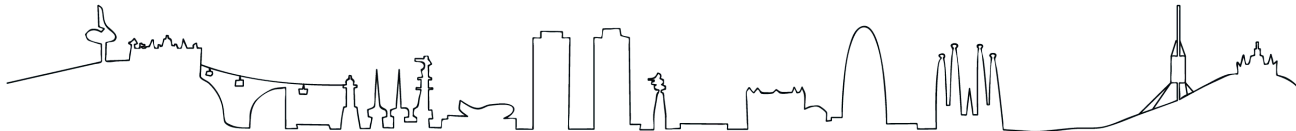
Address Line 1: Camp Nou, C. d'Aristides Maillol, 12

City: Barcelona

State/County: CT

Cancel Save & New Save

Cholecap Home Health On Hold Craig Candidate



Health Cloud - Today Page

The screenshot shows the Salesforce Health Cloud interface. At the top, there is a search bar for Salesforce and navigation icons. Below the navigation bar, the user's profile is visible as 'Verteo Field Nursing' with a 'Referrals' tab selected. The main content area is titled 'April 26, 2018' and features three summary cards: '7 PATIENTS I'M RESPONSIBLE FOR', '0 NEW PATIENTS LAST 7 DAYS', and '0 of 0 TASKS COMPLETED TODAY'. Below these cards are three sections for task management: 'Open Tasks', 'OVERDUE (0)', and 'DUE TODAY (0)', all showing 'No patients with overdue tasks.' and 'No patients with tasks due today.' The right-hand side of the page is a 'What's Happening' feed with a 'Post' button and a text input field. The feed contains three activity items, each with a profile picture and a message: 'SA-0264 - Adam Advisor changed Status from Dispatched to Scheduled.', 'SA-0263 - Adam Advisor changed Status from Dispatched to Scheduled.', and 'SA-0240 - Adam Advisor changed Status from Dispatched to Scheduled.' Each item includes 'Comment' and 'Like' options and a timestamp of 'Two days ago at 12:54 PM'.



Health Cloud - Patient Conversion

Verteo Field Nursing Referrals

Search Referrals and more...

Referrals All Open Patient Referrals

New Convert to Patient

1 item selected

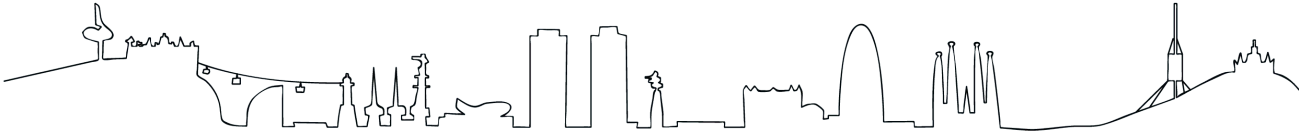
<input checked="" type="checkbox"/>	NAME ↑	MEDICAL REC...	PATIENT SUPPORT PR...	REF...	EMAIL	PH...	CITY	CREATED DATE	CRE...
1	<input checked="" type="checkbox"/> Pulga Atomica	MRN-3619819	Cholecap Home Health	New	pulga@fcbarcelona.cat		Barcelona	4/26/2018 10:59 AM	aaver

Convert to Patient

1. VIEW VALIDATIONS 2. ASSIGN NURSE 3. REVIEW

Nicola

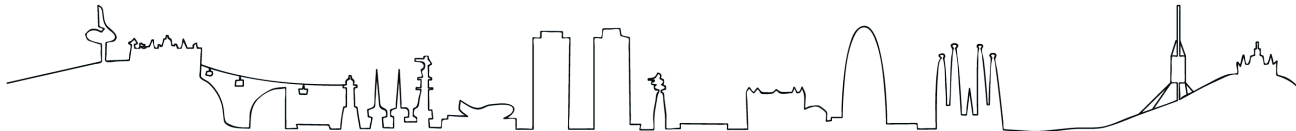
	NURSE NAME	ROLE
<input checked="" type="radio"/>	Nicola Nurse	Patient Support



Health Cloud - Care Console

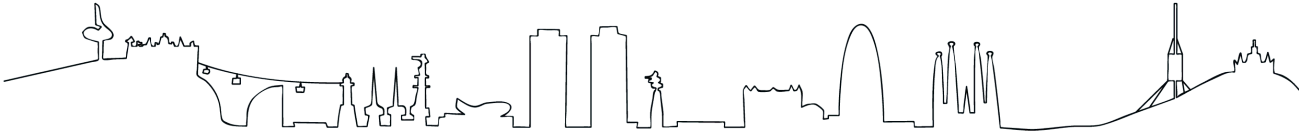
The screenshot displays the Salesforce Health Cloud Care Console for the account 'Pulga Atomica'. The interface is organized into several key sections:

