



Life Sciences Cloud Developer Guide

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CONTENTS

Chapter 1: Life Sciences Cloud Overview	1
Life Sciences Cloud Data Model	2
Clinical Engagement	2
Customer Engagement	143
Patient Engagement	714
MedTech Commercial Engagement	1366
Life Sciences Cloud Associated Objects	1426
StandardObjectNameChangeEvent	1426
StandardObjectNameFeed	1429
StandardObjectNameHistory	1434
StandardObjectNameOwnerSharingRule	1436
StandardObjectNameShare	1438
VisitedPartyFeed	1439
VisitorFeed	1444
Life Sciences Cloud Fields on Standard Objects	1448
Account	1449
AccountPlan	1450
AccountPlanObjective	1453
ActionPlan	1454
ActionPlanItem	1457
ActionPlanTemplateItemValue	1458
Action Plan Template	1459
Action Plan Template Item	1460
ActionPlanTemplateVersion	1460
Contact	1462
Fields on ContactPointAddress	1463
Fields on Event	1466
Fields on Event Relation	1468
Product Request	1470
Product Request Line Item	1470
Product Transfer	1471
StandardValueSet Names and Standard Picklist Fields	1472
Life Sciences Cloud Platform Events	1476
ApplnFormAppealStsChgEvt	1476
CareBnftVrfyRqstStsChgEvent	1477
Working With Electronic Health Records	1478
Mapping FHIR v4.0 to Salesforce Standard Objects	1479
Store HL7 v2.3 Messages in Salesforce Standard Objects	1584
Life Sciences Cloud Business APIs	1602

Contents

Resources	1603
Request Bodies	1689
Response Bodies	1781
Apex Reference	1849
embeddedai Namespace	1849
ConnectApi Namespace	1855
Life Sciences Cloud Standard Invocable Actions	1866
Assign Candidate to Research Study Group Action	1867
Build Product Territory Detailed Availability Action	1869
Generate Research Study Blocks Action	1870
Get Context Data Action	1872
Get Life Sciences Configuration Field Names and Values	1875
Process Criteria Matching Response	1877
Serialize Hierarchical Context Data	1879
Life Sciences Cloud Tooling API Objects	1881
AssessmentConfiguration	1882
CareBenefitVerifySettings	1885
CareLimitType	1888
CareProviderAfflRoleConfig	1892
CareProviderSearchConfig	1894
CareRequestConfiguration	1897
CareSystemFieldMapping	1902
TimelineObjectDefinition	1906
Customer Engagement Tooling API Objects	1906
SearchableObjectSyncInfo	1924
SearchCriteriaConfiguration	1926
SearchResultActionConfig	1931
Life Sciences Cloud Metadata Types	1934
CareBenefitVerifySettings	1935
CareLimitType	1937
CareRequestConfiguration	1939
CareSystemFieldMapping	1942
CareProviderSearchConfig	1944
Flow for Life Sciences Cloud	1945
IndustriesSettings	1946
IndustriesUnifiedInventorySettings	1949
LifeSciConfigCategory	1951
LifeSciConfigRecord	1954
SearchResultActionConfig	1959
TimelineObjectDefinition	1961
UIObjectRelationConfig	1963
Customer Engagement Metadata Type	1968
API End-of-Life Policy	1974

CHAPTER 1 Life Sciences Cloud Overview

In this chapter ...

- [Life Sciences Cloud Data Model](#)
- [Life Sciences Cloud Associated Objects](#)
- [Life Sciences Cloud Fields on Standard Objects](#)
- [StandardValueSet Names and Standard Picklist Fields](#)
- [Life Sciences Cloud Platform Events](#)
- [Working With Electronic Health Records](#)
- [Life Sciences Cloud Business APIs](#)
- [Apex Reference](#)
- [Life Sciences Cloud Standard Invocable Actions](#)
- [Life Sciences Cloud Tooling API Objects](#)
- [Life Sciences Cloud Metadata Types](#)
- [API End-of-Life Policy](#)

Life Sciences Cloud is an end-to-end, purpose-built platform for the life sciences industry spanning clinical to medical to commercial domains. This guide includes the available developer resources for Life Sciences Cloud.

SEE ALSO:

[Revenue Lifecycle Management Developer Guide: Product Catalog Management](#)

Life Sciences Cloud Data Model

Life Sciences Cloud provides a rich set of objects to store and access specialized Life Sciences information.

To verify the complete list of fields for an object, you can use a describe call from the API, or inspect with an appropriate tool, for example, inspecting the WSDL or using a schema viewer.

[Clinical Engagement](#)

These objects are available for Life Sciences Cloud for Clinical Engagement.

[Customer Engagement](#)

These objects are available for Life Sciences Cloud for Customer Engagement.

[Patient Engagement](#)

These objects are available for Life Sciences Cloud for Patient Engagement.

[MedTech Commercial Engagement](#)

These objects are available for Life Sciences Cloud for MedTech Commercial Engagement.

SEE ALSO:

[Object Reference for the Salesforce Platform: Overview of Salesforce Objects and Fields](#)

[SOAP API Developer Guide: Introduction to SOAP API](#)

[Industries Common Resources Developer Guide: Discovery Framework Standard Objects](#)

[Industries Common Resources Developer Guide: Intelligent Form Reader Standard Objects](#)

Clinical Engagement

These objects are available for Life Sciences Cloud for Clinical Engagement.

[Adverse Events](#)

Adverse Events data model helps you in managing and documenting any unfavorable or unintended signs, symptoms, or diseases that occur in participants during the research study. These adverse events can include a wide range of physical or psychological effects that varies from mild discomfort to serious health complications.

[Participant Management](#)

Participant Management data model helps you to streamline the recruitment and enrollment processes in clinical trials with advanced digital solutions. With this data model, you can store clinical trial data representing care programs and research studies. It's USCDI and FHIR R4-aligned, which helps with your system's interoperability and compliance while managing participant data efficiently.

[Site Management](#)

The Site Management data model helps life sciences organizations identify suitable sites for conducting research studies. Study managers can search for the sites and investigators using the Criteria-Based Search and Filter, and send them assessments. From the assessment responses, study managers can assign scores to the sites, investigators, and their responses. They can also tag the sites and investigators for future site selection efforts.

Adverse Events

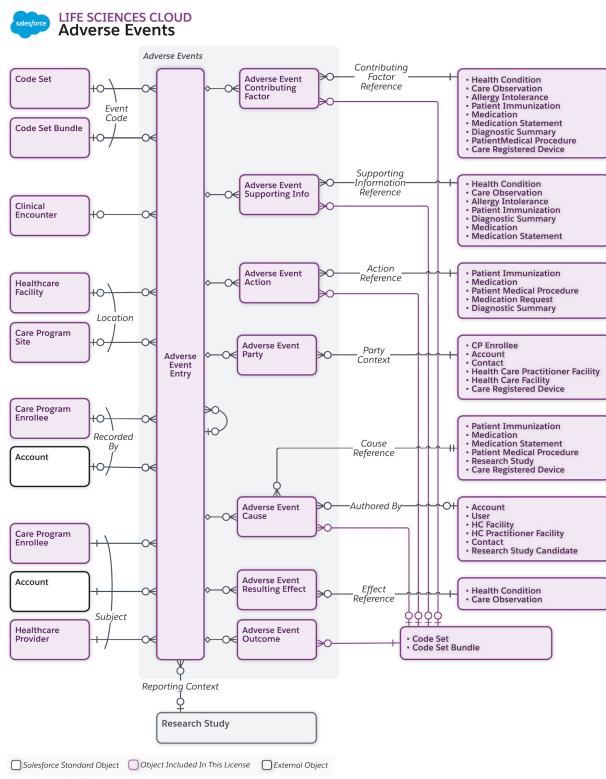
Adverse Events data model helps you in managing and documenting any unfavorable or unintended signs, symptoms, or diseases that occur in participants during the research study. These adverse events can include a wide range of physical or psychological effects that varies from mild discomfort to serious health complications.

The adverse events objects are available to users with Health Cloud Starter or Health Cloud license. Available in API version 61.0 and later.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud



For more details and a larger image, visit the [Data Model Gallery](#).

AdverseEventAction

Preventive actions that contributed to avoiding the adverse event or Ameliorating actions taken after the adverse event occurred in order to reduce the extent of harm. This object is available in API version 61.0 and later.

AdverseEventCause

Describes the entity that is suspected to have caused the adverse event. This object is available in API version 61.0 and later.

AdverseEventContribFactor

The contributing factors suspected to have increased the probability or severity of the adverse event. This object is available in API version 61.0 and later.

[AdverseEventEntry](#)

Represents the event related to unintended/anticipated effects on research participants. This object is available in API version 61.0 and later.

[AdverseEventOutcome](#)

Type of outcome from the adverse event. This object is available in API version 61.0 and later.

[AdverseEventParty](#)

Indicates who or what participated in the adverse event and how they were involved. This object is available in API version 61.0 and later.

[AdverseEvtResultingEffect](#)

Effect on the subject due to this event. This object is available in API version 61.0 and later.

[AdverseEventSupportInfo](#)

Supporting information relevant to the event. This object is available in API version 61.0 and later.

AdverseEventAction

Preventive actions that contributed to avoiding the adverse event or Ameliorating actions taken after the adverse event occurred in order to reduce the extent of harm. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ActionCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The code of the adverse incident action. This field is a polymorphic relationship field.</p> <p>Relationship Name ActionCode</p> <p>Refers To CodeSet, CodeSetBundle</p>
ActionReferenceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The reference of the action that caused the adverse incident. This field is a polymorphic relationship field.</p>
	<p>Relationship Name ActionReference</p>
	<p>Refers To DiagnosticSummary, Medication, MedicationRequest, PatientImmunization, PatientMedicalProcedure</p>
ActionType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of action that contributed to the adverse incident. Possible values are:<ul style="list-style-type: none"> • Mitigative • Preventive The default value is Preventive.</p>
AdverseEventEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent adverse incident associated with the action. This field is a relationship field.</p> <p>Relationship Name AdverseEventEntry</p> <p>Relationship Type Master-detail</p> <p>Refers To AdverseEventEntry (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AdverseEventActionChangeEvent on page 1426](#)

Change events are available for the object.

[AdverseEventActionFeed on page 1429](#)

Feed tracking is available for the object.

[AdverseEventActionHistory on page 1434](#)

History is available for tracked fields of the object.

AdverseEventCause

Describes the entity that is suspected to have caused the adverse event. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AdverseEventEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description The adverse incident associated with the adverse incident cause. This field is a relationship field.</p> <p>Relationship Name AdverseEventEntry</p> <p>Relationship Type Master-detail</p> <p>Refers To AdverseEventEntry (the master object)</p>
AssessmentMethodCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The assessment method code associated with the adverse incident cause. This field is a polymorphic relationship field.</p> <p>Relationship Name AssessmentMethodCode</p> <p>Refers To CodeSet, CodeSetBundle</p>
AuthoredById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The person who has authored the adverse incident cause. This field is a polymorphic relationship field.</p> <p>Relationship Name AuthoredBy</p> <p>Refers To Account, Contact, HealthcareFacility, HealthcarePractitionerFacility, ResearchStudyCandidate, User</p>
CauseCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The code of the adverse incident cause.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name CauseCode</p> <p>Refers To CodeSet, CodeSetBundle</p>
CauseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The cause of the adverse event. This field is a polymorphic relationship field.</p> <p>Relationship Name Cause</p> <p>Refers To CareRegisteredDevice, Medication, MedicationStatement, PatientImmunization, PatientMedicalProcedure, ResearchStudy</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study.</p>

Field	Details
Probability	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the probability of the cause to have been the reason for the adverse incident.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Certain • Likely • Possible • Unlikely • Conditional or Classified • Unassessable or Unclassifiable

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AdverseEventCauseChangeEvent on page 1426](#)

Change events are available for the object.

[AdverseEventCauseFeed on page 1429](#)

Feed tracking is available for the object.

[AdverseEventCauseHistory on page 1434](#)

History is available for tracked fields of the object.

AdverseEventContribFactor

The contributing factors suspected to have increased the probability or severity of the adverse event. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AdverseEventEntryId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description The parent adverse incident associated with the contributing factor of the incident. This field is a relationship field.</p> <p>Relationship Name AdverseEventEntry</p> <p>Relationship Type Master-detail</p> <p>Refers To AdverseEventEntry (the master object)</p>
ContributingFactorCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contributing factor of the adverse event. This field is a polymorphic relationship field.</p> <p>Relationship Name ContributingFactorCode</p> <p>Refers To CodeSet, CodeSetBundle</p>
ContributingFactorId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The code of the adverse event contributing factor. This field is a polymorphic relationship field.</p> <p>Relationship Name ContributingFactor</p> <p>Refers To AllergyIntolerance, CareObservation, CareRegisteredDevice, DiagnosticSummary, HealthCondition, Medication, MedicationStatement, PatientImmunization, PatientMedicalProcedure</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AdverseEventContribFactorChangeEvent on page 1426](#)

Change events are available for the object.

[AdverseEventContribFactorFeed on page 1429](#)

Feed tracking is available for the object.

[AdverseEventContribFactorHistory on page 1434](#)

History is available for tracked fields of the object.

AdverseEventEntry

Represents the event related to unintended/anticipated effects on research participants. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Category	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the category of the adverse event. Possible values are:</p> <ul style="list-style-type: none"> • Wrong Patient • Procedure Incident • Medication Incident • Device Malfunction • Unsafe Physical Environment • Hospital Acquired Infection • Wrong Body Site
CauseEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date and time of the cause.</p>
CauseStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start date and time of the cause.</p>
ClinicalEncounterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The clinical encounter associated with the adverse incident. This field is a relationship field.</p> <p>Relationship Name ClinicalEncounter</p>

Field	Details
	<p>Refers To ClinicalEncounter</p>
DetectedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time when the adverse event was detected.</p>
EventCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The code of the adverse incident. This field is a polymorphic relationship field.</p> <p>Relationship Name EventCode</p> <p>Refers To CodeSet, CodeSetBundle</p>
EventEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The end date and time of the incident.</p>
EventStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The start date and time of the incident.</p>
HasSubjectDiscontinuedStudy	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether the subject has discontinued from the research study due to the adverse incident. The default value is <code>false</code>.</p>
IsExpected	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the adverse incident is expected for the research study. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The site where the adverse event occurred. This field is a polymorphic relationship field.</p> <p>Relationship Name Location</p> <p>Refers To CareProgramSite, HealthcareFacility</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the adverse event.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
RecordedBy	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account or person who recorded the adverse incident. This field is a polymorphic relationship field.</p> <p>Relationship Name RecordedBy</p> <p>Refers To Account, CareProgramEnrollee</p>
RecordedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the adverse event was recorded.</p>
RelatedAdverseEventEntryId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The adverse event entry that's associated with this record. This field is a relationship field.</p> <p>Relationship Name RelatedAdverseEventEntry</p> <p>Refers To AdverseEventEntry</p>
ReportingContextId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The context for which the adverse incident has been reported. This field is a polymorphic relationship field.</p> <p>Relationship Name ReportingContext</p> <p>Refers To ResearchStudy</p>
Severity	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the severity of the adverse event. Possible values are:</p> <ul style="list-style-type: none"> • Mild • Moderate • Serious • Life Threatening or Disabling • Death • Unserious
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The name of the external system that generated the record.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this item was last changed in the source system</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the status of the adverse incident. Possible values are:</p> <ul style="list-style-type: none"> • In Progress • Completed • Entered-in-Error • Unknown
SubjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The subject of the adverse incident. This field is a polymorphic relationship field.</p> <p>Relationship Name Subject</p> <p>Refers To Account, CareProgramEnrollee, HealthcareProvider</p>

Field	Details
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the type of adverse incident. Possible values are:</p> <ul style="list-style-type: none"> • Actual Adverse Event • Potential Adverse Event

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AdverseEventEntryChangeEvent on page 1426](#)

Change events are available for the object.

[AdverseEventEntryFeed on page 1429](#)

Feed tracking is available for the object.

[AdverseEventEntryHistory on page 1434](#)

History is available for tracked fields of the object.

[AdverseEventEntryShare on page 1438](#)

Sharing is available for the object.

AdverseEventOutcome

Type of outcome from the adverse event. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AdverseEventEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent adverse incident associated with the outcome.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name AdverseEventEntry</p> <p>Relationship Type Master-detail</p> <p>Refers To AdverseEventEntry (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study.</p>
OutcomeCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The code of the adverse event outcome.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name OutcomeCode</p> <p>Refers To CodeSet, CodeSetBundle</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AdverseEventOutcomeChangeEvent on page 1426](#)

Change events are available for the object.

[AdverseEventOutcomeFeed on page 1429](#)

Feed tracking is available for the object.

[AdverseEventOutcomeHistory on page 1434](#)

History is available for tracked fields of the object.

AdverseEventParty

Indicates who or what participated in the adverse event and how they were involved. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AdverseEventEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The adverse incident associated with the party. This field is a relationship field.</p> <p>Relationship Name AdverseEventEntry</p> <p>Relationship Type Master-detail</p> <p>Refers To AdverseEventEntry (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the adverse event.</p>
PartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the adverse event party. This field is a polymorphic relationship field.</p> <p>Relationship Name Party</p> <p>Refers To Account, CareProgramEnrollee, CareRegisteredDevice, Contact, HealthcareFacility, HealthcarePractitionerFacility</p>
Role	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the role of the party in the adverse incident. Possible values are:</p> <ul style="list-style-type: none"> • Informant • Participant • Witness • Author • LSAdverseEventPartyRole

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AdverseEventPartyChangeEvent on page 1426](#)

Change events are available for the object.

[AdverseEventPartyFeed on page 1429](#)

Feed tracking is available for the object.

[AdverseEventPartyHistory on page 1434](#)

History is available for tracked fields of the object.

AdverseEvtResultingEffect

Effect on the subject due to this event. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AdverseEventEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent adverse incident associated with the effect. This field is a relationship field.</p> <p>Relationship Name AdverseEventEntry</p> <p>Relationship Type Master-detail</p> <p>Refers To AdverseEventEntry (the master object)</p>
EffectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The effect of the adverse incident. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Effect</p> <p>Refers To CareObservation, HealthCondition</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AdverseEvtResultingEffectChangeEvent on page 1426](#)

Change events are available for the object.

[AdverseEvtResultingEffectFeed on page 1429](#)

Feed tracking is available for the object.

[AdverseEvtResultingEffectHistory on page 1434](#)

History is available for tracked fields of the object.

AdverseEventSupportInfo

Supporting information relevant to the event. This object is available in API version 61.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AdverseEventEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent adverse incident associated with the supporting information. This field is a relationship field.</p> <p>Relationship Name AdverseEventEntry</p> <p>Relationship Type Master-detail</p> <p>Refers To AdverseEventEntry (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study.</p>

Field	Details
SupportingInfoCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The code of the supporting information. This field is a polymorphic relationship field.</p> <p>Relationship Name SupportingInfoCode</p> <p>Refers To CodeSet, CodeSetBundle</p>
SupportingInformationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The supporting information of the adverse incident. This field is a polymorphic relationship field.</p> <p>Relationship Name SupportingInformation</p> <p>Refers To AllergyIntolerance, CareObservation, DiagnosticSummary, HealthCondition, Medication, MedicationStatement, PatientImmunization</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AdverseEventSupportInfoChangeEvent on page 1426](#)

Change events are available for the object.

[AdverseEventSupportInfoFeed on page 1429](#)

Feed tracking is available for the object.

[AdverseEventSupportInfoHistory on page 1434](#)

History is available for tracked fields of the object.

Participant Management

Participant Management data model helps you to streamline the recruitment and enrollment processes in clinical trials with advanced digital solutions. With this data model, you can store clinical trial data representing care programs and research studies. It's USCDI and FHIR R4-aligned, which helps with your system's interoperability and compliance while managing participant data efficiently.

Participant data in clinical trials is essential in the Life Sciences industry as it helps you track and manage participants' enrollment journey. This data model is your key to collecting information on participants and monitoring the effectiveness and safety of clinical trials.

The Participant Management data model allows you to store clinical trial data representing care program management and research studies. Participant Management uses Care Program Management objects to improve patient outcomes. It also uses the Discovery Framework objects to build more complex prescreening assessment forms and questions to check participants' eligibility. To learn more about Care Program Management objects and Discovery Framework objects, refer [Care Program Management](#) and [Discovery Framework Standard Objects](#).

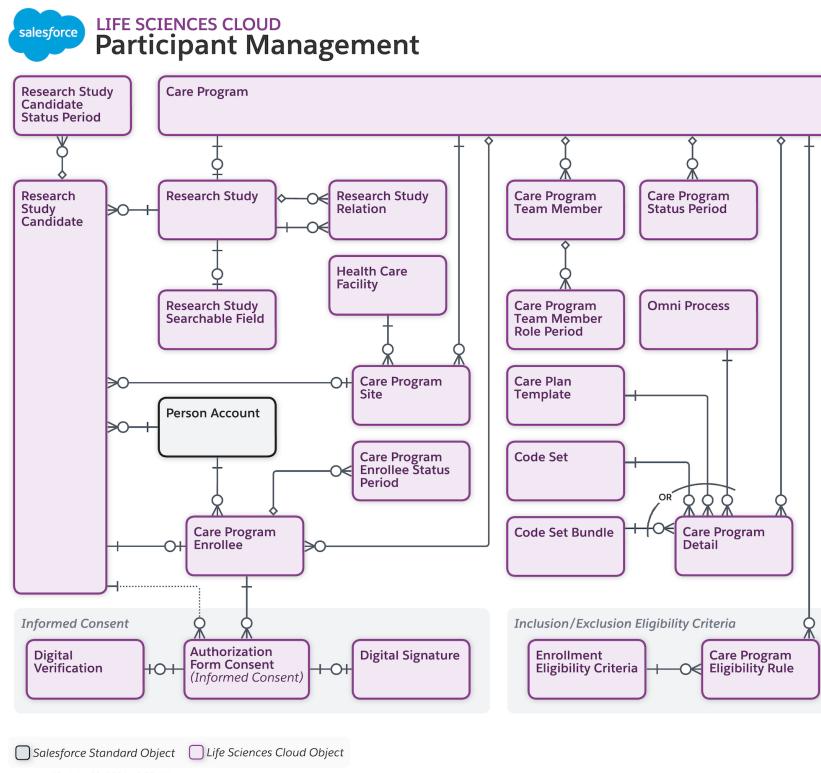
Participant Management also reuses some of the standard Salesforce objects to digitize the Consent Management flow. You can add consent documents to clinical trials by associating them with the related care program and defining their data use purpose. To learn more about the standard objects used for e-consents, refer [Standard Objects](#).

The participant management objects are available to users with Health Cloud Starter and the Participant Enrollment Add-On license. Available in API version 61.0 and later.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences or Health Cloud



For more details and a larger image, visit the [Data Model Gallery](#).

[CareProgram](#)

Represents a set of activities, such as a patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.

[CareProgramDetail](#)

Represents the detail records related to the care program. This object is available in API version 61.0 and later.

[CareProgramEligibilityRule](#)

Represents a rule defining the criteria for patient care program enrollment eligibility. This entity creates an association between Care Program and an Enrollment Eligibility Criteria.

[CareProgramEnrollee](#)

Represents a participant enrolled in a care program.

[CareProgramSite](#)

Represents the details about the care program site. This object is available in API version 61.0 and later.

[CareProgramStatusPeriod](#)

Represents the historical changes to the status of a care program. This object is available in API version 61.0 and later.

[CareProgramTeamMember](#)

Represents a person who delivers services under a program, such as a program manager or care coordinator.

[CarePgmEnrleeStatusPeriod](#)

Represents the historical changes to the status or stage of a care program enrollee. This object is available in API version 61.0 and later.

[CarePgmEnrollmentEvalRslt](#)

Represents the result of an evaluation done to assess the eligibility of a participant enrolling for a research study or care program. This object is available in API version 62.0 and later.

[CarePgmTeamMbrRolePeriod](#)

Represents the historical changes in the role of a care program team member. This object is available in API version 61.0 and later.

[DiagnosticSummary](#)

Represents the findings, interpretations, and summaries of tests performed on patients. This object is available in API version 51.0 and later.

[DigitalVerification](#)

Stores information about the verification of a related record. This object is available in API version 60.0 and later.

[EnrollmentEligibilityCriteria](#)

Represents criteria that define patient enrollment eligibility for one or more care programs.

[ResearchStudy](#)

Represents the details of a research study that include its design, execution, and oversight. This object is available in API version 61.0 and later.

[ResearchStudyCandidate](#)

Represents the details of the research participant which includes the associated account and the status of the subject. This object is available in API version 61.0 and later.

[ResearchStudyCmprGroup](#)

Represents the details of a research study comparison group. This object is available in API version 61.0 and later.

[ResearchStudyProtocolInfo](#)

Represents details of the research study protocol document. This object is available in API version 62.0 and later.

[ResearchStudyRelation](#)

Represents different related research studies. This object is available in API version 61.0 and later.

[ResearchStudyRndmBlockSlot](#)

Represents the individual randomization block items corresponding to a Research Study Randomization Block. This object is available in API version 61.0 and later.

[ResearchStudyCndtStatusPrd](#)

Represents the time duration during which a research study candidate is assigned a specific status. This object is available in API version 61.0 and later.

[ResearchStudyCmprGroupCndt](#)

Represents the junction between a research study control group and a research study candidate. This object is available in API version 61.0 and later.

[RsrchStudyRandomizationCrit](#)

Represents the criteria definition for grouping the candidates participating in the research study. This object is available in API version 61.0 and later.

[ResearchStudyRandomization](#)

Represents the randomization algorithm configuration defined for a research study. This object is available in API version 61.0 and later.

[RsrchStudyRandomizationBlock](#)

Represents the details of a block that's generated through the parameters specified in the research study randomization. This object is available in API version 61.0 and later.

[ResearchStudySearchableField](#)

Represents a common dataset that includes multiple fields and values from multiple objects and serves as the basis for searches related to research studies. This object is available in API version 61.0 and later.

CareProgram

Represents a set of activities, such as a patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field Name	Details
ActiveSiteCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The number of active sites for conducting the research study. This field is available in API version 64.0 and later when Site Management is enabled.</p>

Field Name	Details
BudgetAmount	<p>Type Currency</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Approved budget for the care program.</p>
CareProgramName	<p>Type Text</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the care program.</p>
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Represents the category of the care program. Possible values are:</p> <ul style="list-style-type: none"> • AdvancedTherapy • TrialManagement (This field is available for the Participant Management feature in API version 61.0 and later.) • Patient Services (This field is available with Patient Program Outcome Management permission set in API version 62.0 and later.)
CurrentEnrolleeCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of enrollees who have joined the care program to date. This field is available for the Participant Management feature in API version 61.0 and later.</p>
Description	<p>Type Long Text Area</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A short description explaining the program.</p>

Field Name	Details
EndDate	Type Date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Program termination date.
EnrollmentDurationMeasureId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unit of measure for the participant enrollment duration. This field is available in API version 64.0 and later when Site Management is enabled.
	This field is a relationship field.
	Relationship Name EnrollmentDurationMeasure
	Refers To UnitOfMeasure
EnrollmentRate	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The rate of the participant enrollment at the site. This is calculated by dividing the target enrollment count by the target enrollment duration and the number of planned sites. This field is available in API version 64.0 and later when Site Management is enabled.
FirstSiteClosedOutDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The date on which the first site is closed out.
FirstSiteActivatedDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	<p>The date on which the first site is activated for conducting research studies. This field is available in API version 64.0 and later when Site Management is enabled.</p>
LastSiteActivatedDate	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The date on which the last site is activated for conducting research studies. This field is available in API version 64.0 and later when Site Management is enabled.</p>
LastSiteClosedOutDate	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The date on which the last site is closed out. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ParentProgram	Type
	Lookup(Care Program)
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Name of another program that this program is a part of, if any.
ProgramSponsor	Type
	Lookup(Account)
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Name of the third-party program sponsor, if any.
SourceSystemIdentifier	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	ID of the system from which the record was sourced.

Field Name	Details
StartDate	Type Date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Effective start date of the program.
Status	Type Pick list
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	Status of the program.
TargetEnrollmentDuration	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The duration in which the enrollment for the targeted number of participants must be completed. This field is available in API version 64.0 and later when Site Management is enabled.
TargetEnrolleeCount	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The target enrollee count of the care program. This field is available for the Participant Management feature in API version 61.0 and later.
TargetSiteCount	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The number of sites planned for conducting the research study. This field is available in API version 64.0 and later when Site Management is enabled.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramFeed](#)

Feed tracking is available for the object.

[CareProgramHistory](#)

History is available for tracked fields of the object.

[CareProgramShare](#)

Sharing is available for the object.

CareProgramDetail

Represents the detail records related to the care program. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The care program that the specified detail is related to. This field is a relationship field.</p> <p>Relationship Name CareProgram</p> <p>Relationship Type Master-detail</p> <p>Refers To CareProgram (the master object)</p>
DetailRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The detail of the specified type, associated with the specified care program. This field is a polymorphic relationship field.</p> <p>Relationship Name DetailRecord</p> <p>Refers To CodeSet, CodeSetBundle, OmniProcess</p>
DetailSubtype	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The subtype of the care program detail.</p>
DetailType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of detail specified in the Detail Record field for the specified care program. Possible values are:</p> <ul style="list-style-type: none"> • CarePlanTemplate—Care Plan Template • ClassificationCode—Classification Code • ConditionCode—Condition Code • Focus • KeywordCode—Keyword Code • Label • OmniProcess—Omni Process • RegionCode—Region Code • Result • StudyDesignCode—Study Design Code
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the care program detail.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramDetailChangeEvent on page 1426](#)

Change events are available for the object.

[CareProgramDetailFeed on page 1429](#)

Feed tracking is available for the object.

[CareProgramDetailHistory on page 1434](#)

History is available for tracked fields of the object.

CareProgramEligibilityRule

Represents a rule defining the criteria for patient care program enrollment eligibility. This entity creates an association between Care Program and an Enrollment Eligibility Criteria.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
CareProgramId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Identifier of a care program. Represents a set of activities, such as therapy, wellness, or a fitness plan, offered to participants by a healthcare provider, life sciences organization, employer, or insurer.</p>
EligibilityCriteriaId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Criteria that define patient enrollment eligibility for a care program.</p>
IsInclusionRule	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the rule is included or excluded when determining care program eligibility. This field is available in API version 62.0 and later. The default value is false.</p>
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the care program eligibility rule is required.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description Name for the care program eligibility rule.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Defines whether the eligibility rule is in force or not.</p>
Type	<p>Type picklist</p>

Field	Details
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	<p>Type of the eligibility Rule. This field is available for the Participant Management feature in API version 61.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Inclusion Rule • Exclusion Rule • Age Rule • Gender Rule

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramEligibilityRuleChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramEligibilityRuleFeed](#)

Feed tracking is available for the object.

[CareProgramEligibilityRuleHistory](#)

History is available for tracked fields of the object.

[CareProgramEligibilityRuleOwnerSharingRule](#)

Sharing rules are available for the object.

[CareProgramEligibilityRuleShare](#)

Sharing is available for the object.

CareProgramEnrollee

Represents a participant enrolled in a care program.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field Name	Details
AccountId	<p>Type Lookup(Account)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Person Account representing the enrollee</p>
BenefitCoverageType	<p>Type Picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the coverage status of the enrollee under both Medicare and Medicaid.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • ContinuedEnrollee • NewEnrollee
CareProgramId	<p>Type Master-Detail(Care Program)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Look up for Care Program.</p>
ClinicalServiceRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The clinical service request associated with the care program enrollee. This field is a relationship field and is available in API version 60.0 and later.</p> <p>Relationship Name ClinicalServiceRequest</p> <p>Relationship Type Lookup</p> <p>Refers To ClinicalServiceRequest</p>

Field Name	Details
CurrentWorkOrderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The work order that's currently being executed for the care program enrollee. This field is a relationship field and is available for the Advanced Therapy Management feature in API version 58.0 and later.</p> <p>Relationship Name CurrentWorkOrder</p> <p>Relationship Type Lookup</p> <p>Refers To CarePgmEnrolleeWorkOrder</p>
CurrentWorkOrderStepId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The work order step that's currently being executed for the care program enrollee. This field is a relationship field and is available for the Advanced Therapy Management feature in API version 58.0 and later.</p> <p>Relationship Name CurrentWorkOrderStep</p> <p>Relationship Type Lookup</p> <p>Refers To CarePgmEnrolleeWkOrdStep</p>
EnrolledAtId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The site, location, or territory where the enrollee enrolled in the care program. This field is available in API version 64.0 when Site Management is enabled. This field is a polymorphic relationship field.</p> <p>Relationship Name EnrolledAt</p>

Field Name	Details
	<p>Refers To CareProgramSite</p>
EnrolleeType	<p>Type Picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the enrollee is a new enrollee or a continued enrollee. Possible values are:</p> <ul style="list-style-type: none"> • FullBenefitDual • PartialBenefitDual • NonDual • Dual
EnrollmentLocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The service territory where an advanced therapy care program is executed. This field is a relationship field and is available for the Advanced Therapy Management feature in API version 59.0 and later.</p> <p>Relationship Name EnrollmentLocation</p> <p>Relationship Type Lookup</p> <p>Refers To ServiceTerritory</p>
FlowInterviewId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Runtime instance of the associated flow. This field is a relationship field.</p> <p>Relationship Name FlowInterview</p>

Field Name	Details
	<p>Refers To FlowInterview</p>
FlowOrchestrationInstanceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Runtime instance of the associated flow orchestration. This field is a relationship field.</p> <p>Relationship Name FlowOrchestrationInstance</p> <p>Refers To FlowOrchestrationInstance</p>
IsPatientInLtrmCareFacility	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates that the patient was at a long-term healthcare facility during outreach or enrollment to the care program. This field is available for the Medication Management feature in API version 56.0 and later. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field Name	Details
LeadId	Type Lookup(Lead)
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	Lead representing the enrollee.
Name	Type string
Properties	Create, Filter, Group, Sort, Update
Description	Name of the enrollee.
OptOutPeriodEndDateTime	Type dateTime
Properties	Create, Filter, Nillable, Sort, Update
Description	The date on which the patient's opt-out from the care program ends. This field is available in API version 56.0 and later.
OptOutPeriodStartTime	Type dateTime
Properties	Create, Filter, Nillable, Sort, Update
Description	The date that the patient opted out of the care program. This field is available in API version 56.0 and later.
OptOutReasonType	Type picklist
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The reason why the patient opted out of the care program. This field is available in API version 56.0 and later.
ResearchStudyCandidateId	Type reference
Properties	Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	<p>Description The related Research Study Candidate record of the care program enrollee. This field is a relationship field.</p> <p>Relationship Name ResearchStudyCandidate</p> <p>Refers To ResearchStudyCandidate</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The User Id for the record owner. This field is a polymorphic relationship field. This field is available in API version 58.0 and later.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the enrollee record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the enrollee record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of the enrollee. Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive

Field Name	Details
UserId	<p>Type Lookup(User)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description User representing the enrollee.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramEnrolleeChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramEnrolleeFeed](#)

Feed tracking is available for the object.

[CareProgramEnrolleeHistory](#)

History is available for tracked fields of the object.

[CareProgramEnrolleeOwnerSharingRule \(API version 58.0\)](#)

Sharing rules are available for the object.

[CareProgramEnrolleeShare \(API version 58.0\)](#)

Sharing is available for the object.

CareProgramSite

Represents the details about the care program site. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ActlFirstPtcpEnrlDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The actual date when the first participant was enrolled in the study at the site. This field is available in API version 64.0 and later when Site Management is enabled.</p>

Field	Details
Act1FstPtcpFstVstDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The actual date when the first enrolled participant at the site had their initial study visit, as specified in the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
Act1FstPtcpLastVstDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The actual date when the first enrolled participant at the site completed their final scheduled study visit, as outlined in the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
Act1LastPtcpEnrlDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The actual date when the last participant was enrolled in the study at the site. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ActualPtcpEnrollmentCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The actual number of participants that are enrolled for the research study at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
ActualPtcpEnrollmentDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The actual number of days spent enrolling participants at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>

Field	Details
ActualPtcpEnrollmentRate	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The actual rate of participant enrollment at the site. This field is available in API version 64.0 and later when Site Management is enabled.</p>
Act1LastPtcpFstVstDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The actual date when the last enrolled participant at the site had their initial study visit, as defined by the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
Act1LastPtcpLastVstDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The actual date when the last enrolled participant at the site completed their final scheduled study visit, as outlined in the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
CareProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care program associated with the research study that's conducted at the specified site. This field is a relationship field.</p> <p>Relationship Name CareProgram</p> <p>Refers To CareProgram</p>
ClnclTrialAgreeSignedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
ClnclTrialAgreeTrnarnDrttn	<p>Description</p> <p>The date when the clinical trial agreement for the site was signed. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ForcstFirstPtcpEnrlDate	<p>Type</p> <p>int</p>
Properties	<p>Create, Filter, Group, Nillable, Sort, Update</p>
Description	<p>The time taken to execute the clinical trial agreement. This field is available in API version 62.0 and later when Site Management is enabled.</p>
ForcstFstPtcpFstVstDate	<p>Type</p> <p>date</p>
Properties	<p>Create, Filter, Group, Nillable, Sort, Update</p>
Description	<p>The projected date when the first participant enrolls in the study at the site. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ForcstFstPtcpLastVstDate	<p>Type</p> <p>date</p>
Properties	<p>Create, Filter, Group, Nillable, Sort, Update</p>
Description	<p>The projected date when the first enrolled participant at the site has their initial study visit, such as a screening or a baseline visit. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ForcstLastPtcpEnrlDate	<p>Type</p> <p>date</p>
Properties	<p>Create, Filter, Group, Nillable, Sort, Update</p>
Description	<p>The initially projected date when the first enrolled participant at the site completes their final scheduled study visit, as defined in the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ForcstLastPtcpEnrlDate	<p>Type</p> <p>date</p>
Properties	<p>Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The projected date when the final participant enrolls in the study at the site. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ForcstLastPtcpFstVstDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The projected date when the last enrolled participant at the site has their initial study visit, as defined by the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ForcstLastPtcpLastVstDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The initially projected date when the last enrolled participant at the site completes their final scheduled study visit, as outlined in the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
HealthCareFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The health care facility associated with the care program site. This field is a relationship field.</p> <p>Relationship Name HealthCareFacility</p> <p>Refers To HealthcareFacility</p>
InvestigatorId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The investigator who is responsible for conducting the research study at the healthcare facility. This field is available in API version 63.0 and later when Site Management is enabled. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name Investigator</p> <p>Refers To HealthcareProvider</p>
InvtglProductReleaseDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of days between the start of the site activation process to the release of the investigational product at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LocationId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The location associated with the care program site. This field is a relationship field.</p> <p>Relationship Name Location</p> <p>Refers To Location</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the care program site.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the object assigned to the territory. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PlannedPtcpEnrollmentRate	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The planned rate of participant enrollment, based on the estimates by the investigator at the site.</p>
PredictedPtcpEnrollmentRate	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The predicted rate of participant enrollment at the site.</p>
ProjectedPtcpEnrlCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of participants that are expected to enroll for the research study at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>

Field	Details
ProjectedPtcpEnrlDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The projected number of days to enroll participants at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
ProtocolDeviationCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of protocol deviations reported during the research study at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
QualVstToInitVstDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of days between the site qualification visit and site initiation visit. This field is available in API version 62.0 and later when Site Management is enabled.</p>
RandomizedParticipantCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of participants randomly assigned to different study groups at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
RegulatoryDocTurnaroundDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The turnaround time for the preparation of the regulatory documents for IRB or the ethics committee submission. This field is available in API version 62.0 and later when Site Management is enabled.</p>

Field	Details
ResearchStudyId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The research study associated with the care program site. This field is a relationship field.</p> <p>Relationship Name ResearchStudy</p> <p>Refers To ResearchStudy</p>
RsrchStudyCmplPtcpCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of participants who completed the research study at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
ScreenedParticipantCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of participants screened for the research study at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
SeriousAdverseEventCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of serious adverse events reported during the research study at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
SiteActivatedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The date when the site was activated for the research study. This field is available in API version 64.0 and later when Site Management is enabled.</p>
SiteClosedOutDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the site was closed out for the research study. This field is available in API version 64.0 and later when Site Management is enabled.</p>
SiteIdentifiedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the site was identified for the feasibility for conducting research study. This field is available in API version 64.0 and later when Site Management is enabled.</p>
SiteActvToFirstPtcpDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of days between the site activation and the first participant visit to the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
SiteActvToLastPtcpDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of days between the site activation and the last participant visit to the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
SponsorRepresentativeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The representative of the sponsor for the site during the research study. This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>This field is a relationship field.</p>
	<p>Relationship Name SponsorRepresentative</p> <p>Refers To Contact</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The status of the care program site. Possible values are:</p> <ul style="list-style-type: none"> • Inactive • Recruitment Closed • Recruitment Ongoing • Trial Completed • Trial Ongoing • Trial Upcoming
TeamId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The team associated with the care program site. This field is a relationship field.</p> <p>Relationship Name Team</p> <p>Refers To Team</p>
UnitOfMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
Description	The unit of measure for selected duration. This field is available in API version 62.0 and later when Site Management is enabled.
This field is a relationship field.	
Relationship Name	UnitOfMeasure

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

CareProgramSiteOwnerSharingRule

Sharing rules are available for the object.

CareProgramSiteShare

Sharing is available for the object.

CareProgramStatusPeriod

Represents the historical changes to the status of a care program. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describesObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AreDatesTentative	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the period dates are actual or expected. The default value is <code>false</code>.</p>
CareProgram	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description The parent care program associated with the status. This field is a relationship field.</p>
	<p>Relationship Name CareProgram</p>
	<p>Relationship Type Master-detail</p>
	<p>Refers To CareProgram (the master object)</p>
EffectiveEndDateTime	<p>Type dateTime</p>
	<p>Properties Create, Filter, Nillable, Sort, Update</p>
	<p>Description The end date and time of the period when the specified status was in effect for the specified care program.</p>
EffectiveStartTime	<p>Type dateTime</p>
	<p>Properties Create, Filter, Sort, Update</p>
	<p>Description The start date and time of the period when the specified status was in effect for the specified care program.</p>
LastReferencedDate	<p>Type dateTime</p>
	<p>Properties Filter, Nillable, Sort</p>
	<p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p>
	<p>Properties Filter, Nillable, Sort</p>
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the care program status period.</p>
Reason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason why the care program was assigned the status.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the status of the care program.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[careprogramstatusperiodChangeEvent on page 1426](#)

Change events are available for the object.

[careprogramstatusperiodFeed on page 1429](#)

Feed tracking is available for the object.

[careprogramstatusperiodHistory on page 1434](#)

History is available for tracked fields of the object.

CareProgramTeamMember

Represents a person who delivers services under a program, such as a program manager or care coordinator.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field Name	Details
AccountId	Type Lookup(Account)
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Person account representing the team member.
CareProgramId	Type Master-Detail(CareProgram)
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Lookup for the care program.
Category	Type multipicklist
	Properties Create, Filter, Nillable, Update
	Description Specifies the category that the member belongs to. This field is available for the Participant Management feature in API version 61.0 and later.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field Name	Details
MemberId	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	The team member associated with the care program team member. This field is available for the Participant Management feature in API version 61.0 and later.
Name	Type string
	Properties Create, Filter, Group, Sort, Update
	Description Name of the care program team member.
Role	Type Picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description Role of the team member.
SourceSystem	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description System from which the record was sourced.
SourceSystemIdentifier	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of the system from which the record was sourced.
UserId	Type Lookup(User)
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	User representing the team member.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramTeamMemberChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramTeamMemberFeed](#)

Feed tracking is available for the object.

[CareProgramTeamMemberHistory](#)

History is available for tracked fields of the object.

CarePgmEnrleeStatusPeriod

Represents the historical changes to the status or stage of a care program enrollee. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareProgramEnrolleeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent Care program Enrollee that's associated with the status period. This field is a relationship field.</p> <p>Relationship Name CareProgramEnrollee</p> <p>Relationship Type Master-detail</p> <p>Refers To CareProgramEnrollee (the master object)</p>
EffectiveEndDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The effective end date and time of the role.</p>
EffectiveStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The effective start date and time of the role.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the care program enrollee status period.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the status of the enrollee.</p>

Field	Details
StatusReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason for the status.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CarePgmEnrleeStatusPeriodChangeEvent on page 1426](#)

Change events are available for the object.

[CarePgmEnrleeStatusPeriodFeed on page 1429](#)

Feed tracking is available for the object.

[CarePgmEnrleeStatusPeriodHistory on page 1434](#)

History is available for tracked fields of the object.

CarePgmEnrollmentEvalRslt

Represents the result of an evaluation done to assess the eligibility of a participant enrolling for a research study or care program. This object is available in API version 62.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareProgramEligibilityRuleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care program eligibility rule that's used to do the evaluation. This field is a relationship field.</p> <p>Relationship Name CareProgramEligibilityRule</p>

Field	Details
	<p>Refers To CareProgramEligibilityRule</p>
EnrolleeReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The record of the object that's associated with the evaluation. This field is a polymorphic relationship field.</p> <p>Relationship Name EnrolleeReferenceRecord</p> <p>Refers To CareProgramEnrollee, ResearchStudyCandidate</p>
EvaluationIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique identifier for each evaluation.</p>
IsLatestEvaluation	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the evaluation is the latest (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Reason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason that describes the evaluation result.</p>
RefRecordIdentifierList	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The list of reference record identifiers for the result.</p>
Result	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Specifies the result of the evaluation.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • InsufficientData—Insufficient Data • Match • NotMatch—Not Match

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CarePgmEnrollmentEvalRsltChangeEvent on page 1426](#)

Change events are available for the object.

[CarePgmEnrollmentEvalRsltFeed on page 1429](#)

Feed tracking is available for the object.

[CarePgmEnrollmentEvalRsltHistory on page 1434](#)

History is available for tracked fields of the object.

[CarePgmEnrollmentEvalRsltOwnerSharingRule on page 1436](#)

Sharing rules are available for the object.

[CarePgmEnrollmentEvalRsltShare on page 1438](#)

Sharing is available for the object.

CarePgmTeamMbrRolePeriod

Represents the historical changes in the role of a care program team member. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareProgramTeamMemberId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort</p> <p>Description</p> <p>The parent care program team member associated with the role.</p> <p>This field is a relationship field.</p>

Field	Details
	<p>Relationship Name CareProgramTeamMember</p> <p>Relationship Type Master-detail</p> <p>Refers To CareProgramTeamMember (the master object)</p>
EffectiveEndTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time until when the team member is assigned the role.</p>
EffectiveStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the team member was assigned the role.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description The name of the care program team member role period.</p>
Role	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the role of the care program team member. Possible values are:</p> <ul style="list-style-type: none"> • Collaborator • Contact-General • Contact-Recruitment • Funding Source • Primary Investigator • Sponsor • Sponsor-Investigator • Sponsor-Lead • Study-Chair • Study-Director • Subinvestigator

DiagnosticSummary

Represents the findings, interpretations, and summaries of tests performed on patients. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AttachmentLanguage	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Records the language of the attached document.</p>
BasedOnId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the medication or clinical service request that the diagnostic summary is based on.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • MedicationStatement • ClinicalServiceRequest
CareObservationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the care observation that's a part of the diagnostic summary.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalServiceRequest
Category	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the category of the department or service that the diagnostic summary is a product of. Possible values are:</p> <ul style="list-style-type: none"> • Community • Inpatient • Outpatient • Patient Specified
ClinicalEncounterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Specifies the encounter that the diagnostic summary is about.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
CodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The system-defined code that describes the diagnostic summary.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The case associated with the diagnostic summary. This field is a relationship field.</p> <p>Relationship Name Case</p> <p>Refers To Case</p>
ContentDocumentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The content document associated with diagnostic summary. You can include up to 5 documents in the PDF format. This field is available in API version 62.0 and later. This field is a relationship field.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ContentDocument
EffectiveEndDateTime	<p>Type dateTime</p>

Field	Details
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The end date and time of the clinically relevant period of the summary.
EffectiveStartTime	Type
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The start date and time of the clinically relevant period of the summary.
ImageComments1	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Comments about the first image linked in the report.
ImageComments2	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Comments about the second image linked in the report.
ImageComments3	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Comments about the third image linked in the report.
ImageComments4	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Comments about the fourth image linked in the report.
ImageComments5	Type
	string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Comments about the fifth image linked in the report.
ImageUrl1	Type url
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The link to a key image associated with the diagnostic summary.
ImageUrl2	Type url
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The link to a key image associated with the diagnostic summary.
ImageUrl3	Type url
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The link to a key image associated with the diagnostic summary.
ImageUrl4	Type url
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The link to a key image associated with the diagnostic summary.
ImageUrl5	Type url
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The link to a key image associated with the diagnostic summary.
InterpretedById	Type reference

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the person or organization responsible for interpreting the diagnostic summary and its conclusions.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CarePerformer
IssuedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care performer that issues the diagnostic summary.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CarePerformer
IssuedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the diagnostic summary was issued.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was viewed.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the diagnostic summary record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the diagnostic summary record. Available in API version 56.0 and later. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To</p> <ul style="list-style-type: none"> • Group • User
PatientId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description References the patient who is the subject of the diagnostic summary.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system from where the record was brought into Salesforce.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The identifier of the record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the record was last modified in its source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of the diagnostic summary.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Completed • Entered-in-error • Intended • Not-taken • On-hold • Stopped • Unknown
Summary	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The clinical conclusion of the tests performed in the diagnostic service.</p>
SummaryCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the clinical conclusion of the tests as reported in the diagnostic service.</p>

Field	Details
	<p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the information in the record represents a diagnostic summary or a document reference.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> DiagnosticSummary—Diagnostic Summary DocumentReference—Document Reference

Usage

DiagnosticSummary is used to store records representing both DiagnosticReport and DocumentReference type information from FHIR-based systems. You can use the UsageType field to specify which records represent diagnostic reports and which records represent document references.

