

Phase 9 Report

Reporting, Dashboards & Security Review

Project: Smart Healthcare Appointment & Compliance Hub

Batch: 4

Program: TCS Last Mile SmartBridge

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1. Introduction

This phase focuses on ensuring that the **Smart Healthcare Appointment & Compliance Hub** provides both **actionable insights** through reports and dashboards, and **robust data security** through Salesforce's layered security model. Healthcare professionals require quick access to patient and compliance data, while administrators must safeguard sensitive information such as medical notes and patient identifiers. By implementing reports, dashboards, profiles, roles, and sharing settings, this phase establishes a balance between **data visibility** and **data protection**, ensuring the system is both **useful** and **secure**.

2. Objectives

- Build **Reports (Tabular, Summary, Matrix, Joined)** to analyze appointments, compliance, and patient activity.
- Create **Custom Report Types** to combine healthcare-related objects for better insights.
- Design **Dashboards and Dynamic Dashboards** for doctors, administrators, and executives.
- Define **Profiles, Roles, and Permission Sets** to manage user access.
- Configure **OWD, Sharing Rules, and Sharing Settings** to establish a secure data-sharing model.
- Implement **Field-Level Security** to protect sensitive patient data.
- Strengthen org-wide safety with **Session Settings, Login IP Ranges, and Audit Trail** for compliance and monitoring.

3. Steps Performed

3.1 Reports & Dashboards(with Dynamic Dashboards)

- ◆ **Use Case:** Doctors, admins, and compliance officers need **insights** into appointments, missed visits, and compliance status.

Smart Healthcare H... Appointments Reports and Dashboards Contacts Compliance Documents Reports

New Appointments with Patient Report / Appointments with Patient

Fields Outline Filters 1 Previewing a limited number of records. Run the report to see everything.

Appointment: Appointment Number Patient: Last Name

No records returned in preview. Try running the report or editing report filters.

- Show All appointments.
- Edit other filters in the filter panel.

Update Preview Automatically

Filter By

Field: Appointment Date Operator: equals Type: Value Date: 9/30/2025 Time: 6:00 PM

Cancel Apply

Smart Healthcare H... Appointments Reports and Dashboards Contacts Compliance Documents Reports Dashboards

Dashboards Recent 2 items

	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Pie chart	Pie chart showing Appointment Status	Private Dashboards	Palla Bhugarba	9/30/2025, 2:21 AM	
Created by Me	Enablement Dashboard	View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it.	Enablement Dashboard Spring '24	Automated Process	9/17/2025, 1:03 PM	

Search recent dashboards... New Dashboard New Folder

DASHBOARDS

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

3.2 Custom Report Types

Use Case: Out-of-the-box reports don't always cover healthcare needs.

Example: Check if patients attending appointments also submitted compliance documents.

Custom Report Types

New Custom Report Type

1 Define the Custom Report Type

Select Primary Object

Select the object that is the focus of reports created with this report type.

* Primary Object: Appointments

Details

* Display Label: Appointments with Compliance

* API Name: Appointments_with_Compliance

* Description:

Cancel Next

Appointments with Compliance

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type.

Preview Layout Edit Layout Clone Delete Close

Details	Object Relationships
Display Label : Appointments with Compliance API Name : Appointments_with_Compliance Description : Report to view Appointments and their related Compliance Documents for patients. Created By : Palla Bhugarbha, 9/30/25, 3:01 PM Store in Case... : other Deployment ... : Deployed Modified By : Palla Bhugarbha, 9/30/25, 3:01 PM	Appointments (A) ... with at least one related record from Activities (B)

3.3 Profiles & Roles

◆ Use Case: Control access and visibility based on role.

- **Admin** → Full access.
- **Doctor** → View/edit own appointments.
- **Nurse** → Limited access (read-only compliance).

orgfarm-9c399a4996-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL0000058bqj%2Fe%3FretURL%3D%252F00egL0000058bqj%...

Verify it's you

Setup Home Object Manager

profile

SETUP Profiles

Profile Edit Doctor Profile

Set the permissions and page layouts for this profile.