- Header:** Includes the Salesforce logo, a search bar, and navigation tabs for 'Verteo Field Nursing', 'Accounts', and 'Salesforce - Develo...'. The current account 'Pulga Atomica' is selected.
- Left Sidebar:**
 - Patient Navigation:** Features an 'OPEN NEW TAB' dropdown.
 - Patient Details:** Shows a profile picture and the name 'Pulga Atomica'. Below, it lists 'Birthdate: June 24, 1987 (30 Years 10 Months)' and 'Gender: Male'.
 - Patient Card:** A summary card containing:
 - MEDICAL RECORD NUMBER: MRN-3619819
 - CITY: Barcelona
 - REFERRER: Amy Avery
 - PROGRAMME: Cholecap Home Health
 - REFERRAL DATE: 2018-4-26
 - ENROLMENT DATE: 2018-4-26

- Main Content Area:**
- Account Summary:** Shows 'Account Owner: Adam Advisor' and 'Medical Record Number: MRN-3619819'. Action buttons include '+ Follow', 'Edit', 'Book Appointment', and 'Delete'.
- Account Information:** A table-like view with fields for 'Account Name' (Pulga Atomica), 'Account Owner' (Adam Advisor), 'Phone', and 'Medical Record Number' (MRN-3619819).
- Additional Information:** Includes 'Care Plan' (00001147), 'Primary Contact' (Pulga Atomica), and 'Parent Account'.
- Address Information:** Lists 'Billing Address' as 'Camp Nou, C. d'Aristides Maillol, 12, Barcelona, CT 08028, Spain'.
- System Information:** Shows 'Created By' and 'Last Modified By' as Adam Advisor on 4/26/2018 at 11:02 AM.
- Right Sidebar:**
- Post/Question:** A section for sharing updates with a 'Share' button.
- Activity Timeline:** Displays 'Next Steps' and 'Past Activity'. The next steps include tasks like 'Book Cholecap Training...' and 'Book Cholecap Welcom...'. The past activity section shows 'No past activity'.
- Service Appointments (3):** A list of upcoming appointments, with one example: 'SA-0289: Cholecap Training Visit'.


Health Cloud - Timeline

The screenshot displays the Salesforce Health Cloud interface for a patient named Pulga Atomica. The main section is the 'Health Timeline', which shows a series of events from April 1, 2018, to July 1, 2018. The timeline is currently filtered to show 'Medical Data' events, including 'Book Cholecap We...', 'Book Cholecap Tr...', 'Cholecap Trainin...', and 'Book Ongoing Adh...'. A dropdown menu is open, showing options for 'Medical Data', 'Procedures', 'Procedure Requests', 'Patient Data', 'Tasks', and 'Visits'. The left sidebar contains 'Patient Navigation', 'Patient Details' (including birthdate and gender), and a 'Patient Card' with medical record number, city, referrer, programme, referral date, and enrolment date. The top navigation bar shows the user is logged in as 'Verteo Field Nursing' and is viewing the 'Salesforce - Develo...' page for 'Pulga Atomica'.



Health Cloud - Care Plan

The screenshot displays the Salesforce Health Cloud interface for a patient's care plan. The top navigation bar includes the Salesforce logo, a search bar, and tabs for 'Verteo Field Nursing', 'Accounts', 'Salesforce - Develo...', and 'Pulga Atomica'. The main content area is divided into three sections: Patient Navigation, Patient Details, and Patient Card on the left; and the main Care Plan details on the right.

Patient Navigation

OPEN NEW TAB

Patient Details

Pulga Atomica

Birthdate: June 24, 1987 (30 Years 10 Months) | Gender: Male

Patient Card

MEDICAL RECORD NUMBER: MRN-3619819 | CITY: Barcelona

Pulga Atomica's Care Plan

Case Number: 00001147 | Status: New | Owner: Nicola Nurse | Last Modified Date: Apr 26, 2018 11:02:38 AM | Created Date: Apr 26, 2018 11:02:38 AM

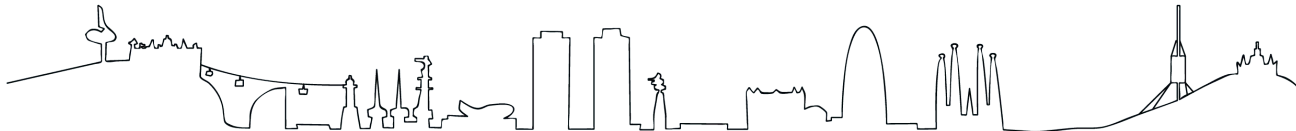
PROGRAM STAGES AND GOALS | CARE TEAM

New Program Stage

- Onboarding Stage (HIGH)
- Welcome Onto Programme (MEDIUM, 0% COMPLETE)

SUBJECT	DUE DATE	PRIORITY	STATUS	TASK OWNER	EXTERNAL MEM...
Book Cholecap Welcome Visit	Apr 26, 2018	Normal	Not Started	Adam Advisor	Pulga Atomica