For document reference records, you can also use the DiagnosticSummaryDetail child object to associate authors, related documents, and related encounters to your DiagnosticSummary record.

Additional Information for DiagnosticSummary in Other Objects

In addition to creating a record using these fields, you can add more details to your DiagnosticSummary record by creating records in certain other objects, and referencing your DiagnosticSummary record as the parent record. Here's the list of objects you can associate to DiagnosticSummary in this way, the type of information they add, and the field they use to reference DiagnosticSummary.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the diagnostic summary.	ParentRecordId
DiagnosticSummaryDetail	Associates document reference-type DiagnosticSummary records with various other records and defines the nature of association. For instance, authors, related documents, and related encounters.	DiagnosticSummaryId

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

DiagnosticSummaryChangeEvent (API version 58.0)

Change events are available for the object.

DiagnosticSummaryFeed

Feed tracking is available for the object.

DiagnosticSummaryHistory

History is available for tracked fields of the object.

DiagnosticSummaryOwnerSharingRule (API version 56.0)

Sharing rules are available for the object.

DiagnosticSummaryShare (API version 56.0)

Sharing is available for the object.

DiagnosticSummaryDetail

Represents additional information associated with document reference-type DiagnosticSummary records. This additional information may be related documents, authors, or related encounters. This object is available in API version 52.0 and later.

DigitalVerification

Stores information about the verification of a related record. This object is available in API version 60.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Comment	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Stores additional comments about the verification.</p>
DesignatedVerifierId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user or user group who can provide verification for a parent reference record. This field is a polymorphic relationship field.</p> <p>Relationship Name DesignatedVerifier</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Group, User</p>
DigitalVerificationSetupDetailId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The details associated with the digital verification setup record. This field is a relationship field.</p> <p>Relationship Name DigitalVerificationSetupDetail</p> <p>Relationship Type Lookup</p> <p>Refers To DigitalVerfSetupDetail</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a record indirectly; for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the digital verification record.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParentReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent reference record that is verified. This field is a polymorphic relationship field.</p> <p>Relationship Name ParentReferenceRecord</p> <p>Relationship Type Lookup</p> <p>Refers To ClinicalTrial__c, CustodyChainEntry, DemoObject__c, HC24_AccountAccountRelation__c, HC24_CandidatePatient__c, HC24_CardView_Dropdown__c, HC24_CarePlanGoal__c, HC24_CarePlanProblem__c, HC24_CarePlanTemplateGoal__c, HC24_CarePlanTemplateProblem__c, HC24_CarePlanTemplateTask__c, HC24_CarePlanTemplate__c, HC24_CareProgramPlanTemplate__c, HC24_Clinical_Assessment_Response__c, HC24_CommunityProfileName__c, HC24_ConditionToHCCCodeMapping__c, HC24_ContactContactRelation__c, HC24_CrossObjectRelationship__c, HC24_CustomFieldSets__c, HC24_CustomLabelConfig__c, HC24_EHRProcedurePerformer__c, HC24_EHRProcedureRequest__c, HC24_EHRProcedure__c, HC24_EhrAllergyIntolerance__c, HC24_EhrCarePlanActivity__c, HC24_EhrCarePlanConcern__c, HC24_EhrCarePlanGoal__c, HC24_EhrCarePlanParticipant__c, HC24_EhrCarePlan__c, HC24_EhrConditionRelatedItem__c, HC24_EhrCondition__c, HC24_EhrDevice__c, HC24_EhrDosageInstruction__c, HC24_EhrEncounterAccommodation__c, HC24_EhrEncounterParticipant__c, HC24_EhrEncounter__c, HC24_EhrImmunizationReaction__c, HC24_EhrImmunization__c,</p>

Field	Details
	HC24_EhrMedicationPrescription_c, HC24_EhrMedicationStatement_c, HC24_EhrObservation_c, HC24_EhrPatientCareProvider_c, HC24_EhrPatientContact_c, HC24_EhrPatient_c, HC24_EhrPractitionerIdentity_c, HC24_EhrPractitionerQualification_c, HC24_EhrPractitionerRole_c, HC24_EhrPractitioner_c, HC24_EhrRelatedObservation_c, HC24_EhrRelatedPerson_c, HC24_EhrVaccinationProtocol_c, HC24_EhrVirtualDeviceChannel_c, HC24_EhrVirtualDevice_c, HC24_FilterColumn_c, HC24_FilterCondition_c, HC24_FilterCriterion_c, HC24_HcFlexibleCarePlanTabs_c, HC24_HealthCloudFeatureToggle_c, HC24_HousingAssessment_c, HC24_IndustriesAppConfig_c, HC24_IndustriesSettings_c, HC24_PatientCardViewConfiguration_c, HC24_ProgramPatientAffiliation_c, HC24_ProgramPatientSummary_c, HC24_Program_c, HC24_Provider_c, HC24_ReciprocalRole_c, HC24_TaskGroups_c, HC24_TimelineViewConfiguration_c, HC24_UsePersonAccount_c, HC24_individualExcludedFields_c, custom_sk_c, vlocity_lwc20_CardFrameworkConfiguration_c, vlocity_lwc20_DRBatchQueue_c, vlocity_lwc20_DRBulkData_c, vlocity_lwc20_DREncryption_c, vlocity_lwc20_DRWorker_c, vlocity_lwc20_Interface_DRGeneric_c, vlocity_lwc20_TestResult_c, vlocity_lwc20_TriggerSetup_c, vlocity_lwc20_UISettings_c, vlocity_lwc20_VlocityDataPack_c, vlocity_lwc20_VlocityDocuSignTemplate_c, vlocity_lwc20_VlocityErrorLogEntry_c, vlocity_lwc20_VlocityScheduledJob_c, vlocity_lwc20_VlocityTrackingEntry_c
PostVerificationMessage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The message that is displayed after a verification is performed.</p>
PreVerificationMessage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The message that is displayed before a verification is performed.</p>
VerificationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the verification of the related record was done.</p>

Field	Details
VerificationRequestDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the verification was requested.</p>
VerificationSite	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The place where the verification is done.</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of verification for the parent reference record.</p>
VerificationStatusCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status category of the verification for the parent reference record. Possible values are:</p> <ul style="list-style-type: none"> • Completed • OnHold • ReadyForSigning • RejectedClosed • RejectedOpen
VerifiedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user who performed the verification.</p>

Field	Details
	This field is a polymorphic relationship field.
	Relationship Name
	VerifiedBy
	Relationship Type
	Lookup
	Refers To
	User
VerifierOrder	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The order of the verifier who performed the verification.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • FifthVerifier • FirstVerifier • FourthVerifier • SecondVerifier • ThirdVerifier

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[DigitalVerificationHistory on page 1434](#)

History is available for tracked fields of the object.

[DigitalVerificationShare on page 1438](#)

Sharing is available for the object.

EnrollmentEligibilityCriteria

Represents criteria that define patient enrollment eligibility for one or more care programs.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Description	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description A comprehensive description of the enrollment eligibility criteria.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description A short name for the enrollment eligibility criteria.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[EnrollmentEligibilityCriteriaChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[EnrollmentEligibilityCriteriaFeed](#)

Feed tracking is available for the object.

[EnrollmentEligibilityCriteriaHistory](#)

History is available for tracked fields of the object.

[EnrollmentEligibilityCriteriaOwnerSharingRule](#)

Sharing rules are available for the object.

[EnrollmentEligibilityCriteriaShare](#)

Sharing is available for the object.

ResearchStudy

Represents the details of a research study that include its design, execution, and oversight. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Act1FirstPtcpEnrlDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	<p>The actual date when the first participant was enrolled in the study at a participating clinical trial site. This field is available in API version 64.0 and later when Site Management is enabled.</p>
Act1FstPtcpFstVstDate	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The actual date when the first enrolled participant across all sites had their initial study visit, as specified in the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
Act1FstPtcpLastVstDate	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The actual date when the first enrolled participant across all sites completed their final scheduled study visit, as outlined in the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
Act1LastPtcpEnrlDate	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The actual date when the final participant was enrolled in the study across all participating clinical trial sites. This field is available in API version 64.0 and later when Site Management is enabled.</p>
Act1LastPtcpFstVstDate	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The actual date when the last enrolled participant across all sites had their initial study visit, as defined by the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
Act1LastPtcpLastVstDate	Type
	date

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The actual date when the last enrolled participant across all sites completed their final scheduled study visit, as outlined in the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ActualFinalDbLockDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The actual date when the final database lock is implemented across the clinical trial sites. This field is available in API version 64.0 and later when Site Management is enabled.</p>
BiospecRetention	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the retention of the collected participant samples in a biorepository. This field is available in API version 62.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • None Retained • Samples With DNA • Samples Without DNA
BlindingTypeCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Blinding Type of the Care Program. This field is a polymorphic relationship field.</p> <p>Relationship Name BlindingTypeCode</p> <p>Refers To CodeSet, CodeSetBundle</p>
CareProgramId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care program associated with the research study. This field is a relationship field.</p> <p>Relationship Name CareProgram</p> <p>Refers To CareProgram</p>
CareSpecialtyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care specialty associated with the research study. This field is available in API version 62.0 and later. This field is a relationship field.</p>
Description	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A detailed description of the research.</p>
DiscontinuationReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The reason why the research was discontinued. Possible values are:</p> <ul style="list-style-type: none"> • Accrual Goal Met • Lack of Progress • Temporarily Closed as per Study Design • Toxicity
EligibleGender	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the gender that's eligible for the research study. Possible values are:</p> <ul style="list-style-type: none"> • Any • Female • Male • Transgender
EligibleMaximumAge	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum eligibility age of a candidate for the research study.</p>
EligibleMinimumAge	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The minimum eligibility age of a candidate for the research study.</p>
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the research ends.</p>
ForcstFirstPtcpEnrlDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The projected date when the first participant enrolls in the study at a participating clinical trial site. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ForcstFstPtcpLastVstDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The initially projected date when the first enrolled participant across all sites completes their final scheduled study visit, as defined in the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ForcstFstPtcpFstVstDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The projected date when the first enrolled participant across all sites has their initial study visit, such as a screening or baseline visit. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ForcstLastPtcpEnrlDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The projected date when the final participant enrolls in the study across all participating clinical trial sites. This forecast is based on the planned sample size and recruitment rate. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ForcstLastPtcpFstVstDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The projected date when the last enrolled participant across all sites has their initial study visit, as defined by the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ForcstLastPtcpLastVstDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The initially projected date when the last enrolled participant across all sites completes their final scheduled study visit, as outlined in the study protocol. This field is available in API version 64.0 and later when Site Management is enabled.</p>

Field	Details
InclusionExclusionCriteria	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The inclusion criteria and exclusion criteria of the research study.</p>
IntentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of the research, based on the intent of its activities.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Basic Science • Device Feasibility • Diagnostic Study • Health Services Research • Prevention • Screening • Supportive Care • Treatment
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the research study.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Phase	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The current phase of the research. Possible values are:</p> <ul style="list-style-type: none"> • Early Phase 1 • Not Applicable • Phase 1 • Phase 1/Phase 2 • Phase 2 • Phase 2/Phase 3 • Phase 3 • Phase 4
PlannedFinalDbLockDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The planned date when the final database lock is implemented across the clinical trial sites. This field is available in API version 64.0 and later when Site Management is enabled.</p>

Field	Details
PrimaryContactInformationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The primary phone number of the candidate. This field is a relationship field.</p> <p>Relationship Name PrimaryContactInformation</p> <p>Refers To ContactPointPhone</p>
ProtocolDocumentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The protocol content document associated with the research study. This field is a relationship field.</p> <p>Relationship Name ProtocolDocument</p> <p>Refers To ContentDocument</p>
PublicationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The publication status of the research study's record. Possible values are:</p> <ul style="list-style-type: none"> • Active • Draft • Retired • Unknown
ResearchStudyNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	The identifier of the research study.
ShouldAcptHealthyCandidates	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the research study should accept healthy candidates (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
SourceSystem	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the external system that generated the record.
SourceSystemIdentifier	Type string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	The ID of the record in the external system.
SourceSystemModified	Type dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date on which this item was last changed in the source system.
StartDate	Type dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date when the research starts.
Summary	Type textarea

Field	Details
	<p>Properties Create, Nillable, Update</p> <p>Description A brief summary of the research.</p>
Title	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The human-readable name of the research study.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of research study. Possible values are:<ul style="list-style-type: none"> • Interventional • Observational </p>
UniformResourceIdentifier	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The canonical identifier of the research study.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ResearchStudyChangeEvent on page 1426](#)

Change events are available for the object.

[ResearchStudyFeed on page 1429](#)

Feed tracking is available for the object.

[ResearchStudyHistory on page 1434](#)

History is available for tracked fields of the object.

[ResearchStudyShare on page 1438](#)

Sharing is available for the object.

ResearchStudyCandidate

Represents the details of the research participant which includes the associated account and the status of the subject. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CandidateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The candidate of the research study. This field is a polymorphic relationship field.</p> <p>Relationship Name Candidate</p> <p>Refers To Account</p>
CareProgramSiteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The location where the study happens. This field is a relationship field.</p> <p>Relationship Name CareProgramSite</p> <p>Refers To CareProgramSite</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MatchedExclusionCritCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of exclusion criteria fulfilled by the candidate during automatic evaluation. This field is available in API version 62.0 and later.</p>
MatchedInclusionCritCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of inclusion criteria fulfilled by the candidate during automatic evaluation. This field is available in API version 62.0 and later.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study candidate.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p>

Field	Details
	<p>Refers To Group, User</p>
ResearchStudyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The research study that the Candidate is a part of. This field is a relationship field.</p> <p>Relationship Name ResearchStudy</p> <p>Refers To ResearchStudy</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this item was last changed in the source system.</p>
SourceType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Specifies the type of source from where the information about the candidate is obtained.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Others • Participant Registry • Referrals • Site Patient Pool
Status	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The status of the research study candidate.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Consent • Enrolled • New • Randomization • Referral Accepted • Rejected • Screening

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[researchstudycandidateChangeEvent on page 1426](#)

Change events are available for the object.

[researchstudycandidateFeed on page 1429](#)

Feed tracking is available for the object.

[researchstudycandidateHistory on page 1434](#)

History is available for tracked fields of the object.

[researchstudycandidateShare on page 1438](#)

Sharing is available for the object.

ResearchStudyCmprGroup

Represents the details of a research study comparison group. This object is available in API version 61.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AllocationRatioValue	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The comparison group's allocation ratio in the research study randomization.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the research study comparison group.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the research study randomization comparison group.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the object assigned to the territory. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ResearchStudyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The research study associated with the research study comparison group. This field is a relationship field.</p> <p>Relationship Name ResearchStudy</p> <p>Refers To ResearchStudy</p>
TypeCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The code set associated with the research study comparison group. This field is a relationship field.</p> <p>Relationship Name TypeCode</p> <p>Refers To CodeSet</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ResearchStudyCmprGroupFeed](#) on page 1429

Feed tracking is available for the object.

[ResearchStudyCmprGroupHistory](#) on page 1434

History is available for tracked fields of the object.

[ResearchStudyCmprGroupShare](#) on page 1438

Sharing is available for the object.

ResearchStudyProtocolInfo

Represents details of the research study protocol document. This object is available in API version 62.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Content	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description The content text for the research study protocol.</p>
ContentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of the content stored. Possible values are:</p> <ul style="list-style-type: none"> • Abbreviations • Adverse Events Classification • Adverse Events Definition • Adverse Events Participant Reporting • Adverse Events Reporting • Analysis Dataset Criteria • Analysis Population Criteria • Background • Biospecimen Sample Retention

Field	Details
	<ul style="list-style-type: none">• Clinical Masking Description• Clinical Monitoring• Confidentiality and Privacy• Conflict of Interest Policy• Data Handling and Record Keeping• Dosage Justification• End of Study Procedure• Event Assessment Frequency and Time Period• Gender Eligibility Description• Informed Consent Process• Intervention Benefits• Intervention Compliance• Intervention Discontinuation• Intervention Dosing and Administration• Intervention Preparation• Intervention Risks• Intervention Risks and Benefits Assessments• Intervention Storage and Stability• Lost to Follow-up• Pregnancy Reporting• Primary Endpoint Analysis• Protocol Deviations• Publication and Data Sharing Policy• Quality Assurance and Control• Safety Analysis• Safety Oversight• Sample Size Determination• Secondary Endpoint Analysis• Serious Adverse Events Definition• Serious Adverse Events Reporting• Special Interest Reporting• Statistical Analysis Summary• Study Design• Study Discontinuation and Closure• Study Population• Study Population Description• Study Record Retention Period• Study Scientific Rationale

Field	Details
	<ul style="list-style-type: none"> Subgroup Analysis Summary
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study protocol information.</p>
ResearchStudyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The research study associated with the content. This field is a relationship field.</p> <p>Relationship Name ResearchStudy</p> <p>Relationship Type Master-detail</p> <p>Refers To ResearchStudy (the master object)</p>

ResearchStudyRelation

Represents different related research studies. This object is available in API version 61.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study relation.</p>
RelatedResearchStudyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The smaller research study that's a part of the larger study. This field is a relationship field.</p> <p>Relationship Name RelatedResearchStudy</p>

Field	Details
	<p>Refers To ResearchStudy</p>
ResearchStudyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The larger research study that the smaller study is a part of. This field is a relationship field.</p> <p>Relationship Name ResearchStudy</p> <p>Relationship Type Master-detail</p> <p>Refers To ResearchStudy (the master object)</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ResearchStudyRelationChangeEvent on page 1426](#)

Change events are available for the object.

[ResearchStudyRelationFeed on page 1429](#)

Feed tracking is available for the object.

[ResearchStudyRelationHistory on page 1434](#)

History is available for tracked fields of the object.

ResearchStudyRndmBlockSlot

Represents the individual randomization block items corresponding to a Research Study Randomization Block This object is available in API version 61.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ItemAssignmentStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the research study randomization block item. Possible values are:</p> <ul style="list-style-type: none"> • Abandoned • Assigned • Available
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study randomization block slot.</p>
ResearchStudyCmprGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The research study comparison group associated with the research study randomization block item.</p> <p>This field is a relationship field.</p>
	<p>Relationship Name ResearchStudyCmprGroup</p> <p>Refers To ResearchStudyCmprGroup</p>
RsrchStdyRandomizationBlkId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The research study randomization block associated with the research study randomization block item.</p> <p>This field is a relationship field.</p> <p>Relationship Name RsrchStdyRandomizationBlk</p> <p>Relationship Type Master-detail</p> <p>Refers To RsrchStdyRandomizationBlock (the master object)</p>
SequenceNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The sequence number of the research study randomization block item.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ResearchStudyRndmBlockSlotChangeEvent on page 1426](#)

Change events are available for the object.

[ResearchStudyRndmBlockSlotFeed on page 1429](#)

Feed tracking is available for the object.

[ResearchStudyRndmBlockSlotHistory on page 1434](#)

History is available for tracked fields of the object.

ResearchStudyRndmBlockSlotOwnerSharingRule on page 1436

Sharing rules are available for the object.

ResearchStudyRndmBlockSlotShare on page 1438

Sharing is available for the object.

ResearchStdyCndtStatusPrd

Represents the time duration during which a research study candidate is assigned a specific status. This object is available in API version 61.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
EffectiveEndDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The effective end date and time of the candidate status.
EffectiveStartTime	Type dateTime Properties Create, Filter, Sort, Update Description The effective start date and time of the candidate status.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study candidate status period.</p>
ResearchStudyCandidateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The research study candidate associated with the research study candidate status period. This field is a relationship field.</p> <p>Relationship Name ResearchStudyCandidate</p> <p>Relationship Type Master-detail</p> <p>Refers To ResearchStudyCandidate (the master object)</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the status of the candidate. Possible values are:</p> <ul style="list-style-type: none"> • Dropped • Eligible • Enrolled • Evaluation Completed • Evaluation In Progress • In Consideration • Ineligible • New

Field	Details
	<ul style="list-style-type: none"> Pre-screening Randomized Rejected Screening
StatusReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason why the candidate was assigned the status.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ResearchStdyCndtStatusPrdChangeEvent](#)

Change events are available for the object.

[ResearchStdyCmprGroupCndt](#)

Represents the junction between a research study control group and a research study candidate. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CandidateAllocSourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The context through which the research study candidate is mapped to the research study group. This field is a polymorphic relationship field.</p> <p>Relationship Name CandidateAllocSource</p>

Field	Details
	<p>Refers To</p> <p>ResearchStudyRndmBlockSlot, devopsimpkg11__CardFrameworkConfiguration__c, devopsimpkg11__DRBatchQueue__c, devopsimpkg11__DRBulkData__c, devopsimpkg11__DREncryption__c, devopsimpkg11__DRWorker__c, devopsimpkg11__Interface_DRGeneric__c, devopsimpkg11__TestResult__c, devopsimpkg11__TriggerSetup__c, devopsimpkg11__UISettings__c, devopsimpkg11__VlocityDataPack__c, devopsimpkg11__VlocityDocuSignTemplate__c, devopsimpkg11__VlocityErrorLogEntry__c, devopsimpkg11__VlocityScheduledJob__c, devopsimpkg11__VlocityTrackingEntry__c</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description</p> <p>The name of the research study comparison group candidate.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The ID of the object assigned to the territory. This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Owner</p>

Field	Details
	<p>Refers To Group, User</p>
ResearchStudyCandidateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The research study candidate associated with the research study candidate group. This field is a relationship field.</p> <p>Relationship Name ResearchStudyCandidate</p> <p>Refers To ResearchStudyCandidate</p>
ResearchStudyCmprGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The research study group associated with the research study candidate group. This field is a relationship field.</p> <p>Relationship Name ResearchStudyCmprGroup</p> <p>Refers To ResearchStudyCmprGroup</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ResearchStdyCmprGroupCndtFeed on page 1429](#)

Feed tracking is available for the object.

[ResearchStdyCmprGroupCndtHistory on page 1434](#)

History is available for tracked fields of the object.

[ResearchStdyCmprGroupCndtShare on page 1438](#)

Sharing is available for the object.

RsrchStdyRandomizationCrit

Represents the criteria definition for grouping the candidates participating in the research study. This object is available in API version 61.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CareProgramSiteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care program site associated with the research study randomization criteria. This field is a relationship field.</p> <p>Relationship Name CareProgramSite</p> <p>Refers To CareProgramSite</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description The name of the research study randomization criteria.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the object assigned to the territory. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ResearchStdyRandomizationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The research study randomization associated with the research study randomization criteria. This field is a relationship field.</p> <p>Relationship Name ResearchStdyRandomization</p> <p>Refers To ResearchStdyRandomization</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[RsrchStdyRandomizationCritChangeEvent on page 1426](#)

Change events are available for the object.

[RsrchStdyRandomizationCritFeed on page 1429](#)

Feed tracking is available for the object.

[RsrchStdyRandomizationCritHistory on page 1434](#)

History is available for tracked fields of the object.

[RsrchStdyRandomizationCritShare on page 1438](#)

Sharing is available for the object.

ResearchStdyRandomization

Represents the randomization algorithm configuration defined for a research study. This object is available in API version 61.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AlgorithmFlowDefinition	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The flow definition that contains the block generation algorithm.</p>
AlgorithmType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the algorithm type of the research study randomization. Possible values are:<ul style="list-style-type: none"> • Block • Custom </p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the research study randomization.</p>
DoesAsgnCandidatesToGroups	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the randomization procedure should create a Research Study Comparison Group Candidate record for candidates for the matching group.</p>

Field	Details
	<p>The default value is <code>false</code>.</p>
DoesGenerateBlockOnDemand	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the algorithm can generate new blocks during randomization (true) or not (false).</p> <p>The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MaximumBlockSizeMultiplier	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum multiplier that's applied to decide the size of a block type research study randomization.</p>
MinimumBlockSizeMultiplier	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The minimum multiplier that's applied to decide the size of a block type research study randomization.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the research study randomization.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the object assigned to the territory. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
RandomizationLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the randomization level of the research study randomization. Possible values are:</p> <ul style="list-style-type: none"> • Central • Noncentral
ResearchStudyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The research study associated with the research study randomization. This field is a relationship field.</p> <p>Relationship Name ResearchStudy</p> <p>Refers To ResearchStudy</p>

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the research study randomization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ResearchStdyRandomizationFeed on page 1429](#)

Feed tracking is available for the object.

[ResearchStdyRandomizationHistory on page 1434](#)

History is available for tracked fields of the object.

[ResearchStdyRandomizationShare on page 1438](#)

Sharing is available for the object.

RsrchStdyRandomizationBlock

Represents the details of a block that's generated through the parameters specified in the research study randomization. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CurrentBlockItemSeqNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The sequence number of the item in the research study randomization block.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study randomization block.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the object assigned to the territory. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ResearchStdyRandomizationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The research study randomization associated with the research study randomization block. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name ResearchStdyRandomization</p> <p>Refers To ResearchStdyRandomization</p>
RsrchStdyRndmCriteriaSrcId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Research study criteria source associated with the research study randomization block. This field is a polymorphic relationship field.</p> <p>Relationship Name RsrchStdyRndmCriteriaSrc</p> <p>Refers To CareProgramSite, RsrchStdyRandomizationCrit, devopsimpkg11__CardFrameworkConfiguration__c, devopsimpkg11__DRBatchQueue__c, devopsimpkg11__DRBulkData__c, devopsimpkg11__DREncryption__c, devopsimpkg11__DRWorker__c, devopsimpkg11__Interface_DRGeneric__c, devopsimpkg11__TestResult__c, devopsimpkg11__TriggerSetup__c, devopsimpkg11__UISettings__c, devopsimpkg11__VlocityDataPack__c, devopsimpkg11__VlocityDocuSignTemplate__c, devopsimpkg11__VlocityErrorLogEntry__c, devopsimpkg11__VlocityScheduledJob__c, devopsimpkg11__VlocityTrackingEntry__c</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the research study randomization block. Possible values are:</p> <ul style="list-style-type: none"> • AllocationComplete—Allocation Complete • Available • InProgress—In Progress

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[RsrchStdyRandomizationBlockChangeEvent on page 1426](#)

Change events are available for the object.

RsrchStdyRandomizationBlockFeed on page 1429

Feed tracking is available for the object.

RsrchStdyRandomizationBlockHistory on page 1434

History is available for tracked fields of the object.

RsrchStdyRandomizationBlockShare on page 1438

Sharing is available for the object.

ResearchStdySearchableField

Represents a common dataset that includes multiple fields and values from multiple objects and serves as the basis for searches related to research studies. This object is available in API version 61.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CurrentEnrolleCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The current enrollment count of the research study.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the research study.</p>
DoesAcceptHealthyCandidates	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the research study accepts healthy candidates (true) or not (false). The default value is <code>false</code>.</p>
EligibleGender	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The eligible gender for the research study.</p>
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date and time of the research study.</p>
Focus	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The focus of the research study.</p>
Intent	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The intent of the research study.</p>
Keywords	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The keywords that are used to search for the research study.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MaximumEligibleAge	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum eligible age for the research study.</p>
MinimumEligibleAge	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The minimum eligible age for the research study.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the research study searchable field.</p>
OmniProcess	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the Omni Process associated with the research study.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the object assigned to the territory. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Phase	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The phase of the research study.</p>
PrimaryConditionArea	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The focus area of the research study.</p>
ResearchStudyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The research study associated with the research study searchable field. This field is a relationship field.</p> <p>Relationship Name ResearchStudy</p> <p>Refers To ResearchStudy</p>
ResearchStudyNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier number of the research study.</p>
ResearchStudyType	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of research study.</p>
SiteCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The count of sites where the research study is conducted.</p>
Sponsor	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The sponsor of the research study.</p>
StartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start date and time of the research study.</p>
Status	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the research study.</p>
Summary	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The summary of the research study.</p>
TargetEnrolleeCount	<p>Type int</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum enrollment count of the research study.</p>
Title	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The title of the research study.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ResearchStdySearchableFieldChangeEvent on page 1426](#)

Change events are available for the object.

[ResearchStdySearchableFieldFeed on page 1429](#)

Feed tracking is available for the object.

[ResearchStdySearchableFieldHistory on page 1434](#)

History is available for tracked fields of the object.

[ResearchStdySearchableFieldShare on page 1438](#)

Sharing is available for the object.

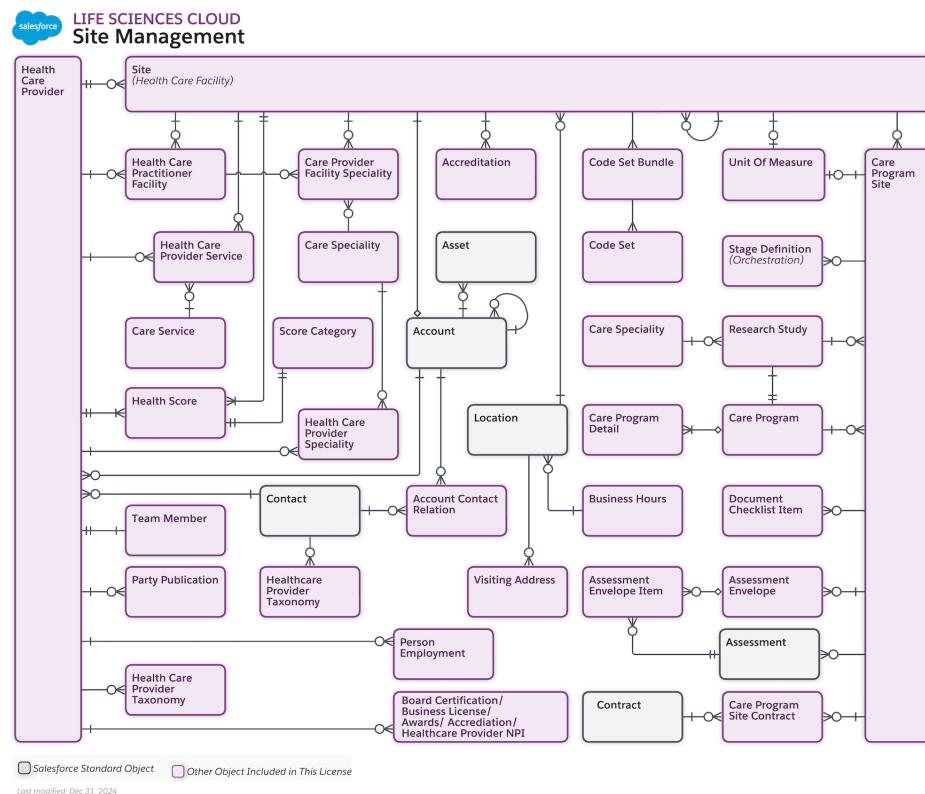
Site Management

The Site Management data model helps life sciences organizations identify suitable sites for conducting research studies. Study managers can search for the sites and investigators using the Criteria-Based Search and Filter, and send them assessments. From the assessment responses, study managers can assign scores to the sites, investigators, and their responses. They can also tag the sites and investigators for future site selection efforts.

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

The Site Management objects are available in API version 62.0 and later.



For more details and a larger image, visit the [Data Model Gallery](#).

[CareProgramSiteContract](#)

Represents the association of a care program site and a contract. This object is available in API version 62.0 and later.

[CareSitelgrSearchableFld](#)

Represents information about the clinical trial investigator associated with a site. This object is available in API version 63.0 and later.

[PartyPublication](#)

Represents the details of a party's publication. This object is available in API version 62.0 and later.

[ResearchStudyProtocolInfo](#)

Represents details of the research study protocol document. This object is available in API version 62.0 and later.

[CareProgramSiteContract](#)

Represents the association of a care program site and a contract. This object is available in API version 62.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareProgramSiteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent care program site associated with the record that the sponsor intends to engage through a contract.</p> <p>This field is a relationship field.</p> <p>Relationship Name CareProgramSite</p> <p>Relationship Type Master-detail</p> <p>Refers To CareProgramSite</p>
ContractId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The contract associated with the record between the sponsor and the care program site.</p> <p>This field is a relationship field.</p> <p>Relationship Name Contract</p> <p>Refers To Contract</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the care program site contract.</p>

CareSiteIstgrSearchableFld

Represents information about the clinical trial investigator associated with a site. This object is available in API version 63.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ActiveStudyCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The count of active research studies performed by the investigator for a specialty.</p>
AverageActualPtcpEnrlDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The average actual number of days for enrollment of participants at the site.</p>
AverageOpdPatientCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The average count of the patients who visit the OPD at the healthcare facility.</p>
AvgActualPtcpEnrlCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The average number of participants who enrolled for the research study at the site.</p>
AvgClnclTrialAgreeDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The average time taken to execute the clinical trial agreement.</p>
AvgInvtglProductReleaseDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The average number of days between the start of the site activation process to the release of the investigational product at the site.</p>
AvgQualVstToInitVstDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The average number of days between the site qualification visit and site initiation visit.</p>
AvgRgltyDocTrnarndDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The average turnaround time for the preparation of the regulatory documents for Institutional Review Board (IRB) or the Ethics Committee (EC) submission.</p>
AvgSiteActvToFstPtcpDrtn	<p>Type int</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The average number of days between the site activation and the first participant visit to the site.</p>
AvgSiteActvToLastPtcpDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The average number of days between the site activation and the last participant visit to the site.</p>
CompletedStudyCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The count of research studies completed by the investigator for a specialty.</p>
HealthcareFacilityCity	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The city where the healthcare facility is located.</p>
HealthcareFacilityClssf	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The classification of the healthcare facility, such as Previous Partner, Key opinion Leader, and New Member.</p>
HealthcareFacilityCountry	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country where the healthcare facility is located.</p>

Field	Details
HealthcareFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The healthcare facility associated with the site investigator. This field is a relationship field.</p> <p>Relationship Name HealthcareFacility</p> <p>Refers To HealthcareFacility</p>
HealthcareFacilityName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the healthcare facility associated with the site investigator.</p>
HealthcareFacilitySpecialty	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The healthcare specialty associated with the healthcare facility.</p>
HealthcareFacilityState	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The state where the healthcare facility is located.</p>
HealthcareFacilityType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the healthcare facility associated with the site investigator, such as Government.</p>

Field	Details
HlthcrFacilRsrchStudyExprc	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The total years of experience of the healthcare facility in conducting research studies.</p>
InvestigatorClassification	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The classification of the investigator, such as Previous Partner, Key Opinion Leader, and New Member.</p>
InvestigatorId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The investigator who conducts the research study at the healthcare facility. This field is a relationship field.</p> <p>Relationship Name Investigator</p> <p>Refers To HealthcareProvider</p>
InvestigatorName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the investigator who conducts the research study at the healthcare facility.</p>
InvestigatorTherapeuticArea	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The therapeutic areas that an investigator specializes in, for example, Oncology and Cardiology.</p>

Field	Details
InvestigatorType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the investigator who conducts the research study at the healthcare facility, such as Investigator or Sub investigator.</p>
Invtg1ProdtDestructionCpb1	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The type of investigational product disposal capability.</p>
Invtg1ProdtPreparationCpb1	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Specifies the list of handling equipment available at the facility for the investigational product.</p>
Invtg1ProductStorageCpb1	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The features of the investigational product storage available at the healthcare facility.</p>
IsAfflWithSiteMgmtOrg	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the healthcare facility is affiliated to a site management organization (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsHealthcareFacilAcrdtAvl	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the healthcare facility is accredited to a healthcare accreditation body (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsIstgrLicenseAvailable	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the investigator has a license to conduct clinical trials (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsIstgrPublicationAvailable	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the investigator has published articles related to the research study (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsSatelliteSiteAssociated	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether satellite sites are associated with the healthcare facility (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LaboratoryCapability	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The imaging and the non-imaging laboratory capabilities in the healthcare facility, such as X-ray and blood tests.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the care site investigator searchable field.</p>
OverallFacilityScore	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The overall score for the healthcare facility based on criteria such as facility experience and licenses.</p>
OverallInvestigatorScore	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The overall score of the investigator based on criteria, such as experience and licenses.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The owner of the care site investigator searchable field record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PatientAgeRange	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The age range of the patients at the healthcare facility.</p>
SuppInvtglProductType	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The type of investigational product supported at the healthcare facility.</p>
SupportedStudyPhase	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The phases of the research study that are supported at the healthcare facility.</p>
SupportedStudyType	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The type of research study supported at the healthcare facility.</p>

PartyPublication

Represents the details of a party's publication. This object is available in API version 62.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the party publication.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PartyId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The party associated with the publication. This field is a polymorphic relationship field.</p> <p>Relationship Name Party</p> <p>Refers To Account, HealthcareProvider, Individual</p>
PublicationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which the publication is available.</p>
PublicationIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier for the publication.</p>
PublishedOn	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the journal where the publication is available.</p>
Summary	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The abstract of the publication.</p>
Title	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The title of the publication.</p>
Url	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The URL to the publication.</p>

ResearchStudyProtocolInfo

Represents details of the research study protocol document. This object is available in API version 62.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Content	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description The content text for the research study protocol.</p>
ContentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of the content stored. Possible values are:</p> <ul style="list-style-type: none"> • Abbreviations • Adverse Events Classification • Adverse Events Definition

Field	Details
	<ul style="list-style-type: none">• Adverse Events Participant Reporting• Adverse Events Reporting• Analysis Dataset Criteria• Analysis Population Criteria• Background• Biospecimen Sample Retention• Clinical Masking Description• Clinical Monitoring• Confidentiality and Privacy• Conflict of Interest Policy• Data Handling and Record Keeping• Dosage Justification• End of Study Procedure• Event Assessment Frequency and Time Period• Gender Eligibility Description• Informed Consent Process• Intervention Benefits• Intervention Compliance• Intervention Discontinuation• Intervention Dosing and Administration• Intervention Preparation• Intervention Risks• Intervention Risks and Benefits Assessments• Intervention Storage and Stability• Lost to Follow-up• Pregnancy Reporting• Primary Endpoint Analysis• Protocol Deviations• Publication and Data Sharing Policy• Quality Assurance and Control• Safety Analysis• Safety Oversight• Sample Size Determination• Secondary Endpoint Analysis• Serious Adverse Events Definition• Serious Adverse Events Reporting• Special Interest Reporting• Statistical Analysis Summary

Field	Details
	<ul style="list-style-type: none"> • Study Design • Study Discontinuation and Closure • Study Population • Study Population Description • Study Record Retention Period • Study Scientific Rationale • Subgroup Analysis • Summary
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the research study protocol information.</p>
ResearchStudyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The research study associated with the content. This field is a relationship field.</p> <p>Relationship Name ResearchStudy</p>

Field	Details
Relationship Type	Master-detail
Refers To	ResearchStudy (the master object)

Customer Engagement

These objects are available for Life Sciences Cloud for Customer Engagement.

Account Management

Account Management in the Life Sciences industry is crucial for organizations to effectively manage their relationships with healthcare providers (HCPs) and healthcare organizations (HCOs). The profile information serves as a foundation for various operational activities within the organization, providing a comprehensive view of HCPs and HCOs including their contact and social network details, specialties, affiliations, business licenses, ratings to segment and categorize HCPs and HCOs, as well as territory and product, and team-specific details. Life Sciences Cloud extends the Salesforce Core Account data model allowing organizations to create a holistic view of their customers providing up-to-date information in support of their business priorities.

Activity Plans

Activity plans allow administrators to define goals for specific employees, including targeted accounts, plan cycle duration, types of activities, links to products, and weight of activity type. Employees and managers can review and edit these goals before final approval by the administrator. After plans are approved, employees execute activities against their goals, with the option to request changes during an active plan. Charts provide a visual representation of the employee's progress toward goals.

App Alerts

App Alerts keep users informed of critical updates, events, and insights that require timely action, helping to prevent missed opportunities. These alerts can deliver messages from admins and managers, as well as system-triggered updates and external recommendations, enabling users to act directly or dismiss suggestions with feedback. Serving as a direct, immediate communication channel, App Alerts integrate across components to streamline teamwork and enhance commercial engagement.

Consent Management

Consent Management captures and honors healthcare provider consent and communication preferences across subscriptions and channels. Increase engagement and improve relationships by personalizing healthcare provider communications while ensuring privacy and compliance.

Field Email

Field Email streamlines the email creation process, enhances efficiency, and ensures professional and compliant communication that aligns with brand guidelines. Predefined email templates ensure compliance with regulations like GDPR and CAN-SPAM while maintaining brand consistency. Customization options such as dynamic variables and content fragments, allow for personalized messages that resonate with recipients. Tracking key performance metrics like opens and clicks enables users to optimize their email campaigns effectively.

General Events

General Events enable users to log and manage various non-customer related activities. With the Planner tool, users can easily create, view, and manage General Events in their schedules. Users can also add employees to a General Event for team collaborations.

[Intelligent Content](#)

Intelligent Content facilitates marketing strategies by enabling direct and interactive communications with healthcare professionals (HCPs). Sales and medical teams can deliver personalized presentations based on real-time feedback and analytics, enhancing the impact of their interactions. By continuously refining and optimizing marketing messages and strategies through data collection and analysis, Intelligent Content ensures that they are relevant and responsive to HCP needs and preferences. Intelligent Content capabilities include analytics and optimized user interfaces, offering a comprehensive solution for targeted content delivery in both planned and unplanned presentations.

[Key Account Management](#)

Key Account Management enables Key Account Managers (KAM) to strategically manage and engage with their most important customers. By using comprehensive account and territory plans, KAMs can set clear business objectives, track progress, and ensure alignment across global, affiliate, and territory levels. This structured approach enhances customer targeting accuracy and drives effective execution of strategic initiatives. With capabilities for creating multiple plans, defining specific objectives, and assigning tasks, the Key Account Management ensures alignment, collaboration, and effective execution of strategies to achieve desired business outcomes.

[Life Sciences Commercial Engagement Configuration](#)

The Life Sciences Commercial Engagement Configuration objects store settings and configurations for many Customer Engagement features. In some cases, you can control a feature's behavior by assigning configurations to specific profiles or users. Other configurations apply to all the users in an org.

[Life Sciences Workflow Management](#)

Configure workflows for Commercial Engagement objects. As users advance records through the steps in a workflow path, unique permissions apply based on each step and the conditions met for that step. Control data permissions for create, update, and delete operations, and control user actions based on a user's role in the workflow. Validate custom business rules and enforce a status transition action checklist. Configure additional actions such as calling Platform Events for both mobile and web platforms.

[Lists and Filters](#)

Quickly identify a target group of accounts by using Lists and Filters. Static lists are manually-curated lists of accounts that remain fixed. Users can add or remove accounts individually. Dynamic filters apply to a list of accounts that updates based on user pre-defined criteria, and show sortable relevant fields that users add. By using dynamic filters, users can quickly associate the group of accounts with tailored actions, saving time and efforts by removing the need for repetitive manual updates. Lists and Filters streamline workflows by enabling users to identify, interact with, and act on relevant accounts.

[Medical Inquiries](#)

Capture critical questions from healthcare professionals such as medical inquiries, adverse events, and product quality complaints with Medical Inquiries. Inquiries can come from multiple channels such as face-to-face visits, remote engagements, or contact centers. Inquiries require a quick and compliant response by the right individuals, typically medical experts like Medical Science Liaisons and Medical Communication Specialists. Medical Science Liaisons (MSLs) are skilled professionals who can answer scientific questions about drug details, interactions, off-label usage, and clinical product information. Medical Communication Specialists work in contact center environments and partner with MSLs to resolve inquiries, including incoming patient and consumer calls about product information, side effects, and adverse reactions.

[Mobile Metadata](#)

Mobile Metadata represents a metadata cache for the Life Sciences Cloud for Customer Engagement mobile application.

[Mobile Sync](#)

The Mobile Sync objects store information about data transactions synchronized from the Life Sciences Cloud for Customer Engagement mobile application. This information includes individual data transactions and supporting summary and logging information.

Next Best

The Next Best intelligent component is an AI-predictive tool that helps sales representatives to prioritize and personalize their customer interactions. Next Best Customer, Next Best Action, and Next Best Message together comprise the Next Best intelligent family. Next Best Customer surfaces the top accounts within a territory. Next Best Action suggests timely actions on a weekly basis, such as visits and emails. Next Best Message provides tailored and relevant messages for each product associated with the account. These recommendations are dynamically generated based on the real-time data, allowing field sales teams to act quickly or dismiss as needed. Next Best recommendations guide users to concentrate on the right accounts at the right time in the right channel to deliver the right message, fostering strong customer relationships.

Product Management

Product Management centers on products, which are essential for business activities within the system. Products are modeled in a hierarchy that can mirror a company's SKU structure and are used in scenarios such as selling to pharmacies and delivering messages and samples to healthcare professionals. Product alignment is key to ensuring that users have access to products and related data to perform their jobs effectively. To maintain compliance and adherence to regulatory standards, user access to products can be controlled. Users can access and discuss only products available to them and not restricted for the target customer.

Visit Management

Visit Management supports the call planning and execution process in the Life Sciences Industry. Field users can engage compliantly with accounts through various channels such as face-to-face, phone, and remote. With integrated intelligent content and remote engagement capabilities, field sales representatives and medical teams can plan, execute, and report on visits to healthcare providers and healthcare organizations. Information entered in a provider visit typically includes product details, product messages, presentations, marketing items and samples. Provider Visit Management also supports various compliance requirements regarding sample eligibility, sample limits and allocations, and e-signature capture.

Remote Engagement

Enable sales and medical teams to connect with healthcare professionals virtually across multiple channels, with interactive and compliant content, data collection capabilities, and technology flexibility. The benefits of Remote Engagement include accessibility, compliance with regulations like GDPR, increased productivity, convenience in scheduling, and the ability to create interactions through video, voice, and digital assets. Users can plan, launch, conduct, and finish remote calls or meetings, by using tracking, screen sharing, remote signatures, and feedback capture.

Samples Management

Enable pharmaceutical companies to efficiently handle and distribute drug samples to healthcare providers. Enhance drug sales and keep healthcare providers informed about the safe and effective use of products, leading to quicker treatments. Track and manage sales representative inventories of samples, ensuring compliance with regulations, and maintaining accurate records of distribution. Effective sample management is crucial for supporting healthcare providers and low-income patients, and ensuring ethical practices and regulatory compliance.

Segmentation

Group accounts based on specific conditions. Segmentations are reusable across different areas (such as sample limits) to distribute or assign elements to segments of accounts with the same set of criteria. There are two types of segmentations: static and dynamic. Static segmentation maintains the assignment even after the initial assignment. Dynamic segmentation changes based on account status or logic changes. Use Segmentation to assign and restrict of various elements without the need for individual account management.

Subject Management

Use Subjects to organize and manage information across various functions. Users can add topics to medical inquiries as subjects, facilitating automatic queue assignments and building a knowledge repository. Subjects can also be applied to medical insights and email templates for easy searching by subject filtering.

Surveys

Surveys provide Life Science companies with an easy-to-use solution for creating, distributing, and completing surveys. Surveys help ensure regulatory compliance, support accurate data management, and deliver actionable insights that enhance research outcomes and enable informed decision-making. Additionally, Surveys include an offline survey capability in the Life Sciences Cloud mobile app, allowing users to collect responses without an internet connection. When back online, data is automatically synced, ensuring seamless integration with the feedback and analytics processes.

