

SALESFORCE SETUP FOR DIETITIAN LIVE

Our remote dietitians provide personalized guidance to help you reach your health goals.



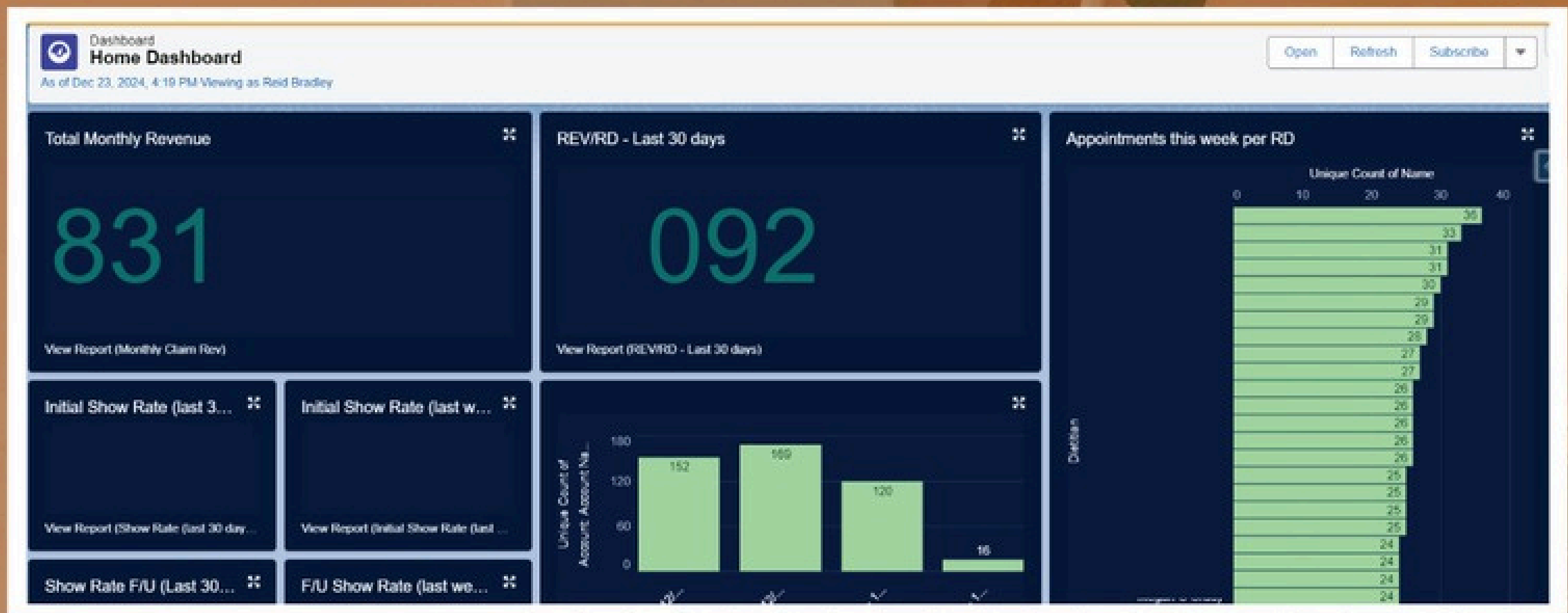
Project Description



Set up the entire Salesforce org for the Dietitian Live platform, allowing clients to book appointments with available dietitians based on their state and insurance coverage. These appointments should seamlessly integrate with the EHR system, DrChrono.



Reports and Dashboard



Form for Dietitian Appointment



Book an appointment in less than sixty seconds

Fun fact: Sessions are fully covered by most insurance plans.

* First Name

* Last Name

* Email

* Phone

* Gender

* State

* Birthday

* Do you have insurance?

☒ Yes

☐ No

* Search for your Insurance Carrier



I consent to receive text messages for appointment reminders, confirmations, and cancellations.

Dietitian Appointment Calendar



February

| Mon | Tue | Wed | Thu | Fri | Mon | Tue | Wed |
|-----|-----|-----|-----|-----|-----|-----|-----|
| 26 | 27 | 28 | 29 | 1 | 4 | 5 | 6 |

Morning Appointments

12:00 am

02:00 am

Evening Appointments

09:00 pm

09:30 pm

10:00 pm

10:30 pm

11:00 pm

11:30 pm

Confirm Appointment

Success screen for Dietitian Appointment



**Thank you, Your session has been
scheduled**

Monday February, 26 2024 11:30 pm

You will receive an email shortly with your meeting link and more details. We look forward to having a small part in your health and wellness journey.