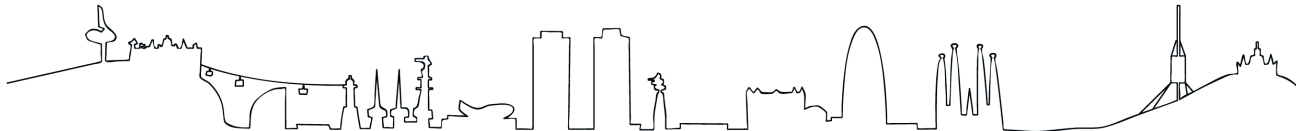
- Training Stage (MEDIUM)
- Adherence Stage (LOW)



Health Cloud - Care Team

The screenshot displays the Salesforce Health Cloud interface for a patient named Pulga Atomica. The interface is divided into several sections:

- Header:** Includes the Salesforce logo, a search bar, and navigation tabs for "Verteo Field Nursing", "Accounts", "Salesforce - Develo...", and "Pulga Atomica".
- Left Sidebar:**
 - Patient Navigation:** Features a "Patient Navigation" header and an "OPEN NEW TAB" button.
 - Patient Details:** Shows the patient's name "Pulga Atomica", birthdate "June 24, 1987 (30 Years 10 Months)", and gender "Male".
 - Patient Card:** Displays the "MEDICAL RECORD NUMBER MRN-3619819" and "CITY Barcelona".
- Main Content Area:** A central diagram shows the patient "PULGA ATOMICA PATIENT" at the center. Lines connect the patient to three external roles: "Ernesto Valverde Caregiver", "Amy Avery Referrer", and "Antonella Rocuzzo Caregiver". On the right, two internal roles are shown: "Adam Advisor Patient Support Advisor" and "Nicola Nurse Nurse". The diagram is labeled "EXTERNAL" on the left and "INTERNAL" on the right.
- Right Sidebar:** Includes a "Add a Care Team Member" button and a search icon.



Health Cloud - Household Map

The screenshot displays the Salesforce Health Cloud interface for a patient named Pulga Atomica. The interface is divided into several sections:

- Left Sidebar:**
 - Patient Navigation:** Includes an "OPEN NEW TAB" dropdown.
 - Patient Details:** Shows the patient's name, Pulga Atomica, and a profile picture.
 - Patient Card:** Contains medical information:
 - MEDICAL RECORD NUMBER: MRN-3619819
 - CITY: Barcelona
 - REFERRER: Amy Avery
 - PROGRAMME: Cholecap Home Health
 - REFERRAL DATE: 2018-4-26
 - ENROLMENT DATE: 2018-4-26

- Main Content Area:**
- Household Map:** A central diagram showing the patient at the top, with a "+ Add Household" button below it. The map branches into three categories:
 - Pulga Atomica's Care Pl...:** A list of roles:
 - Pulga Atomica (Patient) - PRIMARY MEMBER
 - Nicola Nurse (Care Coordinator)
 - Amy Avery (Referrer)
 - Adam Advisor (Patient Support ...)
 - Antonella Rocca... (Caregiver)
 - Ernesto Valverde (Caregiver)
 - Related Accounts (1):** Includes FC Barcelona (Employer) and a "+ Add Account" button.
 - Related Contacts (1):** Includes Ernesto Valverde (Manager) and a "+ Add Contact" button.


FSL - Book Appointment

Book Appointment

SA-0289

Back

Friday, April 27th 2018

- 9:00AM - 11:00AM **Recommended**
- 11:00AM - 1:00PM **Recommended**
- 1:00PM - 3:00PM **Recommended**
- 3:00PM - 5:00PM **Recommended**

Monday, April 30th 2018

- 9:00AM - 11:00AM
- 11:00AM - 1:00PM
- 1:00PM - 3:00PM
- 3:00PM - 5:00PM

Tuesday, May 1st 2018

- 9:00AM - 11:00AM
- 11:00AM - 1:00PM

Cancel Save

Service Appointment SA-0289

Owner: Adam Advisor | Account: Pulga Atomica | Parent Record: 00000285

RELATED DETAILS

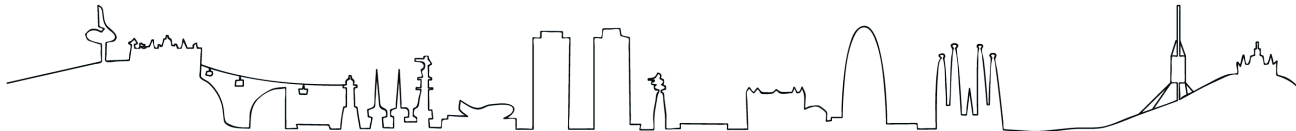
General Information

Appointment Number: SA-0289
Parent Record: 00000285
Parent Record Type: WorkOrder
Subject: Cholecap Training Visit
Description:

