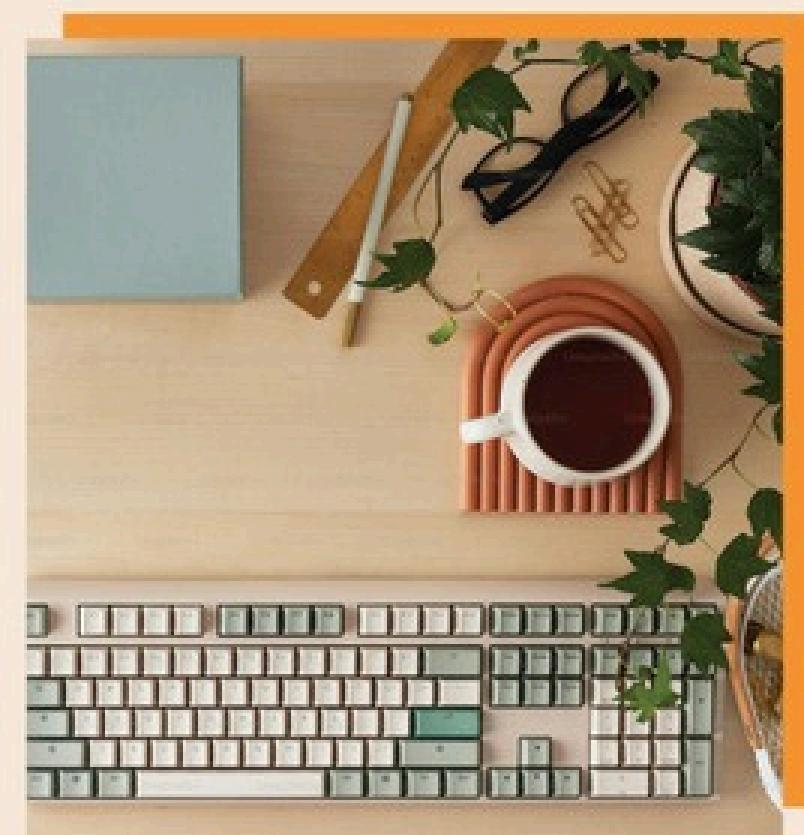


SALESFORCE SETUP FOR DIETITIAN LIVE

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

Dashboard
Home Dashboard

As of Dec 23, 2024, 4:19 PM Viewing as Reid Bradley

[Open](#) [Refresh](#) [Subscribe](#) [▼](#)

Total Monthly Revenue

831

[View Report \(Monthly Claim Rev\)](#)

REV/RD - Last 30 days

092

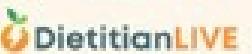
[View Report \(REV/RD - Last 30 days\)](#)

Appointments this week per RD

Unique Count of Name

RD	Unique Count of Name
RD 1	35
RD 2	33
RD 3	31
RD 4	31
RD 5	30
RD 6	29
RD 7	29
RD 8	28
RD 9	28
RD 10	27
RD 11	27
RD 12	26
RD 13	26
RD 14	26
RD 15	26
RD 16	26
RD 17	25
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RD 480	

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

By clicking the "Get Started" button, you are agreeing to our [Privacy Policy](#) and [Terms of Use](#).