Add to Calendar

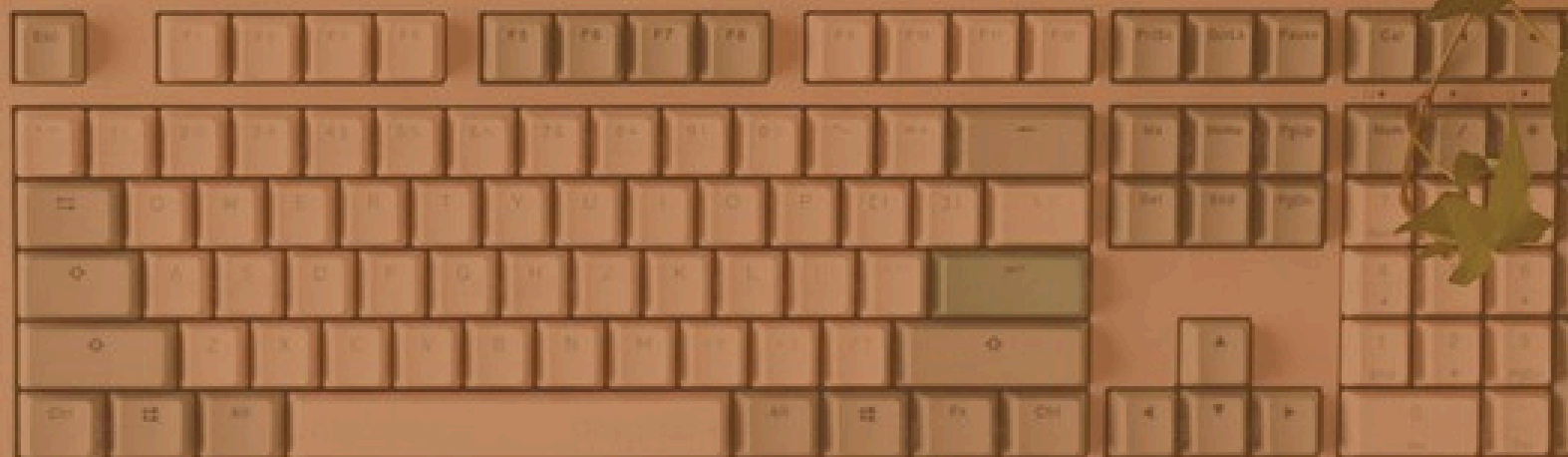
Google

Outlook

Office

Waitlist client, Dietitian Appointment

| Sales | | | | | | | | | | |
|--|------|-------------|-------|--------------------------|-----------------|----------------------|-------------------|----------------|--|--|
| Home Accounts Contacts Leads Opportunities Tasks Calendar Dashboards Notes Reports Groups Forecasts Files More | | | | | | | | | | |
| Leads | | | | | | | | | | |
| Waitlist | | | | | | | | | | |
| 50+ Items • Sorted by Position on the waitlist • Filtered by All leads • Lead Status • Updated a few seconds ago | | | | | | | | | | |
| New Intelligence View Import Add to Campaign Change Status | | | | | | | | | | |
| Search this list... | | | | | | | | | | |
| | Name | Lead Status | Email | Position on the waitlist | Available Slots | Available Percentage | Insurance Carrier | State/Province | | |
| 1 | | Wait List | | 123 | 0.00 | 0.00 | | | | |
| 2 | | Wait List | | 122 | 0.00 | 0.00 | | | | |
| 3 | | Wait List | | 121 | 0.00 | 0.00 | | | | |
| 4 | | Wait List | | 120 | 0.00 | 0.00 | | | | |
| 5 | | Wait List | | 119 | 0.00 | 0.00 | | | | |
| 6 | | Wait List | | 118 | 0.00 | 0.00 | | | | |
| 7 | | Wait List | | 117 | 0.00 | 0.00 | | | | |
| 8 | | Wait List | | 116 | 0.00 | 0.00 | | | | |
| 9 | | Wait List | | 115 | 0.00 | 0.00 | | | | |