System Objects

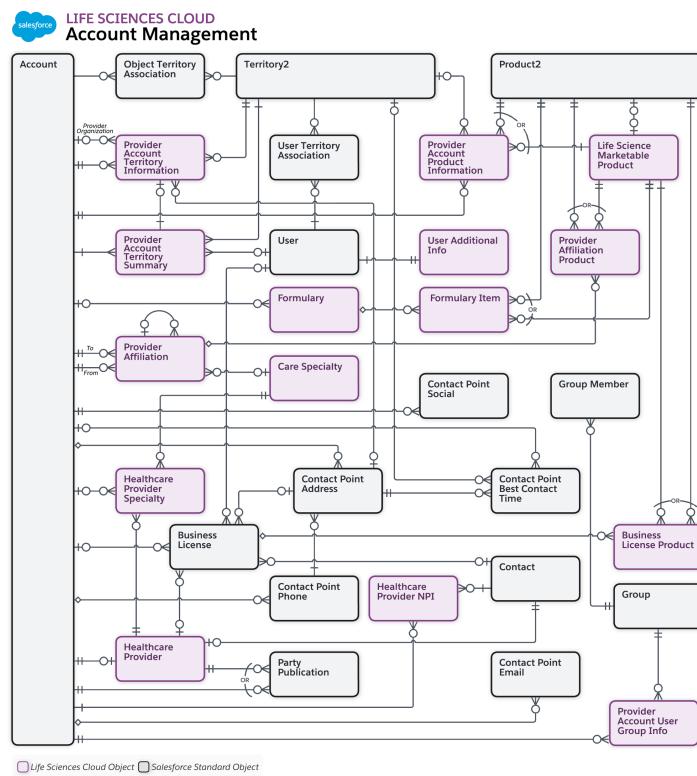
System objects are related to core system functionality used by Life Sciences Cloud for Commercial Engagement.

Territory Management

Territory Management supports strategically organizing territories and aligning healthcare providers (HCPs) and healthcare organizations (HCOs) to territories. Use Territory Management to optimize resource allocation and improve engagement with HCPs/HCOs. Life Sciences Cloud enables industry-specific territory management features that are integrated with Salesforce Enterprise Territory Management.

Account Management

Account Management in the Life Sciences industry is crucial for organizations to effectively manage their relationships with healthcare providers (HCPs) and healthcare organizations (HCOs). The profile information serves as a foundation for various operational activities within the organization, providing a comprehensive view of HCPs and HCOs including their contact and social network details, specialties, affiliations, business licenses, ratings to segment and categorize HCPs and HCOs, as well as territory and product, and team-specific details. Life Sciences Cloud extends the Salesforce Core Account data model allowing organizations to create a holistic view of their customers providing up-to-date information in support of their business priorities.



For more details and a larger image, visit the [Data Model Gallery](#).

[Data Change Requests](#)

With Data Change Requests, organizations can implement configurable data validation processes that are tailored to their specific business needs. Validate data changes by objects and fields and configure data changes by profile and record type. Data Change Requests support controlled data synchronization of externally managed data domains.

[Merge Management](#)

Maintain the integrity of your healthcare provider and healthcare organization profile information with a configurable process that removes duplicated account data. Users can either manually merge or receive merge requests from external sources to consolidate into a single winning account and remove the losing account. This capability provides organizations with a single, accurate view of the HCPs and HCOs that they work with.

[BusinessLicense](#)

Represents the licenses of a party role like healthcare provider or producer.

[BusinessLicenseProduct](#)

Represents the licenses required to be linked to a product for the healthcare provider. This object is available in API version 65.0 and later.

[ContactPointBestContactTime](#)

Represents the optimal time to visit associated contact point addresses. This object is available in API version 65.0 and later.

[ContactPointSocial](#)

Represents social media identifiers or contact points for an individual or account. This object is available in API version 65.0 and later.

[Formulary](#)

Represents the details of the formulary covered by the payer's health insurance plan. This object is available in API version 65.0 and later.

[FormularyItem](#)

Represents details of products within the formulary, including the drug tier, coverage, and copay. This object is available in API version 65.0 and later.

[HealthcareProvider](#)

Represents business-level details about the healthcare organization or the practitioner.

[PartyPublication](#)

Represents the details of a party's publication.

[ProviderAcctProductInfo](#)

Represents specific information for healthcare professionals or healthcare organizations at the territory and product levels. This information is used for segmentation and product-level rankings. This object is available in API version 65.0 and later.

[ProviderAcctTerritoryInfo](#)

Represents the engagement data between an account and a user within an assigned territory, which includes next provider visit date, preferred address, and planned activities. This object is available in API version 65.0 and later.

[ProviderAffiliation](#)

Represents the relationship between two healthcare professionals or healthcare organizations. This object is available in API version 65.0 and later.

[ProviderAffiliationProduct](#)

Represents the relationship between two healthcare professionals, where one influences the other regarding a product. This object is available in API version 65.0 and later.

[PrvdAccountUserGroupInfo](#)

Represents the classification values for the provider account user group. This object is available in API version 65.0 and later.

[PrvdAccountTerritorySummary](#)

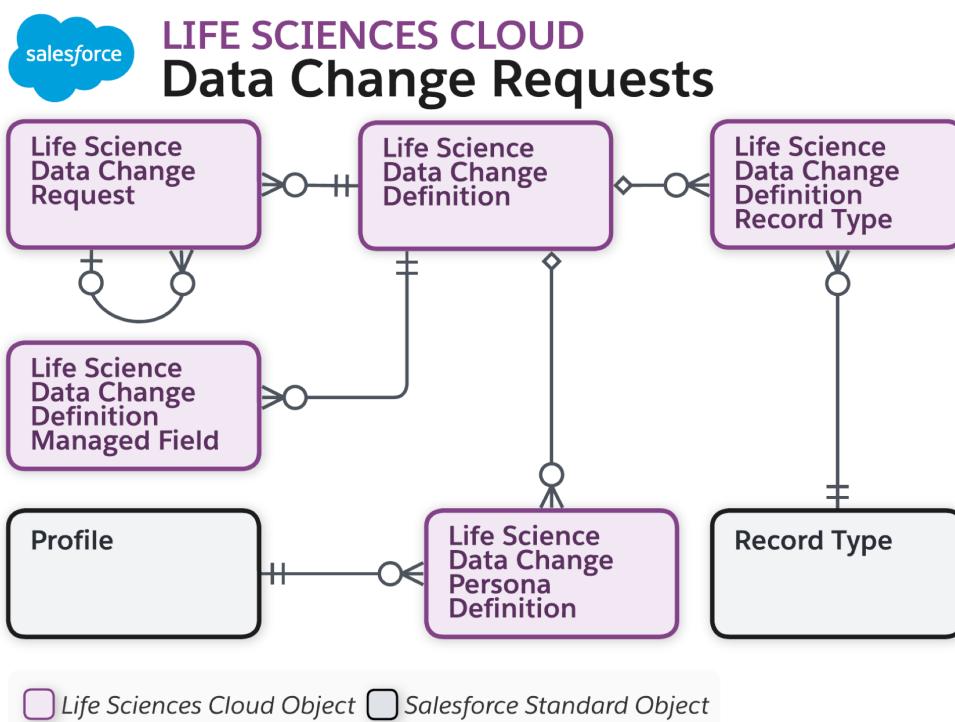
Represents the summaries generated for a provider account for the territories it is aligned to. This object is available in API version 65.0 and later.

SEE ALSO:

- [Object Reference for the Salesforce Platform: Account](#)
- [Object Reference for the Salesforce Platform: ContactPointEmail](#)
- [Object Reference for the Salesforce Platform: ContactPointPhone](#)
- [Object Reference for the Salesforce Platform: HealthcareProviderSpecialty](#)
- [Object Reference for the Salesforce Platform: CareSpecialty](#)
- [Object Reference for the Salesforce Platform: GroupMember](#)
- [Object Reference for the Salesforce Platform: Group](#)

Data Change Requests

With Data Change Requests, organizations can implement configurable data validation processes that are tailored to their specific business needs. Validate data changes by objects and fields and configure data changes by profile and record type. Data Change Requests support controlled data synchronization of externally managed data domains.



For more details and a larger image, visit the [Data Model Gallery](#).

[LifeSciDataChangeDef](#)

Represents the object for which the data change request is configured. This object is available in API version 65.0 and later.

[LifeSciDataChangeRequest](#)

Represents the data change requests for all objects. This object is available in API version 65.0 and later.

[LifeSciDataChgDefMngFld](#)

Represents the fields for which the data change request is configured for all objects. This object is available in API version 65.0 and later.

[LifeSciDataChgDefRecType](#)

Represents the management of data validation for the object by record type.

[LifeSciDataChgPersonaDef](#)

Represents the configuration of data updates for the object by persona.

LifeSciDataChangeDef

Represents the object for which the data change request is configured. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describesObjects(), query(), retrieve(), update(), upsert()
```

Fields

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Determines whether the configuration record for the data change request is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The label for the data change definition value. This display value is the internal label that doesn't get translated.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix that is associated with this object.</p>
ObjectName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The object associated with the data change definition.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Account • BusinessLicense—Business License • ContactPointAddress—Contact Point Address • ContactPointEmail—Contact Point Email • ContactPointPhone—Contact Point Phone • ContactPointSocial—Contact Point Social • HealthcareProvider—Healthcare Provider • Identifier • ProviderAffiliation—Provider Affiliation

LifeSciDataChangeRequest

Represents the data change requests for the all objects. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
Comments	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The comments added by the user. The comments are included in the external validation request.</p>
DataChangeInformation	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description The information related to the old and the new data change in JSON format.</p>
DataChangeRecordIdentifier	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The record identifier for the related data change, for example, Account Id and Account Address Id.</p>
DataChgExt1RecIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The external identifier of the source record for which the data change request was created.</p>
ExternalValidationSysName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Defines the system used for external validation, for example, OneKey and LEXI.</p>
Ext1ValidationReqIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the identifier of the data change validation received from an external system.</p>
Ext1ValidationSysResponse	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The response received for an external data change request validation.</p>
FailureReason	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The exception messages for an unsuccessful create or update action. Also, stores the exception message for a failed request to an external system.</p>

Field	Details
IsNewRecApprovalRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Determines whether the data change request for a new restricted record requires an approval (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description Timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description Timestamp when the current user last viewed the record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
LifeSciDataChgRqstDefId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The data change definition record associated with the data change request. This field is a relationship field.</p> <p>Relationship Name LifeSciDataChgRqstDef</p> <p>Refers To LifeSciDataChangeDef</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description The name of the data change record.</p>
OperationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the change request is to update or create data. Possible values are:</p> <ul style="list-style-type: none"> • Create • Update
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentDataChangeRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent data change request associated with the object. For example, this field stores the Account data change associated with the Affiliation data change request. This field is a relationship field.</p> <p>Relationship Name ParentDataChangeRequest</p> <p>Refers To LifeSciDataChangeRequest</p>
SourceSystemIdentifier	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Indicates the status of a data change request. Possible values are:</p> <ul style="list-style-type: none"> • Approved • Failed • NotProcessed—Not Processed • NotQualified—Not Qualified • Processed • Qualified • Rejected
ValidationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the validation type is internal or external for the data change request. Possible values are:</p> <ul style="list-style-type: none"> • External • Internal

Associated Object

This object has the following associated object. If the API version isn't specified, it's available in the same API versions as this object. Otherwise, it's available in the specified API version and later.

[LifeSciDataChangeRequestShare](#)

Sharing is available for the object.

[LifeSciDataChgDefMngFld](#)

Represents the fields for which the data change request is configured for all objects. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
<code>CountryId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country associated with the object. This field is a relationship field.</p> <p>Relationship Name Country</p> <p>Refers To LifeSciCountry</p>
<code>FieldApiName</code>	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The API name of the data change request definition field.</p>
<code>LastReferencedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
LifeSciDataChgDefId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The data change request definition associated with the object. This field is a relationship field.</p> <p>Relationship Name LifeSciDataChgDef</p> <p>Refers To LifeSciDataChangeDef</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The identifier assigned to the data change record by an external data source.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ShouldApplyChngImmediately	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Determines whether changes to this field must be applied immediately. The default value is <code>false</code>.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
ValidationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the validation type for the data change request is internal or external. Possible values are:</p> <ul style="list-style-type: none"> • External • Internal

Associated Object

This object has the following associated object. If the API version isn't specified, it's available in the same API versions as this object. Otherwise, it's available in the specified API version and later.

[LifeSciDataChgDefMngFldShare on page 1438](#)

Sharing is available for the object.

LifeSciDataChgDefRecType

Represents the management of data validation for the object by record type.

Supported Calls

```
create(), delete(), describeObjects(), query(), retrieve(), update(), upsert()
```

Fields

Field	Details
ExternalValidationSysName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Defines the system used for external validation, for example, OneKey and LEXI.</p>
IsNewRecApprovalRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Determines whether the object record must be created only after the data change request is approved (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LifeSciDataChgRqstDefId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The data change definition associated with the object. This field is a relationship field.</p> <p>Relationship Name LifeSciDataChgRqstDef</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeSciDataChangeDef (the master object)</p>
RecordTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The record type identifier for the validation system for the data change definition.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name RecordType</p> <p>Refers To RecordType</p>
ValidationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the validation type is internal or external for the data change request. Possible values are:</p> <ul style="list-style-type: none"> • External • Internal

LifeSciDataChgPersonaDef

Represents the configuration of data updates for the object by persona.

Supported Calls

`create()`, `delete()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Fields

Field	Details
ChangeUpdateType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the requested changes are applied immediately at the field level, to all managed fields, or if the changes don't apply until the request is approved. Possible values are:</p> <ul style="list-style-type: none"> • <code>ApplyChangesByField</code>—Apply Changes By Field • <code>ApplyChangesImmediately</code>—Apply Changes Immediately • <code>DoNotApplyChangesImmediately</code>—Do Not Apply Changes Immediately <p>The default value is <code>DoNotApplyChangesImmediately</code>.</p>

Field	Details
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Determines whether the configuration record for the data change request is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LifeSciDataChgRqstDefId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The data change definition associated with the object. This field is a relationship field.</p> <p>Relationship Name LifeSciDataChgRqstDef</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeSciDataChangeDef (the master object)</p>
ProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The user profile associated with the data change definition. This field is a relationship field.</p> <p>Relationship Name Profile</p> <p>Refers To Profile</p>

Merge Management

Maintain the integrity of your healthcare provider and healthcare organization profile information with a configurable process that removes duplicated account data. Users can either manually merge or receive merge requests from external sources to consolidate into a single winning account and remove the losing account. This capability provides organizations with a single, accurate view of the HCPs and HCOs that they work with.

MergeRequest

Represents the details related to tracking the merge history of records. It maps the losing record (deleted as result of merge) to the winning records (remains after merge). This object is available in API version 65.0 and later.

MergeRequest

Represents the details related to tracking the merge history of records. It maps the losing record (deleted as result of merge) to the winning records (remains after merge). This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ErrorMessage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The error message displayed when the merge request processing fails.</p>
ExecutionJobIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the job that processed the merge request.</p>
ExecutionJobType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of job that processes the merge request. Possible values are:<ul style="list-style-type: none">BatchJob—Batch JobThe default value is BatchJob.</p>
FinalWinningRecIdentifier	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Salesforce ID of the final winning record. This occurs when the winning record becomes a losing record in a subsequent merge request.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
LosingExtlRecordIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The external ID of the losing record in the merge request.</p>
LosingOfflineRecIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The offline ID of the losing record's external ID in the merge request.</p>
LosingRecordIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Salesforce ID of the losing record in the merge request.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The auto-numbered name of the merge request.</p>
ObjectType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of object for which the merge request is created. Possible values are:<ul style="list-style-type: none">• AccountThe default value is Account.</p>
OriginType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the source of the merge request.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the merge request record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ShouldOverrideBlankValues	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether to update blank values of winning account fields with losing account fields (<code>true</code>) or not (<code>false</code>). The winning account is updated only if there are values in the losing account.</p> <p>The default value is <code>false</code>.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the merge request. Possible values are:</p> <ul style="list-style-type: none"> • Completed • Error • InProgress—In Progress • Requested <p>The default value is Requested.</p>
WinningExtRecordIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The external ID of the winning record in the merge request.</p>

Field	Details
WinningRecordIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Salesforce ID of the winning record in the merge request.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[MergeRequestChangeEvent on page 1426](#)

Change events are available for the object.

[MergeRequestFeed on page 1429](#)

Feed tracking is available for the object.

[MergeRequestHistory on page 1434](#)

History is available for tracked fields of the object.

[MergeRequestShare on page 1438](#)

Sharing is available for the object.

BusinessLicense

Represents the licenses of a party role like healthcare provider or producer.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the organization holding the license. This field is a relationship field.</p> <p>Relationship Name Account</p>

Field	Details
	<p>Refers To Account</p>
ComplianceScope	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The scope of compliance for the business license. Possible values are:</p> <ul style="list-style-type: none"> • Address • Jurisdiction • StateDistributorLicense <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the person who holds the license and is listed as a contact. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Refers To Contact</p>
ContactPointAddressId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the person who holds the license and is listed as a contact. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name ContactPointAddress</p> <p>Refers To ContactPointAddress</p>

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of the license.</p>
HealthCareFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID associated with the healthcare facility. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name HealthCareFacility</p> <p>Refers To HealthcareFacility</p>
HealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the Healthcare Provider who holds this license. This field is a relationship field. This field is a lookup to HealthcareProvider.</p> <p>Relationship Name HealthcareProvider</p> <p>Refers To HealthcareProvider</p>
Identifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Issuer's ID for the licensee. This field is unique within your organization.</p>
IsActive	<p>Type boolean</p>

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the license is active (true) or not (false). The default value is false.
IsLicenseValidated	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates whether the business license is valid (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> . This field is a calculated field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
IsPrimaryLicense	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if the license is the primary license. The default value is <code>false</code> .
IssueDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The date the license or certification was issued.
Issuer	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description License issuer's name.
JurisdictionCountry	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Country where license is valid.

Field	Details
JurisdictionOther	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of other jurisdiction.</p>
JurisdictionState	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description State where license is valid.</p>
JurisdictionType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Jurisdiction for the license.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • COUNTRY • COUNTY • PROVINCE • STATE <p>The default value is STATE.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	Description
	<p>The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
LicenseClass	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The class that the distributor's license belongs to.
	Possible values are:
	<ul style="list-style-type: none"> • APN – Advanced Practice Nurse • LPN – Licensed Practical Nurse • MD – Medical Doctor (MD) • PC – Professional Counselor • PT – Physical Therapist
LicenseNumber	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The number of the license.
LicenseValidatedIcon	Type
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	The icon used to indicate the validation status of the business license. This field is a calculated field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
LineOfAuthority	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The line of authority that the distributor is licensed for.

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Accident & Health or Sickness • Casualty • Property <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the business or professional license.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PeriodEnd	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description License's expiration date.</p>
PeriodStart	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description License's effective start date.</p>
ResidenceStatus	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description Residence status of the producer. Possible values are:</p> <ul style="list-style-type: none"> • Non-resident • Resident <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
SourceSystemUpdateDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description Represents the date when the record was last updated in the source system.</p>
StateDstrLicenseCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The State Distributor License category for the business license. Possible values are:</p> <ul style="list-style-type: none"> • CategoryII—Category II • CategoryIII—Category III • LimitedCategoryII—Limited Category II • LimitedCategoryIII—Limited Category III <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Current status of the license. Possible values are:</p> <ul style="list-style-type: none"> • Draft • Inactive

Field	Details
	<ul style="list-style-type: none"> • Revoked • Verified <p>The default value is <code>Inactive</code>.</p>
<code>UserId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who holds the license and is listed as a user. This field is a relationship field.</p> <p>Relationship Name User</p> <p>Refers To User</p>
<code>VerificationStatus</code>	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Current status for the license. Possible values are:<ul style="list-style-type: none"> • Authorized The default value is <code>Authorized</code>.</p>
<code>VerifiedDate</code>	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description License was validated on this date.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[BusinessLicenseFeed](#)

Feed tracking is available for the object.

[BusinessLicenseHistory](#)

History is available for tracked fields of the object.

BusinessLicenseOwnerSharingRule

Sharing rules are available for the object.

BusinessLicenseShare

Sharing is available for the object.

BusinessLicenseProduct

Represents the licenses required to be linked to a product for the healthcare provider. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
BusinessLicenseId	Type reference Properties Create, Filter, Group, Sort Description The ID associated with the parent business license record. This field is a relationship field. Relationship Name BusinessLicense Relationship Type Master-detail Refers To BusinessLicense (the master object)
LastReferencedDate	Type dateTime Properties Filter, Nullable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nullable, Sort

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the business license product.</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product ID associated with the business license. This field is a polymorphic relationship field.</p> <p>Relationship Name Product2</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

BusinessLicenseProductChangeEvent on page 1426

Change events are available for the object.

BusinessLicenseProductFeed on page 1429

Feed tracking is available for the object.

BusinessLicenseProductHistory on page 1434

History is available for tracked fields of the object.

ContactPointBestContactTime

Represents the optimal time to visit associated contact point addresses. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the account associated with the contact point address. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
ContactPointReferenceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the contact point address linked to the best contact times associated with the account. This field is a polymorphic relationship field.</p> <p>Relationship Name ContactPointReference</p> <p>Refers To ContactPointAddress</p>

Field	Details
DayOfWeek	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The day of the week associated with the best contact time record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Friday • Monday • Saturday • Sunday • Thursday • Tuesday • Wednesday
FromTime	<p>Type time</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The best from time to reach the account.</p>
FromTimeHours	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The best from time hours to reach the account. This field is a calculated field.</p>
FromTimeInHours	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The best from time in hours to reach the account. This field is a calculated field.</p>
FromTimeMinutes	<p>Type int</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The best from time minutes to reach the account. This field is a calculated field.</p>
IndividualId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the individual associated with the contact point address. This field is a relationship field.</p> <p>Relationship Name Individual</p> <p>Refers To Individual</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the contact point best contact time record.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID the territory associated with the best time record. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>
ToTime	<p>Type time</p>

Field	Details
	<p>Properties Create, Filter, Sort, Update</p> <p>Description The best time to reach the account.</p>
ToTimeHours	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The best time hours to reach the account. This field is a calculated field.</p>
ToTimeMinutes	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The best time minutes to reach the account. This field is a calculated field.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the best time record. Possible values are:</p> <ul style="list-style-type: none"> • Appointment Required • Best Time • Closed • My Best Time • Open

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ContactPointBestContactTimeChangeEvent on page 1426](#)

Change events are available for the object.

ContactPointBestContactTimeFeed on page 1429

Feed tracking is available for the object.

ContactPointBestContactTimeHistory on page 1434

History is available for tracked fields of the object.

ContactPointBestContactTimeShare on page 1438

Sharing is available for the object.

ContactPointSocial

Represents social media identifiers or contact points for an individual or account. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the contact point social record.
OwnerId	Type reference

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the account or contact's parent record. This field is a polymorphic relationship field.</p> <p>Relationship Name ParentReferenceRecord</p> <p>Refers To Account, Individual</p>
ProfilePictureUrl	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The link or URL to the contact or account's profile picture on a social platform.</p>
SocialHandleIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID associated with the contact or account's profile on a social platform.</p>
SocialHandleName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The name of the contact or account's profile on the social platform.</p>
SocialPlatformProvider	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name of the social platform the profile is from. Possible values are:</p> <ul style="list-style-type: none"> • WeChat • X • Facebook • WhatsApp
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ContactPointSocialChangeEvent on page 1426](#)

Change events are available for the object.

[ContactPointSocialFeed on page 1429](#)

Feed tracking is available for the object.

[ContactPointSocialHistory on page 1434](#)

History is available for tracked fields of the object.

[ContactPointSocialShare on page 1438](#)

Sharing is available for the object.

Formulary

Represents the details of the formulary covered by the payer's health insurance plan. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
EffectiveEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The effective end date of the formulary.</p>
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The effective start date of the formulary.</p>
FormularyType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the type of formulary.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the formulary.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the formulary record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reference domain associated with the formulary. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceRecord</p> <p>Refers To Account</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the formulary.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[FormularyFeed on page 1429](#)

Feed tracking is available for the object.

[FormularyHistory on page 1434](#)

History is available for tracked fields of the object.

[FormularyShare on page 1438](#)

Sharing is available for the object.

FormularyItem

Represents details of products within the formulary, including the drug tier, coverage, and copay. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CopayAmount	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The copayment amount for the product within the formulary.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The additional details of the formulary product record.</p>
EffectiveEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The effective end date of the product within the formulary.</p>
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The effective start date of the product within the formulary.</p>
FormularyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the parent formulary record associated with the formulary item. This field is a relationship field.</p> <p>Relationship Name Formulary</p> <p>Relationship Type Master-detail</p>

Field	Details
	<p>Refers To Formulary (the master object)</p>
HasQuantityLimit	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product within the formulary has a quantity limit (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
ItemID	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the product associated with the formulary. This field is a polymorphic relationship field.</p> <p>Relationship Name Item</p> <p>Refers To Product2</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the formulary item.</p>
PriorAuthorizationRequiredType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of prior authorization required for the product within the formulary.</p>
QuantityLimitDescription	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The detailed description of quantity limits the formulary imposes on a product. This may include a rolling dispense limit, maximum daily, or therapy days for a time period.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the product within the formulary.</p>

Field	Details
StepTherapyLimitType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of step therapy required for the product within the formulary.</p>
TierType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the tier of the product within the formulary.</p>
TotalCoveredLifeCount	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total number of patients covered for a product within the formulary.</p>
TotalCoveredPharmacyLifeCount	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total number of pharmacy lives covered for a product within the formulary.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[FormularyItemFeed on page 1429](#)

Feed tracking is available for the object.

[FormularyItemHistory on page 1434](#)

History is available for tracked fields of the object.

HealthcareProvider

Represents business-level details about the healthcare organization or the practitioner.

Special Access Rules

In Life Sciences Cloud, the HealthCareProvider object and its fields are used by the Account Management and the Segmentation feature areas. This topic lists fields used in both features.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AbbreviatedName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the abbreviated name of the Japanese healthcare organization (HCO) for INS-DOC records. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Account that this healthcare provider is associated with. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
AssociatedSampleLimit	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The JSON comprising the list of Sample Limits for the HealthcareProvider record. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
CaqhIdentifier	<p>Type string</p>

Field	Details
	Properties Create, Filter, Group, idLookup, Nullable, Sort, Update
	Description This field is unique within your organization. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
DataChangeComments	Type textarea
	Properties Create, Filter, Nullable, Sort, Update
	Description Captures comments explaining the reasons or context for changes made to the data. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
DoesDispenseMedication	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the account dispenses medication.
	The default value is <code>false</code> . This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
EffectiveFrom	Type date
	Properties Create, Filter, Group, Nullable, Sort, Update
	Description Specifies the date from which the provider becomes effective.
EffectiveTo	Type date
	Properties Create, Filter, Group, Nullable, Sort, Update
	Description Specifies the date from which the provider is no longer effective.
EhrSystem	Type textarea
	Properties Create, Nullable, Update

Field	Details
	Description
	Name of the EHR system used at this facility or organization.
HasCarrierContract	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the provider's contract follows a CMS model MA contract amendment, based on Centers for Medicare and Medicaid Services (CMS) guidelines.
	The default value is <code>false</code> . This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
HasSalesDataRestriction	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether access to the sales data about the healthcare provider is restricted.
	The default value is <code>false</code> . This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
InitialStartDate	Type date
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	Specifies the date when the facility first became operational or the practitioner first began practicing.
IsNotSearchable	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the provider is excluded from search results.
	The default value is <code>false</code> . This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
IsPrivacyLawEnabled	Type boolean

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description Indicates whether the privacy law regulations are enabled. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
IsSpeaker	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the provider is designated as a speaker for engagement. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the provider.</p>
OperatingCountryCode	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the country code of the country to which the account belongs. Possible values are:<ul style="list-style-type: none">• USThis field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentOrganizationAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the ID of the parent account, used to establish the account hierarchy. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name ParentOrganizationAccount</p> <p>Refers To Account</p>
PhoneticName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the Japanese phonetic name, applicable to both HCP and HCO, which is used for sorting and text-based searches. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Field	Details
PhoneticName2	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the Japanese phonetic name, applicable to both HCP and HCO, which is used for sorting and text-based searches. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The practitioner that this healthcare provider record is associated with. This field is a relationship field.</p> <p>Relationship Name Practitioner</p> <p>Refers To Contact</p>
ProfessionalDesignation	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the professional designation of the healthcare professional. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProfessionalTitle	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the professional title of the healthcare professional. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProviderClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The class of facility, such as an IPA, medical group, or solo practitioner. Possible values are:</p> <ul style="list-style-type: none"> • IPA • Medical Group • Solo Practitioner
ProviderFullName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The full name of the healthcare provider. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProviderPhotoId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Content Document file that is a photo of the Healthcare Provider. This field is a relationship field.</p> <p>Relationship Name ProviderPhoto</p> <p>Relationship Type Lookup</p> <p>Refers To ContentDocument</p>
ProviderType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of provider or facility. For example, pharmacist or ambulatory care facility. Possible values are:</p> <ul style="list-style-type: none"> • Ambulatory Care • Dentist • Hospital • Laboratory

Field	Details
	<ul style="list-style-type: none"> • Medical Doctor • Pharmacist • Pharmacy
ReferredByContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the provider who originated the referral. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name ReferredByContact</p> <p>Refers To Contact</p>
RelatedHealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the HCP account associated with the INS-DOC. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name RelatedHealthcareProvider</p> <p>Refers To HealthcareProvider</p>
RelatedUserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The User record that relates to the Healthcare Provider record. This field is a relationship field.</p> <p>Relationship Name RelatedUser</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To User</p>
SalesDataRstrcEffectiveDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date when the sales data restriction becomes effective. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the system from which the record was sourced. This field is unique within your organization</p>
SourceSystemModifiedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date when the record was last updated in the source system</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the provider. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • Active • Inactive • Pending <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
TerminationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Termination date for this provider.</p>
TerminationReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reason for termination.</p>
TotalLicensedBeds	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Total number of licensed beds at this facility, if applicable.</p>
WrittenName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the Chinese character name of the organization, applicable only to healthcare professionals (HCPs), which is required for INS-DOC records. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[HealthcareProviderChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

HealthcareProviderFeed

Feed tracking is available for the object.

HealthcareProviderHistory

History is available for tracked fields of the object.

HealthcareProviderOwnerSharingRule

Sharing rules are available for the object.

HealthcareProviderShare

Sharing is available for the object.

PartyPublication

Represents the details of a party's publication.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CitationCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of citations the publication has.</p>
ImpactFactor	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The number of times the publication is listed.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
ListingPlatformType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description The listing platform the publication is listed on.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the party publication.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID associated with party publication. This field is a polymorphic relationship field.</p> <p>Relationship Name Party</p>

Field	Details
	Refers To
	Account, HealthcareProvider, Individual
PartyRoleType	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The role of the author of the publication. Examples include the primary or secondary author.
PublicationCategory	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The publication category of where the publication was published.
PublicationDate	Type date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date of publication.
PublicationIdentifier	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The external ID associated with the publication.
PublishedOn	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The source where the publication was published, if it appears in multiple journals.
Status	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description The status of the publication.</p>
Summary	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The summary of the publication.</p>
Title	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The full title of the publication.</p>
Url	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The link or URL to the publication.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PartyPublicationChangeEvent on page 1426](#)

Change events are available for the object.

[PartyPublicationFeed on page 1429](#)

Feed tracking is available for the object.

[PartyPublicationHistory on page 1434](#)

History is available for tracked fields of the object.

[PartyPublicationShare on page 1438](#)

Sharing is available for the object.

ProviderAcctProductInfo

Represents specific information for healthcare professionals or healthcare organizations at the territory and product levels. This information is used for segmentation and product-level rankings. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the account associated with the provider account product information. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
Description	<p>Type textArea</p> <p>Properties Create, Nullable, Update</p> <p>Description The description of situations related to this provider account and product.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the provider account product information.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the product associated with the provider account product information. This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the territory associated with the provider account product information. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderAcctProductInfoChangeEvent on page 1426](#)

Change events are available for the object.

[ProviderAcctProductInfoFeed on page 1429](#)

Feed tracking is available for the object.

[ProviderAcctProductInfoHistory on page 1434](#)

History is available for tracked fields of the object.

[ProviderAcctProductInfoShare on page 1438](#)

Sharing is available for the object.

ProviderAcctTerritoryInfo

Represents the engagement data between an account and a user within an assigned territory, which includes next provider visit date, preferred address, and planned activities. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account ID associated with provider account territory info. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
AssignmentApprovalStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The approval status when an account is added to the territory through manual request. Possible values are:</p> <ul style="list-style-type: none"> • Approved • Pending • Rejected
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the provider account territory info is active. The default value is <code>false</code>.</p>
IsAvailableOffline	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this record will be downloaded to the mobile application. The default value is <code>false</code>.</p>

Field	Details
IsTargetedAccount	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the account is a target for the territory. The default value is <code>false</code>.</p>
LastProviderVisitDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date of the last submitted visit for this account in this territory.</p>
LastProviderVisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID associated with the last submitted visit for this account in this territory. This field is a relationship field.</p> <p>Relationship Name LastProviderVisit</p> <p>Refers To ProviderVisit</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the provider account territory info.</p>
NextProviderVisitDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The date of the next planned visit for this account in this territory.</p>
NextProviderVisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID of the next planned provider visit record. This field is a relationship field.</p> <p>Relationship Name NextProviderVisit</p> <p>Refers To ProviderVisit</p>
NextProviderVisitObjective	<p>Type textarea</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The objective for the next visit with the healthcare provider, derived from the next visit objective on the last visit in this territory.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PreferredAddressId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID associated with the contact point record that stores the preferred address of the account for the specified territory. This field is a relationship field.</p> <p>Relationship Name PreferredAddress</p> <p>Refers To ContactPointAddress</p>
ProviderOrganizationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The healthcare facility associated with the provider account. This field is a relationship field.</p> <p>Relationship Name ProviderOrganization</p> <p>Refers To Account</p>
RecommendedPresentationInfo	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The next best content recommended for sharing with the healthcare provider during a future visit.</p>
SourceSystemIdentifier	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>
SourceType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source of adding the account to the territory.</p>
TargetedPresentationInfo	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description A list of IDs representing the targeted presentations for the account within the territory.</p>
Territory2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The territory ID associated with the provider account territory info. This field is a relationship field.</p> <p>Relationship Name Territory2</p> <p>Refers To Territory2</p>
YearToDateProviderVisitCount	<p>Type int</p>

Field	Details
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	Indicates the number of provider visits to the account during the current year to date.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderAcctTerritoryInfoChangeEvent on page 1426](#)

Change events are available for the object.

[ProviderAcctTerritoryInfoFeed on page 1429](#)

Feed tracking is available for the object.

[ProviderAcctTerritoryInfoHistory on page 1434](#)

History is available for tracked fields of the object.

[ProviderAcctTerritoryInfoShare on page 1438](#)

Sharing is available for the object.

ProviderAffiliation

Represents the relationship between two healthcare professionals or healthcare organizations. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort, Update Description The ID of the from account of the provider affiliation. This field is a relationship field. Relationship Name Account

Field	Details
	<p>Refers To Account</p>
AccountName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the account.</p>
AffiliationStrengthType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates the strength of the affiliation between the two accounts. Possible values are:</p> <ul style="list-style-type: none"> • High • Low • Medium
AffiliationTitle	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The title associated with the provider affiliation record.</p>
AffiliationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates the nature of the affiliation between accounts. Possible values are:</p> <ul style="list-style-type: none"> • Hard • Soft
CareSpecialtyId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the care specialty associated with the provider affiliation. This field is a relationship field.</p> <p>Relationship Name CareSpecialty</p> <p>Refers To CareSpecialty</p>
EffectiveEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which the affiliation is no longer effective.</p>
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which the affiliation becomes effective.</p>
InfluenceType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The direction of the affiliation between accounts. Possible values are:</p> <ul style="list-style-type: none"> • Bidirectional • Neutral • Unidirectional
IsAccountPersonAccount	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the account is of person account type (true) or not (false).</p>

Field	Details
	The default value is <code>false</code> .
<code>IsActive</code>	Type
	boolean
Properties	Create, Defaulted on create, Filter, Group, Sort, Update
Description	Indicates whether the provider affiliation record is active (true) or not (false).
	The default value is <code>false</code> .
<code>IsAutogenerated</code>	Type
	boolean
Properties	Create, Defaulted on create, Filter, Group, Sort, Update
Description	Indicates whether the provider affiliation record is automatically generated.
	The default value is <code>false</code> .
<code>IsInstitutionDoctorAffl</code>	Type
	boolean
Properties	Create, Defaulted on create, Filter, Group, Sort, Update
Description	Indicates whether the healthcare provider and their affiliated facility are managed as a single account in specific markets.
	The default value is <code>false</code> .
<code>IsPrimary</code>	Type
	boolean
Properties	Create, Defaulted on create, Filter, Group, Sort, Update
Description	Indicates whether the affiliation is the primary affiliation between the healthcare provider and healthcare organization.
	The default value is <code>false</code> .
<code>IsRelatedAccountPersonAccount</code>	Type
	boolean
Properties	Defaulted on create, Filter, Group, Sort

Field	Details
	<p>Description Indicates whether the related account is of person account type (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type <code>dateTime</code></p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type <code>dateTime</code></p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type <code>string</code></p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the provider affiliation.</p>
OwnerId	<p>Type <code>reference</code></p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
RelatedAccountId	<p>Type <code>reference</code></p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the destination or to account of the provider affiliation. This field is a relationship field.</p> <p>Relationship Name RelatedAccount</p> <p>Refers To Account</p>
RelatedAccountName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the related account.</p>
RelatedInverseRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The inverse or reciprocal affiliation between accounts. This field is a relationship field.</p> <p>Relationship Name RelatedInverseRecord</p> <p>Refers To ProviderAffiliation</p>
Role	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The role of the affiliation between two accounts. Possible values are:<ul style="list-style-type: none"> • Consulting • Employ The default value is Employ.</p>

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderAffiliationChangeEvent on page 1426](#)

Change events are available for the object.

[ProviderAffiliationFeed on page 1429](#)

Feed tracking is available for the object.

[ProviderAffiliationHistory on page 1434](#)

History is available for tracked fields of the object.

[ProviderAffiliationShare on page 1438](#)

Sharing is available for the object.

ProviderAffiliationProduct

Represents the relationship between two healthcare professionals, where one influences the other regarding a product. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the provider affiliation product.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product ID associated with the provider affiliation product. This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p>

Field	Details
	<p>Refers To Product2</p>
ProviderAffiliationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The provider affiliation ID associated with the provider affiliation product. This field is a relationship field.</p> <p>Relationship Name ProviderAffiliation</p> <p>Refers To ProviderAffiliation</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderAffiliationProductChangeEvent on page 1426](#)

Change events are available for the object.

[ProviderAffiliationProductFeed on page 1429](#)

Feed tracking is available for the object.

[ProviderAffiliationProductHistory on page 1434](#)

History is available for tracked fields of the object.

[ProviderAffiliationProductShare on page 1438](#)

Sharing is available for the object.

PrvdAccountUserGroupInfo

Represents the classification values for the provider account user group. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The provider account associated with the user group. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
Advocacy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the level of advocacy of the healthcare provider for the products and services offered by the company.</p>
GroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The user group used for classification. This field is a relationship field.</p> <p>Relationship Name Group</p> <p>Refers To Group</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last viewed the record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the provider account user group info.</p>
OpportunityScore	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the score of potential business opportunities with the healthcare provider.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PrvdAccountUserGroupInfoHistory on page 1434](#)

History is available for tracked fields of the object.

[PrvdAccountUserGroupInfoShare on page 1438](#)

Sharing is available for the object.

PrvdAccountTerritorySummary

Represents the summaries generated for a provider account for the territories it is aligned to. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Account for which the summary is generated.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
ChangeInfoSummaryDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date and time at which change information summary is generated.</p>
ChangeInfoSummaryHistory	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description History of latest change history summaries.</p>
ChangeInformationHash	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Hash of the change information for which summary is generated.</p>
ChangeInformationSummary	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Summary of the change information of the account since the user's last interaction.</p>
KeyInfoSummaryDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date and time at which key information summary is generated.</p>

Field	Details
KeyInfoSummaryHistory	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description History of latest Key info summaries.</p>
KeyInformationHash	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Hash of the key information for which the summary is generated.</p>
KeyInformationSummary	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Summary of the key information of the account.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, this record may have been referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description Name of the provider account territory summary.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the external system that generated the record.</p>
Territory2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Territory of the account for which the summary is generated. This field is a relationship field.</p> <p>Relationship Name Territory2</p> <p>Refers To Territory2</p>

Field	Details
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description Context of the user for which the account summary is generated. This field is a relationship field.</p> <p>Relationship Name User</p> <p>Refers To User</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PrvdAccountTerritorySummaryChangeEvent on page 1426](#)

Change events are available for the object.

[PrvdAccountTerritorySummaryFeed on page 1429](#)

Feed tracking is available for the object.

[PrvdAccountTerritorySummaryHistory on page 1434](#)

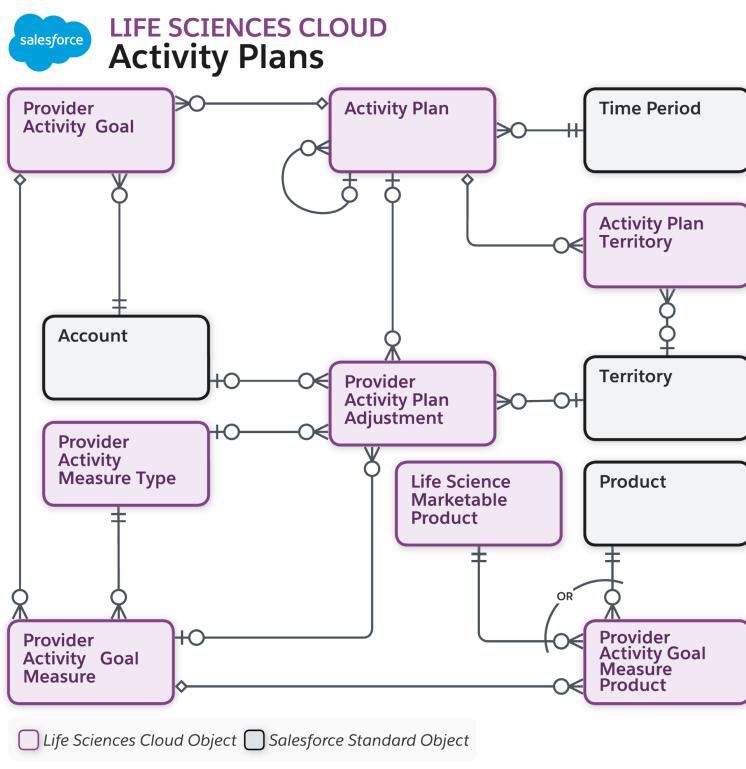
History is available for tracked fields of the object.

[PrvdAccountTerritorySummaryShare on page 1438](#)

Sharing is available for the object.

Activity Plans

Activity plans allow administrators to define goals for specific employees, including targeted accounts, plan cycle duration, types of activities, links to products, and weight of activity type. Employees and managers can review and edit these goals before final approval by the administrator. After plans are approved, employees execute activities against their goals, with the option to request changes during an active plan. Charts provide a visual representation of the employee's progress toward goals.



Last modified: Sep 9, 2025

For more details and a larger image, visit the [Data Model Gallery](#).

ActivityPlan

Represents the user's activity goals for the cycle. This object is available in API version 65.0 and later.

ActivityPlanTerritory

Represents the territory details associated with an activity plan. This object is available in API version 65.0 and later.

ProviderActivityGoal

Represents the goals for the provider accounts. This object is available in API version 65.0 and later.

ProviderActivityGoalMeasure

Represents the goal measurement for an activity type. This object is available in API version 65.0 and later.

ProviderActivityMeasureType

Represents the details of the activity goal measure type. This object is available in API version 65.0 and later.

ProviderActvtyPlanAdjusment

Represents the details of the adjustment requests for an activity plan. This object is available in API version 65.0 and later.

PrvdActvtyGoalMeasureProdt

Represents the details of the products associated with the activity goal measure. This object is available in API version 65.0 and later.

TimePeriod

Represents the time period that's used to calculate the activity.

SEE ALSO:

[Object Reference for the Salesforce Platform: Holiday](#)

ActivityPlan

Represents the user's activity goals for the cycle. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ActivityChgRvwThresholdPct	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The maximum percentage by which an account's overall activity goal can be changed during the review of a future activity plan.</p>
AssigneeDueDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The due date for the activity plan assignee to review the activity plan.</p>
AssigneePlanAdjEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date by which the assignee must complete the activity plan adjustments.</p>
AssigneePlanAdjStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the assignee can start making adjustments to the activity plan.</p>
Comment	<p>Type textarea</p>

Field	Details
	Properties
	Create, Nillable, Update
	Description
	Stores the comments or observations on the activity plan.
<code>IsActive</code>	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Determines whether the activity plan is active (<code>true</code>) or not (<code>false</code>).
	The default value is <code>false</code> .
<code>IsCalculationEnabled</code>	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Determines whether plan calculations are enabled for this activity plan (<code>true</code>) or not (<code>false</code>).
	The default value is <code>false</code> .
<code>LastReferencedDate</code>	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	Timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
<code>LastViewedDate</code>	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	Timestamp when the current user last viewed the record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.
<code>Name</code>	Type
	string

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the activity plan.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the activity plan. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent activity plan for this activity plan. This field is a relationship field.</p> <p>Relationship Name ParentRecord</p> <p>Refers To ActivityPlan</p>
ReviewerDueDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The due date for the activity plan reviewer to approve any changes made by the assignee.</p>
ReviewerPlanAdjEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The date by which the approver must complete approving the assignee's activity plan adjustments.</p>
ReviewerPlanAdjStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the reviewer can start approving the assignee's activity plan adjustments.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the activity plan. Possible values are:</p> <ul style="list-style-type: none"> • AdminReview—Admin Review • Approved • EmployeeReview—Employee Review • InProgress—in Progress • ManagerReview—Manager Review • Rejected • Submitted

Field	Details
TerritoryList	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A list of territories included in this activity plan.</p>
TimePeriodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The period of the activity plan, for example, FY 2024. This field is a relationship field.</p> <p>Relationship Name Period</p> <p>Refers To Period</p>
TotalAcctAdjThresholdPct	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The maximum percentage by which the total number of accounts in an active activity plan can be changed during the adjustment phase.</p>
TotalAcctChgThresholdPct	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The maximum percentage by which the total number of accounts in the activity plan can be changed during the review of a future activity plan.</p>
TotalActvtyChgThresholdPct	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	The maximum percentage by which the combined overall goals of all accounts can be changed during the review of a future activity plan.
TotalAllowAdjRequestCount	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The total number of approved plan adjustment requests allowed for an active activity plan.
Type	Type picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Indicates the type of the activity plan.
	Possible values are:
	<ul style="list-style-type: none"> • AccountGoal—Account Goal • AccountGoalShared—Account Goal Shared • WeightedTerritoryGoals—Weighted Territory Goals
UsageType	Type picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Indicates the usage type of the activity plan.
	Possible values are:
	<ul style="list-style-type: none"> • ProviderPlanCycle—Provider Plan Cycle
WorkingDayCount	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The number of working days available for the activity plan.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ActivityPlanFeed](#) on page 1429

Feed tracking is available for the object.

[ActivityPlanHistory](#) on page 1434

History is available for tracked fields of the object.

[ActivityPlanShare](#)

Sharing is available for the object.

ActivityPlanTerritory

Represents the territory details associated with an activity plan. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), update(), upsert()`

Fields

Field	Details
ActivityPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The activity plan associated with activity plan territory. This field is a relationship field.</p> <p>Relationship Name ActivityPlan</p> <p>Relationship Type Master-detail</p> <p>Refers To ActivityPlan (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last viewed the record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the activity plan territory.</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The territory associated with the activity plan. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>

ProviderActivityGoal

Represents the goals for the provider accounts. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account associated with the activity goal. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
ActivityAttainmentPercentage	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Stores the percentage of the overall goal achieved by the completed activities for this account. Shows the progress towards the target. This field is a calculated field.</p>
ActivityPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The activity plan associated with the activity goal. This field is a relationship field.</p> <p>Relationship Name ActivityPlan</p> <p>Relationship Type Master-detail</p> <p>Refers To ActivityPlan (the master object)</p>
ActivityPlanType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type or the category of the activity plan. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • AccountGoal—Account Goal • AccountGoalShared—Account Goal Shared • WeightedTerritoryGoals—Weighted Territory Goals
Act1NonProdtActvtyCapVal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total value of the completed non-product activities, which is capped at a limit.</p>
ActualActivityCappedValue	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total number of completed activities, which is capped at a limit. This field is a calculated field.</p>
ActualNonProdtActvtyValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total value of the completed activities that aren't related to any product associated with this account.</p>
ActualProdtActvtyCapValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total value of the completed product-related activities, which is capped at a limit.</p>
ActualProductActivityValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total value of the completed activities related to products within this account.</p>

Field	Details
ActvtyAttainmentCappedPct	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Stores the percentage of the overall goal achieved, which is capped at 100 percent. This field is a calculated field.</p>
AssigneeChangeReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason for the change in the account goal, made by the assignee, during the review stage.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last viewed the record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the provider activity goal.</p>
NonProdtAttainmentCapPct	<p>Type double</p>

Field	Details
	Properties
	Filter, Nillable, Sort
	Description
	Stores the percentage of the non-product goal achieved, which is capped at 100 percent.
	This field is a calculated field.
NonProductAttainmentPct	Type
	double
	Properties
	Filter, Nillable, Sort
	Description
	Stores the percentage of the non-product goal achieved through the completed activities. Indicates the progress towards the non-product target.
	This field is a calculated field.
NonProductGoal	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The target number for activities that aren't related to any products associated with this account.
OverallGoal	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The total target number for all activities associated with the account.
ProdActvtyAttainmentPct	Type
	double
	Properties
	Filter, Nillable, Sort
	Description
	Stores the percentage of the product-specific goal achieved through the completed activities. Indicates the progress towards the product target.
	This field is a calculated field.
ProductActivityAtmtCapPct	Type
	double

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description Stores the percentage of the product-specific goal achieved, which is capped at 100 percent. This field is a calculated field.</p>
ProductLevelGoal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The target number for activities related to the products associated with the account.</p>
ReviewerChangeReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason for the change in the account goal made by the reviewer during the review stage.</p>
SchdNonProdtActvtyCapVal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total value of scheduled non-product activities, which is capped at a limit.</p>
SchdProdtActvtyCappedValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total value of the scheduled product-related activities, which is capped at a certain limit.</p>
ScheduledActvtyCappedValue	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total number of scheduled activities, which is capped at a limit. This field is a calculated field.</p>

Field	Details
ScheduledNonProdActvtyVal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Total value of all scheduled activities that aren't related to any product associated with this account.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
TotalActlActvtyWeightedVal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total value of the completed activities for this account adjusted by weights. Shows the difference in the importance of various activities.</p>
TotalActualActivityValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Total number of all completed activities associated with this account.</p>
TotalProjectedActivityValue	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The projected total number of activities associated with this account. Aggregates the values of completed and scheduled activities.</p> <p>This field is a calculated field.</p>
TotalSchdActvtyWeightedVal	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The total value of scheduled activities for this account adjusted by weights. Shows the changes in the importance of different activities.</p>
TotalSchdProdtActvtyValue	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description Total value of all scheduled activities related to the products associated with this account.</p>
TotalScheduledActivityValue	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description Total number of all scheduled activities associated with this account.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderActivityGoalFeed on page 1429](#)

Feed tracking is available for the object.

[ProviderActivityGoalHistory on page 1434](#)

History is available for tracked fields of the object.

ProviderActivityGoalMeasure

Represents the goal measurement for an activity type. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
<code>ActivityAttainmentPercentage</code>	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Stores the percentage of the activity goal that has been attained. This field is a calculated field.</p>
<code>ActivityProratedAtmtGoal</code>	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The portion of the attained goal adjusted for the current date within the plan cycle. Shows the target goal considering the elapsed time. This field is a calculated field.</p>
<code>ActivityProratedGoal</code>	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The activity goal attainment that is capped at 100 percent. This field is a calculated field.</p>
<code>ActivityWeightValue</code>	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Stores the weightage of the activity.</p>
<code>ActualActivityCappedValue</code>	<p>Type int</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The capped count of actual activities. This field is a calculated field.</p>
ActualActivityWeightedValue	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Stores the weighted value of all actual activities. This field is a calculated field.</p>
ActvtyAtmtDifferenceValue	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The difference between the Expected and Actual Attainment of what has been completed against the Goal. This field is a calculated field.</p>
ActvtyAttainmentCappedPct	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Stores the percentage of the activity goal that has been attained, capped at 100 percent. This field is a calculated field.</p>
AdjustedOverallGoal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Stores the adjusted overall activity goal.</p>
AssigneeGoal	<p>Type double</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Assignee's activity goals set by the reviewer.</p>
ExpectedActvtyPrrtAtmtVal	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The portion of the goal expected to be attained by the current date within the activity plan cycle. This field is a calculated field.</p>
GoalAdjustmentType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of adjustment requested for the activity goal.</p>
IsProductWeightagePopulated	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Determines whether product weightage is populated. The default value is <code>false</code>.</p>
IsSuggestedActivity	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Determines whether the activity plan is suggested to the account without a goal. The default value is <code>false</code>.</p>
LastProcessingDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description Stores the latest date when the activity plan calculation job was run.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last viewed the record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the provider activity goal measure.</p>
OverallGoal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The overall goal for the provider activity.</p>
ProcessingJobIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the unique identifier for the activity plan calculation jobs.</p>
ProductList	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description List of products included in the activity plan.</p>
ProviderActivityGoalId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The activity goal associated with the provider activity goal measure. This field is a relationship field.</p> <p>Relationship Name ProviderActivityGoal</p> <p>Relationship Type Master-detail</p> <p>Refers To ProviderActivityGoal (the master object)</p>
ProviderActivityMeasureTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of the provider activity goal measure. This field is a relationship field.</p> <p>Relationship Name ProviderActivityMeasureType</p> <p>Refers To ProviderActivityMeasureType</p>
ReviewerGoal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Assignee's activity goals set by the assignee.</p>
SchdTotalProdtActvtyWtVal	<p>Type double</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Stores the weighted value for all scheduled activities associated with the products.</p>
ScheduledActvtyCappedValue	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The capped count of scheduled activities. This field is a calculated field.</p>
ScheduledActvtyWeightedVal	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Stores the weighted value of all scheduled activities. This field is a calculated field.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
TotalActlProdtActvtyWtVal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Stores the weighted value for all actual activities associated with the products.</p>

Field	Details
TotalActualActivityValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total number of actual activities.</p>
TotalProjActvtyCappedValue	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The capped number of projected activities, which include actual and scheduled activities. This field is a calculated field.</p>
TotalProjectedActivityValue	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total number of projected activities, which include actual and scheduled activities. This field is a calculated field.</p>
TotalScheduledActivityValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total number of scheduled activities.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Type of the activity goal. Possible values are:</p> <ul style="list-style-type: none"> • Goal • WeightedGoal—Weighted Goal

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderActivityGoalMeasureFeed](#) on page 1429

Feed tracking is available for the object.

[ProviderActivityGoalMeasureHistory](#) on page 1434

History is available for tracked fields of the object.

ProviderActivityMeasureType

Represents the details of the activity goal measure type. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Fields

Field	Details
ActivityTypSchdStatusList	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status list of the scheduled activity type.</p>
ActivityTypeFieldValue	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Stores the criteria to identify a specific activity type.</p>
ActivityTypeStatusList	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The list of statuses associated with the activity.</p>
AggregatedActivityActualFld	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The API name of the field to which the actual activity count is copied.</p>
AggregatedActivitySchdField	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the field to which the scheduled activity goal count is copied.</p>
AggregatedGoalField	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the field to which the activity goal count is copied.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API.</p>
DisplayOrder	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ranks used to order the activity plan gauges on Account or Homepage.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Determines whether the activity is active (True) or not (False). The default value is <code>false</code>.</p>
MasterLabel	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The label for the data change definition value. This display value is the internal label that doesn't get translated.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix that is associated with this object.</p>

ProviderActivityPlanAdjustment

Represents the details of the adjustment requests for an activity plan. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account associated with the activity plan adjustment request. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
ActivityPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The activity plan associated with the activity plan adjustment request. This field is a relationship field.</p> <p>Relationship Name ActivityPlan</p> <p>Refers To ActivityPlan</p>
AdjustmentReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason for the activity plan adjustment request.</p>
AdjustmentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The purpose of the activity plan adjustment request. Possible values are: <ul style="list-style-type: none"> • Add • Reset • Update </p>
AssigneeGoal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Assignee's activity goals set by the assignee.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last viewed the record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the activity plan adjustment request.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the provider activity plan adjustment. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProviderActivityMeasureTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of activity associated with the activity plan adjustment request. This field is a relationship field.</p> <p>Relationship Name ProviderActivityMeasureType</p> <p>Refers To ProviderActivityMeasureType</p>
ProviderActvtyGoalMeasureId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The provider activity goal measure associated with the activity plan adjustment request. This field is a relationship field.</p>
	<p>Relationship Name ProviderActvtyGoalMeasure</p> <p>Refers To ProviderActivityGoalMeasure</p>
ReviewerGoal	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Assignee's activity goals set by the reviewer.</p>
ShouldRsetActvtyGoalMeas	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Determines whether the account must be removed from all activity plans. The default value is <code>false</code>.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
Status	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The status of the activity plan adjustment request. Possible values are:</p> <ul style="list-style-type: none"> • Approved • Rejected • Submitted
StatusChangeReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason for the rejected activity plan adjustment request.</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The territory associated with the activity plan being adjusted. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderActvtyPlanAdjusmentFeed on page 1429](#)

Feed tracking is available for the object.

[ProviderActvtyPlanAdjusmentHistory on page 1434](#)

History is available for tracked fields of the object.

[ProviderActvtyPlanAdjusmentShare on page 1438](#)

Sharing is available for the object.

PrvdActvtyGoalMeasureProd

Represents the details of the products associated with the activity goal measure. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last viewed the record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the provider activity goal measure product.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product associated with the provider activity goal measure. This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p>

Field	Details
	<p>Refers To LifeSciMarketableProduct, Product2</p>
ProductWeightage	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The weightage for all product-related activities associated with the provider activity goal measure.</p>
ProviderActvtyGoalMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The provider activity goal measure associated with the provider activity goal measure product. This field is a relationship field.</p> <p>Relationship Name ProviderActvtyGoalMeasure</p> <p>Relationship Type Master-detail</p> <p>Refers To ProviderActivityGoalMeasure (the master object)</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PrvdActvtyGoalMeasureProdtFeed on page 1429](#)

Feed tracking is available for the object.

[PrvdActvtyGoalMeasureProdtHistory on page 1434](#)

History is available for tracked fields of the object.

TimePeriod

Represents the time period that's used to calculate the activity.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

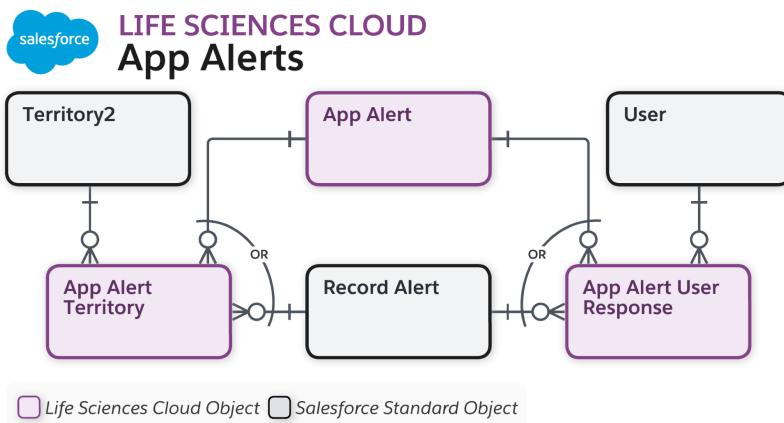
Fields

Field	Details
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The end date and time of the time period.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last viewed the record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the time period.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns the time period. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p>

Field	Details
	<p>Refers To Group, User</p>
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The start date and time of the time period.</p>

App Alerts

App Alerts keep users informed of critical updates, events, and insights that require timely action, helping to prevent missed opportunities. These alerts can deliver messages from admins and managers, as well as system-triggered updates and external recommendations, enabling users to act directly or dismiss suggestions with feedback. Serving as a direct, immediate communication channel, App Alerts integrate across components to streamline teamwork and enhance commercial engagement.



For more details and a larger image, visit the [Data Model Gallery](#).

AppAlert

Represents an alert message at the object, tab, or global level. This object is available in API version 65.0 and later.

AppAlertTerritory

Represents a junction between an Alert and a Territory where the alert is sent. This object is available in API version 65.0 and later.

AppAlertUserResponse

Represents the user action for an alert. This object is available in API version 65.0 and later.

RecordAlert

Represents an alert message about a specific record and tracks the status and active period of the alert. This object is available in API version 65.0 and later.

AppAlert

Represents an alert message at the object, tab, or global level. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AdditionalMessage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The additional details of the message that are communicated in the app alert. This field contains information such as the tag, alert action, URL, or color.</p>
DisplayContextName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The context name related to the app alert display. Possible values are the object name or API name of the tab.</p>
DisplayContextType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the context type related to the app alert display. Possible values are:</p> <ul style="list-style-type: none"> • Global • Object • Tab
EffectiveDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p>

Field	Details
	Description
	The date and time that the alert becomes active.
ImageURL	Type url
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Indicates whether the app alert is silent or not.
	The default value is <code>false</code> .
IsSilent	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the app alert is silent or not.
	The default value is <code>false</code> .
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view.
Message	Type textarea
	Properties
	Create, Nillable, Update
	Description
	The message communicated in the app alert.

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the app alert.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of this app alert record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SnoozeUntilDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date until which the alert is snoozed.</p>
Source	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source of the app alert.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The identifier of the record in the source system.</p>

Field	Details
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
Subject	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description The subject of the app alert.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of app alert. Possible values are:</p> <ul style="list-style-type: none"> • GuidedAction • Notification • Recommendation
ValidUntilDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the alert becomes invalid.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AppAlertChangeEvent on page 1426](#)

Change events are available for the object.

[AppAlertFeed on page 1429](#)

Feed tracking is available for the object.

AppAlertHistory on page 1434

History is available for tracked fields of the object.

AppAlertShare on page 1438

Sharing is available for the object.

AppAlertTerritory

Represents a junction between an Alert and a Territory where the alert is sent. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), update(), upsert()
```

