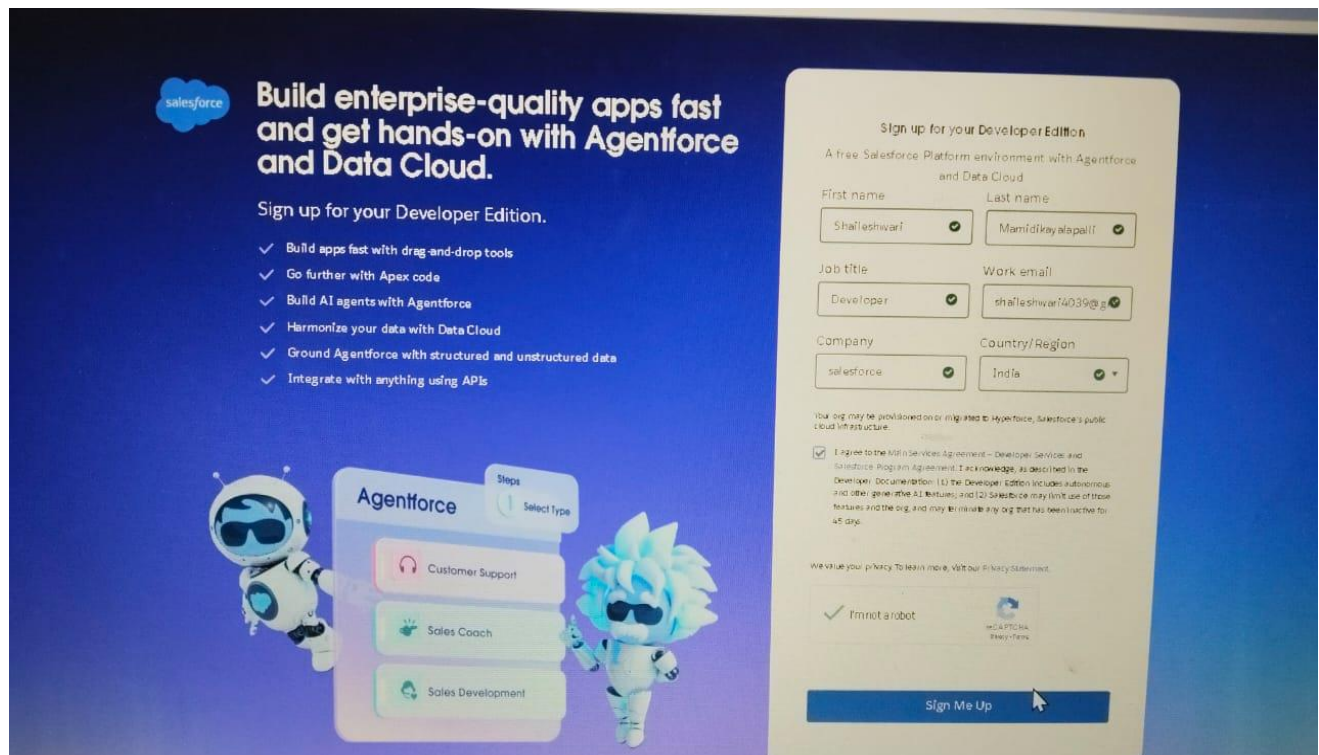


Medicare Cloud – Phase 2: Org Setup & Configuration

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.



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.

SETUP Company Information

Edit Organization Profile
KSRM COLLEGE OF ENGINEERING

Use the form below to edit your organization profile.

Organization Edit

General Information ! Required Information

Organization Name Phone

Primary Contact Fax

Division

Address

Country Street

City

3. Business Hours & Holidays

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

Business Hours Detail

Edit

Business Hours Name	Hospital Business Hours	Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Business Hours	<div> <div>Sunday</div> <div>24 Hours</div> </div> <div> <div>Monday</div> <div>24 Hours</div> </div> <div> <div>Tuesday</div> <div>24 Hours</div> </div> <div> <div>Wednesday</div> <div>24 Hours</div> </div> <div> <div>Thursday</div> <div>24 Hours</div> </div> <div> <div>Friday</div> <div>24 Hours</div> </div> <div> <div>Saturday</div> <div>24 Hours</div> </div>	Default Business Hours	<input type="checkbox"/>

Active

☒

Created By

PALURU SIVANI 9/24/2025, 6:12 AM

Last Modified By

PALURU SIVANI 9/24/2025, 9:02 AM

Edit

- 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.

Business Hours Detail

Edit

Business Hours Name	Hospital Business Hours	Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Business Hours	<div> <div>Sunday</div> <div>24 Hours</div> </div> <div> <div>Monday</div> <div>24 Hours</div> </div> <div> <div>Tuesday</div> <div>24 Hours</div> </div> <div> <div>Wednesday</div> <div>24 Hours</div> </div> <div> <div>Thursday</div> <div>24 Hours</div> </div> <div> <div>Friday</div> <div>24 Hours</div> </div> <div> <div>Saturday</div> <div>24 Hours</div> </div>	Default Business Hours	<input type="checkbox"/>

Active

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Edit

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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.

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.
-


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.
-

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.


SETUP
Roles

Creating the Role Hierarchy

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

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- Medicare Cloud Pvt Ltd
 - Add Role**
 - CEO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - Hospital Director** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - Doctor** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - Nurse** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - Insurance Officer** [Edit](#) | [Del](#) | [Assign](#)

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

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.

The screenshot shows the 'Permission Sets' configuration interface. At the top, there's a 'SETUP' header with a user icon and the title 'Permission Sets'. Below this, the specific permission set 'Reports_Access' is selected. A search bar 'Find Settings...' and several action buttons ('Clone', 'Delete', 'Edit Properties', 'Manage Assignments', 'View Summary') are visible. The breadcrumb trail indicates 'Permission Set Overview > Object Settings' with dropdown menus for 'patients'. Under the 'patients' section, there's an 'Edit' button. The 'Object Permissions' table lists various permissions and their status.


Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

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.

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.



SETUP

Sharing Settings

Setup

Patient Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label

Cardiology Patient Access

Rule Name

Cardiology_Patient_Access

Description

share Cardiology patients among Cardiology doctors

Patient: owned by members of

All Internal Users

Share with

Role: Doctor

Access Level

Read Only

Created By

PALURU SIVANI, 9/24/2025, 7:17 AM

Modified By

PALURU SIVANI, 9/24/2025, 7:17 AM

Save

Cancel

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.

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.

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.

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