Salesforce Integration with Twilio

| | + Follow | Edit | Send On the Waitlist | Send Off the Waitlist |
|--|----------|------|----------------------|-----------------------|
| Opt Out from Waitlist <input type="checkbox"/> | | | | |
| Total Slots | | | | |
| Available Slots | | | | |
| Available Percentage | | | | |
| <hr/> | | | | |
| PCP Phone | | | | |
| <hr/> | | | | |
| <hr/> | | | | |
| Secondary Insurance | | | | |
| Secondary Insurance ID | | | | |
| Insurance Type | | | | |

All Messages

JAN 3, 2024

UD

10:43 AM undelivered Click for Details

UD

10:43 AM undelivered Click for Details

JAN 16, 2024

UD

9:46 AM undelivered Click for Details

JAN 18, 2024

twilio number pool

UD

12:37 PM delivered

Check Dietitian Slots Against State and Insurance

Search By Lead OR Search By State OR Search By State + Insurance

Instructions:

1. Enter the Lead Name, and then click on "Search." (OR)
2. Select the State, and then click on "Search." (OR)
3. Select the State and Insurance, and then click on "Search."

(Note: Please click on the "Clear" button if values are already present in the fields)

Select Lead

Select State

Select Insurance Carrier

Clear

Submit

Data

| Total Slots | State | Lead Name | Insurance Name | Available Slots | Available Percentage | List of Dietitians |
|-------------|-------|-----------|----------------|-----------------|----------------------|--------------------|
|-------------|-------|-----------|----------------|-----------------|----------------------|--------------------|

2613

122

4.668962877918101

Custom LWC report to track Dietitians Progress

Report

Filter


Week

Expand All

Collapse All

| Week of Feb 12 | Total Current Clients (B... | New Initial Scheduled | New Initials (shows) | Show % (New) | New Initial (conversion) | Closing % | Total Weekly Scheduled... |
|----------------|-----------------------------|-----------------------|----------------------|--------------|--------------------------|-----------|---------------------------|
| 1 | 6 | 1 | 0 | 0.00% | 0 | 0.00% | 6 |
| 2 | 23 | 0 | 0 | 0.00% | 0 | 0.00% | 19 |
| 3 | 37 | 4 | 0 | 0.00% | 0 | 0.00% | 37 |
| 4 | 32 | 2 | 0 | 0.00% | 0 | 0.00% | 32 |
| 5 | 34 | 8 | 0 | 0.00% | 0 | 0.00% | 31 |
| 6 | 5 | 0 | 0 | 0.00% | 0 | 0.00% | 2 |
| 7 | 28 | 18 | 0 | 0.00% | 0 | 0.00% | 19 |
| 8 | 30 | 7 | 0 | 0.00% | 0 | 0.00% | 37 |
| 9 | 33 | 0 | 0 | 0.00% | 0 | 0.00% | 31 |

Dr Chrono API Logs Errors




 API Log
API Error-2579002

New NoteEditDelete▼

▼ Details

| | | | | |
|------------|----------------------------|--|---------------|-------------|
| className | rdl_CreateAppointment | | Status | |
| Account | John Allen | | Error Message | Bad Request |
| Patient Id | | | | |
| Other Id | | | | |