Fields

Field	Details
AlertReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The app alert or record alert that's associated with the alert territory. This field is a polymorphic relationship field.</p> <p>Relationship Name AlertReferenceRecord</p> <p>Refers To AppAlert, RecordAlert</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the app alert territory.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of this app alert territory record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The territory that's associated with the alert. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AppAlertTerritoryChangeEvent on page 1426](#)

Change events are available for the object.

[AppAlertTerritoryFeed on page 1429](#)

Feed tracking is available for the object.

[AppAlertTerritoryHistory on page 1434](#)

History is available for tracked fields of the object.

AppAlertTerritoryShare on page 1438

Sharing is available for the object.

AppAlertUserResponse

Represents the user action for an alert. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AlertReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The app alert or record alert that's associated with the alert user action. This field is a polymorphic relationship field.</p> <p>Relationship Name AlertReferenceRecord</p> <p>Refers To AppAlert, RecordAlert</p>
DismissalReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason why the user dismissed the alert.</p>
IsAlertRead	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the user read the alert or not. The default value is <code>false</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the app alert user response.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of this app alert user response record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
UserAction	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the action performed by the user on the alert. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> Dismissed Resolved
UserId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The user who acted upon the alert. This field is a relationship field.</p> <p>Relationship Name User</p> <p>Refers To User</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AppAlertUserResponseChangeEvent on page 1426](#)

Change events are available for the object.

[AppAlertUserResponseFeed on page 1429](#)

Feed tracking is available for the object.

[AppAlertUserResponseHistory on page 1434](#)

History is available for tracked fields of the object.

[AppAlertUserResponseShare on page 1438](#)

Sharing is available for the object.

RecordAlert

Represents an alert message about a specific record and tracks the status and active period of the alert. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AdditionalMessage	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The additional details of the message that are communicated in the alert. This field contains information such as the tag, alert action, URL, or color.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The detailed description of the alert.</p>
EffectiveDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time that the alert was generated or became active.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the alert is still active (true) or has been dismissed (false). The default value is <code>false</code>.</p>
IsSilent	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the alert is silent or not. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record alert.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the record alert. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user, account, or contact associated with the alert. This field is a polymorphic relationship field.</p> <p>Relationship Name Parent</p>

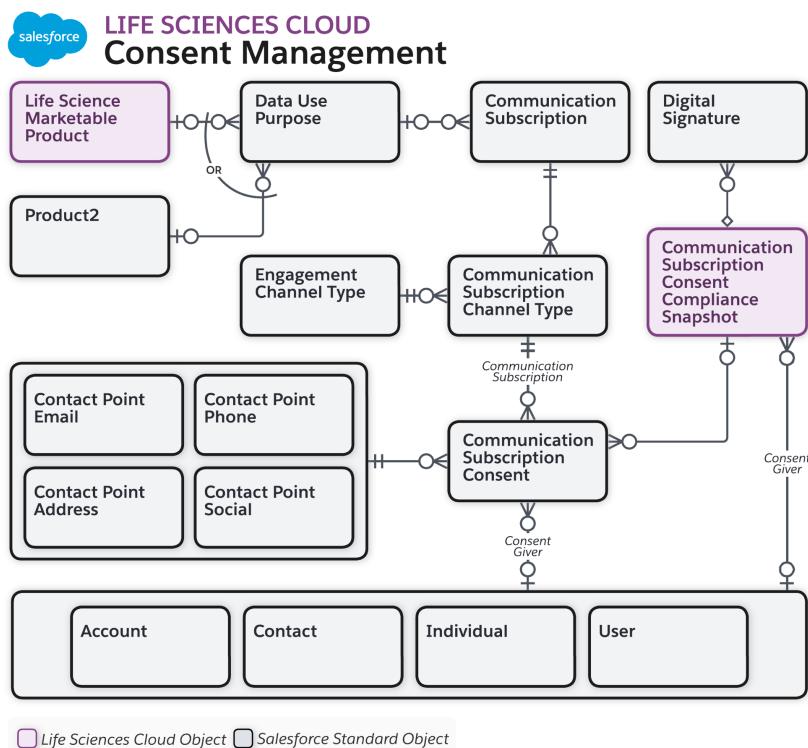
Field	Details
Refers To	
	Account, ApplicationForm, Asset, BenefitAssignment, BenefitDisbursement, BenefitManagementRecertification__c, BusinessMilestone, Case, Claim, Contact, Contract, GoalAssignment, IndividualApplication, InsurancePolicy, InsurancePolicyCoverage, Lead, LoanApplicant, LoanApplicantEmployment, LoanApplicantIncome, LoanApplicationAsset, LoanApplicationFinancial, LoanApplicationLiability, LoanApplicationProperty, Opportunity, PersonLifeEvent, ResidentialLoanApplication, User, lsc4ce_Foo__c, omnistudio_CardFrameworkConfiguration__c, omnistudio_DRBatchQueue__c, omnistudio_DRBulkData__c, omnistudio_DREncryption__c, omnistudio_DRWorker__c, omnistudio_Interface_DRGeneric__c, omnistudio_TestResult__c, omnistudio_TriggerSetup__c, omnistudio_UISettings__c, omnistudio_VlocityDataPack__c, omnistudio_VlocityDocuSignTemplate__c, omnistudio_VlocityErrorLogEntry__c, omnistudio_VlocityScheduledJob__c, omnistudio_VlocityTrackingEntry__c
RecordAlertCategoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The category for the alert. This field is a relationship field.</p> <p>Relationship Name RecordAlertCategory</p> <p>Refers To RecordAlertCategory</p>
Severity	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The severity of the alert. Possible values are:</p> <ul style="list-style-type: none"> • Error • Info • Warning
SnoozeUntilDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	The date until which the alert is snoozed.
SourceSystemIdentifier	Type string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	The identifier of the record in the source system.
Subject	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The subject of the alert.
Type	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the alert type.
	Possible values are:
	<ul style="list-style-type: none"> • GuidedAction • Notification • Recommendation
ValidUntilDate	Type dateTime
	Properties
	Create, Filter, Sort, Update
	Description
	The date and time when the alert becomes invalid.
WhatId	Type reference
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The record that the alert pertains to.

Field	Details
	This field is a polymorphic relationship field.
Relationship Name	What
Refers To	Account, AccountPlan, AccountPlanObjective, ActionPlan, ApplicationForm, ApplicationFormProduct, AssessmentTask, Asset, BenefitAssignment, BenefitDisbursement, BenefitManagementRecertification__c, BusinessMilestone, Case, Claim, Contact, Contract, Event, GoalAssignment, IndividualApplication, InsurancePolicy, InsurancePolicyCoverage, Lead, LifeScienceEmail, LoanApplicant, LoanApplicantEmployment, LoanApplicantIncome, LoanApplicationAsset, LoanApplicationFinancial, LoanApplicationLiability, LoanApplicationProperty, MedicalInsight, OmniScriptSavedSession, Opportunity, Order, PartyRelationshipGroup, PersonLifeEvent, Presentation, ResidentialLoanApplication, User, Visit, lsc4ce_Foo__c, omnistudio__CardFrameworkConfiguration__c, omnistudio__DRBatchQueue__c, omnistudio__DRBulkData__c, omnistudio__DREncryption__c, omnistudio__DRWorker__c, omnistudio__Interface_DRGeneric__c, omnistudio__TestResult__c, omnistudio__TriggerSetup__c, omnistudio__UISettings__c, omnistudio__VlocityDataPack__c, omnistudio__VlocityDocuSignTemplate__c, omnistudio__VlocityErrorLogEntry__c, omnistudio__VlocityScheduledJob__c, omnistudio__VlocityTrackingEntry__c

Consent Management

Consent Management captures and honors healthcare provider consent and communication preferences across subscriptions and channels. Increase engagement and improve relationships by personalizing healthcare provider communications while ensuring privacy and compliance.



For more details and a larger image, visit the [Data Model Gallery](#).

CommSubscription

Standard and custom fields extend the standard Communication Subscription object to represent a customer's subscription preferences for a specific communication. This object is available in API version 65.0 and later.

CommSubscriptionConsent

Standard and custom fields extend the standard Communication Subscription Consent object to represent a customer's consent to a communication subscription. This object is available in API version 65.0 and later.

CommSubConsentCmplSnpsh

Represents the snapshot of compliance information that's captured at the time of consent of the communication subscription. This object is available in API version 65.0 and later.

ContactPointConsent

Standard and custom fields extend the standard Contact Point Consent object to represent information about a customer's consent to be contacted via a specific contact point. This object is available in API version 65.0 and later.

DataUsePurpose

Standard and custom fields extend the standard Data Use Purpose object to represent information about the reason for contacting a prospect or customer. This object is available in API version 65.0 and later.

CommSubscription

Standard and custom fields extend the standard Communication Subscription object to represent a customer's subscription preferences for a specific communication. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
FilterAttributeList	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The attributes used as a criteria for filtering communication subscriptions.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CommSubscriptionChangeEvent on page 1426](#)

Change events are available for the object.

[CommSubscriptionFeed on page 1429](#)

Feed tracking is available for the object.

[CommSubscriptionHistory on page 1434](#)

History is available for tracked fields of the object.

CommSubscriptionShare on page 1438

Sharing is available for the object.

SEE ALSO:

Object Reference for the Salesforce Platform: CommSubscription

CommSubscriptionConsent

Standard and custom fields extend the standard Communication Subscription Consent object to represent a customer's consent to a communication subscription. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeObjects()`, `getDeleted()`, `getUpdated()`, `query()`,
`retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
CommSubConsentCmplSnpshId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the communication subscription consent compliance snapshot record associated with the communication subscription consent. This field is a relationship field. Relationship Name CommSubConsentCmplSnpsh Refers To CommSubConsentCmplSnpsh
ContactPointId	Type reference Properties Create, Filter, Group, Sort, Update Description ID of the contact point, such as an Individual or person account, associated with the communication subscription consent. This field is a polymorphic relationship field. Relationship Name ContactPoint

Field	Details
	<p>Refers To ContactPointAddress, ContactPointEmail, ContactPointPhone, ContactPointSocial</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>

SEE ALSO:

[Object Reference for the Salesforce Platform: CommSubscriptionConsent](#)

CommSubConsentCmplSnpsh

Represents the snapshot of compliance information that's captured at the time of consent of the communication subscription. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountRestrictedProdList	<p>Type textarea</p> <p>Properties Create, Nullable</p> <p>Description The list of restricted products associated with the consent giver at the time of consent.</p>

Field	Details
AccountTerrRstrcProdtList	<p>Type textarea</p> <p>Properties Create, Nillable</p> <p>Description The list of territory restricted products associated with the consent giver at the time of consent.</p>
ConsentGiverId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the person who gave consent to the communication subscription. This field is a polymorphic relationship field.</p> <p>Relationship Name ConsentGiver</p> <p>Refers To Account, Contact, Individual, User</p>
DisclaimerText	<p>Type textarea</p> <p>Properties Create, Nillable</p> <p>Description The disclaimer information agreed upon by the consent giver.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ReceiptRequestStatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the request raised by the consent giver requesting for the receipt with the consent and compliance information. Possible values are:</p> <ul style="list-style-type: none"> • NotRequested • ReceiptSent • Requested <p>The default value is NotRequested.</p>
SourceRequestRecordId	Reserved for future use.
TermsAndConditionsText	<p>Type textarea</p> <p>Properties Create, Nillable</p> <p>Description The terms and conditions information agreed upon by the consent giver.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CommSubConsentCmplSnpshChangeEvent on page 1426](#)

Change events are available for the object.

[CommSubConsentCmplSnpshFeed on page 1429](#)

Feed tracking is available for the object.

[CommSubConsentCmplSnpshHistory on page 1434](#)

History is available for tracked fields of the object.

[CommSubConsentCmplSnpshShare on page 1438](#)

Sharing is available for the object.

ContactPointConsent

Standard and custom fields extend the standard Contact Point Consent object to represent information about a customer's consent to be contacted via a specific contact point. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ContactPointId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the contact point record through which the customer consents to be contacted. This field is a polymorphic relationship field.</p> <p>Relationship Name ContactPoint</p> <p>Refers To ContactPointAddress, ContactPointEmail, ContactPointPhone, ContactPointSocial</p>

SEE ALSO:

[Object Reference for the Salesforce Platform: ContactPointConsent](#)

DataUsePurpose

Standard and custom fields extend the standard Data Use Purpose object to represent information about the reason for contacting a prospect or customer. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Fields

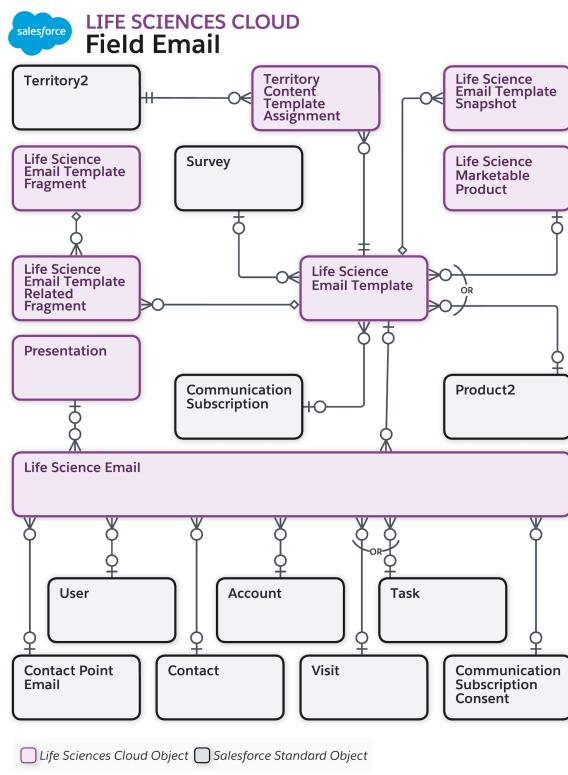
Field	Details
PurposeId	Type reference Properties Create, Filter, Group, Nullable, Sort, Update Description The ID of an object containing data specific to the data use purpose. This field is a polymorphic relationship field. Relationship Name Purpose Refers To Asset, CareProgram, CareRegisteredDevice, LifeSciMarketableProduct, Product2

SEE ALSO:

[Object Reference for the Salesforce Platform: DataUsePurpose](#)

Field Email

Field Email streamlines the email creation process, enhances efficiency, and ensures professional and compliant communication that aligns with brand guidelines. Predefined email templates ensure compliance with regulations like GDPR and CAN-SPAM while maintaining brand consistency. Customization options such as dynamic variables and content fragments, allow for personalized messages that resonate with recipients. Tracking key performance metrics like opens and clicks enables users to optimize their email campaigns effectively.



For more details and a larger image, visit the [Data Model Gallery](#).

LifeScienceEmail

Represents a collection of sendable messages that manages the creation, sending, and tracking of email communications. This object stores the details of each email, including the content, the status of sending attempts, and any responses received. This object is available in API version 65.0 and later.

LifeSciEmailTemplate

Represents a collection of pre-designed and approved email templates that end users send to healthcare professionals (HCPs). These templates help users create and send consistent, professional emails quickly and efficiently. This object is available in API version 65.0 and later.

LifeSciEmailTmplFrgmt

Represents a collection of reusable components that can be inserted into email templates, allowing end users to create custom and modular emails tailored to their needs. This object is available in API version 65.0 and later.

LifeSciEmailTmplRelaFrgmt

Represents the connectors that link email templates and fragments together. This object is available in API version 65.0 and later.

LifeSciEmailTmplSnapshot

Stores the different versions of an email template for tracking purposes. This object is available in API version 65.0 and later.

LifeScienceEmail

Represents a collection of sendable messages that manages the creation, sending, and tracking of email communications. This object stores the details of each email, including the content, the status of sending attempts, and any responses received. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AttachmentIdentifiers	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description A semicolon-separated list of IDs for attachments that need to be sent with the email transaction. This denormalized field displays the attachment names from the content document, allowing for additional attachments to be tracked and sent along with the email.</p>
AttachmentNames	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description A list of attachment names that were selected for the email template. This is a denormalized field (simplified view) that pulls data from the content document to display the names of the attachments included with the email.</p>
BccEmailAddressList	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description A list of email addresses in .csv format that are copied from the email template and included in the bcc field of the email.</p>
BodyAttachmentIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Stores the Salesforce ID of the standard attachment or content version record that contains the formatted content of the email body. This ensures the email body is properly linked and formatted when the email is sent.</p>

Field	Details
BouncedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the email is marked as bounced, indicating that it couldn't be delivered to the recipient.</p>
BouncedReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason why the email bounced, providing insight into the delivery failure (for example, invalid email address, mailbox full, or server issues).</p>
CancelledDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the email is canceled.</p>
CcEmailAddressList	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description A list of email addresses to be included in the cc field when sending the email. These recipients will receive a copy of the email but aren't the primary recipients.</p>
CommSubscriptionConsentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A lookup field that links the email transaction to the consent record that indicates whether the recipient opted into or out of receiving emails. This field is a relationship field.</p> <p>Relationship Name CommSubscriptionConsent</p>

Field	Details
	<p>Refers To CommSubscriptionConsent</p>
EmailLanguage	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the language in which the linked email template is written.</p>
EmailStatus	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Displays the status of the email based on recipient actions or system updates (Sent, Scheduled, Cancelled, Opened, Bounced). This field is a calculated field.</p>
EmailTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A lookup field that links the email transaction to the related email template used for the communication. This field is a relationship field.</p> <p>Relationship Name EmailTemplate</p> <p>Refers To LifeSciEmailTemplate</p>
ErrorMessage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The error message generated if there was an issue sending the email.</p>
FailedAttemptCount	<p>Type double</p>

Field	Details
	Properties Create, Filter, Nillable, Sort, Update
	Description The number of failed attempts made to send the email.
FirstOpenedDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date and time when the email is first opened by the recipient.
FromUserEmailAddress	Type email
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The user email address from which the email is sent. If you use an org-wide email address, emails are sent from that address instead.
IsBounced	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether an email has bounced. The default value is <code>false</code> .
IsConsentIgnored	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates that recipient consent preferences are ignored when the email is sent. The default value is <code>false</code> .
IsHtmlBody	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	<p>Description Required. Indicates whether the email body is in HTML format. The default value is <code>false</code>.</p>
LastEventDateTime	<p>Type <code>dateTime</code></p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the status information related to the email was last updated.</p>
LastOpenedDate	<p>Type <code>dateTime</code></p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the email is last opened by the recipient.</p>
LastReferencedDate	<p>Type <code>dateTime</code></p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type <code>dateTime</code></p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferencedDate</code> isn't null, the user accessed this record or list view indirectly.</p>
Name	<p>Type <code>string</code></p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description Required. An automatically generated unique identifier for the record in the format ET-{0000000000}.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PresentationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A lookup field that links the email transaction to a specific presentation that the sales representative attaches as an email attachment. This field stores the reference to the presentation that must be included in the email as an attachment, ensuring the correct presentation is sent with the email. This field is a relationship field.</p> <p>Relationship Name Presentation</p> <p>Refers To Presentation</p>
ResponseStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Tracks the recipient's response to an RSVP request from the .ics (iCalendar) tracking service. Possible values are:</p> <ul style="list-style-type: none"> • Accepted • Declined • Tentative

Field	Details
ScheduledDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Specifies the date and time when the email is scheduled to be sent. This allows the email to be delivered at the most appropriate or strategic timing, ensuring better engagement and relevance for the recipient.</p>
SenderEmailAddress	<p>Type email</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description This field stores the final sender's email address after evaluating different possible sources. It can be either the user's email or an organization-wide email address, depending on the scenario. Unlike FromEmail, which might be directly associated with the individual user, SenderEmailAddress can be a standard organizational email (for example, no-reply) if configured.</p>
SenderTerritoryId	Reserved for future use.
SenderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A lookup field that links to the user who sent the email. This field tracks the specific individual responsible for sending the email. This field is a relationship field.</p> <p>Relationship Name SenderUser</p> <p>Refers To User</p>
SenderUserName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the final sender's name after evaluating various potential sources. The value is determined based on the FromUser and the email settings, and is populated in the system</p>

Field	Details
	<p>code (EmailQueueSenderHandler.cls). The sender's name can be derived from either the user's details or an organization-wide email configuration, depending on the email context.</p>
SentDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The exact date and time when the email was sent.</p>
SentToContactPointEmailId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contact point email address that the email was sent to. Derived from the associated contact point email (ContactPointEmail object). Opt information is derived from the associated communication subscription consent (CommSubscriptionConsent object).</p> <p>This field is a relationship field.</p> <p>Relationship Name SentToContactPointEmail</p> <p>Refers To ContactPointEmail</p>
SentToEmailAddress	<p>Type email</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The email address where the email is sent. This field captures the recipient's email address. For automated emails, the recipient's email is stored in this field.</p>
SourceReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A polymorphic lookup field that links the email transaction to a specific record from various objects, such as Provider Visit or Task. This allows the email transaction to be associated with the relevant event or task, providing context and traceability for the communication.</p> <p>This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name SourceReferenceRecord</p> <p>Refers To DigitalSignatureRequest, ProviderVisit, Task</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Indicates the status of the email request. Possible values are:</p> <ul style="list-style-type: none"> • Cancelled • Failed • New • Preparing • Retry • Success
SubjectText	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The subject line of the email, providing a summary of the content or purpose of the message. The subject is visible to recipients in their inbox.</p>

Field	Details
ToAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Required. A reference to the account as the message recipient. This field is a relationship field.</p> <p>Relationship Name ToAccount</p> <p>Refers To Account</p>
ToContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A lookup field that references the contact as the email recipient. This field is necessary to track recipient-specific events, such as bounced emails, based on the contact's information. This field is a relationship field.</p> <p>Relationship Name ToContact</p> <p>Refers To Contact</p>
UrgencyType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates the urgency of the email, determining when it should be sent. Possible values are:</p> <ul style="list-style-type: none"> • Immediate • Scheduled

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeScienceEmailChangeEvent on page 1426](#)

Change events are available for the object.

[LifeScienceEmailFeed on page 1429](#)

Feed tracking is available for the object.

[LifeScienceEmailHistory on page 1434](#)

History is available for tracked fields of the object.

[LifeScienceEmailShare on page 1438](#)

Sharing is available for the object.

LifeSciEmailTemplate

Represents a collection of pre-designed and approved email templates that end users send to healthcare professionals (HCPs). These templates help users create and send consistent, professional emails quickly and efficiently. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AttachmentObjectType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the parent objects associated with the record. To configure this field, add the Account picklist value. A sales representative selects which object-level attachments, such as Account, are available for the email template. The values configured for this field enable additional attachments from the selected objects to be included when sending the email.</p>
BccEmailIdList	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A list of email addresses to include in the BCC list on emails sent from this template.</p>
CanAttachiCalendarFile	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether an iCalendar (.ics) file is generated and attached to the email. The default value is <code>false</code>.</p>
CanSendPresentationLinks	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether sales representatives can share presentations as unique links in email content. The default value is <code>false</code>.</p>
CommunicationSubscriptionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A reference to the communication subscription associated with the email template. This field is a relationship field.</p> <p>Relationship Name CommunicationSubscription</p> <p>Refers To CommSubscription</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A brief description of the purpose or content of the email template.</p>
EffectiveEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the email template is no longer available for use by sales representatives.</p>

Field	Details
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The date when the email template becomes available for use by sales representatives.</p>
EmailInvitationActionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Defines the type of action for which the template is used when sending invitations. Possible values are:</p> <ul style="list-style-type: none"> • Cancel • Create • Update
EmailInvitationContextType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the context in which the email template can be used, such as for provider visits. Possible values are:</p> <ul style="list-style-type: none"> • • ProviderVisit
HasSendConsentAcknowledgement	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description When selected, allows the template to be used for sending customizable emails based on captured consent. Used for custom reporting. The default value is <code>false</code>.</p>
IsActive	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the email template is active or inactive. The default value is <code>false</code>.</p>
IsDefaultAutoEmailTemplate	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Identifies whether this template is the default for sending invitations automatically. The default value is <code>false</code>.</p>
IsSubjectLineEditable	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Allows the sender to modify the email subject before sending. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The title or name of the email template.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A reference to the product related to the email template. This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
ReplyToEmailAddress	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The email address where recipients can send replies.</p>
ReplyToType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Specifies the type of email address used for replies. Create these picklist values:</p> <ul style="list-style-type: none"> • Sales Rep Email Address: Uses the sales representative's email address as the Reply to email in the delivered message. • Reply To Email Address: Uses the email address specified in the Reply To Email Address field instead of the sales representative's email.
SenderEmailFieldApiName	<p>Type</p> <p>string</p>
	<p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p> <p>Stores the API name of custom fields that customers create to store the sender's email address. Enables customers to use a predefined sender email for specific email templates, rather than using the sales representative's email.</p>
SenderType	<p>Type</p> <p>picklist</p>
	<p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p> <p>Defines the type of sender for the email. Create these picklist values:</p>
	<ul style="list-style-type: none"> • Sales Rep Email Address: Uses the sales representative's email address as the sender. • Sender Email Field API Name: Uses the email address specified in the Sender Email Field API Name field instead of the sales representative's email.
	<p>To configure this field, add picklist values to control the sender information used for email transactions created with this template. By default, the picklist includes "Sales Rep," but you can customize it by adding field API names that contain different sender email addresses.</p>
ShouldIgnoreEmailConsent	<p>Type</p> <p>boolean</p>
	<p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description</p>
	<p>Ignores email consent preferences for this template and sends the email regardless of the recipient's opt-in status.</p>
	<p>The default value is <code>false</code>.</p>
SourceSystemIdentifier	<p>Type</p> <p>string</p>
	<p>Properties</p>
	<p>Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
	<p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
SurveyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A lookup field that links a survey to the email template. To add the survey invitation link to the email, populate the Account field in the Survey Invitation record. This field is a relationship field.</p> <p>Relationship Name Survey</p> <p>Refers To Survey</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeSciEmailTemplateChangeEvent on page 1426](#)

Change events are available for the object.

[LifeSciEmailTemplateFeed on page 1429](#)

Feed tracking is available for the object.

[LifeSciEmailTemplateHistory on page 1434](#)

History is available for tracked fields of the object.

LifeSciEmailTmpFragment

Represents a collection of reusable components that can be inserted into email templates, allowing end users to create custom and modular emails tailored to their needs. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), update(), upsert()`

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Provides a brief summary or explanation of the content and purpose of the fragment.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferencedDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The title or name of the email template fragment.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeSciEmailTmplFragmentChangeEvent on page 1426](#)

Change events are available for the object.

[LifeSciEmailTmplFragmentFeed on page 1429](#)

Feed tracking is available for the object.

[LifeSciEmailTmplFragmentHistory on page 1434](#)

History is available for tracked fields of the object.

[LifeSciEmailTmplFragmentShare on page 1438](#)

Sharing is available for the object.

[LifeSciEmailTmplRelaFrgmt](#)

Represents the connectors that link email templates and fragments together. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferencedDate</code> is not null, the user accessed this record or list view indirectly.</p>
LifeSciEmailTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. Indicates which life science email template is associated with the record. This field is a relationship field.</p> <p>Relationship Name LifeSciEmailTemplate</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeSciEmailTemplate (the detail object)</p>
LifeSciEmailImplFragmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. Indicates which life science email template fragment is associated with the record. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name LifeSciEmailTmplFragment</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeSciEmailTmplFragment (the master object)</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. An automatically generated unique identifier for the record in the format ETF-{0000000000}.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeSciEmailTmplRelaFrgmtChangeEvent on page 1426](#)

Change events are available for the object.

[LifeSciEmailTmplRelaFrgmtFeed on page 1429](#)

Feed tracking is available for the object.

[LifeSciEmailTmplRelaFrgmtHistory on page 1434](#)

History is available for tracked fields of the object.

LifeSciEmailTmpISnapshot

Stores the different versions of an email template for tracking purposes. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describesObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
ActivatedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. The date when the template version is activated. Template version becomes active immediately after uploading.</p>
CalendarFileDescription	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description to include in the .ics attachment that's sent with the email.</p>
DeactivatedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the template version is deactivated. The template version becomes inactive when a new version is uploaded.</p>
EmailBody	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The body of the email template, when the email is an invitation.</p>
EmailSubject	<p>Type string</p>

Field	Details
EmailTemplateId	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The email subject.</p>
FileIdentifier	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The related email template. This field is a relationship field.</p> <p>Relationship Name EmailTemplate</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeSciEmailTemplate (the master object)</p>
FileName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique key that identifies email templates files for retrieval when stored in Content Document records.</p>
Language	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The email template .zip file name.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. An automatically generated unique identifier for the record in the format ET-{0000000000}.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
Status	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Determines if the email template version is active or inactive. Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive
VersionNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The version of the email template.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeSciEmailTmpISnapshotChangeEvent on page 1426](#)

Change events are available for the object.

[LifeSciEmailTmpISnapshotFeed on page 1429](#)

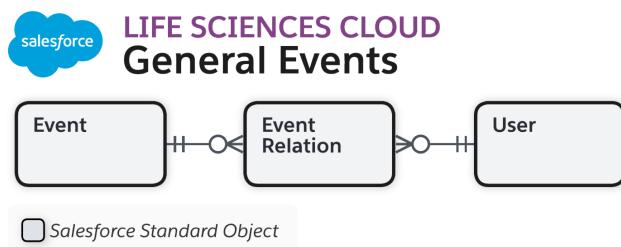
Feed tracking is available for the object.

[LifeSciEmailTmpISnapshotHistory on page 1434](#)

History is available for tracked fields of the object.

General Events

General Events enable users to log and manage various non-customer related activities. With the Planner tool, users can easily create, view, and manage General Events in their schedules. Users can also add employees to a General Event for team collaborations.



Last modified: Sep 9, 2025

For more details and a larger image, visit the [Data Model Gallery](#).

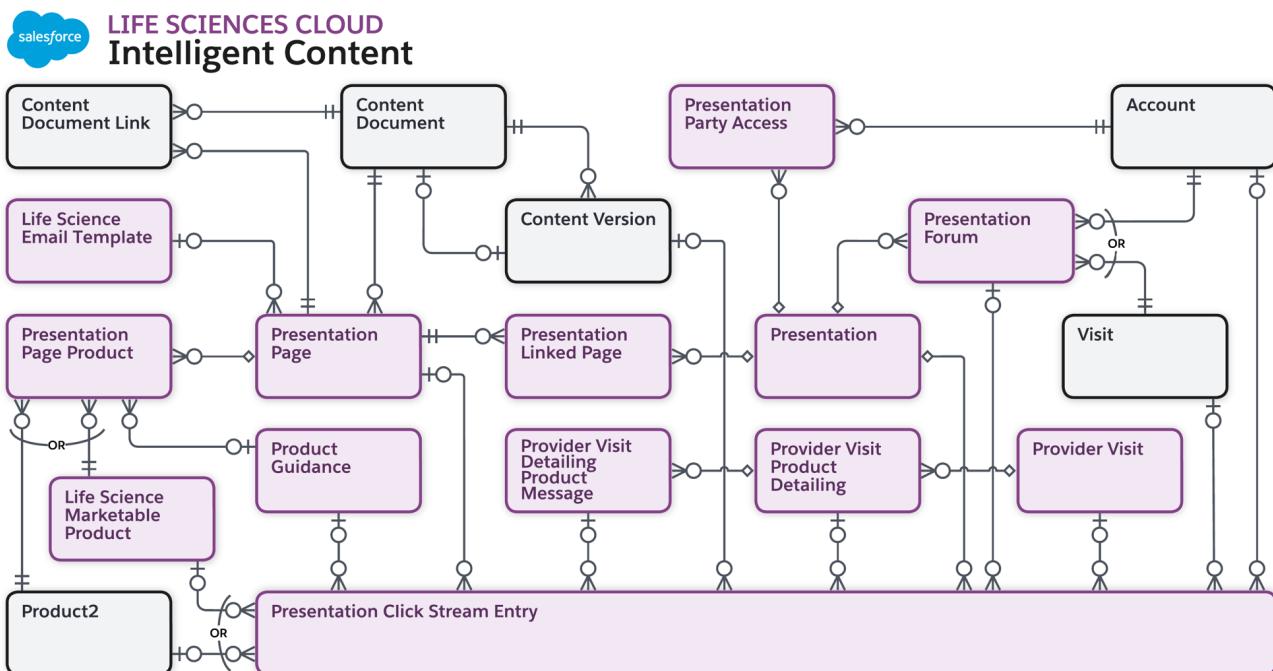
SEE ALSO:

Life Sciences Cloud Fields on Standard Objects: Event

Life Sciences Cloud Fields on Standard Objects: Event Relation

Intelligent Content

Intelligent Content facilitates marketing strategies by enabling direct and interactive communications with healthcare professionals (HCPs). Sales and medical teams can deliver personalized presentations based on real-time feedback and analytics, enhancing the impact of their interactions. By continuously refining and optimizing marketing messages and strategies through data collection and analysis, Intelligent Content ensures that they are relevant and responsive to HCP needs and preferences. Intelligent Content capabilities include analytics and optimized user interfaces, offering a comprehensive solution for targeted content delivery in both planned and unplanned presentations.



For more details and a larger image, visit the [Data Model Gallery](#).

Presentation

Represents a collection of presentations, each with various attributes such as activation dates, the ability to be sent by email, associated tags, and gestures. This object is available in API version 65.0 and later.

PresentationClickStrmEntry

Represents the collection of clickstream data captured while the presentation is being used or shown across different forums. This object is available in API version 65.0 and later.

[PresentationForum](#)

Represents the details of the forums (call, meetings, order) where the presentation was presented. This object is available in API version 65.0 and later.

[PresentationLinkedPage](#)

Represents the connection between a presentation and its associated presentation pages. This object is available in API version 65.0 and later.

[PresentationPage](#)

Represents a collection of pages that can be used within a presentation. Each page can contain multiple slides. Pages can be reused across different presentations. This object is available in API version 65.0 and later.

[PresentationPageProduct](#)

Represents the link between a presentation page and a product, and may also include a connection to related product message (product guidance). This object is available in API version 65.0 and later.

[PresentationPartyAccess](#)

Represents the access-sharing details of a presentation with a healthcare professional, including an expiration date for that access. This object is available in API version 65.0 and later.

Presentation

Represents a collection of presentations, each with various attributes such as activation dates, the ability to be sent by email, associated tags, and gestures. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ActivationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The date from which active presentations become available to sales representatives. If the field is empty, the start date limit is not applied to the presentation.</p>
CanSendByEmail	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Defines whether the presentation can be sent via email. The default value is <code>false</code>.</p>

Field	Details
DeactivationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date limit during which active presentations are available to sales representatives. If the field is empty, the end date limit isn't applied to the presentation.</p>
IsCustom	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Identifies whether the presentation was created by a user. The default value is <code>false</code>.</p>
IsDoubleTapZoomEnabled	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if the double-tap zoom feature is activated for the presentation. Available only for html presentations. The default value is <code>false</code>.</p>
IsPDFIncluded	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the presentation includes a PDF file, which can be sent as an attachment via email. If set to true, it means that the presentation contains PDF files ready for email delivery. The default value is <code>false</code>.</p>
IsPinchZoomEnabled	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Enables or disables the pinch-to-zoom functionality in the presentation.</p>

Field	Details
IsPresentationLocked	<p>The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if the presentation has been locked by an admin, meaning it can no longer be edited.</p> <p>The default value is <code>false</code>.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
Name	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferencedDate</code> is not null, the user accessed this record or list view indirectly.</p>
OwnerId	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. Name of the presentation.</p>
	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Owner</p> <p>Refers To</p> <p>Group, User</p>
PlayerGestureSectionSide	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The gesture with which sales representatives open the Presentation Player menu.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • SwipeDown • SwipeUp • TapBottom • TapTop
PublicDisclaimerContentName	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The name of the public content that will be accessible during remote interactions and tied to the presentation. This content is typically linked to important public documents, such as product information or legal disclaimers, which the healthcare professional can view through their browser.</p>
PublicDisclaimerContentUrl	<p>Type</p> <p>url</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The URL pointing to the public disclaimer.</p>
ReactionSectionSide	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Determines the location of the sequence rating zone in the presentation player.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Left • Right
SourceSystemIdentifier	Type
	string
	Properties
	Create, Filter, Group, idLookup, Nullable, Sort, Update
	Description
	An external ID from the source system for data integrations.
SourceSystemName	Type
	string
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	The name of the source system for data integrations.
Status	Type
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Required.
	Possible values are:
	<ul style="list-style-type: none"> • Active • Deleted • Inactive
Type	Type
	picklist
	Properties
	Create, Filter, Group, Nullable, Restricted picklist, Sort, Update
	Description
	The presentation file type.
	Possible values are:
	<ul style="list-style-type: none"> • PDF • ZIP

Field	Details
Version	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A text field to store the presentation's version.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PresentationFeed on page 1429](#)

Feed tracking is available for the object.