Dietitian Appointment Calendar



February

Mon

26

Tue

27

Wed

28

Thu

29

Fri

1

Mon

4

Tue

5

Wed

6

Morning Appointments

12:00 am

02:00 am

Evening Appointments

09:00 pm

09:30 pm

10:00 pm

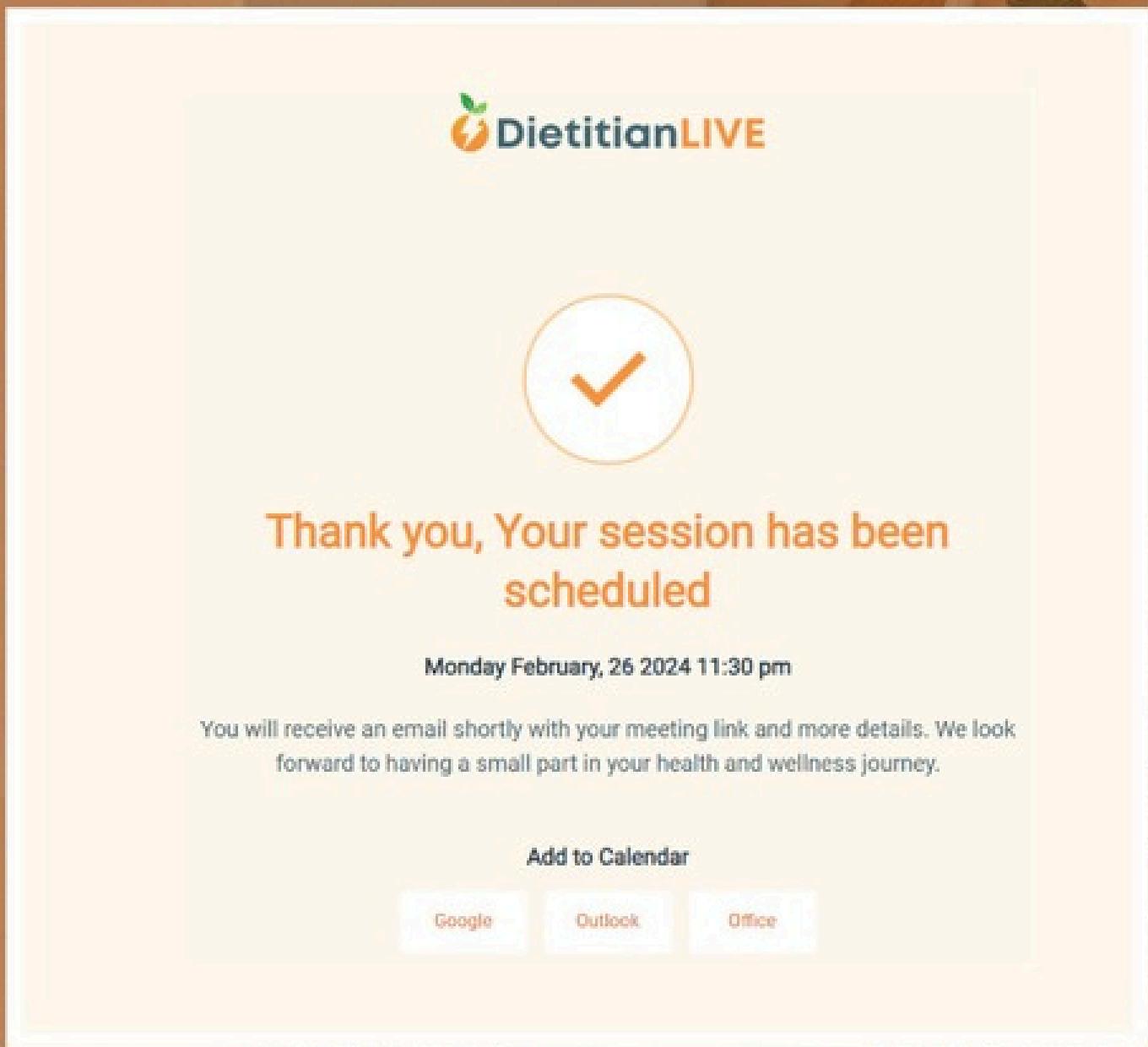
10:30 pm

11:00 pm

11:30 pm

Confirm Appointment

Success screen for Dietitian Appointment



The image shows a success screen for a Dietitian appointment. The background is a warm orange color with a wooden desk and office supplies like a magnifying glass and a keyboard visible. The main content is a white box containing the DietitianLIVE logo, a large orange checkmark, and a thank-you message. It also includes a scheduled date, a note about receiving an email with details, and links to add the appointment to various calendars.

DietitianLIVE

✓

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

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	
PCP Phone	
Secondary Insurance	
Secondary Insurance ID	
Insurance Type	

All Messages

twilio JAN 3, 2024

10:43 AM ⚠ undelivered Click for Details

10:43 AM ⚠ undelivered Click for Details

JAN 16, 2024

9:45 AM ⚠ undelivered Click for Details

JAN 18, 2024

twilio number pool

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	<input type="button" value="Clear"/>	<input type="button" value="Submit"/>
<input type="text"/>	<input type="text" value="Minnesota"/>	<input type="text" value="None"/>		

Data

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

261		122	4.666666666666667	4666666666666667
-----	--	-----	-------------------	------------------



Custom LWC report to track Dietitians Progress

Report

Filter

Week:

Week of Feb 12	Total Current Clients (R...)	New Initial Scheduled	New Initials (shown)	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	13	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 Note Edit Delete ▾

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

Dashboard

Prospects Created

Date Range (Based on 12am EST):