▼ System Data

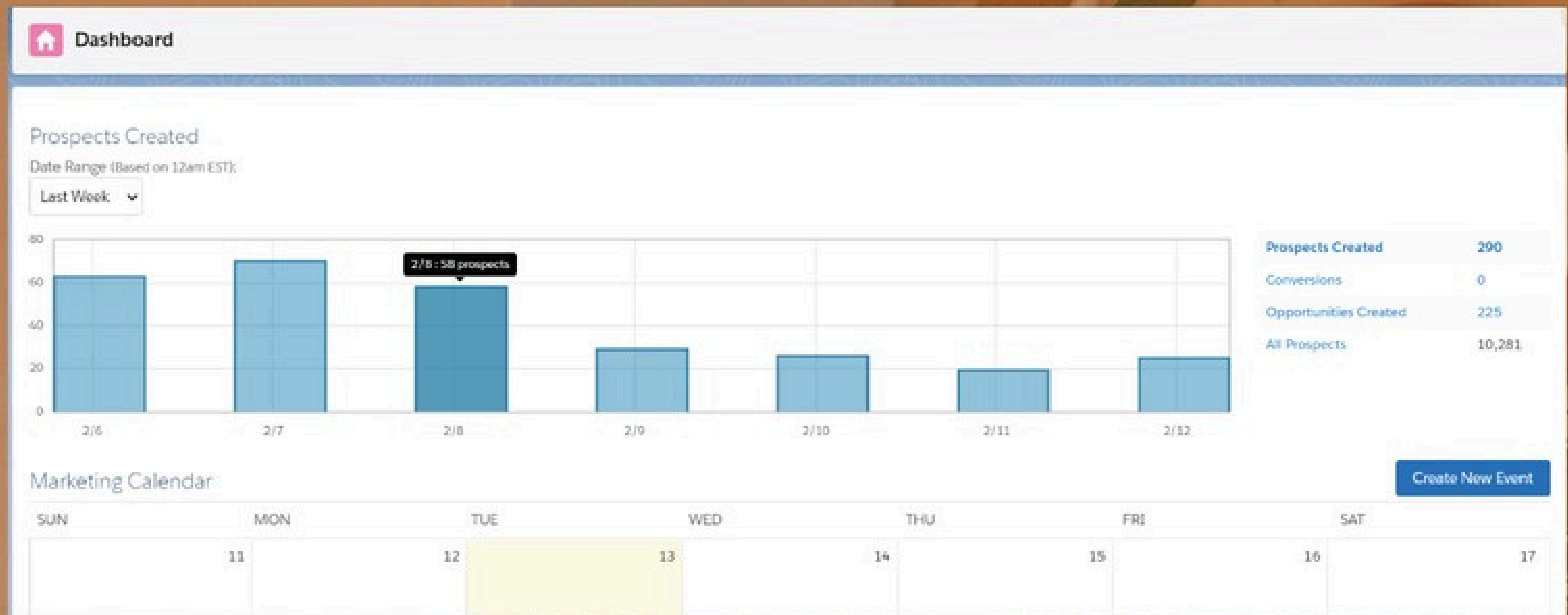
| | | | |
|------------|--|------------------|--|
| Created By |  Rd Comm Site Guest User 12/23/2024, 1:18 PM | Last Modified By |  Rd Comm Site Guest User 12/23/2024, 1:18 PM |
| Owner |  Upwork DEV | | |

▼ JSON

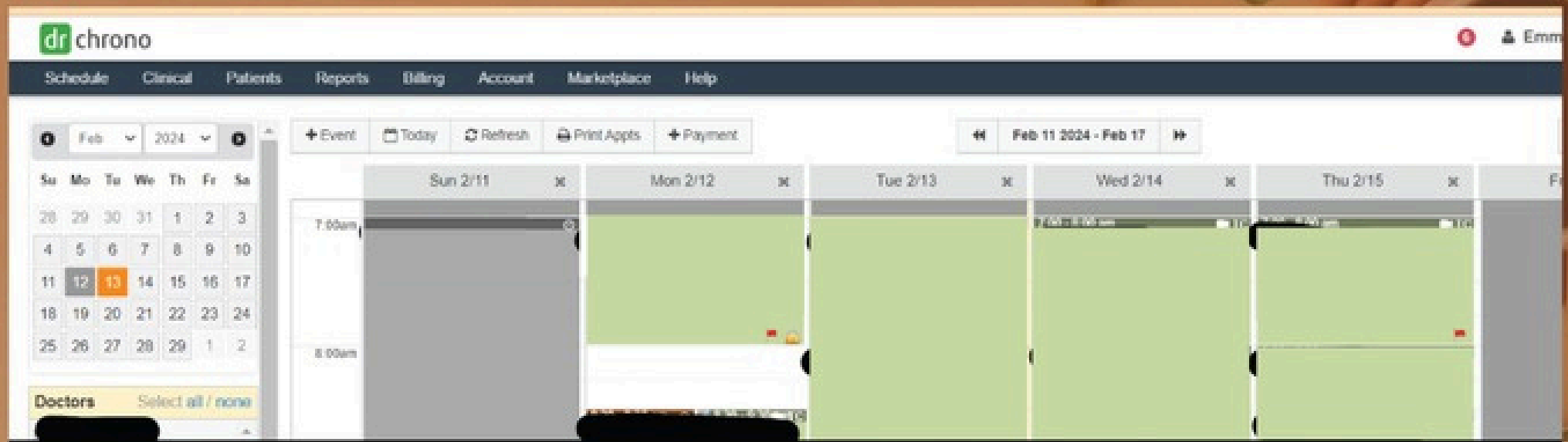
| | |
|----------|---|
| Response | [{"error": "Appointment overlaps with 20250103_312266441"}] |
| Body | { "scheduled_time": "2025-01-03 13:00:00", "profile": 474712, "patient": 124895643, "office": 529139, "is_virtual_base": true, "is_telehealth": true, "exam_room": 1, "duration": 60, "doctor": 500638, "allow_overlapping": false } |