[PresentationHistory on page 1434](#)

History is available for tracked fields of the object.

[PresentationShare on page 1438](#)

Sharing is available for the object.

PresentationClickStrmEntry

Represents the collection of clickstream data captured while the presentation is being used or shown across different forums. This object is available in API version 65.0 and later.

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A reference to the account, identifying the account on which the call was made. This field links the call data to a specific account for tracking purposes. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name Account</p> <p>Refers To Account</p>
AccountLoginName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the guest attendee used to log in remotely, if applicable. Tracks guest users accessing the remote session.</p>
ActualUsageDuration	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Records the total time, in seconds, that the user (during a face-to-face interaction) or the attendee (in a remote session) spent on a slide.</p>
AttendeeBrowser	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies the web browser used by the attendee during a remote session.</p>
AttendeeDeviceOs	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the operating system used by the attendee's device during a remote session.</p>
AttendeeDeviceType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the type of device (smartphone, tablet, computer) used by the attendee during a remote session.</p>

Field	Details
ContentName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the public content that was opened during a remote interaction and that is tied to the presentation. This content is typically linked to important public documents, such as product information or legal disclaimers, which the health care professional can view through their browser.</p>
ContentPageIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies the specific slide within a presentation page container (sequence).</p>
ContentReaction	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Captures the reaction to the presentation page—positive (1), negative (-1), or neutral (0).</p>
ContentUrl	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The public disclaimer URL of the presentation that was opened.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
MetricType	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Specifies the type of metric being collected from the clickstream, such as Tracking or Content Rating. This field is a calculated field.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. An automatically generated unique identifier for the record, following the format, CSM-{00000000}.</p>
PresentationFileContentName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the slide that the user viewed in the presentation page file.</p>
PresentationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. A reference to the presentation, linking to the presentation on which clickstream data was captured. This field is a relationship field.</p> <p>Relationship Name Presentation</p>

Field	Details
	<p>Relationship Type Master-detail</p> <p>Refers To Presentation (the master object)</p>
PresentationName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the presentation from which the clickstream data was captured.</p>
PresentationPageContentVerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A reference to the specific version of the presentation file that was viewed by the user. This field is a relationship field.</p> <p>Relationship Name PresentationPageContentVer</p> <p>Refers To ContentVersion</p>
PresentationPageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A reference to the presentation page, identifying the specific page where the clickstream data was recorded. This field is a relationship field.</p> <p>Relationship Name PresentationPage</p> <p>Refers To PresentationPage</p>
PresentationVersion	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The version of the presentation that was displayed during the session.</p>
ProductGuidanceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A reference to the Product Guidance object, linking a specific product message to a presentation page presented and the clickstream metric record.</p> <p>This field is a relationship field.</p> <p>Relationship Name ProductGuidance</p> <p>Refers To ProductGuidance</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A reference to both the Product2 and LSMarketableProduct objects, associating a product with the presentation page presented and the clickstream metric record.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
ProviderVisitDtlProductMsgId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A reference to the detailing product message associated with the presentation page.</p> <p>This field is a relationship field.</p> <p>Relationship Name ProviderVisitDtlProductMsg</p> <p>Refers To ProviderVisitDtlProductMsg</p>

Field	Details
ProviderVisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A reference to the Provider Visit object, linking to the overall record of the visit (Call). This field is a relationship field.</p> <p>Relationship Name ProviderVisit</p> <p>Refers To ProviderVisit</p>
ProviderVisitPrdDetailingId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A reference to the Provider Visit Product Detailing object, linking to specific product information discussed during the visit. This field is a relationship field.</p> <p>Relationship Name ProviderVisitPrdDetailing</p> <p>Refers To ProviderVisitProdDetailing</p>
ProviderVisitType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of remote call. Possible values are:</p> <ul style="list-style-type: none"> • AdHocSession • RemoteCall • RemoteMeeting
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
	Description
	An external ID from the source system for data integrations.
SourceSystemName	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the source system for data integrations.
UsageEndTime	Type dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The exact date and time when the user left the slide. For remote sessions, captured at the attendee level, not at the user level.
UsageStartTime	Type dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The exact date and time when the user opened the slide. For remote sessions, captured at the attendee level, not at the user level.
VisitId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A reference to the associated visit where clickstream data was captured.
	This field is a relationship field.
	Relationship Name
	Visit
	Refers To
	Visit

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PresentationClickStrmEntryFeed on page 1429](#)

Feed tracking is available for the object.

[PresentationClickStrmEntryHistory on page 1434](#)

History is available for tracked fields of the object.

PresentationForum

Represents the details of the forums (call, meetings, order) where the presentation was presented. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ForumReferenceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. A reference to either the visit or account record that represents the forum in which the presentation was delivered. This field is a polymorphic relationship field.</p> <p>Relationship Name ForumReference</p> <p>Refers To Account, Visit</p>
Geolocation	<p>Type location</p> <p>Properties Nillable</p> <p>Description Captures the geographical location where the presentation was opened.</p>
GeolocationDateTime	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the location was last successfully acquired.</p>
GeolocationLatitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Captures the geographical latitude where the presentation was opened.</p>
GeolocationLongitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Captures the geographical longitude where the presentation was opened.</p>
GeolocationMissingReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies why the location could not be retrieved, with possible reasons. Possible values are:</p> <ul style="list-style-type: none"> • BadData • DeviceRestricted • Offline • UserRestricted
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. A unique identifier for the record, automatically generated in the format PF-{0000000000}.</p>
PresentationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. Indicates the reference to the presentation. This field is a relationship field.</p> <p>Relationship Name Presentation</p> <p>Relationship Type Master-detail</p> <p>Refers To Presentation (the master object)</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
Description	
The name of the source system for data integrations.	

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PresentationForumFeed on page 1429](#)

Feed tracking is available for the object.

[PresentationForumHistory on page 1434](#)

History is available for tracked fields of the object.

PresentationLinkedPage

Represents the connection between a presentation and its associated presentation pages. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
DisplayOrder	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the order of the related presentation page within the overall presentation.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the presentation linked page.</p>
OriginalPrstLinkedPageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source presentation linked page from which this presentation linked page is copied. This field is a relationship field.</p> <p>Relationship Name OriginalPrstLinkedPage</p> <p>Refers To PresentationLinkedPage</p>
PresentationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. Indicates the reference to the presentation. This field is a relationship field.</p> <p>Relationship Name Presentation</p> <p>Relationship Type Master-detail</p> <p>Refers To Presentation (the master object)</p>

Field	Details
PresentationPageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates the reference to the presentation page, linking the specific page within the presentation. This field is a relationship field.</p> <p>Relationship Name PresentationPage</p> <p>Refers To PresentationPage</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The ID of the record in the external source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the external source system from which the record was imported.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PresentationLinkedPageFeed on page 1429](#)

Feed tracking is available for the object.

[PresentationLinkedPageHistory on page 1434](#)

History is available for tracked fields of the object.

PresentationPage

Represents a collection of pages that can be used within a presentation. Each page can contain multiple slides. Pages can be reused across different presentations. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ActivationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time when the presentation page is activated and available for use.</p>
ContentDocumentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The content document that is the PDF or ZIP file containing the content for the presentation page. This field is a relationship field.</p> <p>Relationship Name ContentDocument</p> <p>Refers To ContentDocument</p>
DeactivationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time when the presentation page is deactivated and no longer available for use.</p>
EmailTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description A lookup field that links the presentation page to a specific email template. This email template can be used for sending studies, statistics, or other relevant content associated with the current presentation page via email.</p>

Field	Details
	<p>This field is a relationship field.</p>
	<p>Relationship Name</p>
	<p>EmailTemplate</p>
	<p>Refers To</p>
	<p>LifeSciEmailTemplate</p>
IsAdditionalContent	<p>Type</p>
	<p>boolean</p>
	<p>Properties</p>
	<p>Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description</p>
	<p>Indicates whether the page is an asset. Assets are PDF files which can be added to ZIP presentations and referenced by link from any presentation slide.</p>
	<p>The default value is <code>false</code>.</p>
IsMandatory	<p>Type</p>
	<p>boolean</p>
	<p>Properties</p>
	<p>Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description</p>
	<p>Indicates whether a specific page in the presentation must be shown.</p>
	<p>The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type</p>
	<p>dateTime</p>
	<p>Properties</p>
	<p>Filter, Nillable, Sort</p>
	<p>Description</p>
	<p>The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type</p>
	<p>dateTime</p>
	<p>Properties</p>
	<p>Filter, Nillable, Sort</p>
	<p>Description</p>
	<p>The timestamp when the current user last viewed this record or list view.</p>
	<p>If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the presentation page.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this presentation page. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PageNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The page number of this page in the presentation PDF file. There's no page number for presentations with ZIP file type.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external source system from which the record was imported.</p>

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Indicates whether the page is active, meaning it can be included and used in a presentation. Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies whether the content is in PDF or ZIP format. Possible values are:</p> <ul style="list-style-type: none"> • PDF • ZIP

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PresentationPageFeed on page 1429](#)

Feed tracking is available for the object.

[PresentationPageHistory on page 1434](#)

History is available for tracked fields of the object.

[PresentationPageShare on page 1438](#)

Sharing is available for the object.

PresentationPageProduct

Represents the link between a presentation page and a product, and may also include a connection to related product message (product guidance). This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
DisplayOrder	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the order of the related product message (product guidance) within the presentation page.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferencedDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the presentation page product.</p>
PresentationPageID	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. Indicates the reference to the presentation page. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name PresentationPage</p> <p>Relationship Type Master-detail</p> <p>Refers To PresentationPage (the master object)</p>
ProductGuidanceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A reference to the Product Guidance object, linking a specific product message to the presentation page. This field is a relationship field.</p> <p>Relationship Name ProductGuidance</p> <p>Refers To ProductGuidance</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. A reference to both the Product2 and LemarketableProduct objects, associating a product with the presentation page. This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external source system for data integrations.</p>

Field	Details
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external source system from which the record was imported.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PresentationPageProductFeed on page 1429](#)

Feed tracking is available for the object.

[PresentationPageProductHistory on page 1434](#)

History is available for tracked fields of the object.

PresentationPartyAccess

Represents the access-sharing details of a presentation with a healthcare professional, including an expiration date for that access. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccessIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A UUID that identifies the presentation to show and the user who the link is intended for when sales representatives send presentations as links in email content.</p>
AccessRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	Description
	<p>Required. Represents the role of the party (Account) in relation to the presentation, and define their level of access and permissions.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Approver • Author • Viewer
EffectiveEndDate	Type
	dateTime
	Properties
	Create, Filter, Sort, Update
	Description
	<p>The date when access to the presentation expires.</p>
EffectiveStartDate	Type
	dateTime
	Properties
	Create, Filter, Sort, Update
	Description
	<p>The date when access to the presentation begins.</p>
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The timestamp when the current user last viewed this record or list view.</p>
	<p>If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	Type
	string

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. Name of the presentation party access.</p>
PartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Identifies the party with whom this record is shared, granting access to the presentation associated with this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Party</p> <p>Refers To Account</p>
PresentationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. Indicates the reference to the presentation. This field is a relationship field.</p> <p>Relationship Name Presentation</p> <p>Relationship Type Master-detail</p> <p>Refers To Presentation (the master object)</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external source system for data integrations.</p>
SourceSystemName	<p>Type string</p>

Field	Details
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The name of the external source system from which the record was imported.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PresentationPartyAccessFeed on page 1429](#)

Feed tracking is available for the object.

[PresentationPartyAccessHistory on page 1434](#)

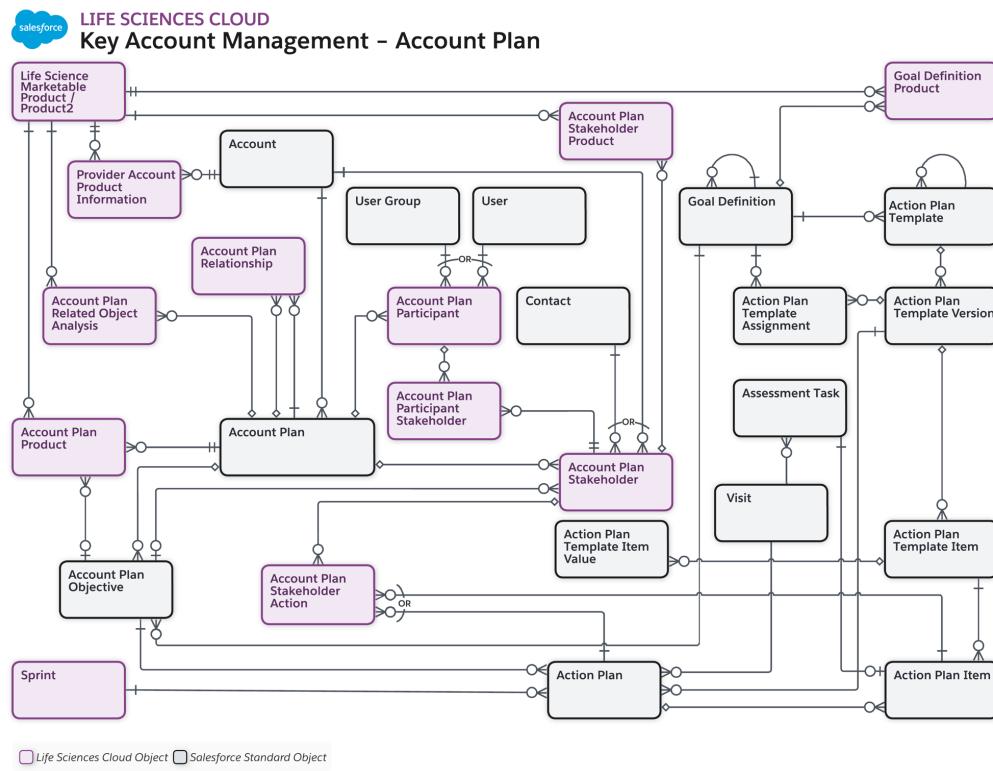
History is available for tracked fields of the object.

Key Account Management

Key Account Management enables Key Account Managers (KAM) to strategically manage and engage with their most important customers. By using comprehensive account and territory plans, KAMs can set clear business objectives, track progress, and ensure alignment across global, affiliate, and territory levels. This structured approach enhances customer targeting accuracy and drives effective execution of strategic initiatives. With capabilities for creating multiple plans, defining specific objectives, and assigning tasks, the Key Account Management ensures alignment, collaboration, and effective execution of strategies to achieve desired business outcomes.

Account Plan

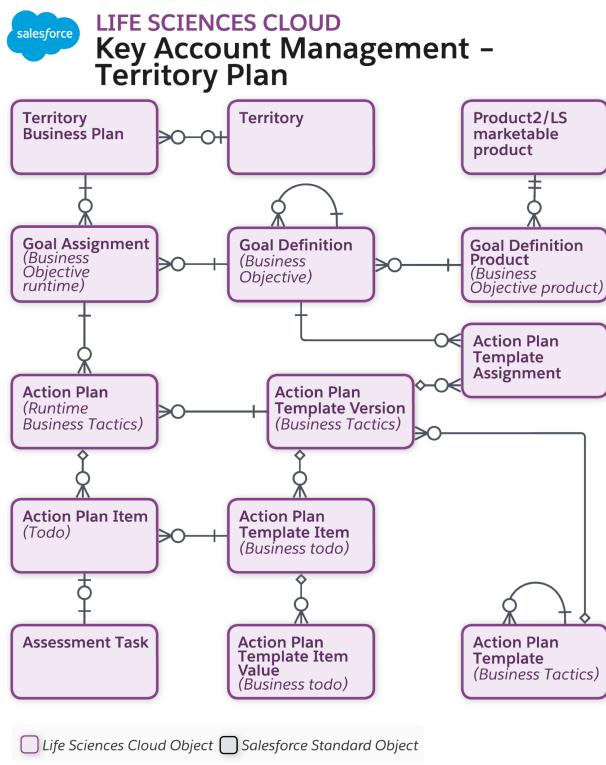
Key account managers use Account Plans to enhance the accuracy of customer targeting and management by defining business objectives at the global, affiliate, and territory levels. Key Account Management in Life Sciences Cloud consists of five stages: Goal Setting, Targeting, Strategic Planning, Execution, and Reporting. An account can have multiple account plans, each with one or more objectives. Each objective can have one or more tactics, which are groups of tasks that can be tracked for progress and rolled up to higher objectives. Assign tasks and tactics to various team members for stakeholders and track them through sprints.



For more details and a larger image, visit the [Data Model Gallery](#).

Territory Plan

Key account managers use Territory Plans to enhance the accuracy of customer targeting and management by establishing business objectives at the Global, Affiliate, and Territory levels. These plans include setting goals, tracking progress, and reporting outcomes through the KAM operating model, which consists of five stages: Goal Setting, Execution, and Reporting. There are three types of objectives: Global Business objectives, Affiliate objectives, and Territory objectives, each serving a specific tracking purpose. Territory Plans can contain multiple objectives, each with corresponding tactics to monitor progress and achieve set goals effectively. Tracking tasks from tactics to objectives ensures a comprehensive approach to managing territories and achieving desired outcomes.



Life Sciences Cloud Object Salesforce Standard Object

Last modified: Sep 9, 2025

For more details and a larger image, visit the [Data Model Gallery](#).

AccountPlanParticipant

Represents the team members participating in the account plan. This object is available in API version 65.0 and later.

AccountPlanProduct

Represents all the products associated with an account plan or its objectives. This object is available in API version 65.0 and later.

AccountPlanRelaObjAnalysis

Represents the strategic analysis done on objects related to the account plan. This object helps to identify internal and external factors that could potentially affect the plan, its objectives, or any related objects. This object is available in API version 65.0 and later.

AccountPlanRelationship

Represents the relationship between multiple account plans for key account management. This object is available in API version 65.0 and later.

AcctPlanPtcpStakeholder

Represents a junction between an account plan participant and an account plan stakeholder. Stores information about the account plan participant who collaborates with the account plan stakeholder for performing account plan tasks. This object is available in API version 65.0 and later.

AccountPlanStakeholder

Represents the key individuals who can influence an account's actions or have a vested interest in its outcomes. This object is available in API version 65.0 and later.

AccountPlanStkhldrAction

Represents a junction between an account plan stakeholder and an action. Stores information about an action for an account plan that's associated with a stakeholder. This object is available in API version 65.0 and later.

[AccountPlanStkldrProduct](#)

Represents a junction between an account plan stakeholder and a product. Stores information about the products associated with a stakeholder for an account plan. This object is available in API version 65.0 and later.

[ActionPlanTemplate](#)

Represents the instance of an action plan template.

[ActionPlanTemplateAssignment](#)

Represents the association of an action plan template with its related care plan template, goal, or problem definition. When instantiated, the action plan generates the corresponding intervention tasks and links them to the appropriate record, such as a condition, goal, or care plan.

[ActionPlanTemplateItem](#)

Represents the instance of an item on an action plan template version.

[AssessmentTask](#)

Perform activities such as patient registration or order authorization to capture information.

[GoalAssignment](#)

Represents the goals that are part of a care plan.

[GoalDefinition](#)

Represents a goal or a business objective that's used as a reference. When instantiated, GoalDefinition records create GoalAssignment records that serve as goals in care plans.

[GoalDefinitionProduct](#)

Represents a junction between a goal definition and a product. Stores information about the goal definition that defines the business objective for a product. This object is available in API version 65.0 and later.

[Sprint](#)

Represents a specific timeframe within which account action plans are executed within key account management. This object is available in API version 65.0 and later.

[TerritoryBusinessPlan](#)

Represents the detailed, strategic outline of vital customer information. This object is used to effectively manage and expand customer relationships within a specific territory. This object is available in API version 65.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: AssessmentTask](#)

[Object Reference for the Salesforce Platform: ActionPlanItem](#)

[Object Reference for the Salesforce Platform: ActionPlanTemplateVersion](#)

[Object Reference for the Salesforce Platform: ActionPlanTemplateItemValue](#)

[Object Reference for the Salesforce Platform: ActionPlanTemplateAssignment](#)

[Object Reference for the Salesforce Platform: ActionPlan](#)

[Object Reference for the Salesforce Platform: ActionPlanTemplate](#)

AccountPlanParticipant

Represents the team members participating in the account plan. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The account plan that the participant is working on. This field is a relationship field.</p> <p>Relationship Name AccountPlan</p> <p>Relationship Type Master-detail</p> <p>Refers To AccountPlan (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the account plan participant record.</p>

Field	Details
ParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The specific team member participating in the account plan. This field is a polymorphic relationship field.</p> <p>Relationship Name Participant</p> <p>Refers To Group, User</p>
ParticipantRoleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The plan participant's role in executing the account plan, such as sales representative or collaborator. This field is a relationship field.</p> <p>Relationship Name ParticipantRole</p> <p>Refers To ParticipantRole</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AccountPlanParticipantChangeEvent on page 1426](#)

Change events are available for the object.

[AccountPlanParticipantFeed on page 1429](#)

Feed tracking is available for the object.

[AccountPlanParticipantHistory on page 1434](#)

History is available for tracked fields of the object.

AccountPlanProduct

Represents all the products associated with an account plan or its objectives. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The account plan associated with a product. This field is a relationship field.</p> <p>Relationship Name AccountPlan</p> <p>Relationship Type Master-detail</p> <p>Refers To AccountPlan (the master object)</p>
AccountPlanObjectiveId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account plan objective associated with a product. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name AccountPlanObjective</p> <p>Refers To AccountPlanObjective</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the account plan product record.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The specific product associated with an account plan or objective. This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
SourceSystemIdentifier	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AccountPlanProductChangeEvent on page 1426](#)

Change events are available for the object.

AccountPlanRelaObjAnalysis

Represents the strategic analysis done on objects related to the account plan. This object helps to identify internal and external factors that could potentially affect the plan, its objectives, or any related objects. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The account plan for which object analysis is done. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name AccountPlan</p> <p>Relationship Type Master-detail</p> <p>Refers To AccountPlan (the master object)</p>
EconomicalAnalysisInfo	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The detailed assessment of economic factors that can impact the account, including market trends, economic indicators, and financial health of the customer and their industry.</p>
EnvironmentalAnalysisInfo	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The detailed assessment of environmental factors that can impact the account, such as sustainability considerations, climate change-related risks, and regulatory compliance with environmental standards.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
LegalAnalysisInfo	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Nillable, Update</p> <p>Description The detailed assessment of legal information relevant to the account, including regulations, compliance requirements, and potential legal risks or opportunities.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the account plan related object analysis record.</p>
OpportunitiesAnalysisInfo	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The in-depth analysis of identified opportunities within the account based on factors like their potential impact, feasibility, and alignment with the overall strategic objectives.</p>
PoliticalAnalysisInfo	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The detailed assessment of political factors that can influence the account, such as government policies, regulatory changes, and political stability in relevant regions.</p>
RelatedObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the specific object for which this analysis is done. This field is a polymorphic relationship field.</p> <p>Relationship Name RelatedObject</p> <p>Refers To LifeSciMarketableProduct, Product2</p>

Field	Details
SocialAnalysisInfo	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The detailed assessment of social factors that can impact the account, including demographic trends, cultural considerations, and social responsibility initiatives.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
StrengthAnalysisInfo	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The assessment of the internal strengths of the account, such as key capabilities, competitive advantages, and resources that can be leveraged to achieve the plan's objectives.</p>
TechnologicalAnalysisInfo	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The detailed assessment of technological factors that can affect the account, including emerging technologies, industry-specific innovations, and the customer's technological capabilities and infrastructure.</p>
ThreatsAnalysisInfo	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Nullable, Update</p> <p>Description The identification and assessment of potential threats to the account, such as competitive pressures, market disruptions, and regulatory changes.</p>
WeaknessAnalysisInfo	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The detailed assessment of internal weaknesses of the account, such as areas for improvement, resource constraints, and potential vulnerabilities that could hinder the achievement of the plan's objectives.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AccountPlanRelaObjAnalysisChangeEvent on page 1426](#)

Change events are available for the object.

[AccountPlanRelaObjAnalysisFeed on page 1429](#)

Feed tracking is available for the object.

[AccountPlanRelaObjAnalysisHistory on page 1434](#)

History is available for tracked fields of the object.

AccountPlanRelationship

Represents the relationship between multiple account plans for key account management. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountPlanId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description The primary account plan associated with a particular account plan. This field is a relationship field.</p> <p>Relationship Name AccountPlan</p> <p>Relationship Type Master-detail</p> <p>Refers To AccountPlan (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the account plan relationship record.</p>
RelatedAccountPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The related account plan associated with an account plan. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name RelatedAccountPlan</p> <p>Refers To AccountPlan</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AccountPlanRelationshipChangeEvent on page 1426](#)

Change events are available for the object.

[AccountPlanRelationshipFeed on page 1429](#)

Feed tracking is available for the object.

[AccountPlanRelationshipHistory on page 1434](#)

History is available for tracked fields of the object.

AcctPlanPtcpStakeholder

Represents a junction between an account plan participant and an account plan stakeholder. Stores information about the account plan participant who collaborates with the account plan stakeholder for performing account plan tasks. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountPlanParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The account plan participant who collaborates with the account plan stakeholder for performing account plan tasks.</p> <p>This field is a relationship field.</p> <p>Relationship Name AccountPlanParticipant</p> <p>Relationship Type Master-detail</p> <p>Refers To AccountPlanParticipant (the master object)</p>
AccountPlanStakeholderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account plan stakeholder who collaborates with the account plan participant and influences the decisions of the account plan.</p> <p>This field is a relationship field.</p> <p>Relationship Name AccountPlanStakeholder</p> <p>Refers To AccountPlanStakeholder</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the account plan participant stakeholder record.</p>
ParticipantName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the referenced account plan participant, defined as a user or a group.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
StakeholderName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the referenced stakeholder, defined as an account or a contact.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

AcctPlanPtcpStakeholderChangeEvent on page 1426

Change events are available for the object.

AcctPlanPtcpStakeholderFeed on page 1429

Feed tracking is available for the object.

AcctPlanPtcpStakeholderHistory on page 1434

History is available for tracked fields of the object.

AccountPlanStakeholder

Represents the key individuals who can influence an account's actions or have a vested interest in its outcomes. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The account plan associated with the stakeholder. This field is a relationship field.</p> <p>Relationship Name AccountPlan</p> <p>Relationship Type Master-detail</p> <p>Refers To AccountPlan (the master object)</p>
AccountPlanObjectiveId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account plan objective associated with the stakeholder. This field is a relationship field.</p> <p>Relationship Name AccountPlanObjective</p>

Field	Details
	<p>Refers To AccountPlanObjective</p>
Comment	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The additional comments or notes relevant to the stakeholder, such as their communication preferences, key interests, or past interactions with the company.</p>
InfluenceLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the level of influence that the stakeholder has within their organization or network, which can impact their ability to affect decisions or drive adoption of products or services.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the account plan stakeholder record.</p>

Field	Details
RoleType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of professional role or title of the stakeholder, such as pharmacist and manager.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
StakeholderRefnRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The stakeholder record associated with the account plan stakeholder. This field is a polymorphic relationship field.</p> <p>Relationship Name StakeholderReferenceRecord</p> <p>Refers To Account, Contact</p>
Strength	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the perceived level of support or advocacy the stakeholder has for the company, its products, or its initiatives.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AccountPlanStakeholderChangeEvent on page 1426](#)

Change events are available for the object.

[AccountPlanStakeholderFeed on page 1429](#)

Feed tracking is available for the object.

[AccountPlanStakeholderHistory on page 1434](#)

History is available for tracked fields of the object.

AccountPlanStkldrAction

Represents a junction between an account plan stakeholder and an action. Stores information about an action for an account plan that's associated with a stakeholder. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountPlanStakeholderId	Type reference Properties Create, Filter, Group, Sort Description The account plan stakeholder for whom the action is performed. This field is a relationship field. Relationship Name AccountPlanStakeholder Relationship Type Master-detail Refers To AccountPlanStakeholder (the master object)
ActionReferenceRecordId	Type reference Properties Create, Filter, Group, Sort, Update

Field	Details
	<p>Description The action plan or action plan item referencing an action to be performed for the account plan stakeholder. This field is a polymorphic relationship field.</p> <p>Relationship Name ActionReferenceRecord</p> <p>Refers To ActionPlan, ActionPlanItem</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the account plan stakeholder action record.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
StakeholderName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the referenced stakeholder, defined as an account or contact.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AccountPlanStkldrActionChangeEvent on page 1426](#)

Change events are available for the object.

AccountPlanStkldrProduct

Represents a junction between an account plan stakeholder and a product. Stores information about the products associated with a stakeholder for an account plan. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountPlanStakeholderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The account plan stakeholder associated with the account plan. This field is a relationship field.</p> <p>Relationship Name AccountPlanStakeholder</p>

Field	Details
	<p>Relationship Type Master-detail</p> <p>Refers To AccountPlanStakeholder (the master object)</p>
Comment	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The additional description about the relationship between the account plan, account plan stakeholder, and the associated products.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the account plan stakeholder product record.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product associated with the account plan stakeholder.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
StakeholderName	<p>Type string</p> <p>Properties Filter, Group, Nullable, Sort</p> <p>Description The name of the referenced stakeholder, defined as an account or contact.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AccountPlanStkldrProductChangeEvent on page 1426](#)

Change events are available for the object.

[AccountPlanStkldrProductFeed on page 1429](#)

Feed tracking is available for the object.

[AccountPlanStkldrProductHistory on page 1434](#)

History is available for tracked fields of the object.

ActionPlanTemplate

Represents the instance of an action plan template.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ActionPlanType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description The action plan template's type. Possible values are:</p> <ul style="list-style-type: none"> • PrvdEngmtCompliance—Provider Engagement Compliance
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of this action plan template.</p>
IsAdHocItemCreationEnabled	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether users can add tasks or other items to generated action plans (true) or not (false).</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of this action plan template.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this action plan template. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the parent template associated with the action plan template. This field is a relationship field.</p> <p>Relationship Name ParentTemplate</p> <p>Refers To ActionPlanTemplate</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>

Field	Details
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
Status	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description View the status of a task. Possible values are:<ul style="list-style-type: none"> • Draft • Final—Published • Obsolete • Read Only </p>
TargetEntityType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description The parent object this action plan template relates to. Possible values are:<ul style="list-style-type: none"> • RelatedListValidation__c—RelatedListValidation • omnistudio__VlocityScheduledJob__c—Vlocity Scheduled Job </p>
UniqueName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name for this action plan template. This field is unique within your organization.</p>

ActionPlanTemplateAssignment

Represents the association of an action plan template with its related care plan template, goal, or problem definition. When instantiated, the action plan generates the corresponding intervention tasks and links them to the appropriate record, such as a condition, goal, or care plan.

Special Access Rules

The ActionPlanTemplateAssignment object and its fields are used by the Key Account Management and the Provider Engagement Compliance feature areas. This topic lists the fields for both features.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ActionPlanTemplateVersionId	<p>Type Reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Action plan template that's mapped to a problem defintion, goal definition, or care plan template. This field is a relationship field. In Life Sciences Cloud (Medical Management), it is the version of the action plan template.</p> <p>Relationship Name ActionPlanTemplateVersion</p> <p>Relationship Type Master-Detail</p> <p>Refers To ActionPlanTemplateVersion</p>
AssociatedObjectId	<p>Type Reference Polymorphic lookup</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The object to which the action plan template is associated. For example: a problem definition, goal definition, or care plan template, associated with an action plan template.</p> <p>Relationship Name AssociatedObject (Life Sciences Cloud - Medical Management)</p>

Field	Details
	<p>Refers To CarePlanTemplate</p> <p>Relationship Type Lookup</p> <p>Refers To</p> <ul style="list-style-type: none"> • Benefit • CarePlanTemplate • CareProgram • GoalDefinition • ProblemDefinition • Program • RegulatoryCode
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the action plan template assignment record.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ActionPlanTemplateAssignmentFeed

Feed tracking is available for the object.

ActionPlanTemplateAssignmentHistory

History is available for tracked fields of the object.

ActionPlanTemplateItem

Represents the instance of an item on an action plan template version.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ActionPlanTemplateVersionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The version of the action plan template this item is for. This field is a relationship field.</p> <p>Relationship Name ActionPlanTemplateVersion</p> <p>Relationship Type Master-detail</p> <p>Refers To ActionPlanTemplateVersion (the master object)</p>
DisplayOrder	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The order in which this item is displayed within the action plan template version.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the task created from this template item is active. The default value is <code>false</code>.</p>

Field	Details
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the task created from this template item is required. The default value is <code>false</code>.</p>
ItemEntityType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of action plan template item entity. Always set to Task. Possible values are:</p> <ul style="list-style-type: none"> • PrvdEngmtComplianceCycle—Provider Engagement Compliance Cycle
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The unique identifier for this action plan template item record.</p>
SourceSystemIdentifier	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
UniqueName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name for this action plan template item. This field is unique within your organization.</p>

AssessmentTask

Perform activities such as patient registration or order authorization to capture information.

Special Access Rules

In Life Sciences Cloud, standard and custom fields extend the standard AssessmentTask object to represent tasks to complete a provider engagement compliance cycle.

The AssessmentTask object and its fields are used by the Key Account Management and the Provider Engagement Compliance feature areas. This topic lists the fields used in both of these features.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AssessmentTaskDefinitionId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The assessment task definition that is referenced for the task. This field is a relationship field.</p> <p>Relationship Name AssessmentTaskDefinition</p> <p>Refers To AssessmentTaskDefinition</p>
AssignedToId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the user that's assigned the task. This field is a polymorphic relationship field.</p> <p>Relationship Name AssignedTo</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Description of task that has to be performed at the store.</p>
EndTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the assessment task is completed.</p>
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicate whether a task must be completed to complete a visit. The default value is False.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Unique identification of the task.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this assessment template. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The visit associated with an assessment task. This field is a relationship field.</p> <p>Relationship Name Parent</p> <p>Refers To Visit</p>
ReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the record with which the associated task is related. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceRecord</p> <p>Relationship Type Lookup</p> <p>Refers To CarePgmEnrolleeWkOrdStep, ActionPlan, PrvdEngmtComplianceCycle Based on the availability of objects in your org.</p>
SequenceNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The sequence in which the tasks must be performed.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
SourceSystemName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Time when the task was started by a field rep.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description View the status of a task. Possible values are:<ul style="list-style-type: none"> • Completed • InProgress—In Progress • NotStarted—Not Started • Skipped The default value is Not Started.</p>
TaskType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description Type of a task that the sales rep can perform during the visit. In Life Sciences Cloud, the task type must match the task type of the assessment task definition. Possible values are:<ul style="list-style-type: none"> • ComponentTask—Component Task • DeliveryTask—Delivery Task • Other • RecordAction—Record Action </p>

Field	Details
	<ul style="list-style-type: none"> • SignatureTask—Signature Task

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

- [AssessmentTaskShare](#)
- [AssessmentTaskFeed](#)

GoalAssignment

Represents the goals that are part of a care plan.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AssignedById	<p>Type Polymorphic lookup Reference (Key Account Management)</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description References the person who assigned the goal. This field is a polymorphic relationship field.</p> <p>Relationship Name AssignedBy</p> <p>Relationship Type Lookup</p> <p>Refers To Account, CarePerformer, Contact, HealthcarePractitionerFacility, HealthcareProvider</p>
CompletionDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p>

Field	Details
	<p>Description The date when the goal is completed.</p>
CompletionPercentage	<p>Type percent</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Records the progress of the goal with a percentage value.</p>
CustomGoalName	<p>Type String</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the custom goal. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the goal.</p>
GoalAssigneeId	<p>Type Polymorphic lookup Reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person to whom the goal is assigned. This field is a polymorphic relationship field.</p> <p>Relationship Name GoalAssignee</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact</p>

Field	Details
GoalDefinitionId	<p>Type Lookup</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the goal definition in the PGI library that defines the details of the goal. This field is a relationship field.</p> <p>Relationship Name GoalDefinition</p> <p>Refers To GoalDefinition</p>
GoalType	<p>Type String</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Specifies the type of the goal.</p>
IsContinuousGoal	<p>Type Boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the goal is a continuous goal (<code>true</code>) or not (<code>false</code>). For instance, setting a goal to quit smoking. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type DateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type DateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The date and time when the record was last viewed.</p>
Name	<p>Type String</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the goal assignment record.</p>
OwnerId	<p>Type Polymorphic lookup Reference (Key Account Management)</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of this goal assignment record. This field is a polymorphic relationship field for Key Account Management.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentRecordId	<p>Type Polymorphic lookup</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The parent record that the goal is associated with. This field is a polymorphic relationship field.</p> <p>Relationship Name ParentRecord</p> <p>Refers To</p> <ul style="list-style-type: none"> • Account • CarePlanActivity • GoalAssignment • TerritoryBusinessPlan
Priority	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the priority of the goal. Possible values are:</p> <ul style="list-style-type: none"> • High • Low • Medium
SortOrder	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Determines the spot of the goal in the list of all goals in a care plan.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in its source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this record came from.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the goal is intended to start.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description Specifies the status of the goal. Possible values are:</p> <ul style="list-style-type: none"> • Canceled • Completed • In Progress • Not Started <p>The default value is <code>Not Started</code>.</p>
StatusDate	<p>Type <code>dateTime</code></p> <p>Properties <code>Create, Filter, Nillable, Sort, Update</code></p> <p>Description Records the date and time when the current status was set.</p>
StatusReason	<p>Type <code>string</code></p> <p>Properties <code>Create, Filter, Group, Nillable, Sort, Update</code></p> <p>Description Describes the reason for the current status.</p>
Target	<p>Type <code>double</code></p> <p>Properties <code>Create, Defaulted on create, Filter, Nillable, Sort, Update</code></p> <p>Description The target of the goal assignment. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
TargetCompletionDate	<p>Type <code>date</code></p> <p>Properties <code>Create, Filter, Group, Nillable, Sort, Update</code></p> <p>Description The date when the goal is targeted to be completed.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

GoalAssignmentFeed

Feed tracking is available for the object.

GoalAssignmentHistory

History is available for tracked fields of the object.

GoalAssignmentOwnerSharingRule

Sharing rules are available for the object.

GoalAssignmentShare

Sharing is available for the object.

GoalDefinition

Represents a goal or a business objective that's used as a reference. When instantiated, GoalDefinition records create GoalAssignment records that serve as goals in care plans.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Category	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The category that the defined goal belongs to.
Description	Type textarea Properties Create, Nillable, Update Description The description of the defined goal.
IsCustomGoalNameRequired	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	<p>Description Indicates whether the custom goal name is required. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the goal definition record.</p>
OwnerId	<p>Type Polymorphic lookup</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of this goal definition record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To</p> <ul style="list-style-type: none"> • Group • User

Field	Details
ParentGoalId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the parent record. This field is a relationship field.</p> <p>Relationship Name ParentGoal</p> <p>Relationship Type Lookup</p> <p>Refers To GoalDefinition</p>
ScopeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of scope of the goal definition. Possible values are:<ul style="list-style-type: none"> • Affiliate • Global • Territory This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The name of the system from which data is loaded into this object. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The status of the goal definition. Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive <p>The default value is <code>Active</code>.</p>
Type	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of the defined goal. Possible values are:</p> <ul style="list-style-type: none"> • Individual—Intermediate Goal • Strategic—Top Goal <p>The default value is <code>Individual</code>.</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the usage type of the defined goal.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

GoalDefinitionFeed

Feed tracking is available for the object.

GoalDefinitionHistory

History is available for tracked fields of the object.

GoalDefinitionShare

Sharing is available for the object.

GoalDefinitionProduct

Represents a junction between a goal definition and a product. Stores information about the goal definition that defines the business objective for a product. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
GoalDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The goal definition that defines the business objective for a product. This field is a relationship field.</p> <p>Relationship Name GoalDefinition</p> <p>Relationship Type Master-detail</p> <p>Refers To GoalDefinition (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p>

Field	Details
	<p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the goal definition product record.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product associated with the goal definition. This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

GoalDefinitionProductChangeEvent on page 1426

Change events are available for the object.

GoalDefinitionProductFeed on page 1429

Feed tracking is available for the object.

GoalDefinitionProductHistory on page 1434

History is available for tracked fields of the object.

Sprint

Represents a specific timeframe within which account action plans are executed within key account management. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CompletedPercentage	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of sprint tasks that have been completed.
EffectiveEndDate	Type dateTime Properties Create, Filter, Sort, Update Description The effective end date and time of the sprint.
EffectiveStartDate	Type dateTime Properties Create, Filter, Sort, Update Description The effective start date and time of the sprint.
LastReferencedDate	Type dateTime

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the sprint record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the current state of the sprint. Possible values are:</p> <ul style="list-style-type: none"> • Completed • In-Progress • New

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[SprintChangeEvent on page 1426](#)

Change events are available for the object.

[SprintFeed on page 1429](#)

Feed tracking is available for the object.

[SprintHistory on page 1434](#)

History is available for tracked fields of the object.

[SprintShare on page 1438](#)

Sharing is available for the object.

TerritoryBusinessPlan

Represents the detailed, strategic outline of vital customer information. This object is used to effectively manage and expand customer relationships within a specific territory. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CompletionPercentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of completion of the territory business plan.</p>
Description	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description The description of the territory plan.</p>
EffectiveEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The effective end date of the territory plan.</p>
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The effective start date of the territory plan.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the territory plan is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	Description
	The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view.
Name	Type string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the territory business plan.
OwnerId	Type reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name
	Owner
	Refers To
	Group, User
SourceSystemIdentifier	Type string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	The identifier of the record in the source system.
SourceSystemName	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description The name of the system from which data is loaded into this object.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the current state of the territory plan. Possible values are:</p> <ul style="list-style-type: none"> • Completed • Idle • In Progress
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the territory associated with the territory plan. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[TerritoryBusinessPlanChangeEvent on page 1426](#)

Change events are available for the object.

[TerritoryBusinessPlanFeed on page 1429](#)

Feed tracking is available for the object.

[TerritoryBusinessPlanHistory on page 1434](#)

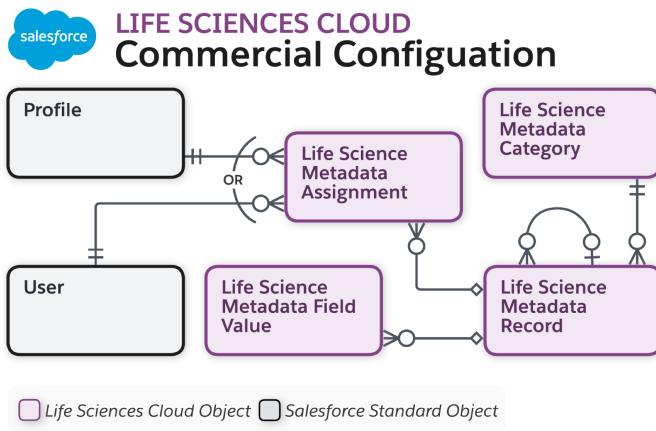
History is available for tracked fields of the object.

[TerritoryBusinessPlanShare on page 1438](#)

Sharing is available for the object.

Life Sciences Commercial Engagement Configuration

The Life Sciences Commercial Engagement Configuration objects store settings and configurations for many Customer Engagement features. In some cases, you can control a feature's behavior by assigning configurations to specific profiles or users. Other configurations apply to all the users in an org.



For more details and a larger image, visit the [Data Model Gallery](#).

LifeSciMetadataAssignment

Represents the assignments for a Life Sciences configuration record. This object is a child of LifeSciMetadataRecord. This object is available in API version 65.0 and later.

LifeSciMetadataCategory

Represents the category that Life Sciences configuration records are organized into. This object is available in API version 65.0 and later.

LifeSciMetadataFieldValue

Represents a field value for a Life Sciences configuration record. This object is a child of LifeSciMetadataRecord. This object is available in API version 65.0 and later.

LifeSciMetadataRecord

Represents a configuration record for Life Sciences. This object is a child of LifeSciMetadataCategory. This object is available in API version 65.0 and later.

LifeSciMetadataAssignment

Represents the assignments for a Life Sciences configuration record. This object is a child of LifeSciMetadataRecord. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AssignedToId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The profile or user associated with the record. This field is a polymorphic relationship field.</p> <p>Relationship Name AssignedTo</p> <p>Relationship Type Lookup</p> <p>Refers To Profile, User</p>
AssignmentApiName	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Required. The API name of the assignment record.</p>
AssignmentLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies the level of the assignment. Possible values are: <ul style="list-style-type: none"> • Profile • User </p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
LifeSciMetadataRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The configuration record associated with the assignment. This field is a relationship field.</p> <p>Relationship Name LifeSciMetadataRecord</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeSciMetadataRecord (the master object)</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the assignment record.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeSciMetadataAssignmentFeed](#) on page 1429

Feed tracking is available for tracked fields of the object.

[LifeSciMetadataAssignmentHistory](#) on page 1434

History is available for tracked fields of the object.

LifeSciMetadataCategory

Represents the category that Life Sciences configuration records are organized into. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The category used to organize the Life Sciences configuration records. Possible values are:</p> <ul style="list-style-type: none"> • AccountDynamicListConfiguration • AccountFilterConfig • AccountListActions • AccountSearchPreferences • ActivityPlanJob • EmailSettings • ExternalSearchSettings • InventoryManagementProfileSettings • PresentationSettings • ProviderVisitSettings • SampleLimitSettings
CategoryLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The custom label for the category.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the category record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The category type. Possible values are:</p> <ul style="list-style-type: none"> • Hierarchical • List

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

LifeSciMetadataCategoryFeed on page 1429

Feed tracking is available for the object.

LifeSciMetadataCategoryHistory on page 1434

History is available for tracked fields of the object.

LifeSciMetadataCategoryShare on page 1438

Sharing is available for the object.

LifeSciMetadataFieldValue

Represents a field value for a Life Sciences configuration record. This object is a child of LifeSciMetadataRecord. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`,
`retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
DataType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The data type of the field. Possible values are:</p> <ul style="list-style-type: none">• BOOLEAN• DATE• DATETIME• DOUBLE• FIELD• LONGTEXT• NUMBER• OBJECT• PHONE• PICKLIST• TEXT• URL

Field	Details
DateTimeValue	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time value for the field.</p>
DateValue	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date value for the field.</p>
FieldName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The name of the field.</p>
FieldValueApiName	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Required. The API name of the field value record.</p>
HasBooleanValue	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the Boolean value of the field is <code>true</code> or <code>false</code>. The default value is <code>false</code>.</p>
IntegerValue	<p>Type long</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The integer value for the field.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
LifeScienceMetadataRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The configuration record associated with the field value. This field is a relationship field.</p> <p>Relationship Name LifeScienceMetadataRecord</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeSciMetadataRecord (the master object)</p>
LongTextValue	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The long text value for the field.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the field value record.</p>
NumberValue	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The number value for the field.</p>
PhoneValue	<p>Type phone</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The phone value for the field.</p>
PicklistValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The picklist value for the field.</p>
TextValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The text value for the field.</p>
UrlValue	<p>Type url</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The URL value for the field.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeSciMetadataFieldValueFeed on page 1429](#)

Feed tracking is available for the object.

[LifeSciMetadataFieldValueHistory on page 1434](#)

History is available for tracked fields of the object.

LifeSciMetadataRecord

Represents a configuration record for Life Sciences. This object is a child of LifeSciMetadataCategory. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the configuration is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsOrgLevel	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the configuration applies to every user in the org (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type <code>dateTime</code></p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
LifeScienceMetadataCategoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The category associated with the configuration. This field is a relationship field.</p> <p>Relationship Name LifeScienceMetadataCategory</p> <p>Relationship Type Lookup</p> <p>Refers To LifeSciMetadataCategory</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the configuration record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the record. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentMetadataRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The configuration's parent record. This field is a relationship field.</p> <p>Relationship Name ParentMetadataRecord</p> <p>Relationship Type Lookup</p> <p>Refers To LifeSciMetadataRecord</p>
RecordApiName	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Required. The API name of the configuration record.</p>
Type	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the configuration. Type defines a relationship between related or similar configurations.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeSciMetadataRecordFeed on page 1429](#)

Feed tracking is available for the object.