Address

Address: Camp Nou, C. d'Aristides Maillol, 12, Barcelona, CT 08028, Spain

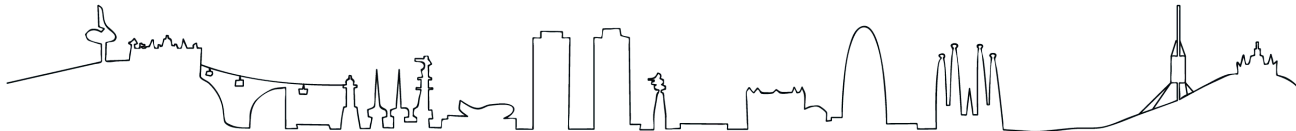
Time Constraints



FSL - Dispatch Console

The screenshot displays the FSL - Dispatch Console interface. At the top, there is a search bar labeled "Search Salesforce" and navigation tabs for "Verteo Field Nursing", "Accounts", "Salesforce - Develo...", "Pulga Atomica", and "Field Service Lightni...". The main area shows a Gantt chart for "Barcelona" on "Mon, April 30, 2018". The chart displays resource utilization for four staff members: Lewis Labrinone, Nicola Nurse, Rebecca Restolar, and Sally Specialist. The chart shows various service appointments (SA-0249, SA-0235, SA-0289, SA-0238, SA-0265, SA-0267, SA-0263, SA-0264, SA-0240) scheduled throughout the day. The utilization is 63%. The interface also includes a "Todo" section on the left with a "New List View" button and a "Search Service Appointment..." field. The bottom left corner shows a list of appointments with columns for "APPOINTMEN...", "STATUS", and "EARLIEST START PERM...".

Resource	Appointment ID	Start Time	End Time
Lewis Labrinone	SA-0249	9:00 AM	11:00 AM
Lewis Labrinone	SA-0235	11:00 AM	1:00 PM
Lewis Labrinone	SA-0266	3:00 PM	4:00 PM
Nicola Nurse	SA-0289	9:00 AM	10:00 AM
Rebecca Restolar	SA-0238	9:00 AM	11:00 AM
Rebecca Restolar	SA-0265	11:00 AM	1:00 PM
Rebecca Restolar	SA-0267	3:00 PM	4:00 PM
Sally Specialist	SA-0263	11:00 AM	12:00 PM
Sally Specialist	SA-0264	12:00 PM	1:00 PM
Sally Specialist	SA-0240	2:00 PM	3:00 PM



FSL - Absence and Violation

Verteo Field Nursing Accounts Salesforce - Develo... Pulga Atomica Field Service Lightni...

Policy: Customer First

Todo New List View

Horizon: 05/01/2018 Match Gantt Dates

1-28 of 28, 0 selected Schedule Dispatch

Search Service Appointment...

APPOINTMEN...	STATUS	EARLIEST START PERM...
SA-0289	Scheduled	4/26/2018 11:02 AM
SA-0275	None	4/18/2018 11:17 AM
SA-0276	None	4/18/2018 11:17 AM
SA-0221	None	3/15/2018 11:47 AM
SA-0278	None	4/18/2018 11:58 AM
SA-0279	None	4/18/2018 11:58 AM
SA-0271	None	4/18/2018 10:48 AM
SA-0272	None	4/18/2018 10:48 AM

Barcelona Utilization: 88%

8 AM 9 AM 10 AM 11 AM 12 PM 1 PM

MON, APRIL 30, 2018

SA-0249 SA-0235

SA-0289 (Scheduled)

SA-0289 (Scheduled)

Status: Scheduled
Arrival Window Start: Mon, Apr 30, 2018 9:00 AM
Arrival Window End: Mon, Apr 30, 2018 11:00 AM
Earliest Start Permitted: Thu, Apr 26, 2018 11:02 AM
Due Date: Thu, May 3, 2018 11:02 AM
Parent Record ID: 00000285
Street: Camp Nou, C. d'Aristides Maillol, 12
City: Barcelona

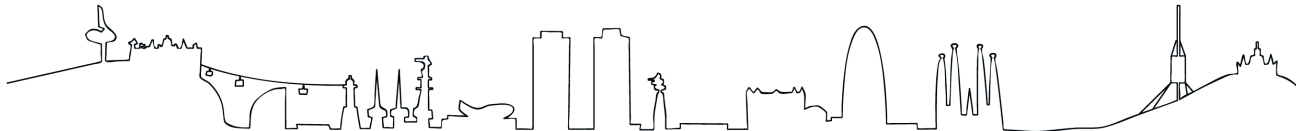
Start: Mon, Apr 30, 2018 9:18 AM
Finish: Mon, Apr 30, 2018 10:18 AM
Travel to: 18 Minutes
Travel from: 15 Minutes

Rule violations
Overlapping Resource Absence - Service Appointment overlaps absence

