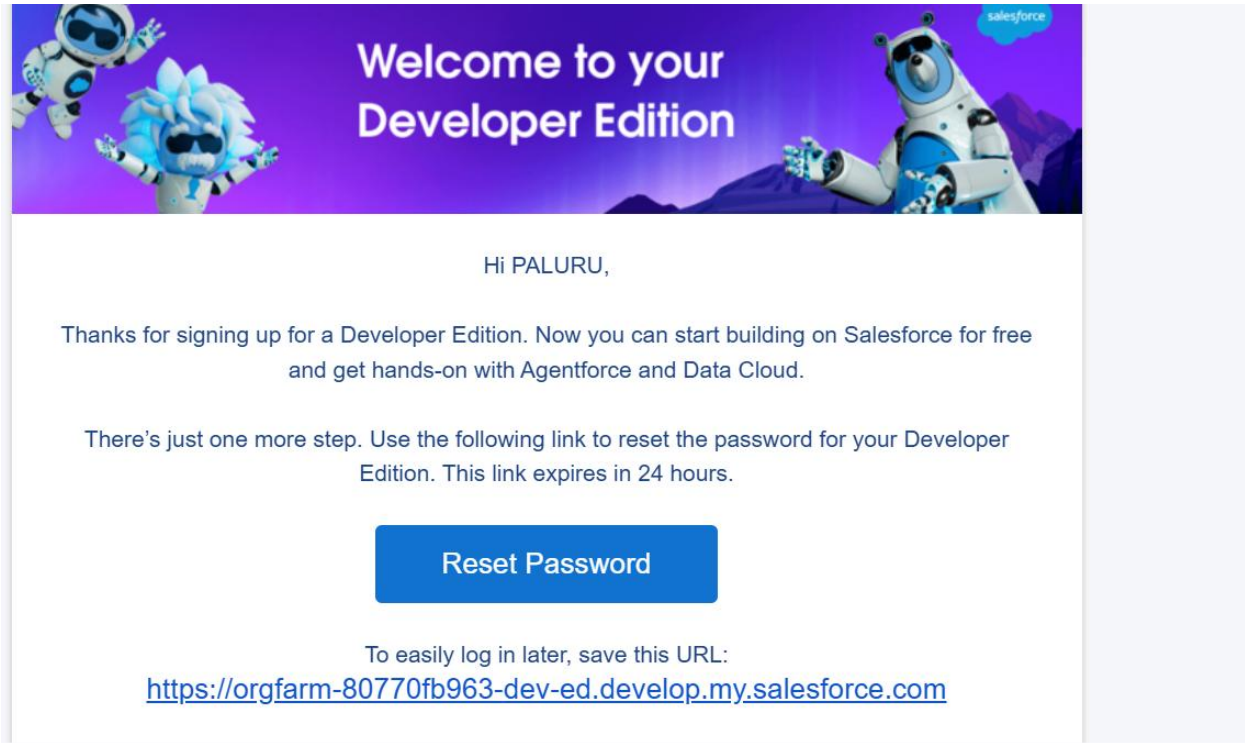
Medicare Cloud – Phase 2: Org Setup & Configuration

Goal: Prepare Salesforce environment for healthcare use case (patients, appointments, claims, care plans) with a secure, structured, and efficient setup

1. Salesforce Edition

- Developer Edition (Free Dev Org) for prototype development.
- Future: Health Cloud license for production to leverage prebuilt healthcare objects like Care Plans, Patient Profiles, and Patient Engagement tools.
- Purpose: Low-cost, flexible environment for testing workflows, object relationships, and automation.



