

TITAN for Healthcare Teams

Run Patient Intake, Referral, and Consent Workflows Inside Salesforce

Titan executes these workflows directly in your CRM, delivering governed visibility, HIPAA-aligned compliance control, and faster time-to-treatment.

Healthcare Pain Points

- ⊗ Intake forms are incomplete or missing required documentation
- ⊗ Referral packets are built manually and shared over email
- ⊗ Consent forms are stored outside Salesforce, increasing HIPAA exposure
- ⊗ Teams lack clear visibility into approval and pre-authorization status
- ⊗ Audit traceability is spread across systems



Result: Delays in care, operational strain, and compliance risk.

How Titan Works Inside Salesforce

Automated Patient Intake

Patients complete secure intake forms through a branded portal. Required fields, insurance details, and medical history are enforced with conditional logic. Submissions write directly to the correct Patient or Case record in Salesforce. Intake status remains visible to care teams in real time.

Consent Management

Consent forms are generated from Salesforce data through HIPAA-aligned workflows. Forms are routed for review, sent for eSignature, and stored directly on the patient record. Consent status remains visible to care teams and fully traceable in real time.



Referral Packet Generation

Referral documents are generated using standardized templates populated from Salesforce data. Packets are routed internally for review and referral progress is tracked in the CRM. All activity remains tied to Salesforce, creating a single governed record.



Without Titan

- External intake forms
- Manual referral packets
- Consent managed outside Salesforce
- Email-based status updates
- Fragmented tracking and audit gaps



With Titan

- Intake validated in Salesforce
- Referrals generated and routed in Salesforce
- Consent generated and signed in Salesforce
- Real-time status visibility
- End-to-end governed traceability

Outcomes for Healthcare Organizations

✓ Faster Time-to-Treatment

Patients move from intake to care without avoidable delays.

✓ Fewer Incomplete Submissions

Required information is captured the first time.

✓ Lower Administrative Workload

Less time spent chasing documentation and approvals.

✓ Audit-Ready Traceability

Documents, approvals, and signatures remain tied to Salesforce records for HIPAA-aligned oversight.



The Bottom Line

Healthcare workflows demand control, visibility, and auditability.

Salesforce remains your system of record. Titan provides the governed execution layer that keeps intake, referral, and consent processes connected and fully traceable within it.