[LifeSciMetadataRecordHistory](#) on page 1434

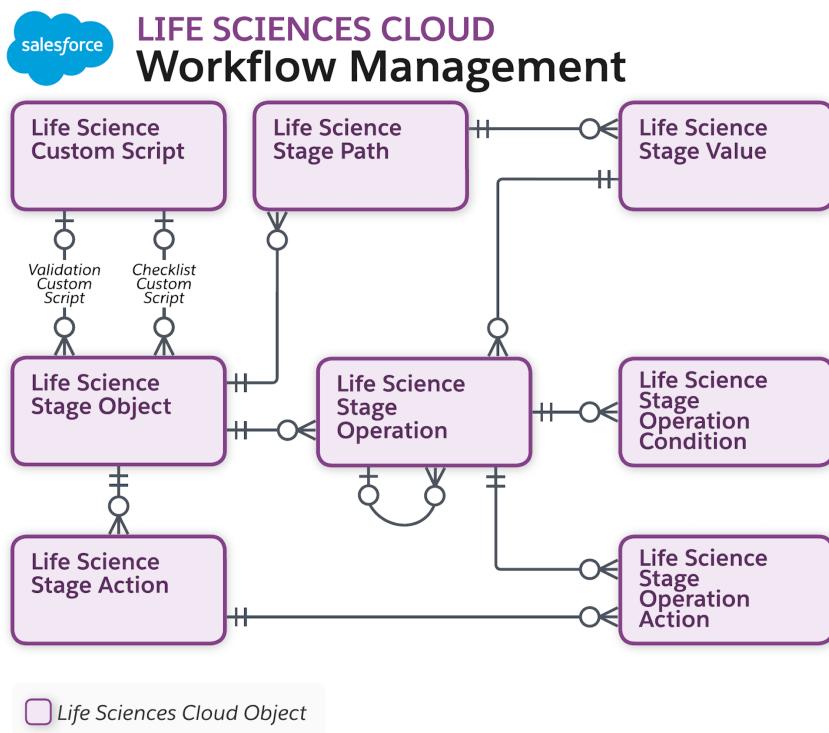
History is available for tracked fields of the object.

[LifeSciMetadataRecordShare](#) on page 1438

Sharing is available for the object.

Life Sciences Workflow Management

Configure workflows for Commercial Engagement objects. As users advance records through the steps in a workflow path, unique permissions apply based on each step and the conditions met for that step. Control data permissions for create, update, and delete operations, and control user actions based on a user's role in the workflow. Validate custom business rules and enforce a status transition action checklist. Configure additional actions such as calling Platform Events for both mobile and web platforms.



For more details and a larger image, visit the [Data Model Gallery](#).

[LifeScienceCustomScript](#)

Represents a custom script associated with a Life Science stage object within a workflow. Use a custom script to implement the validation logic for the stage object. This object is available in API version 65.0 and later.

[LifeSciStageAction](#)

Represents the configuration of an action performed as part of a workflow. This object is available in API version 65.0 and later.

[LifeSciStageObject](#)

Represents an object associated with a workflow. This object is available in API version 65.0 and later.

[LifeSciStageOperation](#)

Represents the criteria to evaluate in determining the applicable permissions and available actions for a specific step in a workflow. This object is available in API version 65.0 and later.

[LifeSciStageOperationAction](#)

Represents a junction between a stage operation and a stage action. This object defines a set of available stage actions in the context of a specific stage operation. This object is available in API version 65.0 and later.

[LifeSciStageOperationCond](#)

Represents a logical expression for applying an operation in a workflow. This object is available in API version 65.0 and later.

[LifeSciStagePath](#)

Represents information about the steps associated with a workflow and the path from one step in the workflow to the next. This object is available in API version 65.0 and later.

[LifeSciStageValue](#)

Represents an individual step within a workflow. This object is available in API version 65.0 and later.

LifeScienceCustomScript

Represents a custom script associated with a Life Science stage object within a workflow. Use a custom script to implement the validation logic for the stage object. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CodeText	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description The JavaScript code associated with a Lightning web component.</p>
ComponentName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The name of the Lightning web component that contains the custom script.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the Life Science custom script record.</p>

Field	Details
ObjectName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For a Mobile Page Layout Validation script, the name of the object associated with the custom script.</p>
OperationEventType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description For a Mobile Page Layout Validation script, the type of operation that the custom script supports.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • OnCreate • OnDelete • OnUpdate
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The type of custom script.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Checklist • MobilePageLayoutDataValidation • OrderValidation • Validation

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeScienceCustomScriptShare](#) on page 1438

Sharing is available for the object.

LifeSciStageAction

Represents the configuration of an action performed as part of a workflow. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
FieldApiName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The API name of the field that the stage action operates on.</p>
FieldValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value to assign to the field specified for Field API Name.</p>
Label	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A custom label to display on the stage action button.</p>
LifeSciStageObjectID	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The stage object associated with the stage action. This field is a relationship field.</p> <p>Relationship Name LifeSciStageObject</p> <p>Relationship Type Lookup</p> <p>Refers To LifeSciStageObject</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the stage action record.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Parameters	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description Additional parameters that apply to the stage action.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The type of action performed. Possible values are:</p> <ul style="list-style-type: none"> • Component • CustomAction • PlatformEvent

Field	Details
	<ul style="list-style-type: none"> RecordUpdate

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeSciStageActionShare](#) on page 1438

Sharing is available for the object.

LifeSciStageObject

Represents an object associated with a workflow. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ChecklistCustomScriptId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The custom script that provides a checklist. This field is a relationship field.</p> <p>Relationship Name ChecklistCustomScript</p> <p>Relationship Type Lookup</p> <p>Refers To LifeScienceCustomScript</p>
IsControlledByStagePath	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the object permissions are determined by a stage path (<code>true</code>) or not (<code>false</code>).</p>

Field	Details
Name	<p>The default value is <code>false</code>.</p>
ObjectName	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the stage object.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentObjRelaFieldName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the field that links the object to a parent object.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>

Field	Details
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
ValidationCustomScriptId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The custom script that enforces validation rules. This field is a relationship field.</p> <p>Relationship Name ValidationCustomScript</p> <p>Relationship Type Lookup</p> <p>Refers To LifeScienceCustomScript</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeSciStageObjectShare](#) on page 1438

Sharing is available for the object.

LifeSciStageOperation

Represents the criteria to evaluate in determining the applicable permissions and available actions for a specific step in a workflow. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CanCreate	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the user can create a record for the object associated with the workflow (<code>true</code>) or not (<code>false</code>) based on the evaluation of condition operations. The default value is <code>false</code>.</p>
CanDelete	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the user can delete an existing record for the object associated with the workflow (<code>true</code>) or not (<code>false</code>) based on the evaluation of condition operations. The default value is <code>false</code>.</p>
CanEdit	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the user can edit an existing record for the object associated with the workflow (<code>true</code>) or not (<code>false</code>) based on the evaluation of condition operations. The default value is <code>false</code>.</p>
CompoundRelationshipName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the object that the stage operation is configured for. For example, Attachment for an operation that applies to attachment records.</p>
LifeSciStageObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Required. The stage object associated with the stage path. This field is a relationship field.</p> <p>Relationship Name LifeSciStageObject</p> <p>Relationship Type Lookup</p> <p>Refers To LifeSciStageObject</p>
LifeSciStageValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The value of the stage path associated with the stage operation. This field is a relationship field.</p> <p>Relationship Name LifeSciStageValue</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeSciStageValue (the master object)</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the stage operation record.</p>
ParentStageOperationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the parent stage operation that this stage operation is a child of. This field is a relationship field.</p> <p>Relationship Name ParentStageOperation</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To LifeSciStageOperation</p>
Priority	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The priority of the stage operation in relation to other stage operations that can apply. A Priority of 1 indicates this operation is applied first.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of the stage operation record. Possible values are:</p> <ul style="list-style-type: none"> • CompoundRelationship • WorkflowPath

LifeSciStageOperationAction

Represents a junction between a stage operation and a stage action. This object defines a set of available stage actions in the context of a specific stage operation. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
DisplayOrder	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. The order in which the stage operation action is displayed within the list of available stage operation actions.</p>
LifeSciStageActionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The stage action that the stage operation action is configured for. This field is a relationship field.</p> <p>Relationship Name LifeSciStageAction</p> <p>Relationship Type Lookup</p> <p>Refers To LifeSciStageAction</p>
LifeSciStageOperationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The stage operation associated with the stage operation action. This field is a relationship field.</p> <p>Relationship Name LifeSciStageOperation</p>

Field	Details
	<p>Relationship Type Master-detail</p> <p>Refers To LifeSciStageOperation (the master object)</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the stage operation action record.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>

LifeSciStageOperationCond

Represents a logical expression for applying an operation in a workflow. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
LifeSciStageOperationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The stage operation associated with the stage operation condition. This field is a relationship field.</p> <p>Relationship Name LifeSciStageOperation</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeSciStageOperation (the master object)</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the stage operation condition record.</p>
ObjectFieldName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The field to evaluate.</p>
ObjectFieldValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value evaluated by the condition.</p>
Operator	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Required. The operator for the condition.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Equals • EqualsNull • In • NotEquals • NotEqualsNull • NotIn
SourceSystemIdentifier	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description</p> <p>An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nullable, Sort, Update</p> <p>Description</p> <p>The name of the source system for data integrations.</p>

LifeSciStagePath

Represents information about the steps associated with a workflow and the path from one step in the workflow to the next. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
FieldApiName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The field that specifies the steps in a workflow. This field tracks a record's progress through a workflow.</p>
LifeSciStageObjectID	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The stage object associated with the stage path. This field is a relationship field.</p> <p>Relationship Name LifeSciStageObject</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeSciStageObject (the master object)</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the stage path record.</p>
Parameters	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional parameters in JSON format.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
	<p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
StageObjectRecordTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The record type associated with the stage path. This field is a relationship field.</p> <p>Relationship Name StageObjectRecordType</p> <p>Relationship Type Lookup</p> <p>Refers To RecordType</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the stage path. Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive <p>The default value is Active.</p>

LifeSciStageValue

Represents an individual step within a workflow. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

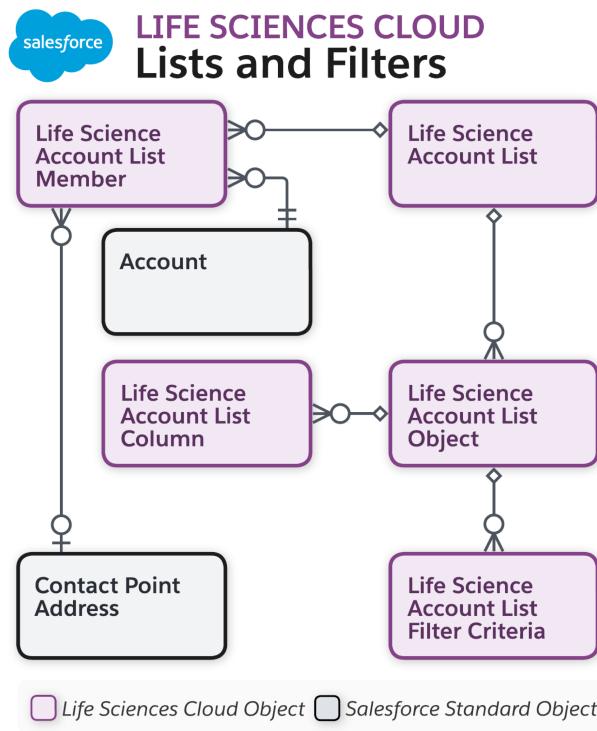
Fields

Field	Details
FieldValue	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. A specific step in a workflow. This value corresponds to a field value in the related stage path's Field API Name field.</p>
LifeSciStagePathId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The stage path associated with the stage value. This field is a relationship field.</p> <p>Relationship Name LifeSciStagePath</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeSciStagePath (the master object)</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the stage value record.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>

Field	Details
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>

Lists and Filters

Quickly identify a target group of accounts by using Lists and Filters. Static lists are manually-curated lists of accounts that remain fixed. Users can add or remove accounts individually. Dynamic filters apply to a list of accounts that updates based on user pre-defined criteria, and show sortable relevant fields that users add. By using dynamic filters, users can quickly associate the group of accounts with tailored actions, saving time and efforts by removing the need for repetitive manual updates. Lists and Filters streamline workflows by enabling users to identify, interact with, and act on relevant accounts.



For more details and a larger image, visit the [Data Model Gallery](#).

[LifeSciAccountListColumn](#)

Represents the information of the columns selected from accounts or its supported direct relationship objects in account filters. This object is available in API version 65.0 and later.

[LifeSciAccountListMember](#)

Represents information about account static lists and routine. This object is available in API version 65.0 and later.

[LifeSciAcctListFilterCrit](#)

Stores the rules and conditions derived from the Account object or its supported direct relationship objects to filter Life Sciences accounts. This object is available in API version 65.0 and later.

[LifeScienceAccountList](#)

Represents the type of account lists, such as filter, static list, and routine. This object is available in API version 65.0 and later.

[LifeScienceAccountListObject](#)

Represents the object that is referenced in the provider account list. This object is available in API version 65.0 and later.

LifeSciAccountListColumn

Represents the information of the columns selected from accounts or its supported direct relationship objects in account filters. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describesObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()`

LifeSciAccountListColumn isn't available in the Object Manager and can't be customized.

Fields

Field	Details
ColumnApiName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The API name of Life Science Account List Object field.</p>
DisplayOrder	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The display order of the Life Science Account List Column in Life Science Account List.</p>
LifeSciAccountListObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description Stores the Life Science Account List Object associated with Life Science Account List Column. This is a relationship field.</p> <p>Relationship Name LifeSciAccountListObject</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeScienceAccountListObject (the master object)</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of Life Science Account List Column.</p>
SortOrderType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The sort order of the Life Science Account List Column. Possible values are:<ul style="list-style-type: none"> • ASC • DESC </p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>

LifeSciAccountListMember

Represents information about account static lists and routine. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describesObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()`

LifeSciAccountListMember isn't available in the Object Manager and can't be customized.

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the identifier for the account associated with the static list or route. This is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
ContactPointAddressId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the location details of an event in a route. This is a relationship field.</p> <p>Relationship Name ContactPointAddress</p> <p>Refers To ContactPointAddress</p>
DurationInMinutes	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Stores the duration of the route event in minutes.</p>

Field	Details
LifeScienceAccountListId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Stores the provider account list, which is a static list or a route. This is a relationship field.</p> <p>Relationship Name LifeScienceAccountList</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeScienceAccountList (the master object)</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the Life Science Account List Member.</p>
ProviderVisitOffsetDay	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Stores the duration between the start date of the route and the date of the visit, in days.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>

Field	Details
VisitStartTime	<p>Type time</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The start time of an event in a route in the 24-Hour format.</p>

LifeSciAcctListFilterCrit

Stores the rules and conditions derived from the Account object or its supported direct relationship objects to filter Life Sciences accounts. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

LifeSciAcctListFilterCrit isn't available in the Object Manager and can't be customized.

Fields

Field	Details
ColumnApiName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The API name of Life Science Account List Object field.</p>
ColumnDataType	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of the Life Science Account List object field.</p>
ColumnValue	<p>Type textarea</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Stores the value against which the Life Science Account List object field is evaluated.</p>

Field	Details
LifeSciAccountListObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Stores the Life Science Account List object associated with the filter criteria. This field is a relationship field.</p> <p>Relationship Name LifeSciAccountListObject</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeScienceAccountListObject (the master object)</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of Life Science Account List Filter Criteria.</p>
OperatorType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Stores the information about an operator that will be used to evaluate a criteria. Possible values are:</p> <ul style="list-style-type: none"> • Contains • DoesNotContain—Does Not Contain • Equals • GreaterOrEqual—Greater Or Equal • GreaterThan—Greater Than • In • LessOrEqual—Less Or Equal • LessThan—Less Than • NotEqualTo—Not Equal To
SequenceNumber	<p>Type double</p>

Field	Details
	<p>Properties Create, Filter, Sort, Update</p> <p>Description The sequence number of the Life Science Account List Filter Criteria in the filter logic of the related account list.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>

LifeScienceAccountList

Represents the type of account lists, such as filter, static list, and routine. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()
```

LifeScienceAccountList isn't available in the Object Manager and can't be customized.

Fields

Field	Details
CurrentTimeZone	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The timezone of the user who creates or updates a route.</p>

Field	Details
IsMultiDayRoute	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the end date of the route is later than the start date, and the duration is more than a day (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsRoute	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether a set of visits for the provider accounts is a Route to be reused to quickly reschedule visits (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the Life Science Account list.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ReportIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The identifier of the report associated with the advanced filter.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which the data is loaded into the object.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Type of the Life Science account list. Possible values are:<ul style="list-style-type: none"> • AdvancedFilter—Advanced Filter • Filter • List </p>

Associated Object

This object has the following associated object. If the API version isn't specified, it's available in the same API versions as this object. Otherwise, it's available in the specified API version and later.

[LifeScienceAccountListShare on page 1438](#)

Sharing is available for the object.

LifeScienceAccountListObject

Represents the object that is referenced in the provider account list. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()`

LifeScienceAccountListObject isn't available in the Object Manager and can't be customized.

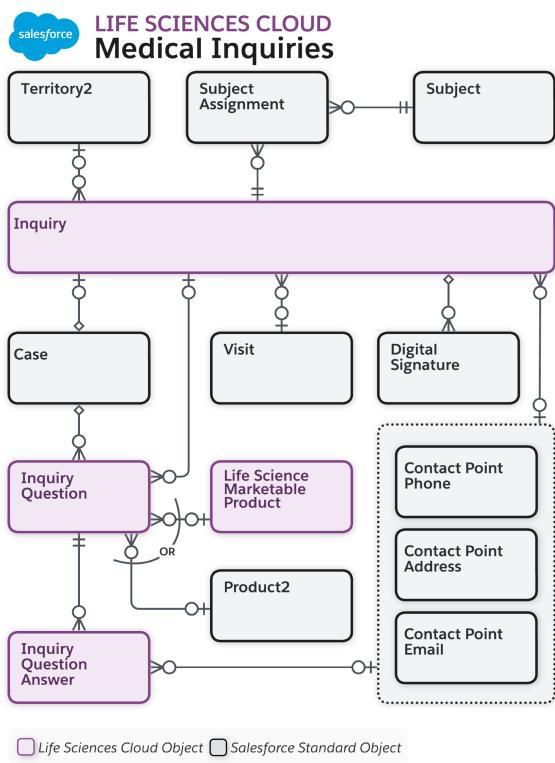
Fields

Field	Details
LifeScienceAccountListId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Stores the provider account list which is of filter <i>Type</i>. This field is a relationship field.</p> <p>Relationship Name LifeScienceAccountList</p> <p>Relationship Type Master-detail</p> <p>Refers To LifeScienceAccountList (the master object)</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the Life Science Account List object.</p>
ObjectName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Stores the information about the object used in the filter. Possible values are:</p> <ul style="list-style-type: none"> • Account • ContactPointAddress —Contact Point Address • ProviderAcctProductInfo—Provider Account Product Information • ProviderAcctTerritoryInfo—Provider Account Territory Information

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>

Medical Inquiries

Capture critical questions from healthcare professionals such as medical inquiries, adverse events, and product quality complaints with Medical Inquiries. Inquiries can come from multiple channels such as face-to-face visits, remote engagements, or contact centers. Inquiries require a quick and compliant response by the right individuals, typically medical experts like Medical Science Liaisons and Medical Communication Specialists. Medical Science Liaisons (MSLs) are skilled professionals who can answer scientific questions about drug details, interactions, off-label usage, and clinical product information. Medical Communication Specialists work in contact center environments and partner with MSLs to resolve inquiries, including incoming patient and consumer calls about product information, side effects, and adverse reactions.



For more details and a larger image, visit the [Data Model Gallery](#).

Inquiry

Represents the details of an inquiry logged by a sales representative or other user. This object is available in API version 65.0 and later.

InquiryQuestion

Represents a question asked by a healthcare professional (HCP) during an inquiry. This object is available in API version 65.0 and later.

InquiryQuestionAnswer

Represents the answer provided by the Medical Science Liaison (MSL) to the inquiry question. This object is available in API version 65.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: Subject](#)

[Object Reference for the Salesforce Platform: SubjectAssignment](#)

Inquiry

Represents the details of an inquiry logged by a sales representative or other user. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()`

Fields

Field	Details
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the case associated with the inquiry. Inquiry is an extension of the case. This is a unique field. This field is a relationship field.</p> <p>Relationship Name Case</p> <p>Relationship Type Master-detail</p> <p>Refers To Case (the master object)</p>
Comment	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The special handling instructions for Inquiry.</p>
DisclaimerText	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The disclaimer that was presented to the user for the Inquiry.</p>
InquiryChannelType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the channel through which the inquiry was made.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Email • Fax • Call Center • Field Request • Web
IsSignatureCopyRequested	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the signature copy is requested (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (<code>LastReferencedDate</code>) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the inquiry.</p>
Priority	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	Description
	The priority type of the inquiry.
	Possible values are:
	<ul style="list-style-type: none"> ● Yes ● No
ResponseContactPointRecId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The contact method through which the account receives the information.
	This field is a polymorphic relationship field.
	Relationship Name
	ResponseContactPointRec
	Refers To
	ContactPointAddress, ContactPointEmail, ContactPointPhone
SourceSystemIdentifier	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the record in the external system.
SourceSystemName	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the external system that generated the record.
SubmittedDateTime	Type
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date and time when the inquiry was submitted.
Territory2Id	Type
	reference

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The territory or organizational region associated with the inquiry. This field is a relationship field.</p> <p>Relationship Name Territory2</p> <p>Refers To Territory2</p>
TerritoryName	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Stores the name of the related territory when the territory is deleted. This field is only used for reporting purposes.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type or category of the inquiry. Possible values are:</p> <ul style="list-style-type: none"> • Efficacy • Safety • Others

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[InquiryChangeEvent on page 1426](#)

Change events are available for the object.

[InquiryFeed on page 1429](#)

Feed tracking is available for the object.

[InquiryHistory on page 1434](#)

History is available for tracked fields of the object.

InquiryQuestion

Represents a question asked by a healthcare professional (HCP) during an inquiry. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the case associated with the inquiry question. This field is a relationship field.</p> <p>Relationship Name Case</p> <p>Relationship Type Master-detail</p> <p>Refers To Case (the master object)</p>
Comment	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The additional details or context related to the inquiry question.</p>
InquiryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID associated with the inquiry. This field is a relationship field.</p> <p>Relationship Name Inquiry</p>

Field	Details
	<p>Refers To Inquiry</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name assigned to the inquiry question.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The product associated with the inquiry question. This field is a polymorphic relationship field.</p> <p>Relationship Name ProductReferenceRecord</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
Question	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description The inquiry question asked by the healthcare professional.</p>
ResponseStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The indicator for the sales representative to determine whether the question has been answered. Possible values are:</p> <ul style="list-style-type: none"> • Not Responded • Responded
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[InquiryQuestionChangeEvent on page 1426](#)

Change events are available for the object.

[InquiryQuestionFeed on page 1429](#)

Feed tracking is available for the object.

[InquiryQuestionHistory on page 1434](#)

History is available for tracked fields of the object.

[InquiryQuestionShare on page 1438](#)

Sharing is available for the object.

InquiryQuestionAnswer

Represents the answer provided by the Medical Science Liaison (MSL) to the inquiry question. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Comment	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The additional details related to the response provided for the inquiry question.</p>
InquiryQuestionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID associated with the inquiry question. This field is a relationship field.</p> <p>Relationship Name InquiryQuestion</p> <p>Refers To InquiryQuestion</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name assigned to the answer of the inquiry question.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Response	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description The answer or response provided to the inquiry question.</p>

Field	Details
ResponseContactPointRecId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contact method used to deliver the response. This field is a polymorphic relationship field.</p> <p>Relationship Name ResponseContactPointRec</p> <p>Refers To ContactPointAddress, ContactPointEmail, ContactPointPhone</p>
ResponseDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the response was provided.</p>
ResponseDurationDays	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of days taken to provide a response to the inquiry. This field is a calculated field.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[InquiryQuestionAnswerChangeEvent on page 1426](#)

Change events are available for the object.

[InquiryQuestionAnswerFeed on page 1429](#)

Feed tracking is available for the object.

[InquiryQuestionAnswerHistory on page 1434](#)

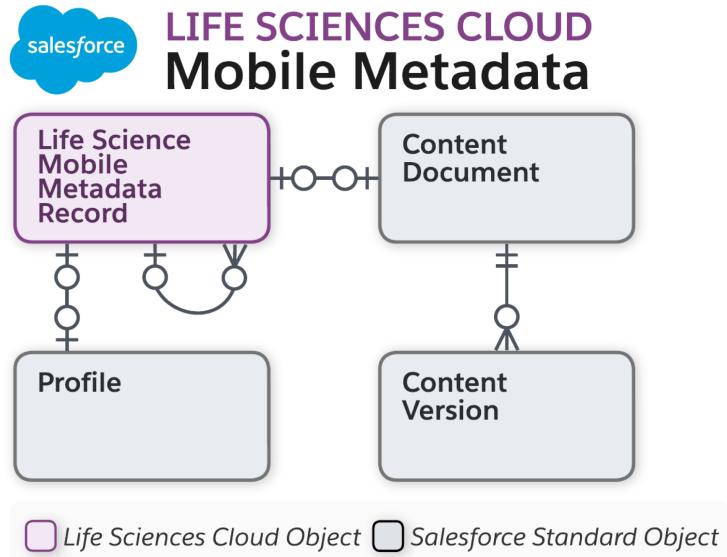
History is available for tracked fields of the object.

[InquiryQuestionAnswerShare on page 1438](#)

Sharing is available for the object.

Mobile Metadata

Mobile Metadata represents a metadata cache for the Life Sciences Cloud for Customer Engagement mobile application.



Last modified: Sep 9, 2025

For more details and a larger image, visit the [Data Model Gallery](#).

[LifeSciMobileMetadataRecord](#)

Represents the metadata created for the mobile application. This object is available in API version 65.0 and later.

LifeSciMobileMetadataRecord

Represents the metadata created for the mobile application. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ApplicationVersionName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the version name for the mobile application.</p>
ApplicationVersionNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the version number for the mobile application.</p>
ErrorLog	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Stores the error log.</p>
IntegrationErrorCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the error code that occurs while intergation.</p>
IntegrationErrorMessage	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the error message that occurs while intergation.</p>
IntegrationStatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Represents the status of the integration.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Error • New • Ok • Pending <p>The default value is <code>New</code>.</p>
<code>LastReferencedDate</code>	<p>Type</p> <p><code>dateTime</code></p> <p>Properties</p> <p>Filter, Nullable, Sort</p> <p>Description</p> <p>The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
<code>LastViewedDate</code>	<p>Type</p> <p><code>dateTime</code></p> <p>Properties</p> <p>Filter, Nullable, Sort</p> <p>Description</p> <p>The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
<code>MetadataDocumentId</code>	<p>Type</p> <p><code>reference</code></p> <p>Properties</p> <p>Create, Filter, Group, Nullable, Sort, Update</p> <p>Description</p> <p>Represents the content document associated with the metadata.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p><code>MetadataDocument</code></p> <p>Refers To</p> <p><code>ContentDocument</code></p>
<code>Name</code>	<p>Type</p> <p><code>string</code></p> <p>Properties</p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

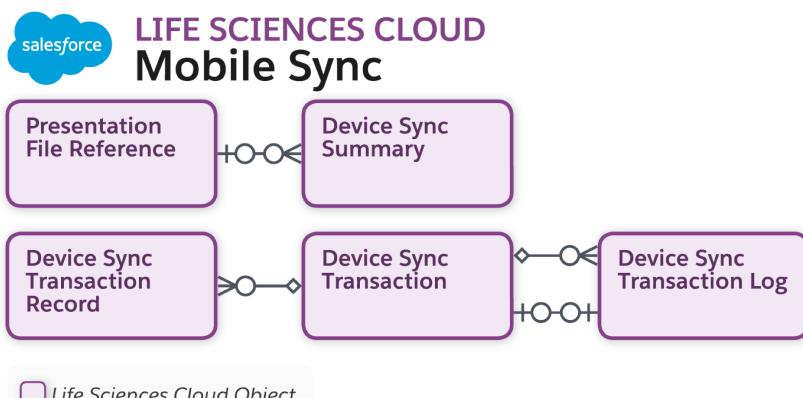
Field	Details
	Description
	The name of the metadata.
OwnerId	Type
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	This field is a polymorphic relationship field.
	Relationship Name
	Owner
	Refers To
	Group, User
ParentMobileMetadataRecId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Name of the parent metadata.
	This field is a relationship field.
	Relationship Name
	ParentMobileMetadataRec
	Refers To
	LifeSciMobileMetadataRecord
ProfileId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Represents the profile associated with metadata.
	This field is a relationship field.
	Relationship Name
	Profile
	Refers To
	Profile
SourceSystemIdentifier	Type
	string

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the system from which data is loaded into the object.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Represents the status of metadata. Possible values are:<ul style="list-style-type: none"> • Active • InProgress • Inactive • Loading • New • Processing • Published • Queued • Validating • Validated The default value is New.</p>
UpdateAvailableAlertDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the alert date to update the metadata.</p>
UpdateDueDate	<p>Type date</p>

Field	Details
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	Represents the due date to update the metadata.

Mobile Sync

The Mobile Sync objects store information about data transactions synchronized from the Life Sciences Cloud for Customer Engagement mobile application. This information includes individual data transactions and supporting summary and logging information.



For more details and a larger image, visit the [Data Model Gallery](#).

BatchJob

Represents an instance of a batch job that is either running and has been run. This object is available in Life Sciences Cloud API version 65.0 and later.

BatchJobPart

Represents one part of a batch job. This object is available in Life Sciences Cloud in API version 65.0 and later.

DeviceSyncSummary

Represents a summary of the synchronized data from a mobile device. This object is available in API version 65.0 and later.

DeviceSyncTransaction

Represents a set of related data items to synchronize from a mobile device. This object is available in API version 65.0 and later.

DeviceSyncTransactionLog

Represents a log with information about the synchronized data from a mobile device. This object is available in API version 65.0 and later.

DeviceSyncTransactionRecord

Represents a single data item to synchronize from a mobile device. This object is available in API version 65.0 and later.

BatchJob

Represents an instance of a batch job that is either running and has been run. This object is available in Life Sciences Cloud API version 65.0 and later.

Supported Calls