Profile Edit

Name: Doctor Profile

User License: Salesforce

Description:

Custom Profile: ✓

orgfarm-9c399a4996-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL0000058bqj%2Fe%3FretURL%3D%252F00egL0000058bqj%...

Verify it's you

Setup Home Object Manager

profile

SETUP Profiles

Data Share Sagemaker Connections

Data Share Snowflake Connections

Data Share Targets

Data Share Target Connection

Work Plan Templates

Work Step Templates

Work Types

Work Type Groups

Custom Object Permissions

Basic Access Data Administration

Appointments Read Create Edit Delete View All Records Modify All Records View All Fields

Compliance Documents Read Create Edit Delete View All Records Modify All Records View All Fields

Hospitals Read Create Edit Delete View All Records Modify All Records View All Fields

Notifications Basic Access Data Administration

Patients Read Create Edit Delete View All Records Modify All Records View All Fields

Platform Event Permissions

orgfarm-9c399a4996-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

Verify it's you

Setup Home Object Manager

users

SETUP Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Smart Health Care

- CEO
- Compliance Officer
- Hospital Admin
- Doctor
- Clinical Staff
- Patient

Help for this Page

Show in tree view

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?
Try using Global Search.

3.4 Organization-Wide Defaults(OWD) & Sharing Rules

◆ Use Case: Protect patient data.

- **Patients (Contacts)** → Private.
- **Appointments** → Controlled by parent (Contact).
- Share appointments of a department with Department Head.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar has 'Sharing Settings' selected under 'Security'. The main content area is titled 'Sharing Settings' and contains a table for 'Organization-Wide Defaults'. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. It lists various objects like Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, and User, with their respective sharing settings.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar has 'Sharing Settings' selected under 'Security'. The main content area is titled 'Sharing Settings' and contains sections for different work type group sharing rules: 'Work Type Group Sharing Rules', 'Appointment Sharing Rules', 'Compliance Document Sharing Rules', 'Hospital Sharing Rules', 'Notification Sharing Rules', and 'Patient Sharing Rules'. Each section has a 'New' and 'Recalculate' button. The 'Patient Sharing Rules' section shows a specific rule: 'Action: Criteria' (Owner: Name EQUALS Bhugarbha) AND (Patient: Email EQUALS bhugarbha9121@gmail.com), 'Shared With: All Internal Users', and 'Access Level: Read/Write'.

3.5 Field-Level Security

- ◊ **Use Case:** Protect sensitive fields like **Description** Unavailable to nurse.

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with links like 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', etc. The main area is titled 'Set Field-Level Security' for the 'Description' field. It shows the field label 'Description' and data type 'Long Text Area(32000)'. Below this is a table titled 'Field-Level Security for Profile' with columns for 'Visible' and 'Read-Only'. The table lists various profiles, all of which have the 'Visible' checkbox checked and the 'Read-Only' checkbox unchecked. The URL in the browser bar is: <https://orgfarm-9c399a4996-dev-ed.lightning.force.com/lightning/setup/null/page?address=%2Fcommon%2Fconfig%2Ffield%2FStandardFieldAttributes%2Fe%3Fid%3D...>

4. Expected Outcomes

- A library of **customized reports** providing meaningful insights on appointments, compliance adherence, and doctor workload.
- **Interactive dashboards** (including dynamic dashboards) tailored to different user roles, enabling quick decision-making.
- Clearly defined **profiles and roles** ensuring proper segregation of duties across healthcare staff.
- Strong **data visibility controls** using OWD and sharing rules, ensuring sensitive patient information is accessible only to authorized users.
- Protected **critical fields** (e.g., medical notes, SSN) through field-level security.
- Enhanced **security compliance** with session settings, restricted login IP ranges, and a maintained audit trail for monitoring administrative changes.

5. Conclusion

Phase 9 establishes the **visibility and security foundation** of the Smart Healthcare Appointment & Compliance Hub. By integrating **reports and dashboards**, healthcare professionals gain real-time insights into operations, while the **security review** ensures compliance with healthcare standards and patient privacy regulations. With these measures, the application not only becomes an **intelligent decision-making tool** but also a **secure platform** for managing sensitive healthcare data.