Pardot Setup




Dr Chrono Integration



Dr Chrono API responses

RD Live

HomeLeads Opportunities Orders Accounts Contacts Reports Dashboards Shifts Staging Test

 Dr Chrono API Response

Creating A Event Record

RelatedDetails

| | | |
|------------------------------|--|-------|
| Dr Chrono API Responses Name | Creating A Event Record | Owner |
| Request | <pre>{ "telehealth_url": null, "is_telehealth": false, "resubmit_claim_original_id": null, "payment_profile": "", "updated_at": "2024-12-23T19:27:11", "supervising_provider": null, "status": "", "scheduled_time": "2024-12-30T19:00:00", "recurs_every": 1, "recurring_days": ["Monday"], "recurring_appointment": true, "recur_start_date": "2024-09-16", "recur_end_date": null, "reason": "End of Day", "profile": null, "patient": null, "office": 514430, "notes": "", "last_edt_date": "", "last_billed_date": "2024-12-30T19:00:00", "is_virtual_base": false, "is_walk_in": false, "ins2_status": "", "ins1_status": "", "infinite_series": true, "id": "335259928", "icd10_codes":</pre> | |

Integration with Jotform



Connect Your Account

You need to complete setup to view this page

[Complete Setup](#)



Jotform HIPPA Data

1

Related Details

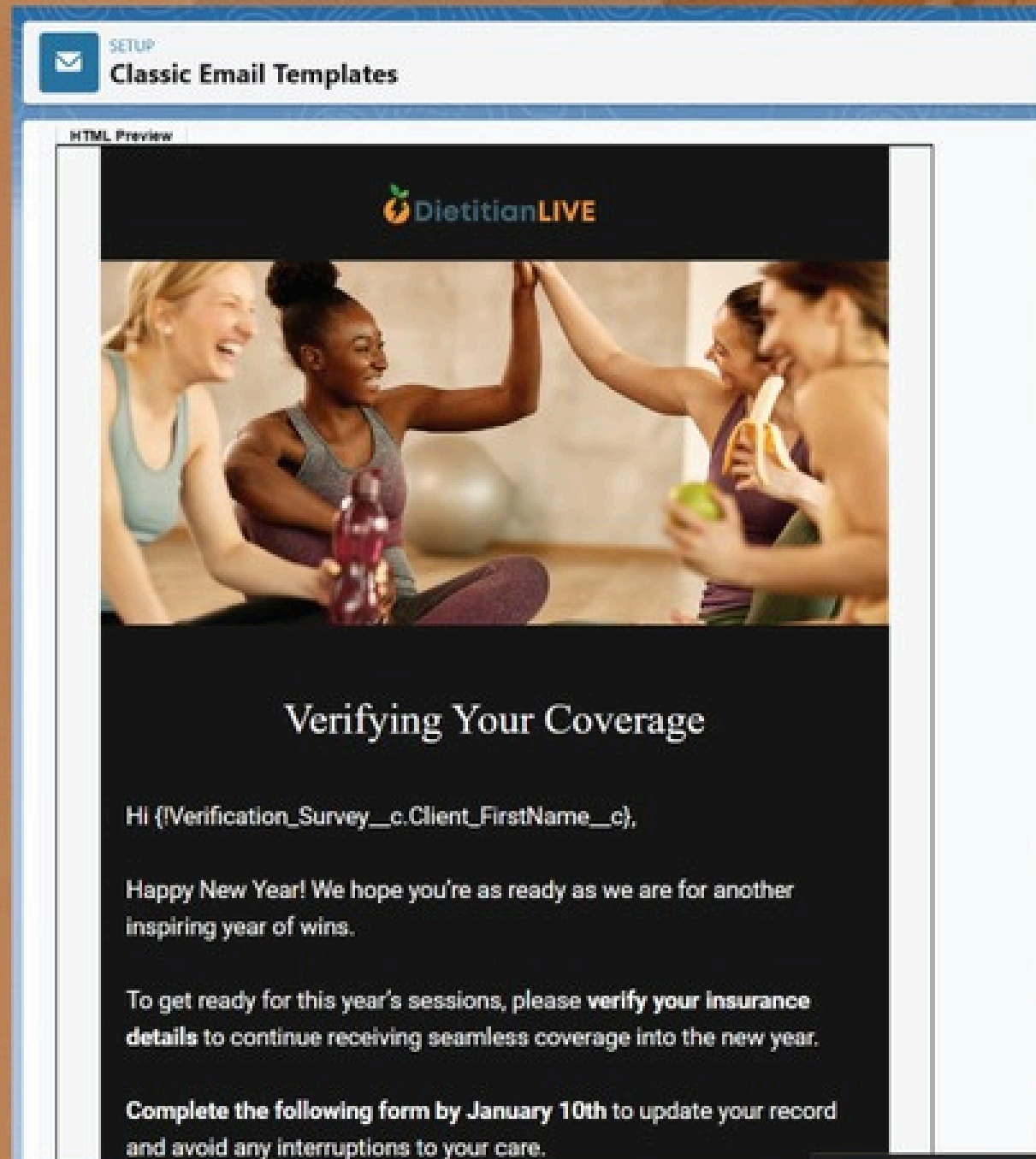
| | |
|---------------------|---|
| Number | 1 |
| HIPPA Form ID | 232495561657163 |
| HIPPA Submission ID | 5704491934504408997 |
| Last Name | JOTFORM TEST INSURANCE |
| Print Name | JOTFORM TEST INSURANCE |
| Date HIPPA Form | 23 june 2000 |
| Signature Link | https://hipaa.jotform.com/uploads/Backes_Emma/232495561657163/5704491934504408997/5704491934504408997_signature_3.png |

