



How a behavioral health provider automated patient intake from Salesforce to Sunwave

Executive snapshot

A multi-state behavioral health provider used Salesforce to capture patient inquiries and pre-assessment data, but their admissions system, Sunwave, required the same data again. Intake teams re-entered everything manually, which slowed down admissions and increased errors.

RevSolutions built a direct integration between Salesforce and Sunwave that sends Leads and related pre-assessment data automatically. The system creates Opportunities in Sunwave with complete assessment details. The team also handled a strict JSON format requirement that Salesforce does not support by default.

The result is a fully automated intake flow with faster admissions, accurate data, and no manual re-entry.

About the client

The client operates in the behavioral health and addiction treatment space. They run multi-state clinical operations and manage patient intake, assessments, and admissions through dedicated teams. Their intake process plays a key role in treatment eligibility, compliance, and timely admissions.

The challenge

The client captured Leads and Pre-Assessment data in Salesforce, but Sunwave handled admissions and clinical workflows. There was no connection between the two systems, so the team managed everything manually.

- no automated sync between Salesforce and Sunwave
- intake teams re-entered the same patient data
- long pre-assessment forms increased error risk
- delays in updating Sunwave slowed admissions
- Salesforce could not generate the JSON format required by Sunwave



Why RevSolutions joined the project

The client needed a partner who could handle both healthcare workflows and complex API requirements. RevSolutions brought experience in Salesforce integrations, healthcare data models, and API design.

The team focused on:

- automating Lead and Pre-Assessment sync to Sunwave
- removing manual data entry
- improving data accuracy
- speeding up intake to admission flow

The solution and implementation

RevSolutions designed a custom API integration using Apex, Named Credentials, and transformation logic.

- mapped Salesforce Lead and Pre-Assessment data to Sunwave Opportunity structure
- built secure API connectivity using Named Credentials
- created Apex callouts to send data to Sunwave
- triggered the integration when Leads and assessments are ready
- transformed data into the required JSON structure
- built custom logic to generate the required unnamed JSON array
- added logging, validation, and retry mechanisms
- tested with real scenarios and rolled out in phases

Results and impact

The client removed manual work from the intake process and improved both speed and accuracy across teams.

Key outcomes:

- 100 percent removal of manual data re-entry
- 40 to 50 percent faster intake to admission time
- zero integration failures after launch
- around 90 percent improvement in data accuracy
- faster admission decisions
- better coordination between intake and clinical teams
- more reliable and consistent patient data



Highlights and next steps

This project stands out because of the strict JSON requirement and the complexity of mapping detailed Pre-Assessment data. The solution improved both operational efficiency and patient handling. Next steps include building follow-up workflows, improving patient engagement, and strengthening coordination across clinical systems.