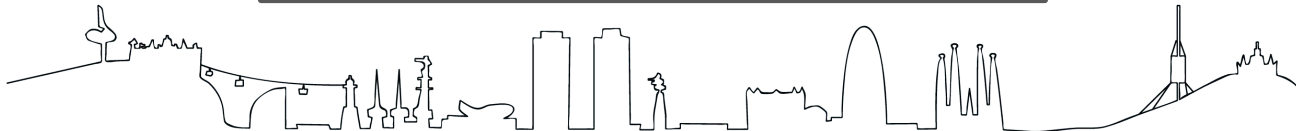
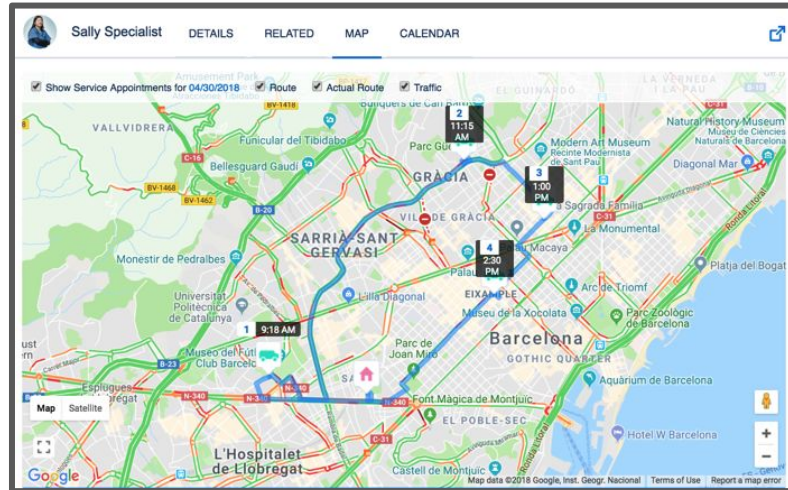
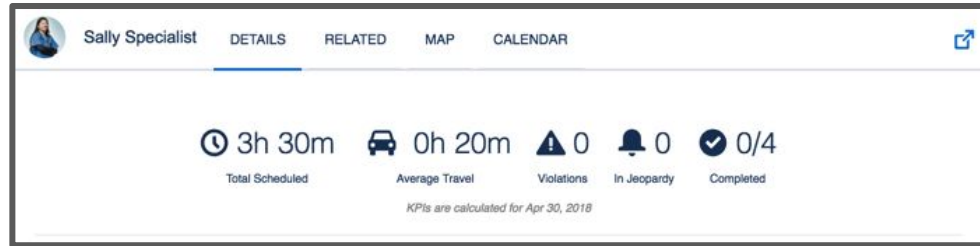


FSL - Get Candidates

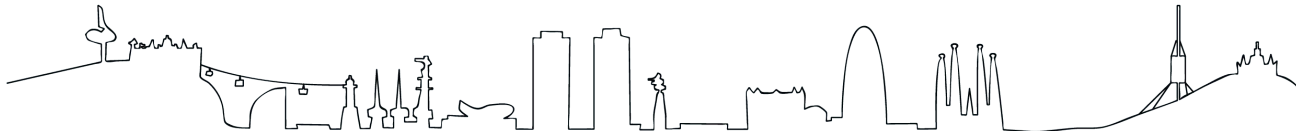
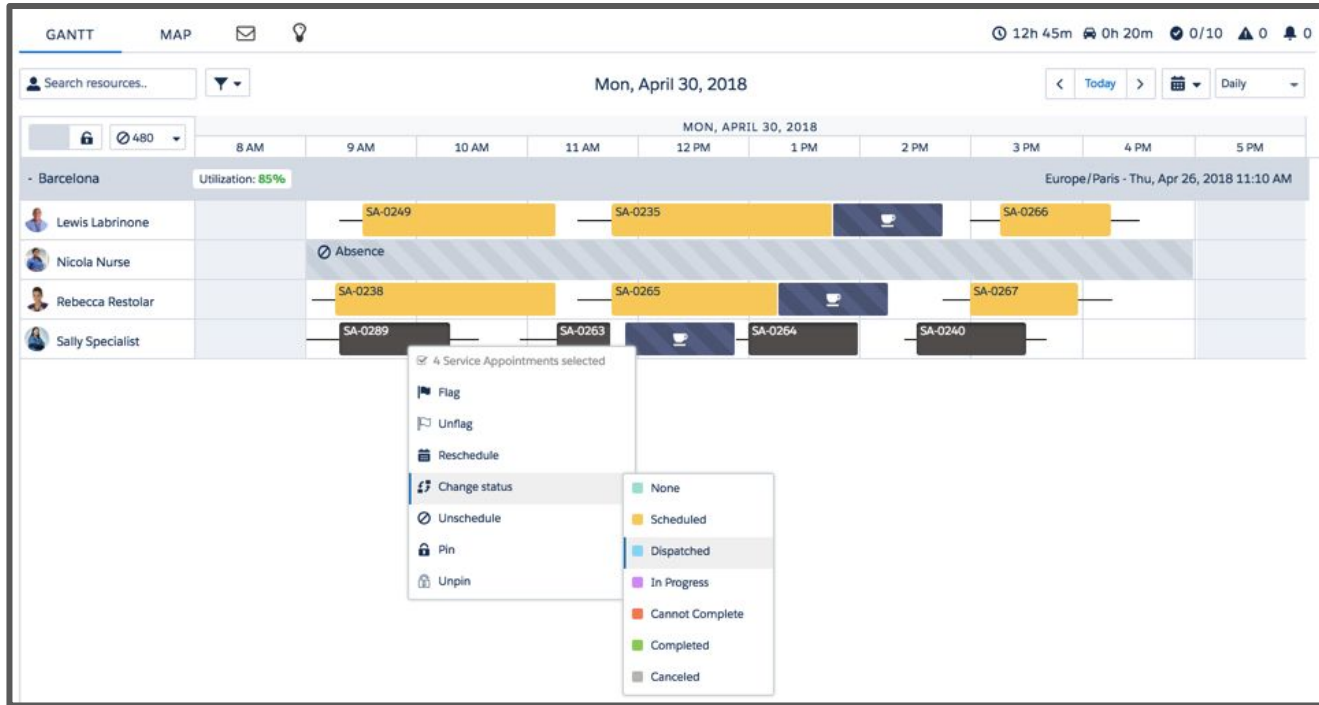
The screenshot displays the Salesforce Field Service Lightning interface. At the top, there's a search bar and navigation tabs for 'Verteo Field Nursing', 'Accounts', 'Salesforce - Develo...', 'Pulga Atomica', and 'Field Service Lightni...'. The main content area is titled 'Showing candidates to SA-0289' and includes a 'Hide Slots' button. A message states: 'We found 1 candidates with a total of 1 slots for SA-0289. The recommended scheduling is for Sally Specialist on Mon, Apr 30, 2018 9:18 AM (Graded ((60/100)).' Below this is an 'ASSIGN RECOMMENDED' button. The 'Group slots by:' section has 'Service Res...' selected. A candidate card for 'Sally Specialist' shows '1 options' and '60/100' slots. A 'Schedule' button is also present. The right side of the interface shows a Gantt chart for 'Mon, April 30, 2018' with a 480-minute duration. The chart shows utilization for 'Barcelona' at 88%. Resources listed include Lewis Labrinone, Nicola Nurse, Rebecca Restolar, and Sally Specialist. Sally Specialist has a highlighted slot from 9 AM to 10 AM on April 30, 2018, with a '60/100' label. Other resources have various slots and absences throughout the day.