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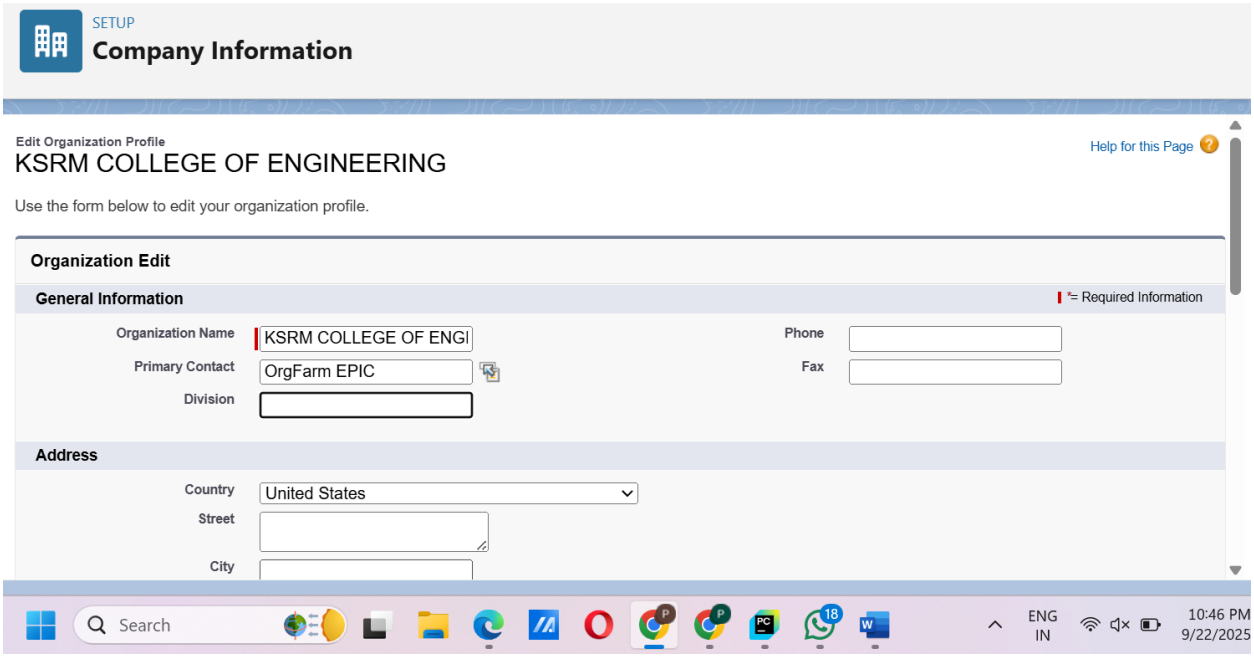
2. Company Profile Setup

- Setup → Company Settings → Company Information
- Add:

    - Company Name: Medicare Cloud Pvt Ltd
    - Time Zone: IST (India Standard Time)
    - Currency: INR (₹) or USD ($) depending on project scope
- Additional Configuration: Locale, language, and default business hours to standardize record creation and reporting.
- Purpose: Accurate time and currency settings ensure proper scheduling, reporting, and workflow processing.
- 

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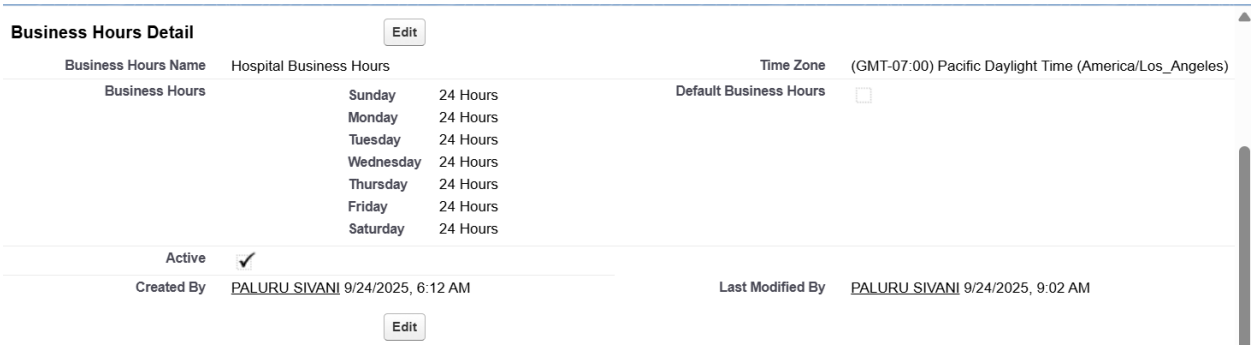
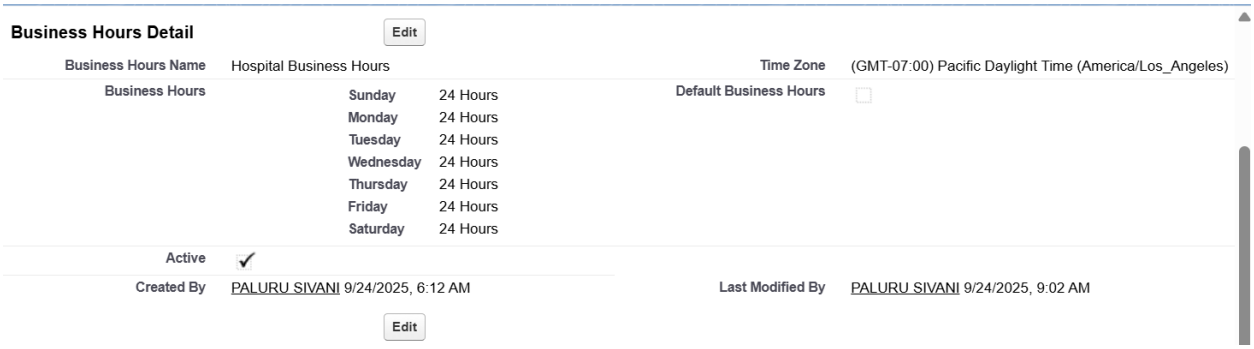
3. Business Hours & Holidays