Created By

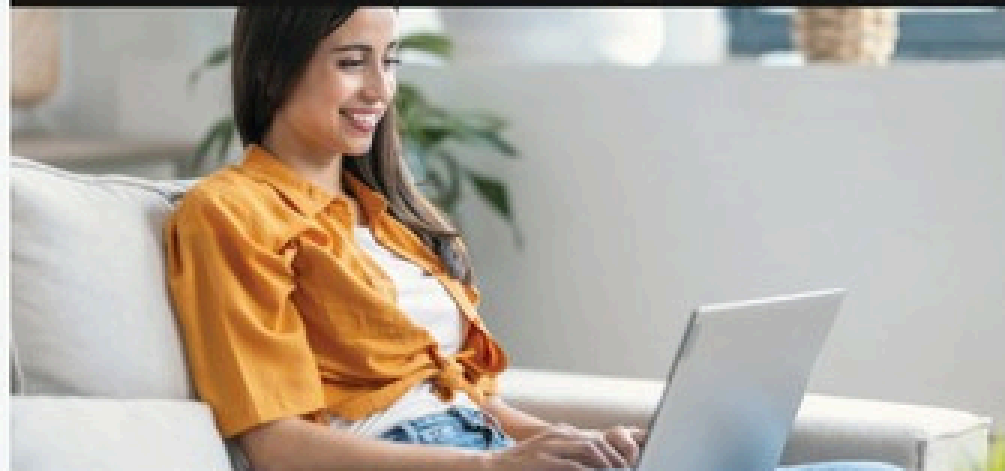
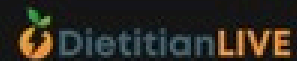


Upwork DEV, 9/13/2023, 4:19 PM

Insurance Verification Email



Update Insurance



Updating Your Insurance

Hi {{Recipient.FirstName}},

As we kick off the new year, we're reaching out to remind you about updating your insurance information. Keeping your details up-to-date ensures smooth billing and uninterrupted care throughout the year.

Updating your information is quick and easy. Simply **complete the**

Holiday treat email templates

Hi {{Recipient.FirstName}},

We're halfway through our holiday giveaway, but there's still time to win big. Refer friends to give your holiday shopping the ultimate boost.

Entering to win is easy! When you make a referral to Dietitian Live from **December 7th to January 3rd** you'll be entered to win a **\$250 Amazon gift card**.

Here's how it works:

1. Let your loved ones know why you're a fan of Dietitian Live, and how they can also get dietitian sessions covered by insurance.
2. Direct them to dietitianlive.com to book their first session at no cost to them.
3. When your loved one signs up, their dietitian will ask for the name of the person who referred them. This is how you get entered to win!

All current Dietitian Live clients are invited to participate. No cap on entries! Refer more friends for more chances to win.