```
delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(),
search(), undelete()
```

Fields

Field	Details
AdditionalInformation	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information about the batch job. This field is available in API version 65.0 when Life Sciences Cloud is enabled.</p>
BatchJobDefinitionId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The unique identifier of the associated batch job definition. This is a relationship field.</p> <p>Relationship Name BatchJobDefinition</p> <p>Relationship Type Lookup</p> <p>Refers To BatchJobDefinition</p>
BatchJobDefinitionName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The developer name of the associated batch job definition.</p>
BatchJobPartCount	<p>Type int</p>

Field	Details
	<p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The count of the batch job parts. This field is available in API version 65.0 when Life Sciences Cloud is enabled.</p>
EndTime	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the batch job run was completed.</p>
ErrorDescription	<p>Type string</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The error message in case the batch job run failed.</p>
ExternalReference	<p>Type string</p> <p>Properties Filter, Group, Nullable, Sort</p> <p>Description The unique identifier of the process that's running or has run the batch job.</p>
IsDebugOn	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if debug mode is turned on. The default value is <code>false</code>.</p>
IsDebugRecipeDeleted	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The default value is <code>false</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed the batch job.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this item.</p>
Name	<p>Type string</p> <p>Properties Filter, Group, idLookup, Sort</p> <p>Description The name of the batch job.</p>
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Unique identifier of the user who initiated the batch job run. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProcessGroup	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The group or team for which the batch job is run.</p>

Field	Details
RetryCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of times the batch job run is automatically rerun in case it fails.</p>
RuntimeParameter	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description The values of the input variables that are used as filter criteria in a Batch Management job.</p>
StartTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the batch job run was started.</p>
Status	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description The status of the batch job run. Possible values are:</p> <ul style="list-style-type: none"> • Canceled • Completed • CompletedWithFailures • Failed • InProgress • Submitted
Type	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description The type of batch job that is run.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Calc Data Processing Engine • DecisionTableRefresh • Flow

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[BatchJobFeed](#) on page 1429

Change events are available for the object.

[BatchJobHistory](#) on page 1434

Feed tracking is available for the object.

BatchJobPart

Represents one part of a batch job. This object is available in Life Sciences Cloud in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
BatchJobId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The unique identifier of the associated batch job. This is a relationship field.</p> <p>Relationship Name BatchJob</p> <p>Relationship Type Lookup</p> <p>Refers To BatchJob</p>

Field	Details
EndTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the batch job part was processed.</p>
ErrorDescription	<p>Type string</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The error message in case the batch job part failed.</p>
FailedRecordCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of records that the batch job part couldn't process.</p>
FailedRecFile	<p>Type FILE</p> <p>Properties Filter, Group, Sort</p> <p>Description The file containing failed records downloaded as CSV, JSON, or TXT formats during a Data Processing Engine definition's run by using CRM Analytics (CRMA) or Data Cloud runtime.</p>
InputRecordCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of records that the batch job part must process.</p>
Name	<p>Type string</p> <p>Properties Filter, Group, idLookup, Sort</p>

Field	Details
	<p>Description The name of the batch job part.</p>
OutputRecordCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of records the batch job part has processed.</p>
ParentBatchJobPartId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The unique identifier of the part batch job part associated with the batch job part. This is a relationship field.</p> <p>Relationship Name ParentBatchJobPart</p> <p>Relationship Type Lookup</p> <p>Refers To BatchJobPart</p>
PrimarySrcObjProcessedCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of output records from the first object in a junction when the source of the batch job is a junction object. This field is available in API version 65.0 when Life Sciences Cloud is enabled.</p>
RetryCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of times the batch job part is automatically rerun in case it fails.</p>

Field	Details
SecondarySrcObjProcessedCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of output records from the second object in a junction when the source of the batch job is a junction object. This field is available in API version 65.0 when Life Sciences Cloud is enabled.</p>
StartTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the batch job part's run was started.</p>
Status	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description The status of the batch job part. Possible values are:<ul style="list-style-type: none"> • Canceled • Completed • Failed • InProgress </p>
Type	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of node in case the associated batch job is of the type Calc (Data Processing Engine). Possible values are:<ul style="list-style-type: none"> • Aggregate • Append • Compute • Custom • Datasync </p>

Field	Details
	<ul style="list-style-type: none"> • Filter • Forecast • Hierarchy • Join • Slice • Source • Transform • Writeback

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[BatchJobPartFeed](#) on page 1429

Change events are available for the object.

[BatchJobPartHistory](#) on page 1434

Feed tracking is available for the object.

DeviceSyncSummary

Represents a summary of the synchronized data from a mobile device. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AppVersion	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The version of the mobile application with data to sync.</p>
BundleIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	Description
	The ID of the mobile application bundle.
DataDownloadDuration	Type
	double
	Properties
	Filter, Nillable, Sort
	Description
	The duration of a download process in milliseconds.
	This field is a calculated field.
DeviceIdentifier	Type
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Required. The ID of the mobile device.
DownloadCreatedRecords	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The number of records created based on the downloaded records.
DownloadEnd	Type
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The timestamp when the download ended.
DownloadFreezeTime	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount of time during a download process that the sync is paused while the mobile application runs in the background.
DownloadStart	Type
	dateTime

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp when the download started.</p>
DownloadUpdatedRecords	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The number of records updated based on the downloaded records.</p>
DownloadedRecords	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The number of records downloaded.</p>
ErrorCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The error code.</p>
ErrorDetail	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The message to display when synchronization fails.</p>
FileReferenceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the file downloaded from the mobile device. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name FileReference</p> <p>Relationship Type Lookup</p> <p>Refers To PresentationFileReference</p>
IosVersion	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The version of the mobile device's operating system.</p>
IsDownloadCompleted	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the download completed (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsUploadCompleted	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the upload completed (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastSuccessfulUploadTime	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp of the most recent successful upload during the synchronization process.</p>
LastSyncTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp of the most recent synchronization process.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
MetadataDownloadDuration	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The duration of a metadata download process in milliseconds.</p>
MetadataDownloadStart	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp when the metadata download started.</p>
MetadataUpdated	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp of the most recent metadata update.</p>

Field	Details
MetadataVersion	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The version of the metadata.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description A system-generated identifier for the device sync summary record.</p>
Network	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of network used for the synchronization process.</p>
OfflineCreatedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. The timestamp when the current user created the record from the mobile device.</p>
OfflineLastModifiedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp when the current user last modified the record from the mobile device.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the record.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
S3Bucket	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Amazon S3 bucket used as a data source.</p>
SignalStrength	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description A measure of the quality of the connection to a mobile device.</p>
SyncErrorMessage	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The message to display when synchronization with an external system fails.</p>
SyncStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of a synchronization process with an external system. Possible values are:<ul style="list-style-type: none"> • Error • New • Ok • Pending </p>
SyncSummaryData	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Nillable, Update</p> <p>Description Additional synchronization data in JSON format.</p>
SyncTrigger	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The action or condition that triggered the synchronization process. Possible values are:</p> <ul style="list-style-type: none"> • Days Offline Limit • Forced • Initial • Manual • Metadata In Background • Pin • Territory Switch
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of synchronization performed. Possible values are:</p> <ul style="list-style-type: none"> • clm • data
UploadDuration	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The duration of an upload process in milliseconds. This field is a calculated field.</p>
UploadEnd	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp when the upload ended.</p>
UploadFreezeTime	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount of time during an upload process that the sync is paused while the mobile application runs in the background.</p>
UploadRecords	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The number or records uploaded during the synchronization process.</p>
UploadStart	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The number or records uploaded during the synchronization process.</p>
UserLocation	<p>Type location</p> <p>Properties Nillable</p> <p>Description The latitude and longitude coordinates of the mobile device during the synchronization process.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[DeviceSyncSummaryFeed on page 1429](#)

Feed tracking is available for the object.

DeviceSyncSummaryHistory on page 1434

History is available for tracked fields of the object.

DeviceSyncSummaryShare on page 1438

Sharing is available for the object.

DeviceSyncTransaction

Represents a set of related data items to synchronize from a mobile device. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ActualRecordsCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of data items retrieved from the mobile device and ready to sync.</p>
AppVersion	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The version of the mobile application with data to sync.</p>
CanCancDpndBeRetired	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether a retry operation is available for a dependent child transaction with a status of Canceled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. This field is a calculated field.</p>
Comments	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Nillable, Update</p> <p>Description Additional information about the transaction.</p>
DependentOfflineIdentifiers	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A comma-separated list of IDs that represent dependent transactions from the mobile device. The transactions are processed in the order in which they're listed.</p>
DeviceIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The ID of the mobile device.</p>
DevicePlatform	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The operating system of the mobile device. Possible values are:</p> <ul style="list-style-type: none"> • Android • MacOS • Windows • iOS
DeviceType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of mobile device, for example Phone or Tablet.</p>
ExpectedRecordCount	<p>Type int</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The expected number of data items to sync.</p>
IsBulk	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether to sync data items in bulk (<code>true</code>) or not (<code>false</code>). Synchronize data items in bulk only if there are no dependencies between transactions. The default value is <code>false</code>.</p>
IsDebugMode	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the sync runs in debug mode (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsOwnerPermissionEnforced	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether to respect the user permissions of the transaction record's owner during the sync (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsRealTime	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the transaction is eligible for real-time batch processing (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>

Field	Details
IsRetry	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the sync is a retry operation (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. This field is a calculated field.</p>
IsSimulatable	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the simulate operation applies to the transaction (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. This field is a calculated field.</p>
IsWithSignedItem	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the transaction includes data items with a signature (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastRunDebug	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID associated with the debug log attachment from the most recent sync.</p>

Field	Details
LastRunLogId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The transaction log from the most recent sync. If no errors occurred, the log is empty. This field is a relationship field.</p> <p>Relationship Name LastRunLog</p> <p>Relationship Type Lookup</p> <p>Refers To DeviceSyncTransactionLog</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
MetadataVersion	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The metadata version for data from the mobile device.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description A system-generated identifier for the device sync transaction.</p>
NumberOfFailedAttempts	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The number of sync failures for the transaction.</p>
OfflineTimestamp	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. The timestamp when the record from the mobile device occurred.</p>
OfflineUniqueIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. A unique identifier for the record from the mobile device.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Sequence	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Order position of the transaction in relation to other transactions to sync. Use sequence values to process device sync transactions in a specific order.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description Required. The sync status. Possible values are:</p> <ul style="list-style-type: none"> • Canceled • Failed • InProgress • Manual • New • Retry • Success • Waiting
TotSyncTranRecordCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of data items in the transaction. This field is a calculated field.</p>
TransactionSource	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The application that stores the data items to sync. Possible values are:</p> <ul style="list-style-type: none"> • CLM
UserDeviceData	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description User data from the mobile device.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

DeviceSyncTransactionFeed on page 1429

Feed tracking is available for the object.

DeviceSyncTransactionHistory on page 1434

History is available for tracked fields of the object.

DeviceSyncTransactionLog

Represents a log with information about the synchronized data from a mobile device. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describesObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
DeviceGenRecordIdentifier	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the record associated with the log entry.
DeviceSyncTransactionId	Type reference Properties Create, Filter, Group, Sort Description Required. The device sync transaction associated with the log. This field is a relationship field. Relationship Name DeviceSyncTransaction Relationship Type Master-detail Refers To DeviceSyncTransaction (the master object)
ExceptionCode	Type string

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The error code if the sync process encountered an error.</p>
ExceptionLocation	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The device sync transaction record associated with the log entry.</p>
ExceptionLog	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The raw log data.</p>
ExceptionType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of error associated with a log entry.</p>
FieldName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The field associated with a log entry.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
LogType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The type of log. Possible values are:<ul style="list-style-type: none">• Error</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the device sync transaction log record.</p>
ObjectName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of object associated with the log.</p>
SyncStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The sync status. Possible values are:<ul style="list-style-type: none">• Error• New• Ok</p>

Field	Details
	<ul style="list-style-type: none"> Pending
Value	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The data item associated with the log entry.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[DeviceSyncTransactionLogFeed](#) on page 1429

Feed tracking is available for the object.

[DeviceSyncTransactionLogHistory](#) on page 1434

History is available for tracked fields of the object.

DeviceSyncTransactionRecord

Represents a single data item to synchronize from a mobile device. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
DeviceSyncTransactionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The device sync transaction associated with the data item to sync. This field is a relationship field.</p> <p>Relationship Name DeviceSyncTransaction</p>

Field	Details
	<p>Relationship Type Master-detail</p> <p>Refers To DeviceSyncTransaction (the master object)</p>
FieldValues	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The content of the data item to sync. If the data item is an attachment or a delete operation, this field is empty.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. A system-generated identifier for the device sync transaction record.</p>
ObjectName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The type of object associated with the data item to sync.</p>

Field	Details
OfflineCreatedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. The timestamp when the current user created the record from the mobile device.</p>
OfflineUniqueIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. A unique identifier for the record from the mobile device.</p>
OperationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The type of sync operation to perform. Possible values are:<ul style="list-style-type: none"> • delete • insert • update </p>
ProcessedRecordIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID of the processed record after the synchronization process is complete.</p>
RecordIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID of the record with the data item to sync, either a custom identifier for a new record or a standard identifier for an existing record.</p>

Field	Details
RelatedRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The record associated with the device sync transaction record. This field is a polymorphic relationship field.</p> <p>Relationship Name RelatedRecord</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
Sequence	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Order position of the data item in relation to other data items associated with the same device sync transaction. Use sequence values to preserve the order of data items in the record received from the mobile device.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The sync status. Possible values are: <ul style="list-style-type: none"> • Preparing • Ready </p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[DeviceSyncTransactionRecordFeed](#) on page 1429

Feed tracking is available for the object.

[DeviceSyncTransactionRecordHistory](#) on page 1434

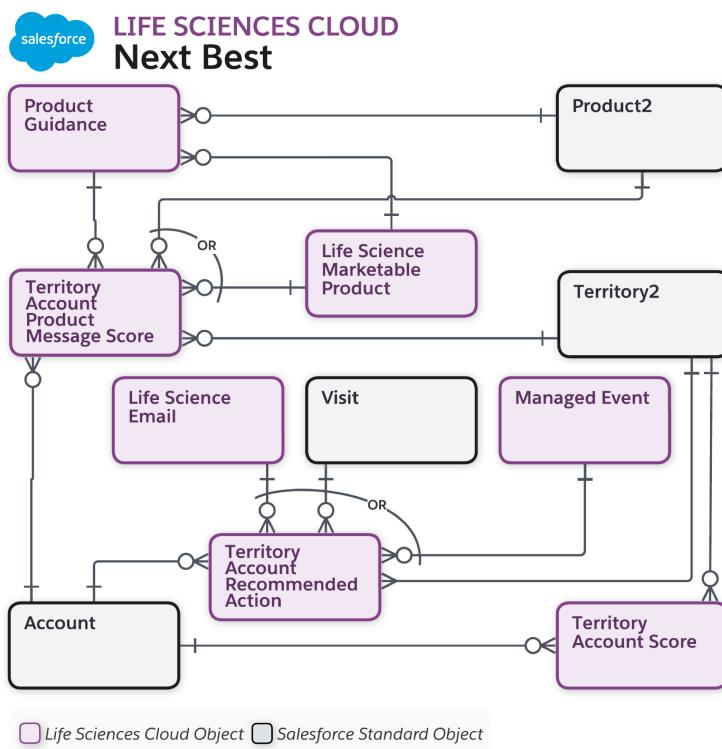
History is available for tracked fields of the object.

[DeviceSyncTransactionRecordShare on page 1438](#)

Sharing is available for the object.

Next Best

The Next Best intelligent component is an AI-predictive tool that helps sales representatives to prioritize and personalize their customer interactions. Next Best Customer, Next Best Action, and Next Best Message together comprise the Next Best intelligent family. Next Best Customer surfaces the top accounts within a territory. Next Best Action suggests timely actions on a weekly basis, such as visits and emails. Next Best Message provides tailored and relevant messages for each product associated with the account. These recommendations are dynamically generated based on the real-time data, allowing field sales teams to act quickly or dismiss as needed. Next Best recommendations guide users to concentrate on the right accounts at the right time in the right channel to deliver the right message, fostering strong customer relationships.



For more details and a larger image, visit the [Data Model Gallery](#).

[TerritoryAccountScore](#)

Stores the intelligent provider scores to help users better recognize the top accounts in their territories. This object is available in API version 65.0 and later.

[TerritoryAcctProdMsgScore](#)

Stores the intelligent product message score on the territory accounts to identify the most relevant message to deliver in their visits. This object is available in API version 65.0 and later.

[TerritoryAcctRcmdAction](#)

Represents the recommended engagement actions for the account at territory level. This object is available in API version 65.0 and later.

TerritoryAccountScore

Stores the intelligent provider scores to help users better recognize the top accounts in their territories. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the account associated with the territory account score. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description The auto generated name of the territory account score record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the territory account score record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Rank	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The final rank of the territory account based on the total score.</p>
ScoreExplainabilityInfo	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The details about various metrics used to evaluate the territory account score.</p>
ScoreOriginName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external calculation agent used by the user to calculate the territory account product message score based on various metrics.</p>
SnoozeUntilDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The date and time until when the territory account is snoozed.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The territory of the account associated with the territory account score. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>
TotalScore	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The final score for the territory account.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

TerritoryAccountScoreChangeEvent on page 1426

Change events are available for the object.

TerritoryAccountScoreFeed on page 1429

Feed tracking is available for the object.

TerritoryAccountScoreHistory on page 1434

History is available for tracked fields of the object.

TerritoryAccountScoreShare on page 1438

Sharing is available for the object.

TerritoryAcctProdMsgScore

Stores the intelligent product message score on the territory accounts to identify the most relevant message to deliver in their visits. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the account associated with the territory account product message score. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The auto generated name of the territory account product message score record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the territory account product message score record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductGuidanceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The information displayed in the product messages that can assist or guide users when working with the product. This field is a relationship field.</p> <p>Relationship Name ProductGuidance</p> <p>Refers To ProductGuidance</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The product associated with the territory account product message score. This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
Rank	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The final rank of the product message calculated using the associated account and territory.</p>
ScoreExplainabilityInfo	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The details of the various metrics used to evaluate the territory account product message score.</p>
ScoreOriginName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external calculation agent used by the user to calculate the territory account product message score based on various metrics.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The territory associated with the territory account product message score. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>
TotalScore	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The final score of the product message calculated by the external using the associated account and territory.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[TerritoryAcctProdMsgScoreChangeEvent on page 1426](#)

Change events are available for the object.

[TerritoryAcctProdMsgScoreFeed on page 1429](#)

Feed tracking is available for the object.

[TerritoryAcctProdMsgScoreHistory on page 1434](#)

History is available for tracked fields of the object.

[TerritoryAcctProdMsgScoreShare on page 1438](#)

Sharing is available for the object.

TerritoryAcctRcmdAction

Represents the recommended engagement actions for the account at territory level. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account associated with the territory account recommended action. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
ActionCreationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the recommended action was created and referenced.</p>
ActionReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The action reference record associated with the recommended action. This field is a polymorphic relationship field.</p> <p>Relationship Name ActionReferenceRecord</p> <p>Refers To LifeScienceEmail, MngEvent, Visit</p>
ActionType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Specifies the type of recommended action.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • LifeScienceEmail • MngEvent • Visit <p>The default value is <code>Visit</code>.</p>
Comment	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The additional information about the recommended action, such as AI-generated reasons for skipping recommended actions or other comments.</p>
DueDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The due date for completing the recommended action.</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type</p> <p>string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The auto generated name of the territory account recommended action record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SkipReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the reason for skipping the recommended activity.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
Status	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the current state of the recommended activity. Possible values are:</p> <ul style="list-style-type: none"> • Completed • Current • PastDue—Past Due • Skipped • Upcoming <p>The default value is Upcoming.</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The territory associated with the territory account recommended action. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[TerritoryAcctRcmdActionChangeEvent on page 1426](#)

Change events are available for the object.

[TerritoryAcctRcmdActionFeed on page 1429](#)

Feed tracking is available for the object.

[TerritoryAcctRcmdActionHistory on page 1434](#)

History is available for tracked fields of the object.

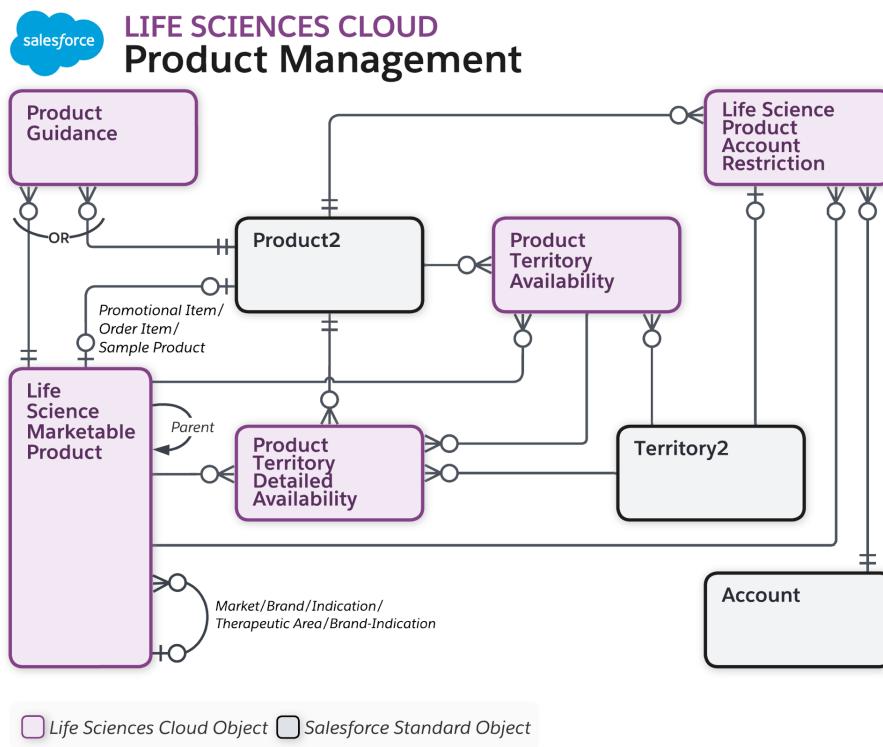
[TerritoryAcctRcmdActionShare on page 1438](#)

Sharing is available for the object.

Product Management

Product Management centers on products, which are essential for business activities within the system. Products are modeled in a hierarchy that can mirror a company's SKU structure and are used in scenarios such as selling to pharmacies and delivering messages and samples to healthcare professionals. Product alignment is key to ensuring that users have access to products and related data to perform their jobs effectively. To maintain compliance and adherence to regulatory standards, user access to products can be controlled. Users can access and discuss only products available to them and not restricted for the target customer.

Life Sciences Marketable Product stores information about all of the products that a Life Science company manufactures, markets, sells, or competes with. This information can include any type of product or product area that is discussed or detailed, including brands, indications, and therapeutic areas. Store additional information about physical products that are sampled, ordered, or distributed as promotional items in the Product2 object.



For more details and a larger image, visit the [Data Model Gallery](#).

LifeSciMarketableProduct

Represents information about all products a Life Science company manufactures, markets, sells, or competes with, including brands, indications, and therapeutic areas. It also represents additional information on physical products that are sampled, ordered, or distributed as promotional items. This object is available in API version 65.0 and later.

LifeSciProductAcctRstrc

Represents information about product use limitations for an account. Product restrictions help facilitate compliance with product detailing and sampling regulations and company policies. This object is available in API version 65.0 and later.

ProductGuidance

Represents information about key product messages, product objectives, or other information that can assist or guide users when working with the product. This object is available in API version 65.0 and later.

[ProductTerritoryAvailability](#)

Represents information about the products aligned to territories. This object is available in API version 65.0 and later.

[ProductTerritoryDtlAvailability](#)

Represents the details of the products aligned to territories. This object is an extension of the information stored in the Product Territory Availability object and is used for internal purposes. This object is available in API version 65.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: Product2](#)

LifeSciMarketableProduct

Represents information about all products a Life Science company manufactures, markets, sells, or competes with, including brands, indications, and therapeutic areas. It also represents additional information on physical products that are sampled, ordered, or distributed as promotional items. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
BoxQuantityInner	Type double Properties Create, Filter, Nillable, Sort, Update Description The number of product units within each pack inside a box.
BoxQuantityOuter	Type double Properties Create, Filter, Nillable, Sort, Update Description The number of product units inside a box.
BusinessGroup	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Represents the business group within which a product is marketed.

Field	Details
DefaultDistributionQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Represents the default quantity of the product that is distributed.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the product.</p>
DistributionMethod	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Represents the way in which a product is distributed to a provider. Possible values are:</p> <ul style="list-style-type: none"> • Drop • DropAndShip • Ship
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the product expires.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product is active (true) or not (false). The default value is <code>false</code>.</p>

Field	Details
IsAvlForSamplingAllocation	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product is available to be allocated for sampling to healthcare providers (true) or not (false). The default value is <code>false</code>.</p>
IsCompetitorProduct	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the life sciences marketable product is a competitor product (true) or not (false). The default value is <code>false</code>.</p>
IsControlledSubstance	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether a product is classified as a controlled substance (true) or not (false). The default value is <code>false</code>.</p>
IsMsgReqdForProvVisit	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether at least one product guidance message is required when the product is being detailed to a healthcare provider during a visit (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
LaunchDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date the product is available on the market. For example, the date a product is available for sampling to healthcare providers.</p>
Manufacturer	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the company that manufactures the product.</p>
MaxSampleOrderQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The maximum quantity of a sample that can be ordered.</p>
MinSampleOrderQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The minimum quantity of a sample that can be ordered.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the life sciences marketable product.</p>
NationalDrugCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The National Drug Code of the Product. This value is a unique identifier, typically defined by a government authority.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentBrandProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent product of type Brand that the life science marketable product belongs to. This field is a relationship field.</p> <p>Relationship Name ParentBrandProduct</p> <p>Refers To LifeSciMarketableProduct</p>
ParentIndicationId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The indication associated with the parent brand product within the product hierarchy. This field links a Brand-Indication to its parent indication. This field is a relationship field.</p> <p>Relationship Name ParentIndication</p> <p>Refers To LifeSciMarketableProduct</p>
ParentProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent product that the life science marketable product belongs to. This field is a relationship field.</p> <p>Relationship Name ParentProduct</p> <p>Refers To LifeSciMarketableProduct</p>
ParentTherapeuticAreaId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The indication associated with the parent brand product within the product hierarchy. This field links products to a parent therapeutic area. This field is a relationship field.</p> <p>Relationship Name ParentTherapeuticArea</p> <p>Refers To LifeSciMarketableProduct</p>
ProductCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The product code, which is typically an abbreviated version of the product name.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product associated with the life sciences marketable product. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
ProductMetadata	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The additional information about related products that are not aligned to a specific territory. This field helps in identifying on-label and off-label discussions.</p>
ProductSpecificationType	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Represents the type of specification that is being created.</p>
ProductionCost	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The cost incurred by the manufacturer to produce the product.</p>
SignatureRequirementLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	Description
	Specifies the product's signature requirement discussed with a healthcare provider during a visit.
	Possible values are:
	<ul style="list-style-type: none"> • Mandatory • NotRequired • Optional
SortOrder	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The default sort order for products.
SourceSystem	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the system from which data is loaded into the object.
SourceSystemIdentifier	Type string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	The identifier of the record in the source system.
StartDate	Type date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date from when the product is valid.
StateDstrLicenseCategory	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	<p>Description Specifies the State Distributor License (SDL) category of the product. Possible values are:</p> <ul style="list-style-type: none"> • CategoryII • CategoryIII
TherapeuticArea	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the therapeutic area for which the product is intended, such as cardiology or dermatology.</p>
TherapeuticClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the therapeutic class for which the product is intended, such as narcotics or pain relief. This value is determined by the therapeutic area.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of the life sciences marketable product. Possible values are:</p> <ul style="list-style-type: none"> • Brand • BrandIndication • Indication • Market • Product • TherapeuticArea

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

LifeSciMarketableProductChangeEvent on page 1426

Change events are available for the object.

LifeSciMarketableProductFeed on page 1429

Feed tracking is available for the object.

LifeSciMarketableProductHistory on page 1434

History is available for tracked fields of the object.

LifeSciMarketableProductShare on page 1438

Sharing is available for the object.

LifeSciProductAcctRstrc

Represents information about product use limitations for an account. Product restrictions help facilitate compliance with product detailing and sampling regulations and company policies. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()`

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort, Update Description The account to which the product restriction applies. This field is a relationship field. Relationship Name Account Refers To Account
LastReferencedDate	Type dateTime Properties Filter, Nullable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product account restriction.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product being restricted for an account. This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
Description	The territory for which the restriction applies. This field is a relationship field.
Relationship Name	Territory
Refers To	Territory2

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeSciProductAcctRstrcChangeEvent on page 1426](#)

Change events are available for the object.

[LifeSciProductAcctRstrcShare on page 1438](#)

Sharing is available for the object.

Product Guidance

Represents information about key product messages, product objectives, or other information that can assist or guide users when working with the product. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ContentText	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The product guidance message or objective.</p>
EffectiveEndDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The date after which the guidance is no longer available.</p>
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the product guidance takes effect.</p>
GroupName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The group name used to categorize messages.</p>
GroupSequence	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The sequence in which group are displayed.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product guidance is active (true) or not (false). The default value is <code>false</code>.</p>
IsReactionSelectionHidden	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether reaction capture is hidden (true) or not (false). The default value is <code>false</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the product guidance.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Priority	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default priority order of product guidance messages.</p>

Field	Details
ProductReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product that's associated with the product guidance. This field is a polymorphic relationship field.</p> <p>Relationship Name ProductReferenceRecord</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
Reactions	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A semicolon-delimited list of custom reactions captured by the user.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
Type	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of the product guidance. Possible values are:</p> <ul style="list-style-type: none"> • Message

Field	Details
	<ul style="list-style-type: none"> • Objective • Other <p>The default value is <code>Message</code>.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProductGuidanceChangeEvent on page 1426](#)

Change events are available for the object.

[ProductGuidanceFeed on page 1429](#)

Feed tracking is available for the object.

[ProductGuidanceHistory on page 1434](#)

History is available for tracked fields of the object.

[ProductGuidanceShare on page 1438](#)

Sharing is available for the object.

ProductTerritoryAvailability

Represents information about the products aligned to territories. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `update()`, `upsert()`

Fields

Field	Details
<code>AlignmentType</code>	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the alignment type of a product in relation to a territory. A product can be made directly available to a territory, inherited, or specifically excluded.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Inclusion • Territory Exclusion • Territory and Subordinates Inclusion <p>The default value is <code>Inclusion</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product territory availability.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product for which the territory availability is defined.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
Purpose	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the purpose of the product territory availability. Possible values are:<ul style="list-style-type: none">• VisitThe default value is <code>Visit</code>.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Indicates the status of the product territory alignment record. Possible values are:<ul style="list-style-type: none">• Active• Draft• Inactive• QueuedThe default value is <code>Draft</code>.</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The territory for which the product availability is defined. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>

Field	Details
UsageType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the usage type of the product territory availability.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • LifeScience <p>The default value is LifeScience.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProductTerritoryAvailabilityChangeEvent on page 1426](#)

Change events are available for the object.

[ProductTerritoryAvailabilityFeed on page 1429](#)

Feed tracking is available for the object.

[ProductTerritoryAvailabilityShare on page 1438](#)

Sharing is available for the object.

ProductTerritoryAvailability

Represents the details of the products aligned to territories. This object is an extension of the information stored in the Product Territory Availability object and is used for internal purposes. This object is available in API version 65.0 and later.

Supported Calls

`describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `update()`, `upsert()`

Fields

Field	Details
IsActive	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product territory detailed availability is active (true) or not (false).</p> <p>The default value is <code>false</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product territory detailed availability.</p>
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProdTerritoryAvailabilityId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The product territory availability associated with the product territory detailed availability.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name ProdTerritoryAvailability</p> <p>Refers To ProductTerritoryAvailability</p>
ProductId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The product for which the territory availability is defined . This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
ProductType	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The type of the product associated with the product territory detailed availability.</p>
Purpose	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the purpose of the product territory detailed availability. Possible values are:<ul style="list-style-type: none">• VisitThe default value is <code>Visit</code>.</p>
RelatedTerritoryId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Stores the ID of the territory associated with the product territory detailed availability.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name RelatedTerritory</p> <p>Refers To Territory2</p>
SortOrder	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The order in which product territories are displayed.</p>
TerritoryId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The territory for which the product availability is defined .</p> <p>This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>
UsageType	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the usage type of the product territory detailed availability.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • LifeSciences <p>The default value is LifeSciences.</p>

Associated Objects

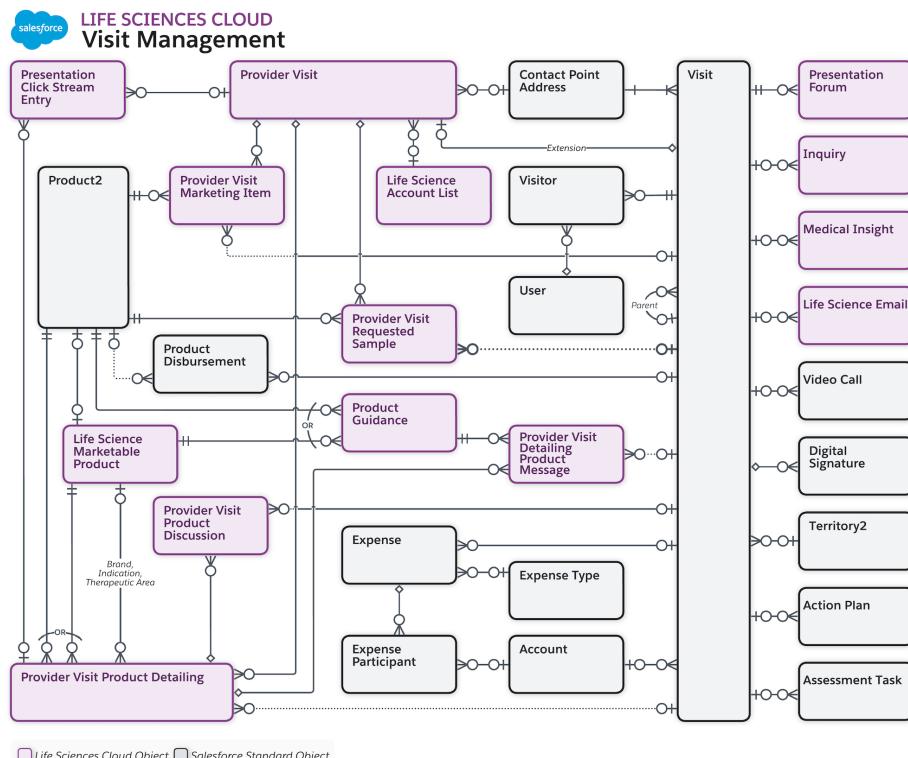
This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProductTerrDtlAvailabilityShare](#) on page 1438

Sharing is available for the object.

Visit Management

Visit Management supports the call planning and execution process in the Life Sciences Industry. Field users can engage compliantly with accounts through various channels such as face-to-face, phone, and remote. With integrated intelligent content and remote engagement capabilities, field sales representatives and medical teams can plan, execute, and report on visits to healthcare providers and healthcare organizations. Information entered in a provider visit typically includes product details, product messages, presentations, marketing items and samples. Provider Visit Management also supports various compliance requirements regarding sample eligibility, sample limits and allocations, and e-signature capture.



Life Sciences Cloud Object Salesforce Standard Object

Last modified: Sep 24, 2025

For more details and a larger image, visit the [Data Model Gallery](#).

DigitalSignature

Life Sciences Cloud fields extend the standard DigitalSignature object to represent a signature. This object is available in API version 65.0 and later.

Expense

Life Sciences Cloud fields extend the standard Expense object to represent expenses related to a visit. This object is available in API version 65.0 and later.

ExpenseParticipant

Represents a participant in an expense and is used in expense allocation. This object is available in API version 65.0 and later..

ExpenseType

The ExpenseType object is a category that's used to classify an expense that occurs. This object is available in API version 65.0 and later.

[PresentationForum](#)

Represents the details of the forums (call, meetings, order) where the presentation was presented. This object is available in API version 65.0 and later.

[ProviderVisit](#)

Represents the details of a field user's visit to a health care provider. For example, a sales representative visiting a health care provider to discuss product usage and efficacy to enhance adoption. This object is available in API version 65.0 and later.

[ProviderVisitChangedEvent](#)

Represents an event for a data manipulation operation performed on a provider visit record. This object is available in API version 65.0 and later.

[ProviderVisitDtlProductMsg](#)

Represents delivered messages and reactions from the health care provider for products discussed during a visit. This object is available in API version 65.0 and later.

[ProviderVisitMarketingItem](#)

Represents marketing items provided to the health care provider as part of a visit. This object is available in API version 65.0 and later.

[ProviderVisitProdDetailing](#)

Represents products discussed during a visit with a health care provider, including key details such as the product brand, therapeutic area, and other relevant information. This object is available in API version 65.0 and later.

[ProviderVisitProdDiscussion](#)

Represents any additional notes or information regarding the products discussed during a visit to a health care provider. This object is available in API version 65.0 and later.

[ProviderVisitRqstSample](#)

Represents sample products requested to be shipped to the health care provider during a visit. This object is available in API version 65.0 and later.

[Visit](#)

Track information related to a field rep's visit to a health care provider.

[Visitor](#)

Represents the sales reps performing visits.

DigitalSignature

Life Sciences Cloud fields extend the standard DigitalSignature object to represent a signature. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete()`

Fields

Field	Details
DeviceOs	Reserved for future use.

Field	Details
DeviceType	Reserved for future use.
DigitalSignatureRequestId	Reserved for future use.
Geolocation	<p>Type location</p> <p>Properties Nillable</p> <p>Description Captures the GPS location at the time the signature was captured, providing a record of where the signing occurred.</p>
GeolocationMissingReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Identifies the reason why GPS data was not collected when the signature was captured. Possible values are:</p> <ul style="list-style-type: none"> • BadData • DeviceRestricted • Offline • UserRestricted
GeolocationTimestamp	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort</p> <p>Description Captures the exact time when GPS data was collected, especially in mobile offline cases where the GPS collection time differs from the signature capture time.</p>
IsSignatureCopyRequested	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the user has requested a copy of the signed document.</p>
ParentId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p>
	<p>Description Reference to a related record, such as a visit or inquiry. This field is a polymorphic relationship field.</p>
	<p>Relationship Name Parent</p>
	<p>Relationship Type Master-detail</p>
	<p>Refers To CommSubConsentCmplSsnsht, Inquiry, Visit</p>
WebBrowser	Reserved for future use.

SEE ALSO:

[Object Reference for the Salesforce Platform: DigitalSignature](#)

Expense

Life Sciences Cloud fields extend the standard Expense object to represent expenses related to a visit. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. The amount of the expense.</p>
ExpenseNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description The name of the expense.</p>
ExpenseOriginId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The associated provider visit record. This field is a polymorphic relationship field.</p> <p>Relationship Name ExpenseOrigin</p> <p>Refers To Visit</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description If this value is null, and <code>LastReferencedDate</code> is not null, the user accessed this record or list view indirectly.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of the expense. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p>

Field	Details
	<p>Refers To Group, User</p>
RelatedExpenseType	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The associated expense type record. This field is a relationship field.</p> <p>Relationship Name RelatedExpenseType</p> <p>Refers To ExpenseType</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external source system from which the record was imported.</p>
TransactionDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The date when the expense is incurred for the provider visit.</p>

ExpenseParticipant

Represents a participant in an expense and is used in expense allocation. This object is available in API version 65.0 and later..

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The amount of the expense allocated to the participant.</p>
ExpenseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description This field is a relationship field.</p> <p>Relationship Name Expense</p> <p>Relationship Type Master-detail</p> <p>Refers To Expense (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>

Field	Details
	If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the participant.</p>
ParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of participant. This field is a polymorphic relationship field.</p> <p>Relationship Name Participant</p> <p>Refers To Account, Contact</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[expenseParticipantFeed on page 1429](#)

Feed tracking is available for the object.

[expenseParticipantHistory on page 1434](#)

History is available for tracked fields of the object.

ExpenseType

The ExpenseType object is a category that's used to classify an expense that occurs. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of the expense type.</p>
EffectiveEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Effective end date of the expense type.</p>
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Effective start date of the expense type.</p>
ExpenseAvailabilityType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates the modules for which the expense type is available Possible values are:</p> <ul style="list-style-type: none"> • ProviderVisit
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the expense type.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ExpenseTypeFeed on page 1429](#)

Feed tracking is available for the object.

[ExpenseTypeHistory on page 1434](#)

History is available for tracked fields of the object.

[ExpenseTypeShare on page 1438](#)

Sharing is available for the object.

PresentationForum

Represents the details of the forums (call, meetings, order) where the presentation was presented. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ForumReferenceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. A reference to either the visit or account record that represents the forum in which the presentation was delivered. This field is a polymorphic relationship field.</p> <p>Relationship Name ForumReference</p> <p>Refers To Account, Visit</p>
Geolocation	<p>Type location</p> <p>Properties Nillable</p> <p>Description Captures the geographical location where the presentation was opened.</p>

Field	Details
GeolocationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the location was last successfully acquired.</p>
GeolocationLatitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Captures the geographical latitude where the presentation was opened.</p>
GeolocationLongitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Captures the geographical longitude where the presentation was opened.</p>
GeolocationMissingReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies why the location could not be retrieved, with possible reasons. Possible values are:</p> <ul style="list-style-type: none"> • BadData • DeviceRestricted • Offline • UserRestricted
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. A unique identifier for the record, automatically generated in the format PF-{0000000000}.</p>
PresentationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. Indicates the reference to the presentation. This field is a relationship field.</p> <p>Relationship Name Presentation</p> <p>Relationship Type Master-detail</p> <p>Refers To Presentation (the master object)</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p>

Field	Details
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The name of the source system for data integrations.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PresentationForumFeed on page 1429](#)

Feed tracking is available for the object.

[PresentationForumHistory on page 1434](#)

History is available for tracked fields of the object.

ProviderVisit

Represents the details of a field user's visit to a health care provider. For example, a sales representative visiting a health care provider to discuss product usage and efficacy to enhance adoption. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The account associated with the provider visit. Derived from the related visit (Visit object). This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
AdditionalInformation	<p>Type textarea</p>

Field	Details
	Properties
	Create, Nillable, Update
	Description
	Information captured on signature capture or provider visit submission for auditability including account name.
BookingStatus	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The booking status of the provider visit.
	Possible values are:
	<ul style="list-style-type: none"> • Accepted • Proposed • Rejected • Retrieved
BookingStatusReason	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Indicates the reason for a rejection of the provider visit.
Channel	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the channel type for the provider visit. Derived from the related visit (Visit object).
ComplianceStatements	Type
	textarea
	Properties
	Create, Nillable, Update
	Description
	Compliance statements displayed to the field user.
GeoLocOnSubmit	Type
	location

Field	Details
	Properties
	Nillable
	Description
	The GPS location captured upon the provider visit submission.
GeoLocOnSubmitLatitude	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The GPS latitude captured upon the provider visit submission.
GeoLocOnSubmitLongitude	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The GPS longitude captured upon the provider visit submission.
HasAttachments	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	On submission, indicates if the provider visit has attachments.
	The default value is <code>false</code> .
InvitationEmailAddress	Type
	email
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Email address used to send an invitation for a remote visit.
InvitationEmailBouncedRsn	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Reason for a bounced email invitation for a remote visit.

Field	Details
InvitationEmailStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Shows the status of an attendee's email invitation for a remote visit.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Accepted • Bounced • Declined • Pending • Sent • Tentative
IsAdhocProviderVisit	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the provider visit was initiated spontaneously, without prior scheduling. The default value is <code>false</code>.</p>
IsBackdatedSbmtVldSkipped	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Specifies whether the backdated validation is skipped on provider visit submission. The default value is <code>false</code>.</p>
IsBackdatedSgnVldSkipped	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Specifies whether the backdated validation is skipped. The default value is <code>false</code>.</p>
IsConfirmed	<p>Type boolean</p>

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether a confirmation is received from the provider for the scheduled date and time of the planned visit. The default value is <code>false</code> .
<code>IsOfflineModeSignature</code>	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates that the provider visit is signed offline and online validation isn't applied to this visit. The default value is <code>false</code> .
<code>IsOfflineModeSubmit</code>	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates that provider visit is submitted offline and online validation isn't applied to this visit. The default value is <code>false</code> .
<code>IsRecordOwner</code>	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates whether the user is the owner of the provider visit record. The default value is <code>false</code> . This field is a calculated field.
<code>IsSignedAwayFrmAllowDstn</code>	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates that the provider visit is signed outside the allowed distance. The default value is <code>false</code> .

Field	Details
IsSubmitAwayFrmAllowDstn	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates that the provider visit is submitted outside the allowed distance. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
LifeScienceAccountListId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The account list that's associated with the provider visit. This field is a relationship field.</p> <p>Relationship Name LifeScienceAccountList</p> <p>Refers To LifeScienceAccountList</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description The name of the provider visit.</p>
NextProviderVisitObjective	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Next visit objective for the provider.</p>
NextPrvdVisitObjectiveType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Next visit objective type for the provider.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PhysicalFormIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the physical form signed instead of an electronic signature.</p>
PlannedEndTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	Description
	The planned end date and time for the provider visit. Derived from the related visit (Visit object).
PlannedStartTime	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The planned start date and time for the provider visit. Derived from the related visit (Visit object).
PreProviderVisitNotes	Type textArea
	Properties
	Create, Nillable, Update
	Description
	The notes derived from the next provider visit objectives of the previous provider visit submitted on the account by the user.
ProvVisitDlvrSampleCount	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The record count of delivered samples linked to the provider visit. Derived from the related visit (Visit object).
ProvVisitMktItemCount	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The record count of marketing items linked to the provider visit. Derived from the related visit (Visit object).
ProvVisitProdDtlCount	Type double
	Properties
	Create, Filter, Nillable, Sort, Update

Field	Details
	Description
	The record count of detailing products linked to the provider visit. Derived from the related visit (Visit object).
ProvVisitReqSampleCount	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The record count of requested samples linked to the provider visit. Derived from the related visit (Visit object).
RemoteAttendanceStatus	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Indicates whether an attendee joined the remote call or missed it.
	Possible values are:
	<ul style="list-style-type: none"> • Attended • NoShow
RemoteChannelServiceProvider	Reserved for future use.
RemoteSessionStatus	Reserved for future use.
RemoteSessionStatusReason	Reserved for future use.
ShippingAddressId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The shipping address of the requested samples for the provider visit.
	This field is a relationship field.
	Relationship Name
	ShippingAddress
	Refers To
	ContactPointAddress
SourceSystemIdentifier	Type string

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
Status	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nullable, Restricted picklist, Sort</p> <p>Description The status of the provider visit. Derived from the related visit (Visit object). Possible values are:</p> <ul style="list-style-type: none"> • Abandoned • Completed • Error • InProgress • None • Planned • Unscheduled <p>The default value is <code>Planned</code>.</p>
SubmitDelayReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The reason for a delay in submitting the provider visit.</p>
SubmitDelayReasonType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p>

Field	Details
	<p>Description The reason type for a delay in submitting the provider visit.</p>
SubmitGeolcMissingReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Reason populated when GPS is not captured upon the provider visit submission. Possible values are:</p> <ul style="list-style-type: none"> • BadData • DeviceRestricted • Offline • UserRestricted
SubmitGeolocationTimestamp	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date and time when GPS is captured upon the provider visit submission.</p>
TerritoryId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The associated territory record. Derived from the related visit (Visit object). This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>
TerritoryName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the territory associated with the provider visit.</p>

Field	Details
VisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The associated visit record. This field is unique within your organization. This field is a relationship field.</p> <p>Relationship Name Visit</p> <p>Relationship Type Master-detail</p> <p>Refers To Visit (the master object)</p>
VisitSubmitDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time when the provider visit is submitted.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderVisitChangeEvent on page 1426](#)

Change events are available for the object.

[ProviderVisitFeed on page 1429](#)

Feed tracking is available for the object.

[ProviderVisitHistory on page 1434](#)

History is available for tracked fields of the object.

ProviderVisitChangedEvent

Represents an event for a data manipulation operation performed on a provider visit record. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `describeSObjects()`

Fields

Field	Details
OperationType	<p>Type picklist</p> <p>Properties Create, Nillable, Restricted picklist</p> <p>Description Specifies the type of the data manipulation operation.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Delete • Insert • Update • Upsert
SourceType	<p>Type picklist</p> <p>Properties Create, Nillable, Restricted picklist</p> <p>Description Specifies the source type of the event.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Mobile • Web
UserIdentifier	<p>Type string</p> <p>Properties Create, Nillable</p> <p>Description The user ID of the Provider Visit record owner. It indicates the user who either created or last updated the visit.</p>
VisitID	<p>Type reference</p> <p>Properties Create, Nillable</p> <p>Description The ID of the Provider Visit record that triggered the event. It links the event to a specific visit. This field is a relationship field.</p> <p>Relationship Name Visit</p>

Field	Details
	Refers To
	Visit

ProviderVisitDtlProductMsg

Represents delivered messages and reactions from the health care provider for products discussed during a visit. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AdditionalInformation	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Information captured on signature capture or provider visit submission for auditability.</p>
CapturedReaction	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Provider's reaction to detailing product message.</p>
IsGeneratedFromPresentation	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is generated based on an intelligent content presentation. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
MessageRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Reference to detailing product message record. This field is a relationship field.</p> <p>Relationship Name MessageRecord</p> <p>Refers To ProductGuidance</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the provider visit detailing product message.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProviderVisitId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Required. Associated provider visit record. This field is a relationship field.</p> <p>Relationship Name ProviderVisit</p> <p>Refers To ProviderVisit</p>
ProviderVisitProductDtlId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. Associated provider visit product detailing record. This field is a relationship field.</p> <p>Relationship Name ProviderVisitProductDtl</p> <p>Relationship Type Master-detail</p> <p>Refers To ProviderVisitProdDetailing (the master object)</p>
ReactionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Provider's reaction to detailing product message. Possible values are:</p> <ul style="list-style-type: none"> • Negative • Neutral

Field	Details
	<ul style="list-style-type: none"> Positive
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
VisitId	<p>Type reference</p> <p>Properties Filter, Group, Nullable, Sort</p> <p>Description Required. Associated visit record. This field is a relationship field.</p> <p>Relationship Name Visit</p> <p>Refers To Visit</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderVisitDtlProductMsgFeed](#) on page 1429

Feed tracking is available for the object.

[ProviderVisitDtlProductMsgHistory](#) on page 1434

History is available for tracked fields of the object.

[ProviderVisitDtlProductMsgShare](#) on page 1438

Sharing is available for the object.

ProviderVisitMarketingItem

Represents marketing items provided to the health care provider as part of a visit. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AdditionalInformation	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description Information captured on signature capture or provider visit submission for auditability.</p>
IsSignatureCaptured	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the signature has been captured. The default value is false.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description Name of the provider visit marketing item.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The marketing item disbursed to the provider. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
ProviderVisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The associated provider visit record. This field is a relationship field.</p> <p>Relationship Name ProviderVisit</p> <p>Relationship Type Master-detail</p> <p>Refers To ProviderVisit (the master object)</p>

Field	Details
Quantity	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. Quantity of marketing items disbursed to the provider.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
VisitId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Required. The associated visit record. This field is a relationship field.</p> <p>Relationship Name Visit</p> <p>Refers To Visit</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderVisitMarketingItemFeed on page 1429](#)

Feed tracking is available for the object.

[ProviderVisitMarketingItemHistory on page 1434](#)

History is available for tracked fields of the object.

ProviderVisitMarketingItemShare on page 1438

Sharing is available for the object.

ProviderVisitProdDetailing

Represents products discussed during a visit with a health care provider, including key details such as the product brand, therapeutic area, and other relevant information. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AdditionalInformation	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Information captured on signature capture or provider visit submission for auditability including product name.</p>
BrandId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The brand discussed during the provider visit. This field is a polymorphic relationship field.</p> <p>Relationship Name Brand</p> <p>Refers To LifeSciMarketableProduct</p>
IsGeneratedFromPresentation	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is generated based on an intelligent content presentation. The default value is <code>false</code>.</p>

Field	Details
IsOffLabel	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates that the product detailing is off-label. The default value is <code>false</code>.</p>
IsSignatureCaptured	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the signature was captured. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the provider visit product detailing.</p>

Field	Details
NextPrvdVisitObjectives	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Next visit objectives for the provider regarding the detailing product.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Priority	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Indicates the order in which the product information is delivered to the provider.</p>
ProductHierarchyName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The generated name of the brand, indication and therapeutic area combination discussed during the provider visit.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The product discussed during the provider visit. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Product</p> <p>Refers To LifeSciMarketableProduct, Product2</p>
ProductIndicationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indication discussed during the provider visit. This field is a polymorphic relationship field.</p> <p>Relationship Name ProductIndication</p> <p>Refers To LifeSciMarketableProduct</p>
ProductTherapeuticAreaId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Therapeutic area discussed during the provider visit. This field is a polymorphic relationship field.</p> <p>Relationship Name ProductTherapeuticArea</p> <p>Refers To LifeSciMarketableProduct</p>
ProviderVisitAccountId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The account associated with the provider visit. Derived from the related visit (ProviderVisit object). This field is a relationship field.</p> <p>Relationship Name ProviderVisitAccount</p> <p>Refers To Account</p>

Field	Details
ProviderVisitChannel	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Specifies the channel type for the provider visit. Derived from the related visit (ProviderVisit object).</p>
ProviderVisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The associated provider visit record. This field is a relationship field.</p> <p>Relationship Name ProviderVisit</p> <p>Relationship Type Master-detail</p> <p>Refers To ProviderVisit (the master object)</p>
ProviderVisitStatus	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status of the provider visit. Derived from the related visit (ProviderVisit object). Possible values are:</p> <ul style="list-style-type: none"> • Abandoned • Completed • Error • InProgress • None • Planned • Unscheduled <p>The default value is Planned.</p>
ProviderVisitTerritoryId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The territory associated with the provider visit. Derived from the related visit (ProviderVisit object). This field is a relationship field.</p> <p>Relationship Name ProviderVisitTerritory</p> <p>Refers To Territory2</p>
PrvdVisitPlannedEndTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The planned end date and time for the provider visit. Derived from the related visit (ProviderVisit object).</p>
PrvdVisitPlannedStartTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The planned start date and time for the provider visit. Derived from the related visit (ProviderVisit object).</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>

Field	Details
VisitId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Required. Associated visit record. This field is a relationship field.</p> <p>Relationship Name Visit</p> <p>Refers To Visit</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderVisitProdDetailingFeed](#) on page 1429

Feed tracking is available for the object.

[ProviderVisitProdDetailingHistory](#) on page 1434

History is available for tracked fields of the object.

[ProviderVisitProdDetailingShare](#) on page 1438

Sharing is available for the object.

ProviderVisitProdDiscussion

Represents any additional notes or information regarding the products discussed during a visit to a health care provider. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AdditionalInformation	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p>

Field	Details
	<p>Description Information captured on signature capture or provider visit submission for auditability.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the provider visit product discussion.</p>
Note	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description Required. Notes associated with the product discussion.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProviderVisitId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The provider visit associated with the product discussion. This field is a relationship field.</p> <p>Relationship Name ProviderVisit</p> <p>Refers To ProviderVisit</p>
ProviderVisitProductDtlId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The detailing product associated with the product discussion. This field is a relationship field.</p> <p>Relationship Name ProviderVisitProductDtl</p> <p>Relationship Type Master-detail</p> <p>Refers To ProviderVisitProdDetailing (the master object)</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
VisitId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Required. Associated visit record. This field is a relationship field.</p> <p>Relationship Name Visit</p> <p>Refers To Visit</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderVisitProdDiscussionFeed on page 1429](#)

Feed tracking is available for the object.

[ProviderVisitProdDiscussionHistory on page 1434](#)

History is available for tracked fields of the object.

[ProviderVisitProdDiscussionShare on page 1438](#)

Sharing is available for the object.

ProviderVisitRqstSample

Represents sample products requested to be shipped to the health care provider during a visit. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ActualDeliveryDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the samples are delivered to the provider.</p>
AdditionalInformation	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Information captured on signature capture or provider visit submission for auditability.</p>
DeliveryStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Delivery status of the sample order.</p>
DistributorName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the distributor for the samples.</p>
ExpectedDeliveryDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Expected delivery date of the samples.</p>
IsCalcForDirToPhysician	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	Description
	Indicates if the samples have been calculated for territory product quantity allocation.
	The default value is <code>false</code> .
IsSignatureCaptured	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the signature was captured.
	The default value is <code>false</code> .
IsTrackedForSmp1TrxnLimit	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the samples are tracked in sample limit transaction.
	The default value is <code>false</code> .
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastShippedQuantity	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Indicates the number of items in the previous shipment.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view.

Field	Details
	If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the provider visit requested sample.</p>
OrderTrackingIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Tracking number of the sample shipment.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The sample product requested by the provider. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>

Field	Details
ProviderVisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The associated provider visit record. This field is a relationship field.</p> <p>Relationship Name ProviderVisit</p> <p>Relationship Type Master-detail</p> <p>Refers To ProviderVisit (the master object)</p>
RequestedQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Requested quantity of samples.</p>
ShippedQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Shipped quantity of the samples.</p>
ShippingDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the samples are shipped.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description An external ID from the source system for data integrations.</p>

Field	Details
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
ViolationType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description The type of violation.</p>
VisitId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Required. The associated visit record. This field is a relationship field.</p> <p>Relationship Name Visit</p> <p>Relationship Type Master-detail</p> <p>Refers To Visit (the master object)</p>
WarningMessage	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Warning message displayed for the validation of territory product quantity allocation.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderVisitRqstSampleHistory on page 1434](#)

History is available for tracked fields of the object.

Visit

Track information related to a field rep's visit to a health care provider.

Special Access Rules

In Life Sciences Cloud, Visit is used for Customer Engagement.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account that is associated with a visit.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
Channel	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The channel of the visit. Possible values are:</p> <ul style="list-style-type: none"> • Email • In-Person • Phone • Remote • SMS • WeChat • WhatsApp <p>The default value is <code>In-Person</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Field	Details
ParentVisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description If this visit is the child of a larger group visit, this field is used to provide a link to that visit. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name ParentVisit</p> <p>Refers To Visit</p>
PlaceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the location that sales reps visit.</p> <p>Relationship Name Place</p> <p>Refers To Address, ContactPointAddress, Location, RetailStore</p>
PlannedVisitStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the visit is expected to start.</p>
SignatureType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description The type of the signature. Possible values are:</p> <ul style="list-style-type: none"> • Digital • Physical

Field	Details
This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.	
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of a visit. Possible values are:</p> <ul style="list-style-type: none"> • Completed • Planned <p>The default value is <code>Planned</code>.</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID of the territory for this visit. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>

Visitor

Represents the sales reps performing visits.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

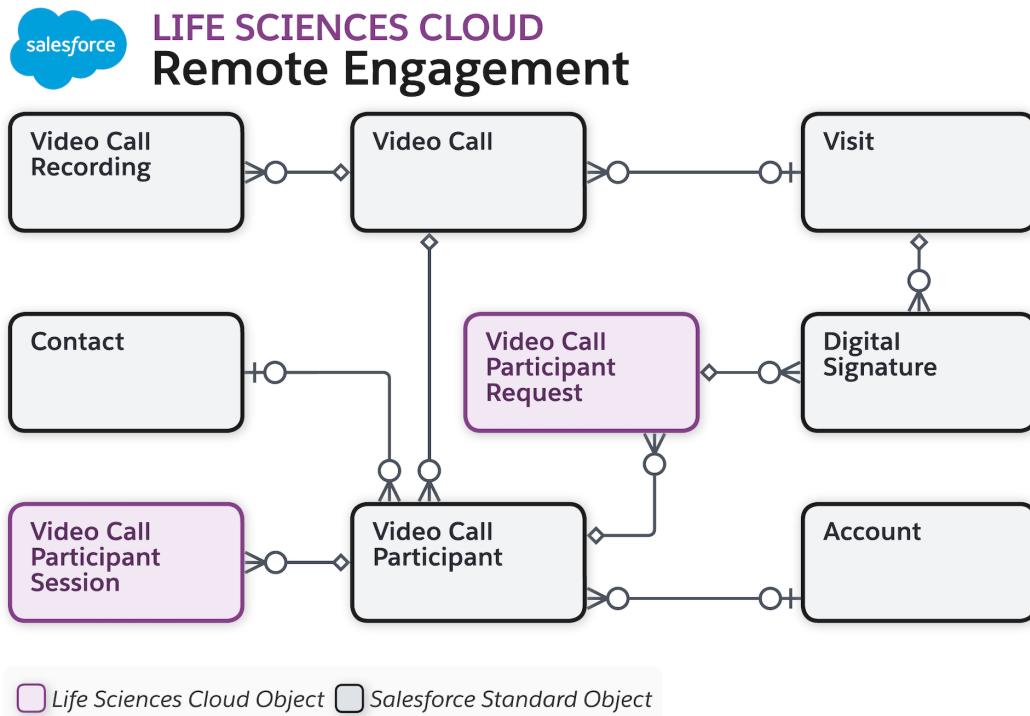
Field	Details
AssigneeId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description Lookup to the person assigned as the visitor. Such as the employee attending the visit with the field user. This field is a polymorphic relationship field.</p> <p>Relationship Name Assignee</p> <p>Relationship Type Master-detail</p> <p>Refers To</p> <ul style="list-style-type: none"> • Contact • User
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the visitor.</p>
VisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
Description	Lookup to the Visit record this visitor is associated with. This field is a relationship field.
Relationship Name	Visit
Refers To	Visit

Remote Engagement

Enable sales and medical teams to connect with healthcare professionals virtually across multiple channels, with interactive and compliant content, data collection capabilities, and technology flexibility. The benefits of Remote Engagement include accessibility, compliance with regulations like GDPR, increased productivity, convenience in scheduling, and the ability to create interactions through video, voice, and digital assets. Users can plan, launch, conduct, and finish remote calls or meetings, by using tracking, screen sharing, remote signatures, and feedback capture.



For more details and a larger image, visit the [Data Model Gallery](#).

DigitalSignatureRequest

Reserved for future use.

[VideoCall](#)

Standard and custom fields extend the standard VideoCall object to represent a video call. The VideoCall object stores important information about the video session, including the meeting ID for connection, video call duration, associated participants, linked recordings, and vendor-specific attributes, ensuring a seamless and organized approach to managing video call data. This object is available in API version 65.0 and later.

[VideoCallParticipant](#)

Standard and custom fields extend the standard VideoCallParticipant object to represent a participant of a video call. Participant information can come from the video call provider (for example, Zoom), or Salesforce. This object is available in API version 65.0 and later.

[VideoCallRecording](#)

Standard and custom fields extend the standard VideoCallRecording object to represent a recording from a video call, such as a video recording, a voice recording, or a transcript. This object is available in API version 65.0 and later.

[VideoCallPtcpRequest](#)

Represents information about remote signature request for video call participants, including key details such as status, type, and other relevant information for tracking and managing the signature process. This object is available in API version 65.0 and later.

[VideoCallPtcpSession](#)

Represents information about participants during remote sessions, including duration, device type, operating system, and browser. It logs reconnections separately, offering a comprehensive view of each participant's experience. This object is available in API version 65.0 and later.

DigitalSignatureRequest

Reserved for future use.

VideoCall

Standard and custom fields extend the standard VideoCall object to represent a video call. The VideoCall object stores important information about the video session, including the meeting ID for connection, video call duration, associated participants, linked recordings, and vendor-specific attributes, ensuring a seamless and organized approach to managing video call data. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()`

Fields

Field	Details
AcceptanceTimeStamp	Type dateTime Properties Create, Filter, Nillable, Sort

Field	Details
	Description
	<p>The timestamp when the user consented for uploading the video call recording. Reserved for future use.</p>
	<p>This field is available in API version 62.0 and later.</p>
ConsentedUserId	Type
	<p>reference</p>
	Properties
	<p>Create, Filter, Group, Nillable, Sort</p>
	Description
	<p>The ID of the user who consented to upload the video call recording. Reserved for future use.</p>
	<p>This field is available in API version 62.0 and later.</p>
	<p>This field is a relationship field.</p>
	Relationship Name
	<p>ConsentedUser</p>
	Refers To
	<p>User</p>
Description	Type
	<p>textarea</p>
	Properties
	<p>Nillable</p>
	Description
	<p>Description of the video call. Typically, the sales rep enters the description.</p>
DurationInSeconds	Type
	<p>int</p>
	Properties
	<p>Filter, Group, Nillable, Sort</p>
	Description
	<p>The video call duration in seconds.</p>
EndDateTime	Type
	<p>dateTime</p>
	Properties
	<p>Filter, Nillable, Sort</p>
	Description
	<p>The date and time when the video call ended, in universal time coordinated (UTC).</p>

Field	Details
EventId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the event record associated with this video call. Reserved for future use. This is a relationship field.</p> <p>Relationship Name Event</p> <p>Relationship Type Lookup</p> <p>Refers To Event</p>
ExternalId	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The unique ID of the video call, sent by the video call provider.</p>
HostId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the user who hosted the meeting. This is a relationship field.</p> <p>Relationship Name Host</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
IntelligenceScore	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The Einstein Intelligence score for the video call. Video calls with higher scores are likely to contain more relevant information. For example, video calls where product names and competitor names are mentioned tend to have a higher score.</p>
IsCallCoachingIncluded	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether Einstein Conversation Insights is available for this org and this user (<code>true</code>) or not (<code>false</code>).</p>
IsDiarizationOptIn	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether optimal speaker separation (diarization) is opted in (<code>true</code>) or not (<code>false</code>) for the call.</p>
IsRecorded	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the video call was recorded (<code>true</code>) or not (<code>false</code>).</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<code>LastReferencedDate</code>) but not viewed it.</p>
MeetingType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of the call. Reserved for future use. This field is available in API version 61.0 and later. Possible values are:</p> <ul style="list-style-type: none"> • EXTERNAL—A call with two or more participants (default). • MANUAL—A call that is manually uploaded. • SINGLE_USER—A single user call where the sales rep is evaluated and coached.
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort</p> <p>Description The name of the video call. Typically entered by the sales rep.</p>
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort, Update</p> <p>Description The ID of the user who created the video call. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
RelatedRecordId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The provider visit associated with the video call. This field is a polymorphic relationship field.</p> <p>Relationship Name RelatedRecord</p> <p>Refers To Account, Case, Contact, Lead, Opportunity, Visit</p>
StartTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the video call started, in universal time coordinated (UTC).</p>
TranscribedLanguage	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The language that is transcribed for this video call.</p>
UsageType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the usage type of the video call. Possible values are:<ul style="list-style-type: none"> • Life Sciences – Remote Engagement • Sales Cloud </p>
VendorMeetingKey	<p>Type string</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The vendor's ID for this video call.</p>

Field	Details
VendorMeetingUuid	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The vendor's unique identifier for this video call.</p>
VendorName	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The name of the vendor providing the video call software.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • AMAZON CHIME • INTERNAL • ZOOM • googlemeet • msteams • twilio

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[VideoCallChangeEvent on page 1426](#)

Change events are available for the object.

[VideoCallFeed on page 1429](#)

Feed tracking is available for the object.

[VideoCallShare on page 1438](#)

Sharing is available for the object.

SEE ALSO:

[Object Reference for the Salesforce Platform: VideoCall](#)

VideoCallParticipant

Standard and custom fields extend the standard `VideoCallParticipant` object to represent a participant of a video call. Participant information can come from the video call provider (for example, Zoom), or Salesforce. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Email	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nullable, Sort</p> <p>Description The email address of the participant, from the video call provider.</p>
ExternalAttendeeIdentifier	<p>Type string</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The unique identifier used to identify the participant in a video call.</p>
ExternalUserIdentifer	<p>Type string</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The unique passcode assigned to the participant for joining the video call.</p>
IsAllowed	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the participant is admitted into the video call (true) or not (false). The default value is <code>false</code>.</p>
JoinDateTime	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the participant joins the video call.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.</p>
LeaveDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the participant leaves the video call.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The name of the video call participant.</p>
RelatedAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Salesforce ID of the account record for this participant.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name RelatedAccount</p> <p>Refers To Account</p>
RelatedPersonId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Salesforce ID of the user, lead, or contact record for this participant. This field is a polymorphic relationship field.</p> <p>Relationship Name RelatedPerson</p> <p>Refers To Contact, Lead, User</p>
VideoCallId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The identifier of the video call. This field is a relationship field.</p> <p>Relationship Name VideoCall</p> <p>Relationship Type Master-detail</p> <p>Refers To VideoCall (the master object)</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[VideoCallParticipantChangeEvent on page 1426](#)

Change events are available for the object.

SEE ALSO:

[Object Reference for the Salesforce Platform: VideoCallParticipant](#)

VideoCallRecording

Standard and custom fields extend the standard `VideoCallRecording` object to represent a recording from a video call, such as a video recording, a voice recording, or a transcript. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