- Business Hours: Setup → Quick Find → Business Hours → New
    - Example: Mon–Sat, 09:00–18:00

- 

- Holidays: Setup → Quick Find → Holidays → New
    - Suggested: New Year, Republic Day, Independence Day, Diwali, Christmas, Hospital Annual Maintenance Day
    - Mark as Active.
- Purpose: Workflows, approval processes, and scheduling respect working hours and holidays.
- 

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4. Fiscal Year Settings

- Setup → Quick Find → Fiscal Year
- Use Standard (Jan–Dec)
- Purpose: Aligns with revenue reporting, insurance claim cycles, and hospital budgeting.

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5. User Setup & Licenses

- Create hospital user roles:
    - Doctor: Salesforce license, Doctor Profile
    - Nurse: Salesforce license, Nurse Profile
    - Insurance Officer: Salesforce license, Insurance Profile
    - Admin: System Administrator
- Assign role, profile, and permission sets at creation.
- Purpose: Ensures proper access control and workflow responsibilities.

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6. Profiles

- Setup → Profiles → Clone Standard User/Admin → Name appropriately → Assign to users
- Suggested Profiles:
    - Doctor: Create/edit patients & appointments, view claims
    - Nurse: Update appointments & patient notes
    - Insurance Officer: View & update claims only
    - Admin: Full access
- Future Steps: Assign object-level permissions for custom objects once created.
- Purpose: Baseline access for users, with flexibility via permission sets.

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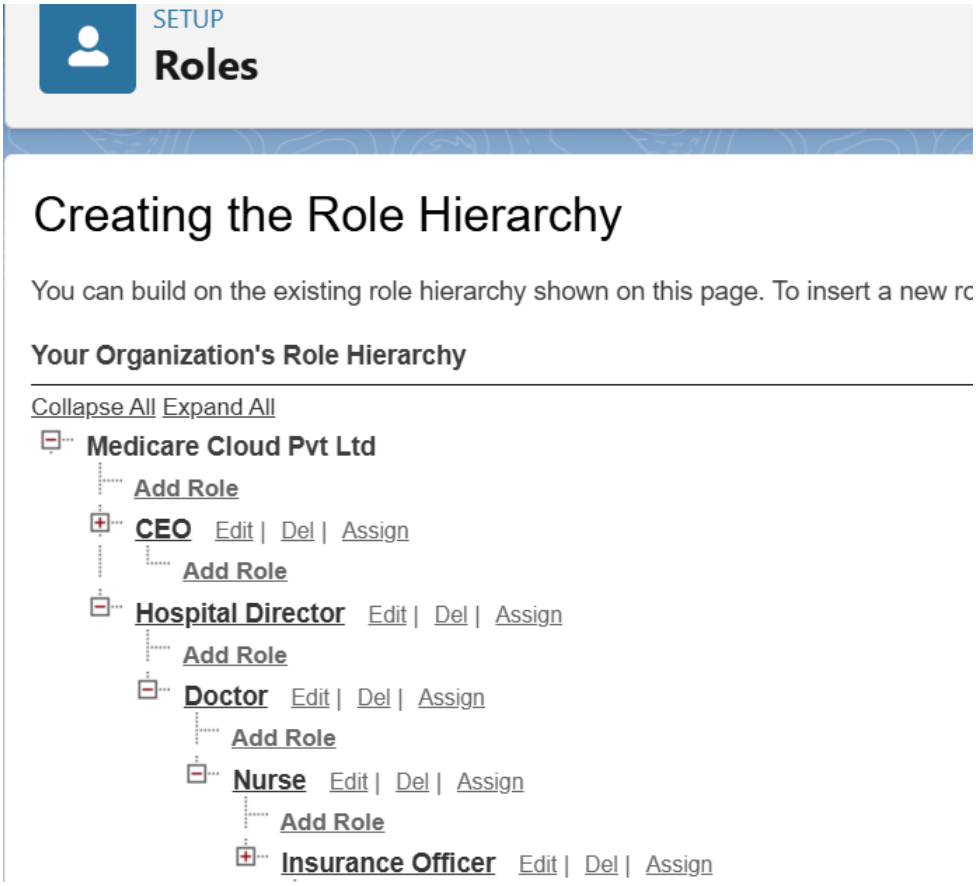
7. Roles (Hierarchy)

