Phase 2: Org Setup & Configuration

Goal: To prepare the Salesforce environment through setup and configuration to support the Hospital Appointment & Health Tracker System.

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1. Platform & Editions

Edition Used: Salesforce Developer Org (free) – best for prototyping and testing before live deployment.

Reason: Provides a full set of tools to customize, experiment, and validate workflows without affecting real patient data.

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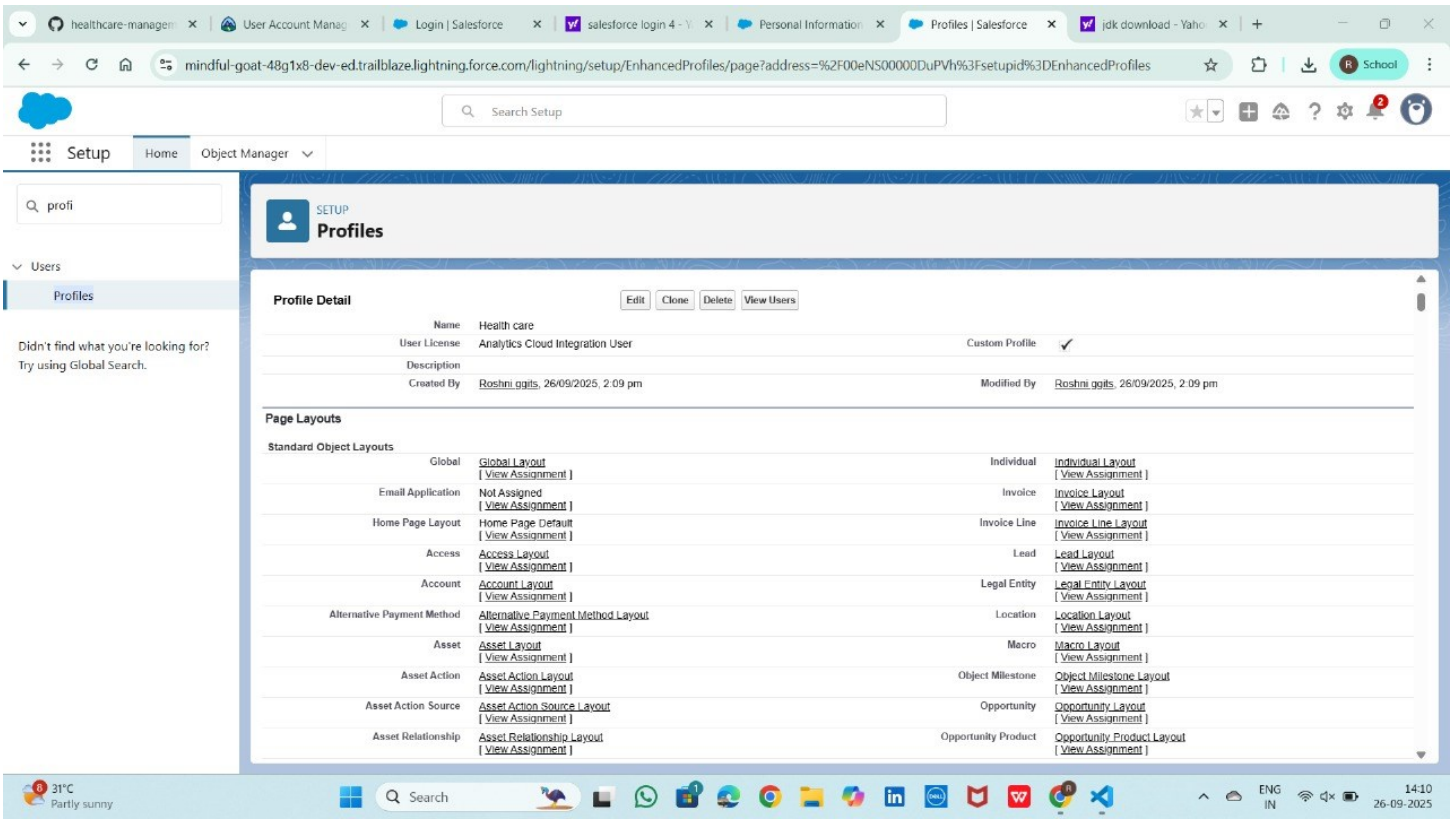
2. Company Profile Setup

- **System Name:** Healthcare Management System
- **Default Locale**: English (India)
- **Currency**: Indian Rupee (INR) – primary; USD enabled for international patients.
- **Time Zone**: Asia/Kolkata (IST)
- **Business Address**: Hospital HQ (configurable).

