

## Phase 9: Reporting, Dashboards

### Goal

Provide hospital administrators and management with actionable insights—appointment volumes, revenue, doctor utilization—while ensuring all patient data remains secure and compliant with healthcare privacy requirements.

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#### **1** Reporting

**Purpose:** Transform raw data from Doctor, Patient, Appointment (and optional Billing) objects into useful summaries.

- **Key Reports**

- **Daily Appointments Report** – Number of appointments scheduled and completed per day/doctor.
- **Doctor Utilization Report** – Percentage of available slots filled for each doctor.
- **Revenue by Department** – If you use a Billing object, show total fees collected by specialty or period.
- **New Patient Registrations** – Track growth and marketing impact.
- **No-Show / Cancellation Rate** – Monitor patient engagement and scheduling efficiency.

- **Steps**

1. **Setup → Reports → New Report.**
2. Choose report type (e.g., “Appointments with Doctors”).
3. Add filters: Date = TODAY(), Status = “Completed,” etc.
4. Group by Doctor or Department; add charts (bar, pie).

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
<b>Recent</b>	New Patients Report		Public Reports	Sowmya Panithi	9/26/2025, 2:46 AM	<input type="checkbox"/>
Created by Me	New Appointments Report		Public Reports	Sowmya Panithi	9/26/2025, 2:43 AM	<input type="checkbox"/>
Private Reports	New Doctors Report		Public Reports	Sowmya Panithi	9/26/2025, 2:36 AM	<input type="checkbox"/>
Public Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	9/16/2025, 1:02 PM	<input type="checkbox"/>
All Reports						

## 2 Dashboards

**Purpose:** Visualize multiple reports at a glance.

- **Example Dashboard Components**

- Appointment Trend Chart (daily/weekly line chart).
- Revenue by Department (pie chart).
- Doctor Utilization (gauge or bar chart).
- Upcoming Appointments (table).

- **Steps**

1. **Setup → Dashboards → New Dashboard.**
2. Add components, select the reports above.
3. Set running user as “System Administrator” or use **Dynamic Dashboards** so each doctor or receptionist only sees their own data.

Screenshot of a Salesforce Developer Edition dashboard titled "Hospital Operations Dashboard".

The dashboard contains two reports:

- Appointment Reports:** Shows appointment names Manasa and Vanshitha.
- Patient Reports:** Shows patient numbers P-0001, P-0002, P-0003, and P-0004.

A green confirmation message at the top right says "Dashboard saved".

The browser address bar shows the URL: orgfarm-9cf877550-dev-ed.lightning.force.com/one/one.app#eyJhb21wb25lbnREZWYiOjkZXNrdG9wRGFzaGJvYXJkczpkYXNoYm9hcmQiLCJhdHRyaWJ1dGVzIjp7ImRhc2hib2fryZEIkjoi... .

The taskbar at the bottom includes icons for weather (30°C, Light rain), search, and various system applications like File Explorer, Control Panel, and Task Manager.