- Setup → Roles → Set Up Roles
- Suggested hierarchy:
  Hospital Director
  └─ Doctor
  └─ Nurse
  Insurance Officer (separate branch)

- Purpose: Controls record visibility roll-up; higher roles can see records owned by lower roles.



- Verification: Test by logging in as lower-role users to ensure visibility is correct.

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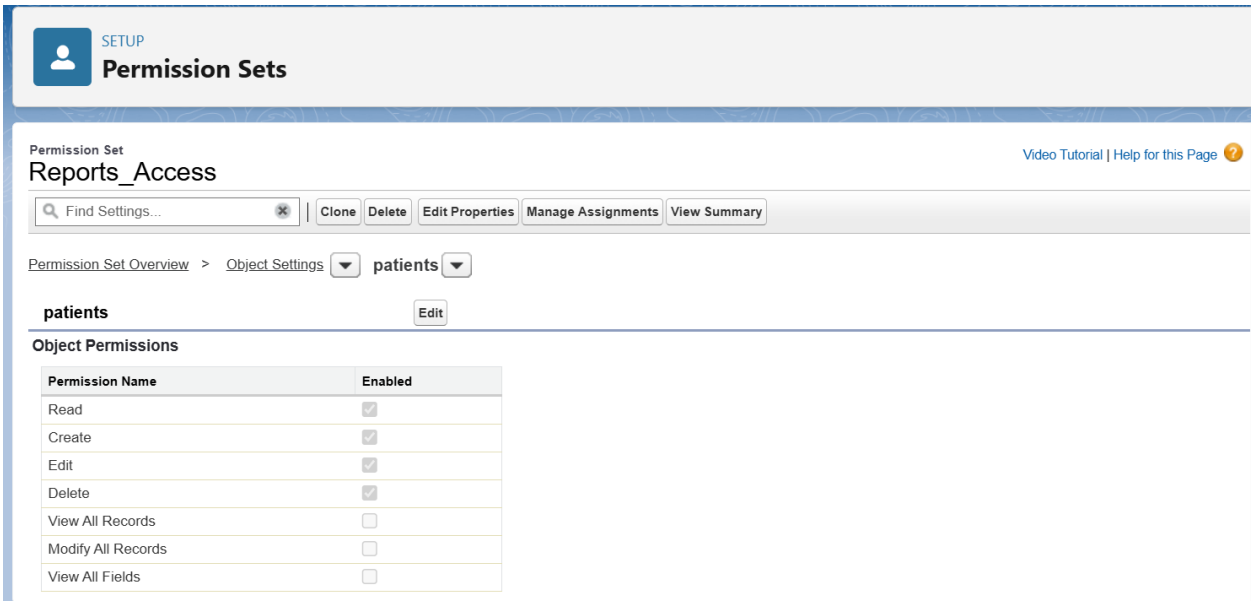
8. Permission Sets

- Setup → Permission Sets → New → Configure → Assign to users
- Suggested Permission Sets:
    - Reports_Access: Run reports, view dashboards
    - Telemedicine_Access: Access telemedicine apps and pages
- Purpose: Grant additional access without modifying profiles, ideal for temporary or role-specific needs.

- Assignment: Users can have multiple permission sets simultaneously.
- 

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9. Org-Wide Defaults (OWD)

- Patient__c: Private (only owner/doctor/manager sees)
- Appointment__c: Public Read Only (staff can view schedules)
- Insurance_Claim__c: Private (only relevant users can see)
- Purpose: Protects sensitive patient and claim information by default.