This ensures appointments, billing, and insurance processes reflect local as well as international standards.



3. Business Hours & Holidays

- **Hours**: 9:00 AM – 8:00 PM IST (Monday–Saturday).
- **Holidays** : Republic Day (26 Jan), Independence Day (15 Aug), Gandhi Jayanti (2 Oct), Diwali, and local holidays.
- **Purpose**: Ensures appointment scheduling, escalations, and automated reminders respect working days and timings.

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4. Fiscal Year Settings

- **Type**: Standard Fiscal Year (Jan–Dec).
- **Reason**: Aligns with hospital billing and insurance cycles.
- **Future**: Custom fiscal year can be enabled if required by hospital policy.

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5. User Setup & Licenses

User Types Configured:

1. **Patient User** (Community/Experience Cloud License) → Register, book appointments, and view health records.
2. **Doctor User** (Salesforce Platform License) → Manage appointments, update health records, and prescriptions.
3. **Reception Staff User** (Salesforce Platform License) → Manage bookings, rescheduling, and patient inquiries.
4. **Hospital Admin User** (Salesforce License) → Manage hospital dashboards, billing, and reports.
5. **System Admin User** (Salesforce License) → Manage overall Salesforce Org.

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6. Profiles

Patient Profile: Limited access (book appointments, view/update personal info, see their own health records).

- **Doctor Profile**: Can view their patients, update records, and manage appointments.
- **Reception Staff Profile**: Manage bookings, cancellations, and patient records.
- **Hospital Admin Profile**: Full reporting and monitoring rights.
- **System Administrator**: Full org access.

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7. Roles

Hierarchy Setup:

- System Admin (Top)
- Hospital Admins
- Doctors
- Reception Staff Patients

This ensures doctors see their own patients, patients see only their records, and admins see everything.

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8. Permission Sets

Additional access via permission sets:

- **Reports_Access**: For Admins to create/modify reports.
- **Analytics_Access**: For Doctors to view patient analytics dashboards.
- **Appointment_Access**: For Reception Staff to manage appointment records.
- **Health_Record_Update**: For Doctors to edit patient vitals & prescriptions.

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9. Org-Wide Defaults (OWD)

- **Appointment Data**: Controlled by Parent (linked to Patient & Doctor).
- **Patient Records**: Private – visible only to patient, their doctor, and admins.
- **Doctor Records**: Public Read Only – visible to admins, restricted to doctors themselves.
- **Billing Data**: Private – visible to patient and admins only.

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10. Sharing Rules

- **Patient Records:** Private (shared only with doctor & admin).
- **Doctor Records:** Public read-only (admins can view, but editing limited).
- **Appointments:** Controlled by patient–doctor relationship.
- **Billing & Insurance Data:** Private (patient + admin only).

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11. Login Access Policies

- Restrict patient portal logins to 6 AM – 11 PM IST.
- Enforce IP restrictions for hospital staff and admins.

- Enable Two-Factor Authentication (2FA) for system admins and doctors.

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12. Dev Org Setup

- Created free Salesforce Developer Org as baseline.
- Enabled **Experience Cloud** for patient portal.
- Installed **VS Code + SFDX CLI** for implementation. Setup GitHub repository for version control.

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13. Sandbox Usage

- Developer Sandbox for testing.
- For production scale: Partial Sandbox for demo data, Full Sandbox for UAT.

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14. Deployment Basics

- **Developer Org:** Base setup created.
- **Experience Cloud:** Enabled for patient portal.
- **Sandbox:** Developer Sandbox for testing, Partial/Full Sandboxes for UAT and demo data.

Phase 2 Deliverable

By the end of Phase 2, we have:

- Configured company setup, users, profiles, roles, and OWDs.
- Enabled Experience Cloud portal for patients.
- Setup security, login policies, and sharing models.
- Prepared sandbox & deployment plan for upcoming phases.


HEALTHCARE