

SmartCare Triage Transformation

Protocol-Driven Patient Triage from the Very First Call

Platform: Salesforce Health Cloud

Business Impact

95%

protocol adherence
across all patient calls

100%

automated call
documentation with zero
manual effort

40%

faster call
handling times

60%

reduction in
clinical risk

Client Overview

The client is a mid-sized healthcare organization operating across multiple US states, managing high volumes of patient interactions across care coordination and triage functions.

As the organization expanded, patient calls were handled through unstructured, nurse-led processes, creating inconsistencies in care advice, documentation gaps, and increasing clinical and compliance risks.

Challenges

The existing triage model created significant variability and operational risk:

Unstructured Call Handling

Care advice depended on nurse memory and experience, resulting in inconsistent recommendations for similar symptoms.

Lack of Documentation Standards

Call records were incomplete or captured as free text, limiting their value for audits, quality control, and clinical review.

Rising Clinical Liability

Undocumented or inconsistent interactions increased exposure to compliance and legal risks.

Training Dependency

New staff required extended mentoring before independently handling calls, slowing workforce readiness.

Limited Escalation Intelligence

High-risk cases depended on individual judgment, which could fail under time pressure.

Siloed Patient Interaction Data

Call history was fragmented across notes and memory, preventing continuity of care and data-driven insights.

The Solution

SmartCare Triage introduces a **Salesforce-native clinical triage platform**, powered by **Thomson Reuters evidence-based medical content**, transforming every patient call into a structured, protocol-compliant interaction.

Core Capabilities



Structured Symptom Intake

Standardized digital forms replace free-text inputs, ensuring clean and consistent clinical data from the first interaction.

Adaptive Question Engine

Dynamic, symptom-based protocols guide nurses through relevant follow-up questions in real time.



Evidence-Based Clinical Content

All care recommendations are derived from globally trusted, peer-reviewed protocols, ensuring consistency and reducing liability.

Real-Time Care Advice Delivery

Structured recommendations - from self-care to emergency escalation - are delivered with supporting clinical rationale.





Automated Audit Trail

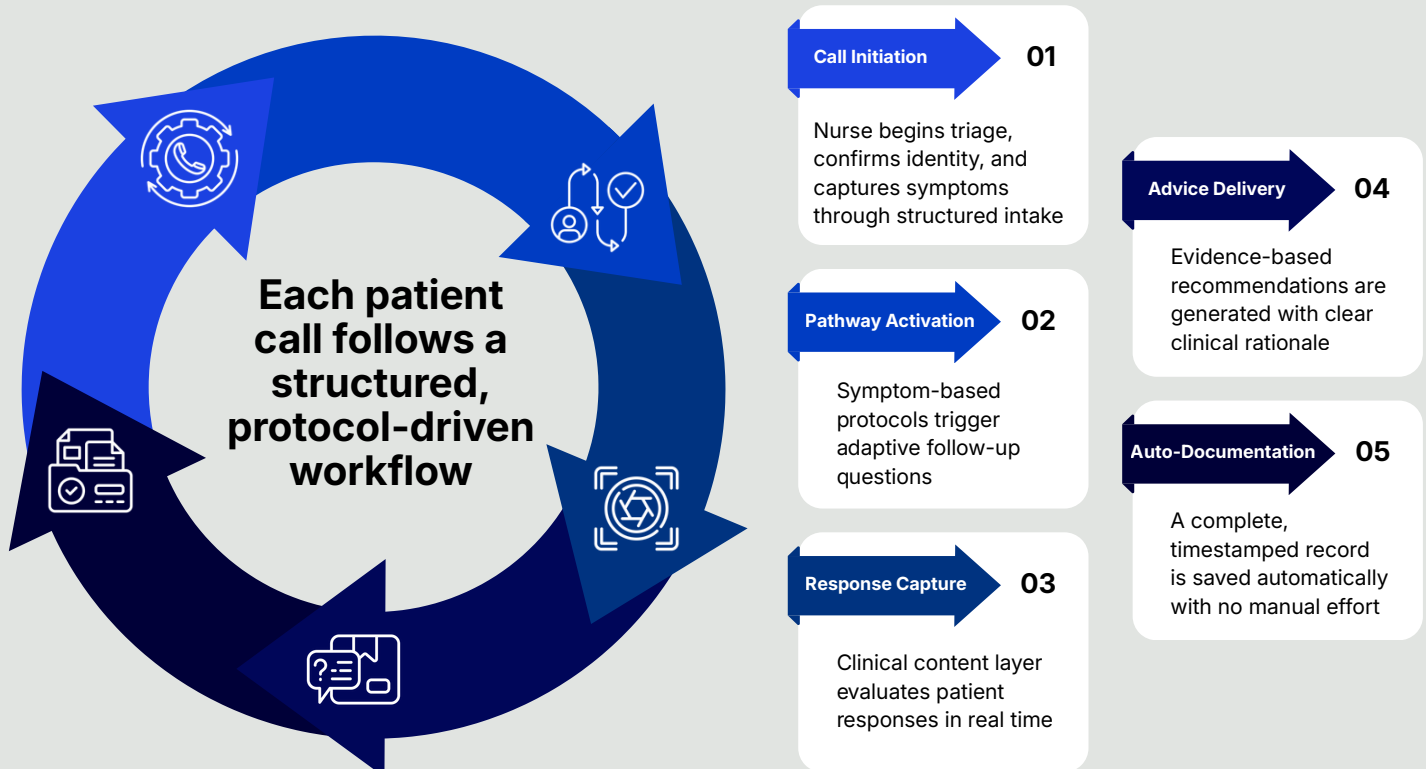
Every interaction is automatically recorded as a timestamped, searchable record, eliminating manual documentation effort.

Nurse-First Interface

A guided interface reduces cognitive load and supports staff across all experience levels.



How It Works



Outcomes

The solution delivers a consistent and scalable triage foundation:

- Standardized care delivery across all patient interactions
- Complete and reliable clinical documentation
- Reduced variability in decision-making
- Faster and more efficient call handling
- Improved staff confidence and productivity
- Stronger compliance and audit readiness

Business Value Realized

The organization achieved measurable improvements across clinical and operational performance:

Reduced clinical risk through evidence-based protocols

Increased operational efficiency in triage workflows

Faster onboarding and reduced training dependency

Improved data quality for analysis and reporting

Enhanced compliance posture with audit-ready records

Consistent patient experience across all interactions

Future Roadmap

- ▶ **AI-Augmented Triage**
Natural language symptom capture, predictive risk scoring, and AI-assisted summarization.
- ▶ **Expanded Automation**
Post-call workflows, intelligent routing based on symptom complexity, and population health dashboards.
- ▶ **Predictive Intelligence**
Longitudinal patient analysis, wearable integration, and protocol performance insights.

Client Testimonials

"Every call now follows the same pathway, every recommendation is documented, and our nurses feel genuinely supported."

- Director of
Nursing Operations

"We can pull complete, structured records for any call within seconds. The documentation alone justified the entire investment."

- Chief Compliance
Officer

"New staff handled calls independently within their first week. Embedded protocols mean quality no longer depends on experience."

- VP of Clinical
Operations

Conclusion

SmartCare Triage transforms patient triage from an **inconsistent, manual process into a structured, protocol-driven clinical system.**

By embedding evidence-based guidance directly into every interaction, the organization can:

- Deliver consistent and defensible care
- Eliminate documentation gaps
- Reduce clinical and compliance risk
- Enable faster, more confident decision-making

The result is a system where **every call is standardized, every recommendation is backed by clinical evidence, and every interaction is fully documented and audit-ready.**