

# Patient Management System for Clinics/Hospitals

## Phase 3: Data Modeling & Relationships

### 1. Custom Objects and their fields

#### Standard Objects We'll Use:

- **Account** - Healthcare facilities, insurance companies
- **Contact** - Patients (as people), emergency contacts
- **User** - Healthcare providers, staff members
- **Case** - General customer service issues

#### Additional Custom Objects to Create:

- a. Insurance Provider Object

Insurance Provider | Salesforce

Google Password Manager

How to add sections on the rec

orgfarm-009bd262ce-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gL000002MKmw/FieldsAndRelationships/view

ACTION MOVIESMARATHI HISTORI...ONE SHOT IWTYCCE ALUMINI...AI IMAGE GENERAT...SQL PRACTICEAGENTIC AIAI TOOLSAll Bookmarks

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Insurance Provider

Details

Fields & Relationships

10 Items, Sorted by Field Label

Quick FindNewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Phone	Contact_Phone__c	Phone		
Coverage Percentage	Coverage_Percentage__c	Percent(16, 2)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email (Unique)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Network Type	Network_Type__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Policy Coverage Type	Policy_Coverage_Type__c	Picklist		
Provider Code	Name	Auto Number		✓

## b. Treatment Plan Object

Screenshot of the Salesforce Setup page for the Treatment Plan Object Manager.

The page shows the "Fields & Relationships" section for the Treatment Plan object. The table lists 10 items, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Diagnosis	Diagnosis__c	Long Text Area(32768)		
Estimated Cost	Estimated_Cost__c	Currency(16, 2)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Plan Name	Plan_Name__c	Text(174)		
Plan Number	Name	Auto Number		✓
Priority	Priority__c	Picklist		
Status	Status__c	Picklist		

## c. Medical Test Object

Screenshot of the Salesforce Setup page for the Medical Test Object Manager.

The page shows the "Fields & Relationships" section for the Medical Test object. The table lists 10 items, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cost	Cost__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Results	Results__c	Long Text Area(32768)		
Status	Status__c	Picklist		
Test Date	Test_Date__c	Date		
Test Name	Test_Name__c	Text(174)		
Test Number	Name	Auto Number		✓

## 2. Record Types

Patient | Salesforce

Google Password Manager

How to add sections on the rec

orgfarm-009bd262ce-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000002K0XN/RecordTypes/view

ACTION MOVIES | MARATHI HISTORI... | ONE SHOT IWT | YCCE ALUMINI | AI IMAGE GENERAT... | SQL PRACTICE | AGENTIC AI | AI TOOLS

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Patient

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Record Types

3 Items, Sorted by Record Type Label

RECORD TYPE LABEL

DESCRIPTION

ACTIVE

MODIFIED BY

Adult Patient

✓

shardul sonkusale, 9/24/2025, 10:30 AM

Emergency Patient

✓

shardul sonkusale, 9/24/2025, 10:34 AM

Pediatric Patient

✓

shardul sonkusale, 9/24/2025, 10:31 AM

Medical Appointment | Salesfor

Google Password Manager

How to add sections on the rec

orgfarm-009bd262ce-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000002K7Vd/RecordTypes/view

ACTION MOVIES | MARATHI HISTORI... | ONE SHOT IWT | YCCE ALUMINI | AI IMAGE GENERAT... | SQL PRACTICE | AGENTIC AI | AI TOOLS

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Record Types

3 Items, Sorted by Record Type Label

RECORD TYPE LABEL

DESCRIPTION

ACTIVE

MODIFIED BY

Emergency Appointment

✓

shardul sonkusale, 9/24/2025, 10:36 AM

Routine Appointment

✓

shardul sonkusale, 9/24/2025, 10:36 AM

Telehealth Appointment

✓

shardul sonkusale, 9/24/2025, 10:36 AM

### 3. Page Layouts

Patient Information:

- Patient Name, Medical Record Number, Date of Birth
- Blood Type, Preferred Language

Contact Information:

- Phone, Email, Mailing Address
- Emergency Contact

Medical Information:

- Allergies, Current Medications
- Primary Insurance, Secondary Insurance

System Information:

- Created By, Created Date, Last Modified By

Patient | Salesforce

Google Password Manager

How to add sections on the rec

orgfarm-009bd262ce-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gL000002K0XN/PageLayouts/view

ACTION MOVIESMARATHI HISTORI...ONE SHOT IWTYCCE ALUMINIAI IMAGE GENERAT...SQL PRACTICEAGENTIC AIAI TOOLSAll Bookmarks

Search Setup

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Page Layouts

2 Items, Sorted by Page Layout Name

Quick FindNewPage Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Adult Patient Layout	shardul sonkusale, 9/24/2025, 10:38 AM	shardul sonkusale, 9/24/2025, 11:08 AM	
Patient Layout	shardul sonkusale, 9/22/2025, 1:24 AM	shardul sonkusale, 9/24/2025, 10:54 AM	

## 4. Compact Layouts

Layout Name: Patient Summary

Selected Fields (in order):

- 1. Patient Name
- 2. Medical Record Number
- 3. Phone
- 4. Blood Type
- 5. Primary Insurance

Patient | Salesforce

Google Password Manager

How to add sections on the rec

orgfarm-009bd262ce-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000002K0XN/CompactLayouts/view

ACTION MOVIESMARATHI HISTORI...ONE SHOT IWTYCCE ALUMINI...AI IMAGE GENERAT...SQL PRACTICEAGENTIC AIAI TOOLS

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2 Items, Sorted by Label

Quick Find

NewCompact Layout Assignment

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Patient Summary	Patient_Summary		shardul sonkusale	9/24/2025, 11:10 AM
System Default	SYSTEM	✓		

## 5. Schema Builder

Patient connected to Appointments, Prescriptions, Treatment Plans

Insurance Provider connected to Patient

Medical Tests connected to Patient

All Request objects connected to Patient

