



How a healthcare company automated patient intake with Salesforce and MuleSoft IDP

Executive snapshot

A nationwide healthcare company that supports injured workers with medical equipment, clinical oversight, and home modifications struggled with a slow and manual patient intake process. Staff had to read scanned forms, interpret different layouts, and type every detail into Salesforce. This caused delays, errors, and heavy administrative workload.

RevSolutions built a full Salesforce and MuleSoft IDP integration that automated the entire intake flow. Staff can now upload forms inside Salesforce, MuleSoft extracts patient data, and Person Accounts get created automatically with clean and consistent information. Intake moved from days to same day, errors dropped to near zero, and teams gained full visibility and control over document processing.

About the client

The client works in the healthcare and medical rehabilitation space. They provide medical equipment, complex rehab technology, home modifications, and clinical support for injured workers across the country. They depend heavily on accurate patient information. Fast and clean onboarding helps them set up cases, schedule services, and meet insurance and regulatory timelines. Their previous manual process could not keep up with rising volume.

The challenge

The intake process relied on manual work from start to finish. Staff received forms in many formats, including PDFs, scans, and images. They had to retype every field into Salesforce, which slowed onboarding and increased the risk of mistakes.

Key issues included:

- slow patient onboarding
- inconsistent and error-prone data entry
- no visibility into processing status
- dependency on back-office teams
- delays in initiating services and partner communication

Growing patient volume pushed the organization to reduce manual effort and automate intake.



Why RevSolutions joined the project

The client chose RevSolutions for their experience in healthcare workflows, complex Salesforce integrations, and MuleSoft IDP projects. They needed a team that could deliver a scalable and compliant automation layer with strong support for Person Accounts.

The goals were clear:

- allow medical staff to upload forms in Salesforce
- parse documents automatically with MuleSoft IDP
- create or update Person Accounts from extracted data
- reduce manual work and improve accuracy
- speed up patient onboarding

The solution and implementation

RevSolutions built a turnkey integration between Salesforce and MuleSoft IDP.

Key components delivered:

- custom LWC for secure form uploads
- integration layer to push documents to MuleSoft IDP
- parsing logic to extract structured patient data
- automated Person Account creation in Salesforce
- confidence scoring and exception handling
- full audit trail for compliance and visibility

Implementation phases:

1. Discovery and process mapping
2. LWC design for file upload
3. Integration build across Salesforce and MuleSoft
4. Multi-format testing and score validation
5. Training for medical staff
6. Staged go-live with support

Key customizations:

- handling large PDFs with ContentVersion
- custom workflows for low-confidence documents
- flexible mapping for inconsistent form layouts

Challenges solved:

- variable PDF formats flexible parsing logic
- large files stable handling and retries
- mapping accuracy confidence scoring workflows



Results and impact

The automation changed how the intake team works. They now process forms inside Salesforce, rely on structured parsing, and track every step of the workflow.

Quantitative results:

- 70% reduction in manual data entry
- 50% faster patient onboarding
- near zero data entry errors
- high consistency in patient record creation

Qualitative benefits:

- staff gained control over uploads and processing
- stronger compliance and traceability
- full visibility into processing status
- faster communication with insurance partners
- cleaner and more reliable patient data

Before vs after:

- manual data entry automated IDP parsing
- 3–4 days for intake same day intake
- frequent errors clean validated records
- no status tracking full audit trail

Highlights and next steps

This project stood out because it combined Salesforce, MuleSoft, and intelligent document processing for a mission-critical healthcare workflow with measurable operational impact.

Next steps:

- extend automation to more clinical forms
- bring IDP workflows to home-modification and equipment-request documents
- expand integrations to downstream medical systems