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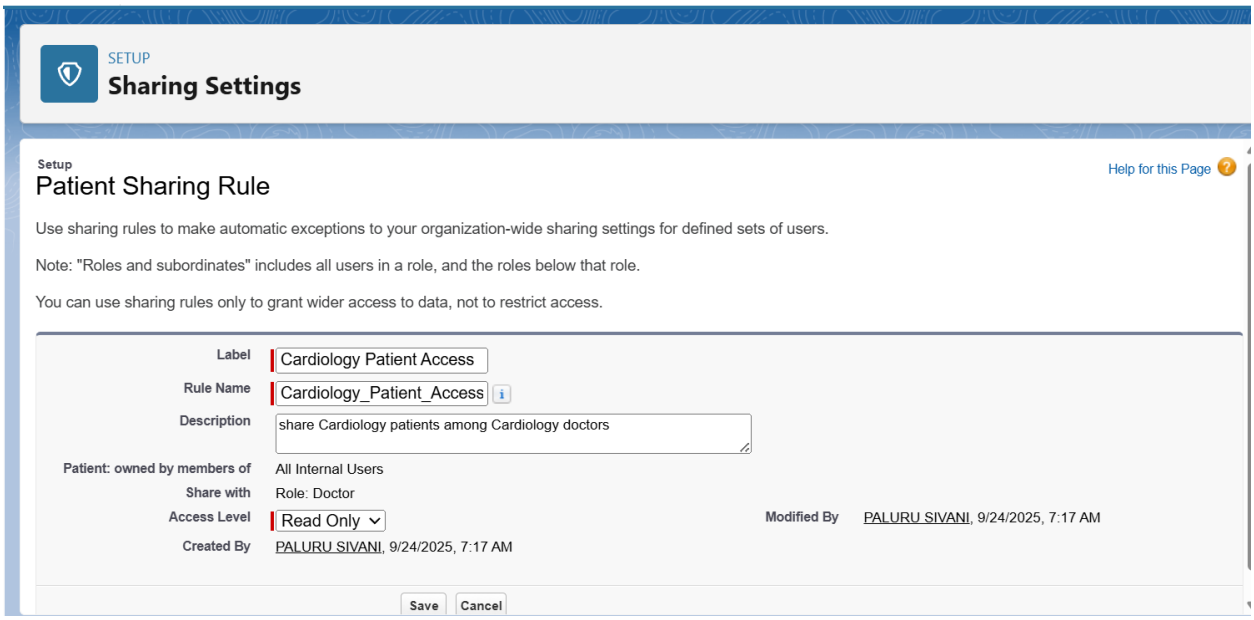
10. Sharing Rules

- Setup → Sharing Settings → New Rule → Define criteria → Assign access
- Example: Cardiology doctors see each other's patients.
- Purpose: Provide exceptions to OWD while maintaining data privacy.



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11. Login Access Policies

- Restrict login hours:
    - Doctors/Nurses: 09:00–18:00
    - Admin: 24x7
    - Insurance Officer: restricted as needed
- Optional: Restrict by IP range for sensitive hospital networks.
- Purpose: Enhances security and ensures compliance with hospital policies.

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12. Dev Org Setup

- Developer Org acts as a sandbox to build and test:
    - Custom objects (Patient__c, Appointment__c, Insurance_Claim__c, Care_Plan__c)
    - Automation (Flows, Process Builder, Workflows)
    - Permissions, layouts, and apps
- Purpose: Safe testing environment without affecting production data.

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13. Sandbox Usage (Future Production)

- Recommended workflow:
    1. Build/test in Sandbox
    2. Conduct UAT (User Acceptance Testing)
    3. Deploy to Production using Change Sets or Salesforce CLI
- Purpose: Ensures changes are validated and reduces production risks.

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14. Deployment Basics

- Package metadata: objects, fields, profiles, permission sets, roles, workflows, flows
- Deploy to Production → Validate → Activate
- Maintain deployment documentation with metadata changes and order
- Purpose: Streamlined, controlled deployment of changes to live environment.

Summary

Phase 2 ensures that Salesforce is secure, structured, and ready for healthcare workflows. By completing this phase, you achieve:

- User accounts, profiles, and roles configured
- Permission sets created and assigned
- OWD and sharing rules implemented
- Business hours and holidays configured
- Dev Org ready for custom object creation and automation
- Deployment strategy defined for Production rollout