Last Week

Prospects Created: 290

Conversions: 0

Opportunities Created: 225

All Prospects: 10,281

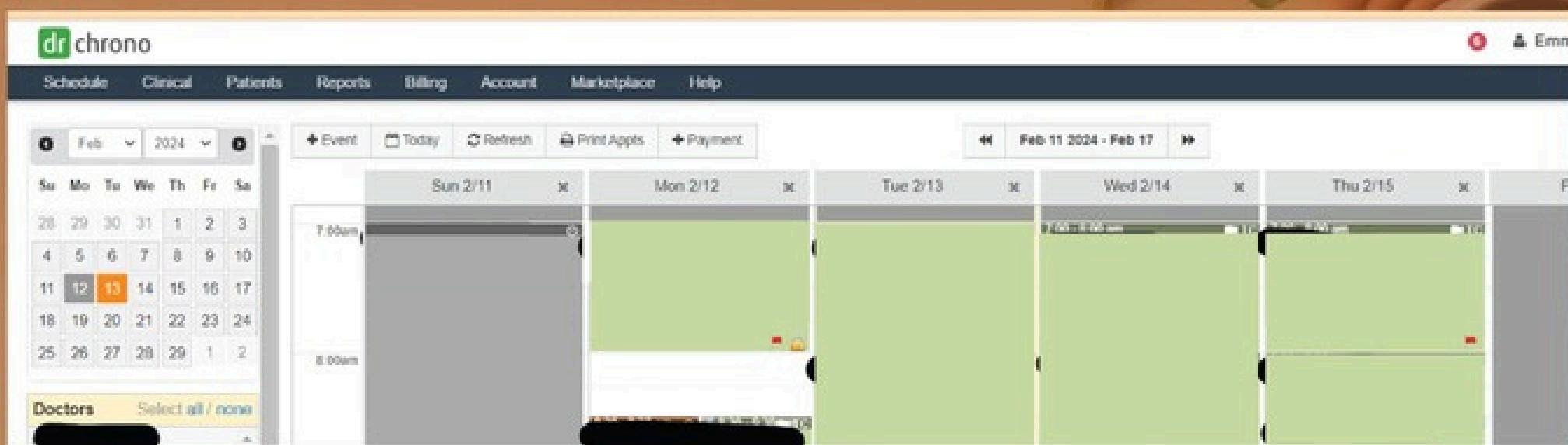
Date	Prospects Created
2/6	65
2/7	70
2/8	60
2/9	30
2/10	30
2/11	20
2/12	30

Marketing Calendar

Create New Event

SUN	MON	TUE	WED	THU	FRI	SAT
11	12	13	14	15	16	17

Dr Chrono Integration



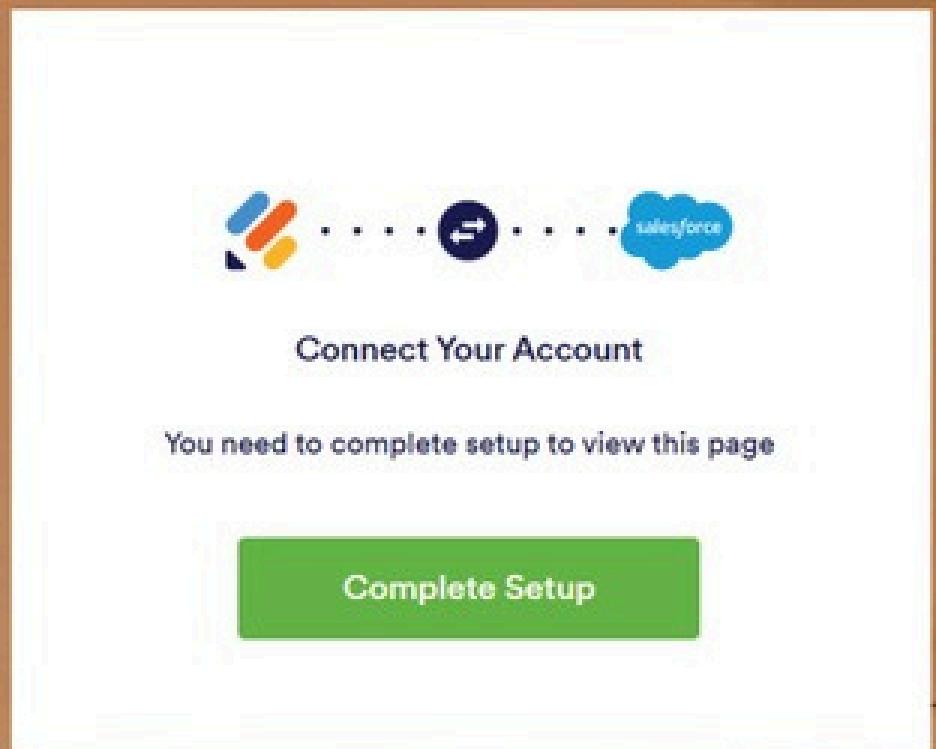
Dr Chorono API responses

RD Live Home Leads Opportunities Orders Accounts Contacts Reports Dashboards Shifts Staging To

Dr Chorono API Response
Creating A Event Record

Related	Details	Owner	
Dr Chorono 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_edi_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



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

SETUP

Classic Email Templates

HTML Preview



DietitianLIVE

Verifying Your Coverage

Hi {Verification_Survey__c.Client_FirstName__c},

Happy New Year! We hope you're as ready as we are for another inspiring year of wins.

To get ready for this year's sessions, please **verify your insurance** details to continue receiving seamless coverage into the new year.

Complete the following form by January 10th to update your record and avoid any interruptions to your care.

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.