FSL - Resource Schedule



FSL - Dispatch Appointments



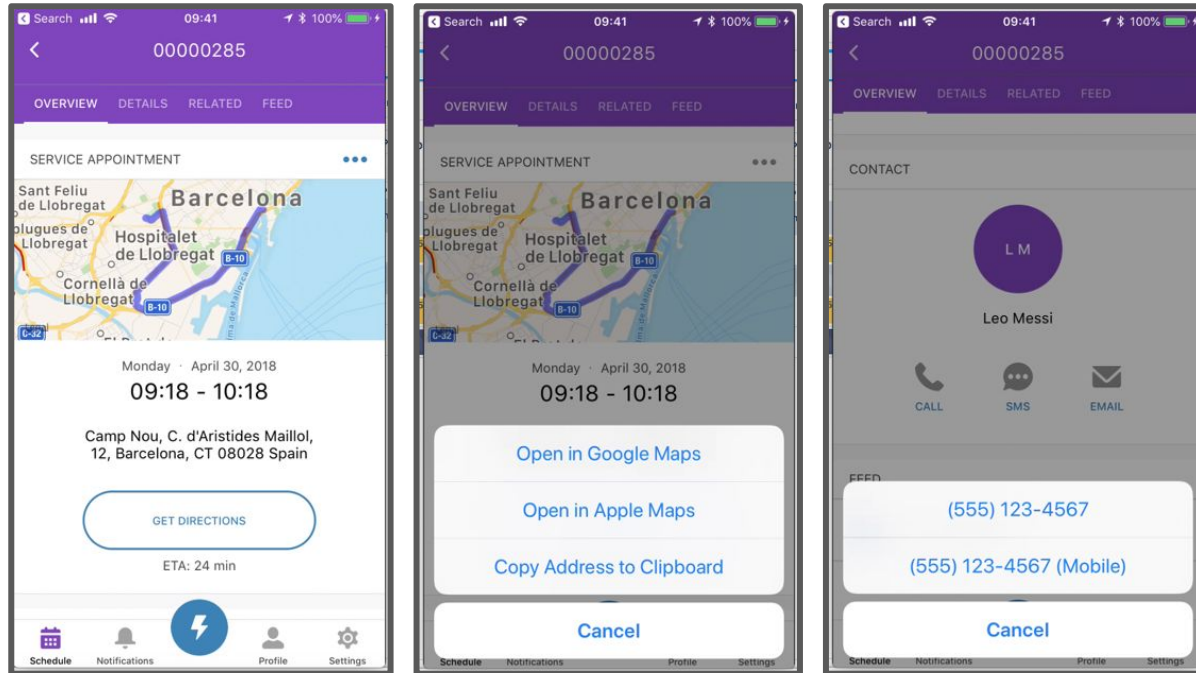
FSL Mobile - Schedule Overview

The screenshot displays the FSL Mobile app interface for a schedule overview. The app is running on a mobile device, as indicated by the status bar at the top showing the time 09:41 and 100% battery. The interface is divided into three main sections:

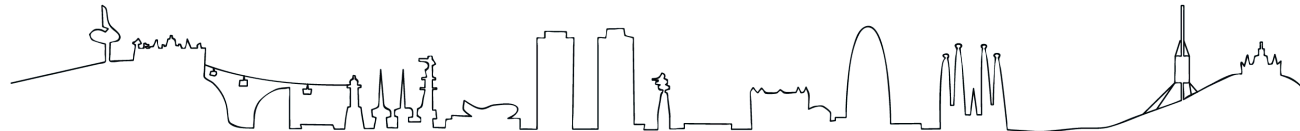
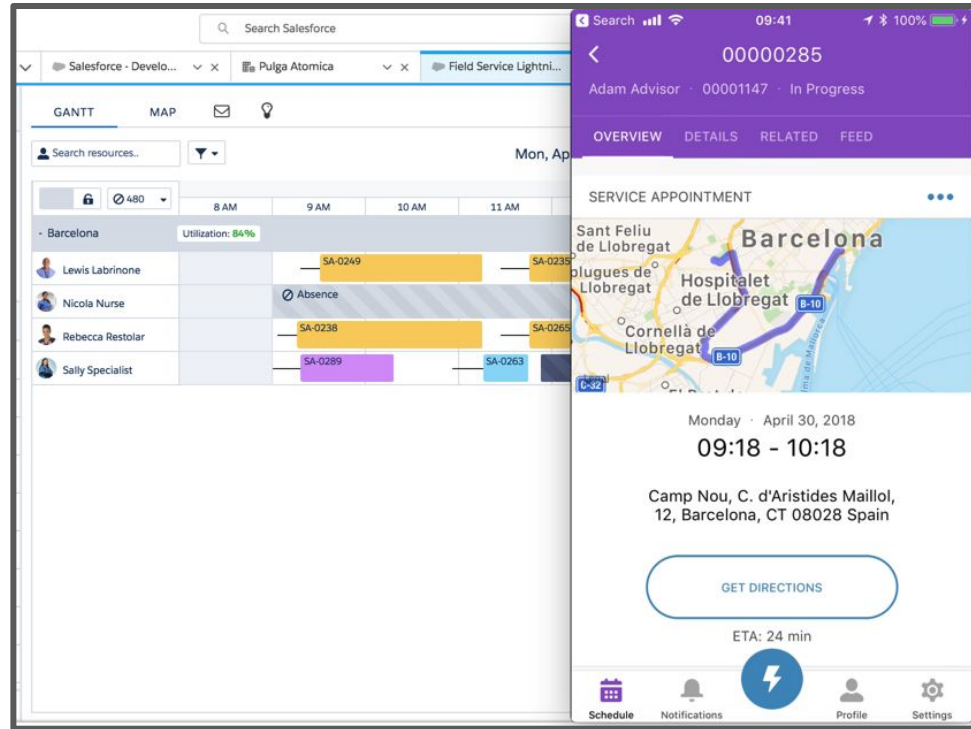
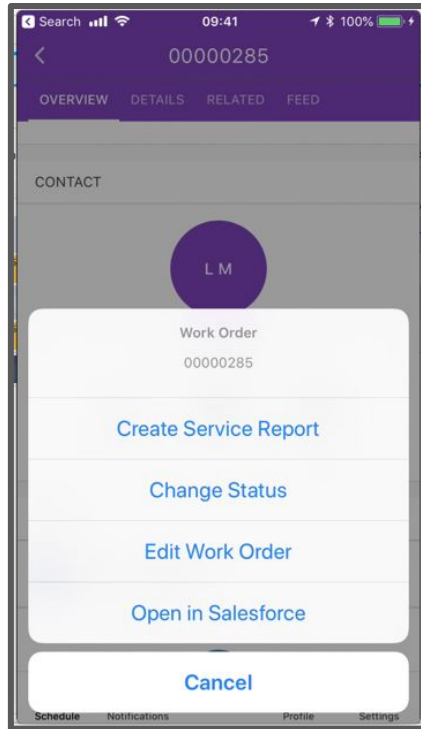
- Left Panel:** A list of appointments with columns for APPOINTMENT ID, STATUS, and EARLIEST START PERM... The list includes appointments such as SA-0275, SA-0276, SA-0221, SA-0278, SA-0279, SA-0271, SA-0272, SA-0273, and SA-0284.
- Middle Panel:** A Gantt chart showing resource utilization for Barcelona. The chart displays bars for Lewis Labrinone, Nicola Nurse, Rebecca Restolar, and Sally Specialist, with utilization at 84%. A search bar for resources is also present.
- Right Panel:** A detailed view of a service appointment. It shows a map of Barcelona with a location pin, an overview section stating "You have 4 service appointments", and a list of appointments. The selected appointment is SA-0289, scheduled for Monday, April 30, 2018, at 09:18 AM. The location is Camp Nou, C. d'Aristides Maillol, 12, Barcelona, CT 08028 Spain. The bottom navigation bar includes icons for Schedule, Notifications, Profile, and Settings.



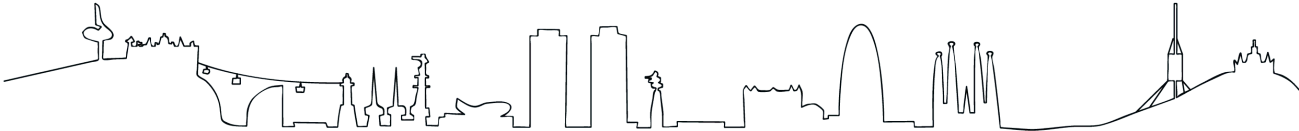
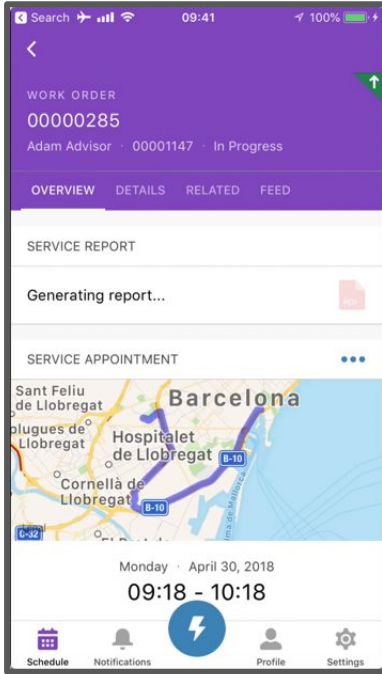
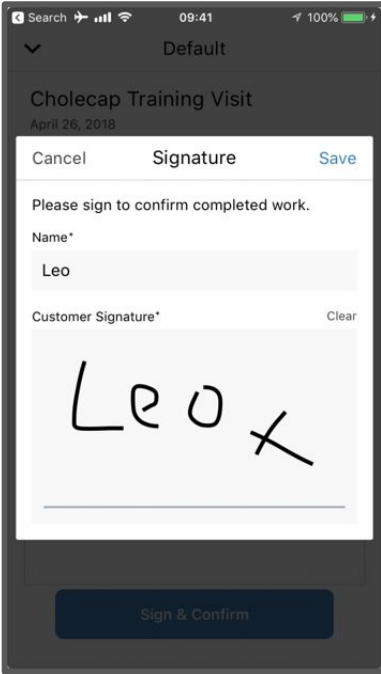
FSL Mobile - Get Directions and Contact



FSL Mobile - In Progress



FSL Mobile - Offline and Signature



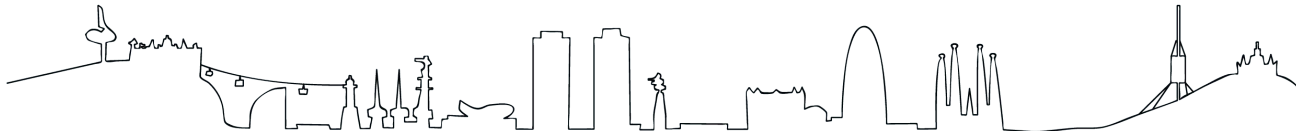
FSL Mobile - Sync and View Report

The image displays three screenshots from the FSL Mobile application. The leftmost screenshot shows a Gantt chart for resource utilization in Barcelona. The middle screenshot shows a mobile view of a work order for 'Adam Advisor' with a service report for 'Sally Specialist'. The rightmost screenshot shows a detailed service report for 'Sally Specialist' at 'VERTEO BIOPHARMA'.

Resource	SA ID	Start Time	End Time
Lewis Labrinone	SA-0249	8 AM	10 AM
Nicola Nurse	Absence	8 AM	11 AM
Rebecca Restolar	SA-0238	8 AM	10 AM
Sally Specialist	SA-0289	8 AM	10 AM

Work Order Overview:
WORK ORDER: 00000285
Adam Advisor · 00001147 · Completed
OVERVIEW | DETAILS | RELATED | FEED
SERVICE REPORT: Sally Specialist, April 26, 2018, 11:17

Service Report Details:
Service Report for VERTEO BIOPHARMA
Address: C/ Josep Pla, 11, 08038 Barcelona, Spain
Appointment: 20180426 11:17
Work Order: 00000285
Customer Signature: Leo X



Q & A



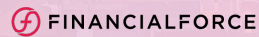
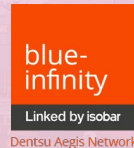
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