```
create(), delete(), describeObjects(), getDeleted(), getUpdated(), query(), retrieve(),
search(), undelete(), update(), upsert()
```

Fields

Field	Details
DurationInSeconds	<p>Type int</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The video call duration in seconds, not the recording duration.</p>
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description Time the call ended, in universal time coordinated (UTC).</p>
ExpirationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time when the recording link expires.</p>
ExternalRecordingKey	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The unique ID of the video call recording, from the recording provider. For example, the Zoom ID of the recording.</p>

Field	Details
ExternalRecordingKeyLong	<p>Type string</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The unique link to access the video call recording.</p>
FileSizeInByte	<p>Type long</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The size of the video call recording, in bytes.</p>
FileType	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The file type of the video call recording. Possible values are:<ul style="list-style-type: none"> • MP4—Video file • M4A—Audio-only file • TIMELINE—Time stamp file in JSON format. • TRANSCRIPT—Transcription files in VTT format. • CHAT—Text file containing chat messages from the video call. • CC—File containing closed captions of the video call recording. The file is in VTT format. </p>
IsRecordingAccessEnabled	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the recording is accessible (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, the user only accessed this record or list view (<code>LastReferencedDate</code>) but not viewed it.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The name of the video call recording, entered by the sales rep.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start time of the video call recording.</p>

Field	Details
VideoCallRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the VideoCall record (the parent record). This field is a relationship field.</p> <p>Relationship Name VideoCallRecord</p> <p>Relationship Type Master-detail</p> <p>Refers To VideoCall (the master object)</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[VideoCallrecordingChangeEvent on page 1426](#)

Change events are available for the object.

SEE ALSO:

[Object Reference for the Salesforce Platform: VideoCallRecording](#)

VideoCallPtcpRequest

Represents information about remote signature request for video call participants, including key details such as status, type, and other relevant information for tracking and managing the signature process. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ExpirationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p>

Field	Details
	Description
	The date when the video call participant request expires.
IsSignatureCopyRequested	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether a copy of the signature receipt is required (true) or not (false).
	The default value is <code>false</code> .
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.
Name	Type string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The name of the video call participant request.
RequestInformation	Type textarea
	Properties
	Create, Update
	Description
	The information related to the samples or consent channels requested.

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the video call participant request. Possible values are:<ul style="list-style-type: none"> • Accepted • Expired • Requested • Verified The default value is Requested.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of the video call participant request. Possible values are:<ul style="list-style-type: none"> • Request Consent • Request Inquiry Signature—Reserved for future use. • Request Signature </p>
VideoCallParticipantId	<p>Type reference</p>

Field	Details
Properties	Create, Filter, Group, Sort
Description	The video call participant associated with the video call participant request. This field is a relationship field.
Relationship Name	VideoCallParticipant
Relationship Type	Master-detail
Refers To	VideoCallParticipant (the master object)

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[VideoCallPtcpRequestFeed](#) on page 1429

Feed tracking is available for the object.

[VideoCallPtcpRequestHistory](#) on page 1434

History is available for tracked fields of the object.

VideoCallPtcpSession

Represents information about participants during remote sessions, including duration, device type, operating system, and browser. It logs reconnections separately, offering a comprehensive view of each participant's experience. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
BrowserName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The browser used by the participant.

Field	Details
DeviceOsName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The operating system used by the participant.</p>
DeviceType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The device used by the participant.</p>
Duration	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Indicates the total time in seconds the attendee actively participated in the remote engagement session, for each connection. This field is a calculated field.</p>
JoinDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the participant joins the video call.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
LeaveDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the participant leaves the video call.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the video call participant session.</p>
VideoCallParticipantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The video call participant associated with the video call participant session. This field is a relationship field.</p> <p>Relationship Name VideoCallParticipant</p> <p>Relationship Type Master-detail</p> <p>Refers To VideoCallParticipant (the master object)</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[VideoCallPtcpSessionFeed on page 1429](#)

Feed tracking is available for the object.

[VideoCallPtcpSessionHistory on page 1434](#)

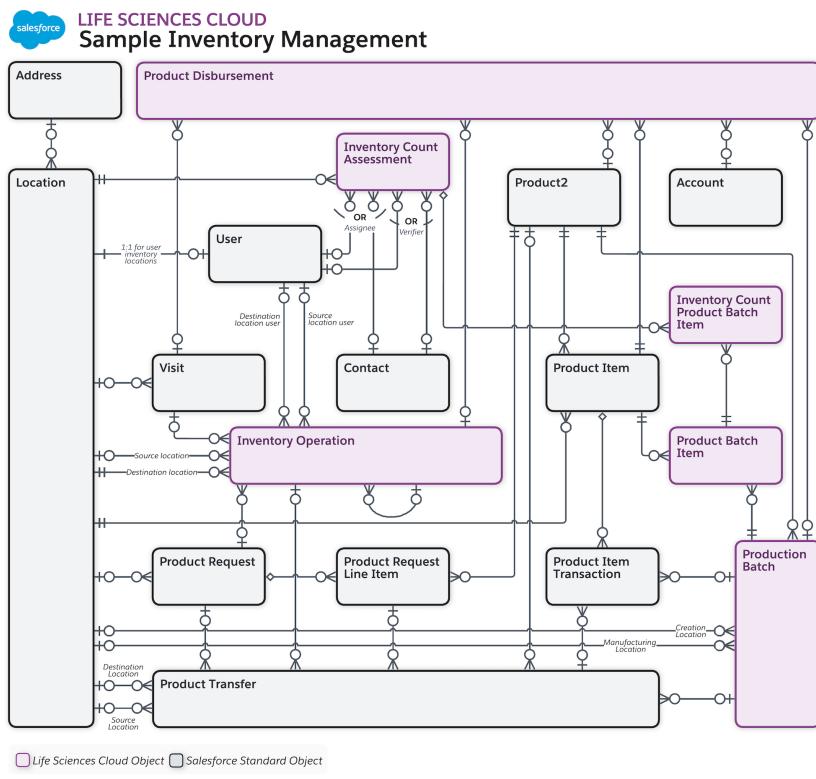
History is available for tracked fields of the object.

Samples Management

Enable pharmaceutical companies to efficiently handle and distribute drug samples to healthcare providers. Enhance drug sales and keep healthcare providers informed about the safe and effective use of products, leading to quicker treatments. Track and manage sales representative inventories of samples, ensuring compliance with regulations, and maintaining accurate records of distribution. Effective sample management is crucial for supporting healthcare providers and low-income patients, and ensuring ethical practices and regulatory compliance.

Sample Inventory Management

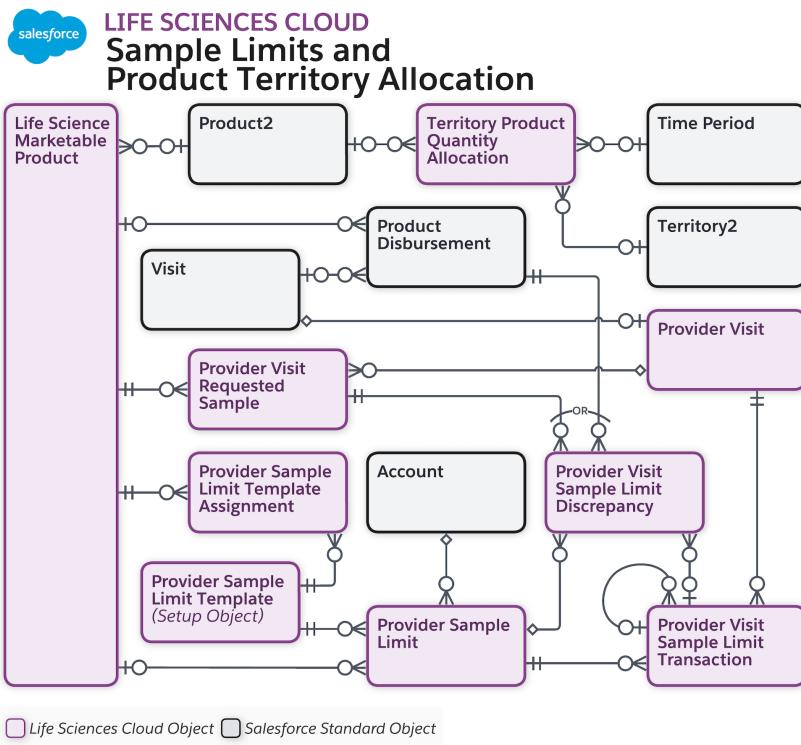
Sample Inventory Management streamlines tracking and managing sample inventory to ensure compliance with regulations, accurate record keeping, and adherence to organizational policies. It supports inventory counting and enable sales representatives to maintain accurate and up-to-date records.



For more details and a larger image, visit the [Data Model Gallery](#).

Product Territory Allocation

Manage the allocation of drug samples to territories and validate against the remaining quantity or maximum disbursement limit to support organizational policies on sample distribution and disbursement.



 Life Sciences Cloud Object Salesforce Standard Object

Last modified: Sep 9, 2025

For more details and a larger image, visit the [Data Model Gallery](#).

Sample Limits

Support effective sample management by maintaining control over sample quantities and aligning distribution practices with organizational policies. Set boundaries on how pharmaceutical samples are distributed to ensure compliance with regulatory requirements and optimize resource allocation. By implementing predefined sample limits templates, organizations can enforce limits systematically and consistently across different account segments, streamline administrative tasks, ensure regulatory adherence, and prevent over-distribution.

For more details and a larger image, visit the [Data Model Gallery](#).

[InventoryCntProdtBatchItem](#)

Represents the inventory count of a product batch at a location. The inventory count product batch item is a child object of inventory count assessment. This object is available in API version 65.0 and later.

[InventoryCountAssessment](#)

Represents an inventory count performed at a location. This object is available in API version 65.0 and later.

[InventoryOperation](#)

Represents operations performed on the inventory, such as transfers, disbursements, or adjustments. This object is available in API version 65.0 and later.

[Location](#)

Standard and custom fields extend the standard Location object to represent information about a user responsible for the location. This object is available in API version 65.0 and later.

[ProductBatchItem](#)

Represents the details about the product items in each batch. This object is available in API version 65.0 and later.

[ProductDisbursement](#)

Represents details about the product being disbursed. This object is available in API version 65.0 and later.

[ProductItemTransaction](#)

Standard and custom fields extend the standard Product Item Transaction object to represent information about an action taken on a product item. This object is available in API version 65.0 and later.

[ProductRequest](#)

Standard and custom fields extend the standard Product Request object to represent information about sample orders. This object is available in API version 65.0 and later.

[ProductRequestLineItem](#)

Standard and custom fields extend the standard Product Request Line Item object to represent information about sample order details. This object is available in API version 65.0 and later.

[ProductTransfer](#)

Standard and custom fields extend the standard Product Transfer object to represent information about the transfer of inventory between locations. This object is available in API version 65.0 and later.

[ProductionBatch](#)

Represents the batch of homogeneous products manufactured in the same production line. This object is available in API version 65.0 and later.

[ProviderSampleLimit](#)

Represents sample limits and remaining quantity applied to a given account and product. This object is available in API version 65.0 and later.

[ProviderSampleLimitTemplate](#)

Setup object that represents the definition and rules of sample limits templates. This object is available in API version 65.0 and later.

[ProviderSmplLmtTmplAssignment](#)

Junction that relates sample limit templates to products. This object is available in API version 65.0 and later.

[PrvdVstSmplLmtDiscrepancy](#)

Represents discrepancies that occur when samples or sample shipment requests exceed a sample limit. This object is available in API version 65.0 and later.

[PrvdVstSmplLmtTransaction](#)

Represents samples or sample shipment requests captured in a visit. This object is available in API version 65.0 and later.

[TerritoryProdtQtyAllocation](#)

Represents the quantity allocation of a product to a given territory so that the system validates against the remaining quantity or maximum disbursement limit. This object is available in API version 65.0 and later.

InventoryCntProdtBatchItem

Represents the inventory count of a product batch at a location. The inventory count product batch item is a child object of inventory count assessment. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ActualEndTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The actual end date and time for counting the batch's inventory.</p>
ActualQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The actual quantity of the batch's inventory.</p>
ActualStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The actual start date and time for counting the batch's inventory.</p>
AssigneeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the person who counts the inventory. This field is a polymorphic relationship field.</p> <p>Relationship Name Assignee</p> <p>Refers To Contact, User</p>
Comment	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description A comment, note, or instruction that gives additional context for the count of the batch's inventory.</p>

Field	Details
DiscrepancyReasonType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of reason for the discrepancy between the actual quantity and the expected quantity.</p>
ExpectedQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The expected quantity of the batch's inventory.</p>
InventoryCountAssessmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The inventory count assessment associated with the inventory count product batch item. This field is a relationship field.</p> <p>Relationship Name InventoryCountAssessment</p> <p>Relationship Type Master-detail</p> <p>Refers To InventoryCountAssessment (the master object)</p>
InventoryCountProductItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The inventory count product item associated with the inventory count product batch item. This field is a relationship field.</p> <p>Relationship Name InventoryCountProductItem</p> <p>Refers To InventoryCountProductItem</p>

Field	Details
IsBlindCount	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the expected inventory quantity is visible to the assignee during inventory counting (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsDiscrepancyInQuantity	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether there's a discrepancy between the actual quantity and the expected quantity (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. This field is a calculated field.</p>
IsSerializedProduct	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the product being counted is serialized (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>

Field	Details
LocationId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the location associated with the inventory count product batch item. This field is a relationship field.</p> <p>Relationship Name Location</p> <p>Refers To Location</p>
LocationPrimaryUserId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the primary user of the location associated with the inventory count product batch item. This field is a relationship field.</p> <p>Relationship Name LocationPrimaryUser</p> <p>Refers To User</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the inventory count product batch item record.</p>
ProductBatchItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the product batch item associated with the inventory count product batch item. This field is a relationship field.</p> <p>Relationship Name ProductBatchItem</p>

Field	Details
	<p>Refers To ProductBatchItem</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the product associated with the inventory count product batch item. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
ProductItemId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the product item associated with the inventory count product batch item. This field is a relationship field.</p> <p>Relationship Name ProductItem</p> <p>Refers To ProductItem</p>
ProductionBatchId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the production batch associated with the inventory count product batch item. This field is a relationship field.</p> <p>Relationship Name ProductionBatch</p> <p>Refers To ProductionBatch</p>
Status	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>
	<p>Description Specifies the status of inventory count product batch item. Possible values are:</p> <ul style="list-style-type: none"> • Completed • InProgress—In Progress • NotStarted—Not Started

InventoryCountAssessment

Represents an inventory count performed at a location. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ActualEndDate	<p>Type date</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The actual end date for the inventory count.</p>
ActualStartTime	<p>Type date</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The actual start date and time for the inventory count.</p>
AssigneeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who counts the inventory.</p>

Field	Details
	This field is a polymorphic relationship field.
Relationship Name	
Assignee	
Refers To	
Contact, User	
Comment	Type textarea
Properties	
Create, Nillable, Update	
Description	
The comment, note, or instruction that gives additional context for the inventory count.	
InventoryCountPlanId	Type reference
Properties	
Create, Filter, Group, Nillable, Sort, Update	
Description	
The inventory count plan associated with the inventory count.	
This field is a relationship field.	
Relationship Name	
InventoryCountPlan	
Refers To	
InventoryCountPlan	
IsBlindCount	Type boolean
Properties	
Create, Defaulted on create, Filter, Group, Sort, Update	
Description	
Indicates whether the expected inventory quantity is visible to the assignee when they count the inventory (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	
LastReferencedDate	Type dateTime
Properties	
Filter, Nillable, Sort	
Description	
The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.	

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
LocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The location associated with the inventory count. This field is a relationship field.</p> <p>Relationship Name Location</p> <p>Refers To Location</p>
LocationPrimaryUserId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The primary user of the location associated with the inventory count. This field is a relationship field.</p> <p>Relationship Name LocationPrimaryUser</p> <p>Refers To User</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the inventory count assessment record.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the inventory count assessment record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PlannedEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The planned end date and time for the inventory count.</p>
PlannedStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The planned start date and time for the inventory count.</p>
Purpose	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the purpose of the inventory count.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the inventory count. Possible values are:</p> <ul style="list-style-type: none"> • Assigned • AuditorApproved—Auditor Approved • Complete—Completed

Field	Details
	<ul style="list-style-type: none"> • InProgress—In Progress
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of the inventory count. Possible values are:</p> <ul style="list-style-type: none"> • Adhoc • Audited • Initial • Periodic
VerificationSubmittedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the inventory count is submitted for verification.</p>
VerifierComment	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The comment, note, or instruction for the verification of inventory count.</p>
VerifierId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who verifies the inventory count. This field is a polymorphic relationship field.</p> <p>Relationship Name Verifier</p> <p>Refers To Contact, User</p>

InventoryOperation

Represents operations performed on the inventory, such as transfers, disbursements, or adjustments. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Comment	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description The comments for the inventory operation.</p>
DestinationLocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the destination location associated with the inventory operation. This field is a relationship field.</p> <p>Relationship Name DestinationLocation</p> <p>Refers To Location</p>
DestinationLocationUserId	<p>Type reference</p> <p>Properties Filter, Group, Nullable, Sort</p> <p>Description The ID of the primary user associated with the destination location of the inventory operation. This field is a relationship field.</p> <p>Relationship Name DestinationLocationUser</p> <p>Refers To User</p>

Field	Details
IsDuplicate	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the inventory operation is a duplicate (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsException	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the inventory operation has any exception (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsSystemCreated	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the inventory operation is created by the system (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the inventory operation record.</p>
OperationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of inventory operation. Possible values are:</p> <ul style="list-style-type: none"> • Adjustment • Disbursement • Return • Transfer
OpportunityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The opportunity associated with the inventory operation. This field is a relationship field.</p> <p>Relationship Name Opportunity</p> <p>Refers To Opportunity</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the inventory operation record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>

Field	Details
ProductRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the product request associated with the inventory operation. This field is a relationship field.</p> <p>Relationship Name ProductRequest</p> <p>Refers To ProductRequest</p>
RelatedOperationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the related operation associated with the inventory operation. This field is a relationship field.</p> <p>Relationship Name RelatedOperation</p> <p>Refers To InventoryOperation</p>
ShipmentStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status indicating the condition of the shipment.</p>
SourceLocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the source location associated with the inventory operation. This field is a relationship field.</p> <p>Relationship Name SourceLocation</p>

Field	Details
	<p>Refers To Location</p>
SourceLocationUserId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the primary user associated with the source location of the inventory operation. This field is a relationship field.</p> <p>Relationship Name SourceLocationUser</p> <p>Refers To User</p>
VisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the visit associated with the inventory operation. This field is a relationship field.</p> <p>Relationship Name Visit</p> <p>Refers To Visit</p>

Location

Standard and custom fields extend the standard Location object to represent information about a user responsible for the location. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
PrimaryUserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the primary user responsible for the location. This field is a relationship field.</p> <p>Relationship Name PrimaryUser</p> <p>Refers To User</p>

SEE ALSO:

[Object Reference for the Salesforce Platform: Location](#)

ProductBatchItem

Represents the details about the product items in each batch. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AssigneeId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the user or group assigned to the product batch item. This field is a polymorphic relationship field.</p> <p>Relationship Name Assignee</p> <p>Refers To Group, User</p>

Field	Details
ExpirationDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the product batch item expires and is no longer usable.</p>
InitialAllocatedQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The initial allocated quantity of product items in the product batch item.</p>
IsProductionBatchActive	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the production batch associated with the product batch item is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
LocationId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The location associated with the product batch item. This field is a relationship field.</p> <p>Relationship Name Location</p> <p>Refers To Location</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product batch item.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the product batch item record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The product associated with the product batch item. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>

Field	Details
ProductItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product item associated with the product batch item. This field is a relationship field.</p> <p>Relationship Name ProductItem</p> <p>Refers To ProductItem</p>
ProductionBatchId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The production batch associated with the product batch item. This field is a relationship field.</p> <p>Relationship Name ProductionBatch</p> <p>Refers To ProductionBatch</p>
QuantityDeductedFromWeb	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The quantity of the product batch item deducted through the web interface.</p>
QuantityUnitOfMeasure	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Specifies the unit of measure for the quantity of the product batch item.</p>
RemainingQuantity	<p>Type double</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The remaining quantity of product items in the product batch item.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the product batch item.</p>

ProductDisbursement

Represents details about the product being disbursed. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Comments	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The comments for the product disbursement.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the products disbursed.</p>
DisbursementDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time of the product disbursement.</p>
DisbursementToAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The destination account associated with the product disbursed. This field is a relationship field.</p> <p>Relationship Name DisbursementToAccount</p> <p>Refers To Account</p>
InventoryOperationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The inventory operation associated with the product disbursement. This field is a relationship field.</p> <p>Relationship Name InventoryOperation</p> <p>Refers To InventoryOperation</p>
IsDisbursed	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product is disbursed (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsProductSerialized	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p>

Field	Details
	<p>Description Indicates whether the product disbursed is serialized (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type <code>dateTime</code></p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type <code>dateTime</code></p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type <code>string</code></p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product to be disbursed.</p>
OpportunityId	<p>Type <code>reference</code></p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID of the opportunity associated with the product disbursement. This field is a relationship field.</p> <p>Relationship Name Opportunity</p> <p>Refers To Opportunity</p>
OwnerId	<p>Type <code>reference</code></p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the product to be disbursed. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
ProductItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the product item at a particular location to be disbursed. This field is a relationship field.</p> <p>Relationship Name ProductItem</p> <p>Refers To ProductItem</p>
ProductName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the product to be disbursed.</p>

Field	Details
ProductionBatchId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the production batch of the products disbursed. This field is a relationship field.</p> <p>Relationship Name ProductionBatch</p> <p>Refers To ProductionBatch</p>
QuantityDisbursed	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The quantity of products that are disbursed.</p>
QuantityRequested	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The quantity of products requested to be disbursed.</p>
QuantityUnitOfMeasure	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the unit used to measure the quantity of products disbursed.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the product disbursement.</p>

Field	Details
ViolationMessage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The violation message for product disbursement.</p>
ViolationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of violation that happens during the product disbursement.</p>
VisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the visit associated with the product disbursement. This field is a relationship field.</p> <p>Relationship Name Visit</p> <p>Refers To Visit</p>
WarningMessage	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The warning message for product disbursement.</p>
WarningType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of warning displayed during the product disbursement.</p>

ProductItemTransaction

Standard and custom fields extend the standard Product Item Transaction object to represent information about an action taken on a product item. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`,
`retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
ProductionBatchId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The production batch associated with transacted products. This field is a relationship field.</p> <p>Relationship Name ProductionBatch</p> <p>Refers To ProductionBatch</p>

SEE ALSO:

[Object Reference for the Salesforce Platform: ProductItemTransaction](#)

ProductRequest

Standard and custom fields extend the standard Product Request object to represent information about sample orders. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`,
`retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
DestinationLocationUserId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p>
	<p>Description The primary user of the destination location associated with the product request. This field is a relationship field.</p>
	<p>Relationship Name DestinationLocationUser</p>
	<p>Refers To User</p>
UrgencyLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the level of urgency associated with the product request.</p>

SEE ALSO:

[Object Reference for the Salesforce Platform: ProductRequest](#)

ProductRequestLineItem

Standard and custom fields extend the standard Product Request Line Item object to represent information about sample order details. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ExceptionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Specifies the type of exception while placing a product request.\</p>

SEE ALSO:

[Object Reference for the Salesforce Platform: ProductRequestLineItem](#)

ProductTransfer

Standard and custom fields extend the standard Product Transfer object to represent information about the transfer of inventory between locations. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
InventoryCountReferenceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The inventory count record where the product transfer is recorded. This field is a relationship field.</p> <p>Relationship Name InventoryCountReference</p> <p>Refers To InventoryCntProdBatchItem</p>
InventoryOperationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The inventory operation associated with the product transfer. This field is a relationship field.</p> <p>Relationship Name InventoryOperation</p>

Field	Details
	Refers To
InventoryOperation	
ProductionBatchId	Type reference
	Properties
Create, Filter, Group, Nillable, Sort, Update	
	Description
The production batch associated with the transferred products.	
This field is a relationship field.	
	Relationship Name
ProductionBatch	
	Refers To
ProductionBatch	
ReceivedDateTime	Type dateTime
	Properties
Create, Filter, Nillable, Sort, Update	
	Description
The date and time when the transferred product is received at the destination location.	
TransferCause	Type picklist
	Properties
Create, Filter, Group, Nillable, Sort, Update	
	Description
Specifies the cause of the product transfer.	
WarningMessage	Type textarea
	Properties
Create, Nillable, Update	
	Description
The warning message displayed to the end user during product transfer.	

SEE ALSO:

[Object Reference for the Salesforce Platform: ProductTransfer](#)

ProductionBatch

Represents the batch of homogeneous products manufactured in the same production line. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
BatchCreatedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the production batch is created.</p>
CreationLocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the location where the batch is created. This field is a relationship field.</p> <p>Relationship Name CreationLocation</p> <p>Refers To Location</p>
Description	<p>Type textArea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the production batch.</p>
ExpirationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The date and time when the batch expires and is no longer usable.</p>
InitialQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The initial quantity of products in the production batch.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the production batch is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
ManufacturingDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The manufactured date and time for the production batch.</p>
ManufacturingLocationId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the manufacturing location of the production batch. This field is a relationship field.</p> <p>Relationship Name ManufacturingLocation</p> <p>Refers To Location</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the production batch.</p>
OriginType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of origin of the batch.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The product associated with the production batch. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
QuantityUnitOfMeasure	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the unit of measure for the products of the production batch.</p>
UniqueIdentificationNumber	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique identification number of the production batch. This field is unique within your organization.</p>

ProviderSampleLimit

Represents sample limits and remaining quantity applied to a given account and product. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description Required. The account that's linked to the sample limit. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Master-detail</p> <p>Refers To Account (the master object)</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The ISO currency code associated with the currency values in the provider sample limit. Possible values are:<ul style="list-style-type: none">• USD—U.S. DollarThe default value is USD.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The name of the provider visit sample limit record.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The product that's linked to the sample limit. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
PrvdSampleLmtTemplateId	<p>Type reference</p> <p>Description Required. The provider sample limit template that's associated with provider sample limit. This field is a relationship field.</p> <p>Relationship Name PrvdSampleLimitTemplate</p> <p>Refers To ProviderSampleLimitTemplate</p>
PrvdSampleLmtTemplateName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The provider sample limit template associated with the provider sample limit.</p>
Rule	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description Required. Stores the rules for allocating sample limits to the linked account.</p>

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external source system from which the record was imported.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderSampleLimitHistory on page 1434](#)

History is available for tracked fields of the object.

ProviderSampleLimitTemplate

Setup object that represents the definition and rules of sample limits templates. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), query(), retrieve(), update(), upsert()`

Fields

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API.</p>

Field	Details
DiscrepancyAlertType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies whether a rule violation in the template is flagged as an error or a warning. Possible values are:</p> <ul style="list-style-type: none"> • Error • Warning <p>The default value is <code>Error</code>.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this template is active or not. The default value is <code>false</code>.</p>
IsAdvanced	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates the type of custom template. Defines whether or not the template is advanced. The default value is <code>false</code>.</p>
IsCloned	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the template is a cloned generic template or not. Cloned generic templates and advanced templates not flagged as IsLawBased are flagged as <code>True</code>. The default value is <code>false</code>.</p>
IsLawBased	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	Description
	<p>Indicates whether an advanced template is a country regulation or not. If the template is law-based, the DiscrepancyAlertType setting is <code>Error</code>.</p>
	<p>The default value is <code>false</code>.</p>
Language	Type
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	<p>The language of the ProviderSampleLimitTemplate record.</p>
MasterLabel	Type
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	<p>The label for this provider sample limit template value. This display value is the internal label that doesn't get translated.</p>
NamespacePrefix	Type
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	<p>The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <code>namespacePrefix__componentName</code> notation.</p>
	<p>The namespace prefix can have one of the following values.</p>
	<ul style="list-style-type: none"> • In Developer Edition orgs, NamespacePrefix is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer. • In orgs that aren't Developer Edition orgs, NamespacePrefix is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
PriorityNumber	Type
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description The priority order of the cloned generic template to be applied to a product.</p>
RuleCondition	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description Required. The rules that establish the limits for this template.</p>
RuleExpression	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description Required. Specifies the rules to be evaluated and the boolean operation (AND/OR) for combining multiple rules.</p>

ProviderSmpLmtTmpAssignment

Junction that relates sample limit templates to products. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description The ISO currency code associated with the currency values in the provider sample limit template assignment. Possible values are:<ul style="list-style-type: none"> • USD—U.S. Dollar The default value is USD.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the provider sample limit template assignment.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Required. Product related to the sample limit template. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
PrvdSampleLimitTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Required. Related sample limit template. This field is a relationship field.</p> <p>Relationship Name PrvdSampleLimitTemplate</p> <p>Refers To ProviderSampleLimitTemplate</p>
RuleCondition	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description Required. JSON structure with rules and configured limits from the template.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID of the record in the external source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the external source system from which the record was imported.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderSmplLmtTmpAssignmentFeed](#) on page 1429

Feed tracking is available for the object.

[ProviderSmplLmtTmpAssignmentHistory](#) on page 1434

History is available for tracked fields of the object.

[ProviderSmplLmtTmpAssignmentShare](#) on page 1438

Sharing is available for the object.

PrvdVstSmplLmtDiscrepancy

Represents discrepancies that occur when samples or sample shipment requests exceed a sample limit. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AlertMessage	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. A description of the discrepancy that occurred.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The ISO currency code associated with the currency values in the provider visit sample limit discrepancy. Possible values are:<ul style="list-style-type: none"> • USD—U.S. Dollar The default value is USD.</p>
DiscrepancyAlertType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies whether the discrepancy is an error or a warning. Possible values are:</p> <ul style="list-style-type: none"> • Error • Warning <p>The default value is <code>Error</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required.</p>
ProviderSampleLimitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The sample limit record on which this discrepancy occurred. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name ProviderSampleLimit</p> <p>Relationship Type Master-detail</p> <p>Refers To ProviderSampleLimit (the master object)</p>
PrvdVisitSampleRefRecId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The call sample or call sample order on which the discrepancy occurred. This field is a polymorphic relationship field.</p> <p>Relationship Name PrvdVisitSampleRefRec</p> <p>Refers To ProductDisbursement, ProviderVisitRqstSample</p>
PrvdVstSmplLmtTransactionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The associated provider visit sample limit transaction record related to sample discrepancy. This field is a relationship field.</p> <p>Relationship Name PrvdVstSmplLmtTransaction</p> <p>Refers To PrvdVstSmplLmtTransaction</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the record in the external source system for data integrations.</p>
SourceSystemName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external source system from which the record was imported.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Indicates the status of a provider visit sample limit discrepancy as it is triaged by an admin.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Closed • InProgress • Open <p>The default value is Open.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PrvdVstSmplLmtDiscrepancyFeed](#) on page 1429

Feed tracking is available for the object.

[PrvdVstSmplLmtDiscrepancyHistory](#) on page 1434

History is available for tracked fields of the object.

PrvdVstSmplLmtTransaction

Represents samples or sample shipment requests captured in a visit. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
CurrencyIsoCode	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The ISO currency code associated with the currency values in the provider visit sample limit transaction. Possible values are:<ul style="list-style-type: none">• USD—U.S. DollarThe default value is USD.</p>
IsRollback	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is a rollback transaction.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the provider visit sample limit transaction.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProviderSampleLimitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Required. The sample limit related to this transaction. This field is a relationship field.</p> <p>Relationship Name ProviderSampleLimit</p> <p>Refers To ProviderSampleLimit</p>
ProviderVisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Related call record. This field is a relationship field.</p> <p>Relationship Name ProviderVisit</p> <p>Refers To ProviderVisit</p>
RelatedTransactionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Reference to the original sample limit transaction. This field is a relationship field.</p> <p>Relationship Name RelatedTransaction</p> <p>Refers To PrvdVstSmplLmtTransaction</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The ID of the record in the external source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the external source system from which the record was imported.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Indicates the status of the transaction. Possible values are:</p> <ul style="list-style-type: none"> • Failed • New • Pending • Success
TransactionInfo	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description Required. This information is used to create sample limit events and updates to sample limit records.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PrvdVstSmplLmtTransactionFeed](#) on page 1429

Feed tracking is available for the object.

[PrvdVstSmplLmtTransactionHistory](#) on page 1434

History is available for tracked fields of the object.

[PrvdVstSmplLmtTransactionShare](#) on page 1438

Sharing is available for the object.

TerritoryProdtQtyAllocation

Represents the quantity allocation of a product to a given territory so that the system validates against the remaining quantity or maximum disbursement limit. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AdjustmentQuantity	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description Adjustment quantity to the allocated quantity.</p>
AllocatedQuantity	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. Allocated quantity to the territory.</p>
AllocationType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Type of allocation. Possible values are:</p>

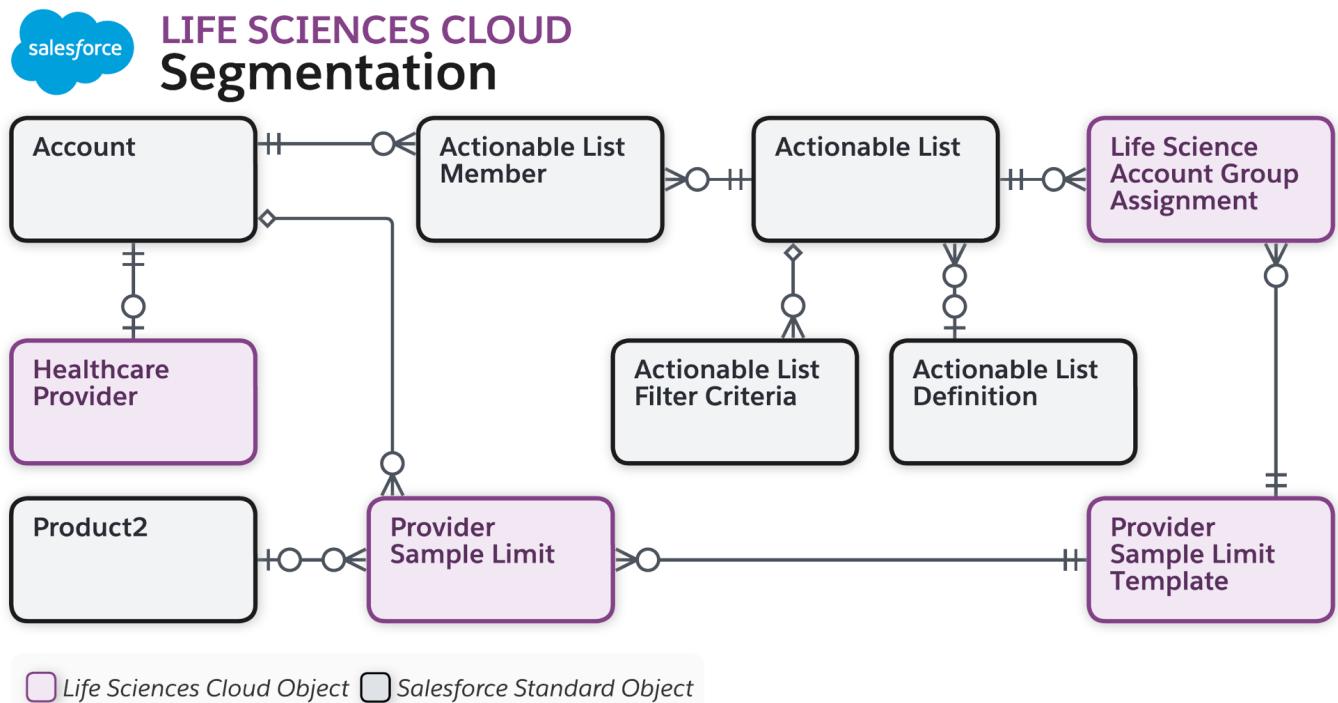
Field	Details
	<ul style="list-style-type: none"> • Orders • ProviderVisit <p>The default value is ProviderVisit.</p>
DebitedQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Debited quantity for the territory.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferencedDate</code> is not null, the user accessed this record or list view indirectly.</p>
MaxDisbursementLimitQty	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Maximum disbursement quantity for a given transaction.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. Name of territory product quantity allocation record.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Product allocated to a territory. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
RemainingQuantity	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Remaining quantity for the territory. This field is a calculated field.</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Territory to which the product quantity is allocated. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name Territory</p> <p>Refers To Territory2</p>
TimePeriodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Effective period for the allocation. This field is a relationship field.</p> <p>Relationship Name TimePeriod</p> <p>Refers To TimePeriod</p>

Segmentation

Group accounts based on specific conditions. Segmentations are reusable across different areas (such as sample limits) to distribute or assign elements to segments of accounts with the same set of criteria. There are two types of segmentations: static and dynamic. Static segmentation maintains the assignment even after the initial assignment. Dynamic segmentation changes based on account status or logic changes. Use Segmentation to assign and restrict of various elements without the need for individual account management.



For more details and a larger image, visit the [Data Model Gallery](#).

ActionableList

Represents an actionable list. This object is available in API version 65.0 and later.

ActionableListFilterCriteria

Represents a logical expression containing filter conditions to include or exclude data from the dataset that's associated with the actionable list. This object is available in API version 65.0 and later.

HealthcareProvider

Represents business-level details about the healthcare organization or the practitioner.

LifeSciAcctGrpAssignment

Represents a junction between an account and actionable list. This object is available in API version 65.0 and later.

ActionableList

Represents an actionable list. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ActionableListDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The list definition that's associated with the actionable list. This field is a relationship field.</p> <p>Relationship Name ActionableListDefinition</p> <p>Refers To ActionableListDefinition</p>
ActionableListType	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The type of the actionable list based on its definition. This value is derived from the ActionableListDefinition record.</p>
AssigneeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person to whom an actionable list is assigned. This field is a polymorphic relationship field.</p> <p>Relationship Name Assignee</p> <p>Refers To Group, User</p>
AssigneeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of assignee of an actionable list. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • Queue • RecordOwner • User
AssignmentStatus	Type picklist
	Properties
	Filter, Group, Nillable, Restricted picklist, Sort
	Description
	The status of the assignment done for an actionable list.
	Possible values are:
	<ul style="list-style-type: none"> • Failed • InProgress • PartiallyComplete • Success • Waiting
AutomaticAssigneeId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The assignee to whom the new members in an actionable list are automatically assigned.
	This field is a polymorphic relationship field.
	Relationship Name
	AutomaticAssignee
	Refers To
	Group, User
AutomaticAssigneeType	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the type of assignee to which the new members in an actionable list are automatically assigned.
	Possible values are:
	<ul style="list-style-type: none"> • Queue • RecordOwner • User

Field	Details
BatchCalcJobDefinitionId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The batch calculation job definition associated with the actionable list. This field is a relationship field.</p> <p>Relationship Name BatchCalcJobDefinition</p> <p>Refers To BatchCalcJobDefinition</p>
CompletionDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The last date for completing engagement with the members in an actionable list.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The ISO currency code for the postauthorization request. Possible values are:<ul style="list-style-type: none"> • USD—U.S. Dollar The default value is USD.</p>
DefaultMemberStatusId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default actionable list member status. This field is a relationship field.</p> <p>Relationship Name DefaultMemberStatus</p> <p>Refers To ActionableListMemberStatus</p>

Field	Details
DefaultSortMemberField	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default field name used for sorting the actionable list members in Outreach List.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the actionable list.</p>
IsActionableListConfigured	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether an actionable list is configured (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsAutoAssignmentAllowed	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether automatic assignment of new actionable list members is allowed (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastMemberAddDateTime	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date and time when the last member was added to an actionable list in epoch time format.</p>
LastReferencedDate	<p>Type <code>dateTime</code></p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
ListStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the actionable list. Possible values are:</p> <ul style="list-style-type: none"> • Active • Archived • Draft • Processing
MemberCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The actionable list members count.</p>
MemberCountLastModDtTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the member count of an actionable list was last modified.</p>

Field	Details
MemberSortOrder	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the default sort order for sorting the actionable list members in Outreach List.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Ascending • Descending
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the actionable list.</p>
ObjectName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the object for which the actionable list is created.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Account • Asset • CareRequest • CareRequestItem • Case • Claim • ClinicalServiceRequest • Contact • HealthcareFacility • InsurancePolicy • Lead • MemberPlan • Opportunity • PersonLifeEvent

Field	Details
OmniScriptKey	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The key that's created by combining the type, subtype, and language of the OmniScript with a '/' separating these values.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Priority	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the priority of the actionable list. Possible values are:</p> <ul style="list-style-type: none"> • High • Low • Medium
SourceType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the source type of the actionable list. Possible values are:</p> <ul style="list-style-type: none"> • CrmAnalytics—Crm Analytics • DataCloudPlatform—Data Cloud Platform

Field	Details
Status	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the status of the actionable list. Possible values are:</p> <ul style="list-style-type: none"> • Failed • Queued • Success
SynchronizationOperationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of operation that's performed when an actionable list synchronizes with a Data Cloud segment. Possible values are:</p> <ul style="list-style-type: none"> • Insert • Update

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ActionableListChangeEvent on page 1426](#)

Change events are available for the object.

[ActionableListFeed on page 1429](#)

Feed tracking is available for the object.

[ActionableListHistory on page 1434](#)

History is available for tracked fields of the object.

[ActionableListShare on page 1438](#)

Sharing is available for the object.

ActionableListFilterCriteria

Represents a logical expression containing filter conditions to include or exclude data from the dataset that's associated with the actionable list. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describesObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`,
`search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
ActionableListId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The actionable list associated with the filter criteria. This field is a relationship field.</p> <p>Relationship Name ActionableList</p> <p>Relationship Type Master-detail</p> <p>Refers To ActionableList (the master object)</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The ISO code for any currency allowed by the organization. Available only for organizations with the multicurrency feature enabled. Possible values are: <ul style="list-style-type: none"> • USD—U.S. Dollar The default value is USD.</p>
FilterLogic	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The logical expression of the filter criteria in the text format.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The auto-assigned number that identifies the actionable list filter criteria record.</p>
SourceType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the source type of the actionable list. Possible values are: <ul style="list-style-type: none"> • <code>CrmAnalytics</code>—Crm Analytics • <code>DataCloudPlatform</code>—Data Cloud Platform </p>

HealthcareProvider

Represents business-level details about the healthcare organization or the practitioner.

Special Access Rules

In Life Sciences Cloud, the HealthCareProvider object and its fields are used by the Account Management and the Segmentation feature areas. This topic lists fields used in both features.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AbbreviatedName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the abbreviated name of the Japanese healthcare organization (HCO) for INS-DOC records. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Account that this healthcare provider is associated with. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
AssociatedSampleLimit	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The JSON comprising the list of Sample Limits for the HealthcareProvider record. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
CaqhIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description This field is unique within your organization. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Field	Details
DataChangeComments	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Captures comments explaining the reasons or context for changes made to the data. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
DoesDispenseMedication	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the account dispenses medication. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date from which the provider becomes effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date from which the provider is no longer effective.</p>
EhrSystem	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Name of the EHR system used at this facility or organization.</p>
HasCarrierContract	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the provider's contract follows a CMS model MA contract amendment, based on Centers for Medicare and Medicaid Services (CMS) guidelines. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
HasSalesDataRestriction	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether access to the sales data about the healthcare provider is restricted. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
InitialStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date when the facility first became operational or the practitioner first began practicing.</p>
IsNotSearchable	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the provider is excluded from search results. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
IsPrivacyLawEnabled	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the privacy law regulations are enabled.</p>

Field	Details
	<p>The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
<code>IsSpeaker</code>	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the provider is designated as a speaker for engagement.</p> <p>The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
<code>LastReferencedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
<code>LastViewedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (<code>LastReferencedDate</code>) and not viewed.</p>
<code>Name</code>	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the provider.</p>
<code>OperatingCountryCode</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the country code of the country to which the account belongs.</p> <p>Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> US
	<p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
OwnerId	<p>Type reference</p>
	<p>Properties</p>
	<p>Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description</p>
	<p>The ID of the user who owns this record. This field is a polymorphic relationship field.</p>
	<p>Relationship Name</p>
	<p>Owner</p>
	<p>Refers To</p>
	<p>Group, User</p>
ParentOrganizationAccountId	<p>Type reference</p>
	<p>Properties</p>
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p>
	<p>Specifies the ID of the parent account, used to establish the account hierarchy. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
	<p>Relationship Name</p>
	<p>ParentOrganizationAccount</p>
	<p>Refers To</p>
	<p>Account</p>
PhoneticName	<p>Type string</p>
	<p>Properties</p>
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p>
	<p>Stores the Japanese phonetic name, applicable to both HCP and HCO, which is used for sorting and text-based searches. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
PhoneticName2	<p>Type string</p>
	<p>Properties</p>
	<p>Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Stores the Japanese phonetic name, applicable to both HCP and HCO, which is used for sorting and text-based searches. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The practitioner that this healthcare provider record is associated with. This field is a relationship field.</p> <p>Relationship Name Practitioner</p> <p>Refers To Contact</p>
ProfessionalDesignation	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the professional designation of the healthcare professional. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProfessionalTitle	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the professional title of the healthcare professional. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProviderClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The class of facility, such as an IPA, medical group, or solo practitioner. Possible values are:</p> <ul style="list-style-type: none"> • IPA

Field	Details
	<ul style="list-style-type: none"> • Medical Group • Solo Practitioner
ProviderFullName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The full name of the healthcare provider. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProviderPhotoId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Content Document file that is a photo of the Healthcare Provider. This field is a relationship field.</p> <p>Relationship Name ProviderPhoto</p> <p>Relationship Type Lookup</p> <p>Refers To ContentDocument</p>
ProviderType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of provider or facility. For example, pharmacist or ambulatory care facility. Possible values are:</p> <ul style="list-style-type: none"> • Ambulatory Care • Dentist • Hospital • Laboratory • Medical Doctor • Pharmacist • Pharmacy

Field	Details
ReferredByContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the provider who originated the referral. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name ReferredByContact</p> <p>Refers To Contact</p>
RelatedHealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the HCP account associated with the INS-DOC. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name RelatedHealthcareProvider</p> <p>Refers To HealthcareProvider</p>
RelatedUserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The User record that relates to the Healthcare Provider record. This field is a relationship field.</p> <p>Relationship Name RelatedUser</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
SalesDataRstrcEffectiveDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date when the sales data restriction becomes effective. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the system from which the record was sourced. This field is unique within your organization</p>
SourceSystemModifiedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date when the record was last updated in the source system</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the provider. Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive • Pending <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Field	Details
TerminationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Termination date for this provider.</p>
TerminationReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reason for termination.</p>
TotalLicensedBeds	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Total number of licensed beds at this facility, if applicable.</p>
WrittenName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the Chinese character name of the organization, applicable only to healthcare professionals (HCPs), which is required for INS-DOC records. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[HealthcareProviderChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[HealthcareProviderFeed](#)

Feed tracking is available for the object.

[HealthcareProviderHistory](#)

History is available for tracked fields of the object.

HealthcareProviderOwnerSharingRule

Sharing rules are available for the object.

HealthcareProviderShare

Sharing is available for the object.

LifeSciAcctGrpAssignment

Represents a junction between an account and actionable list. This object is available in API version 65.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

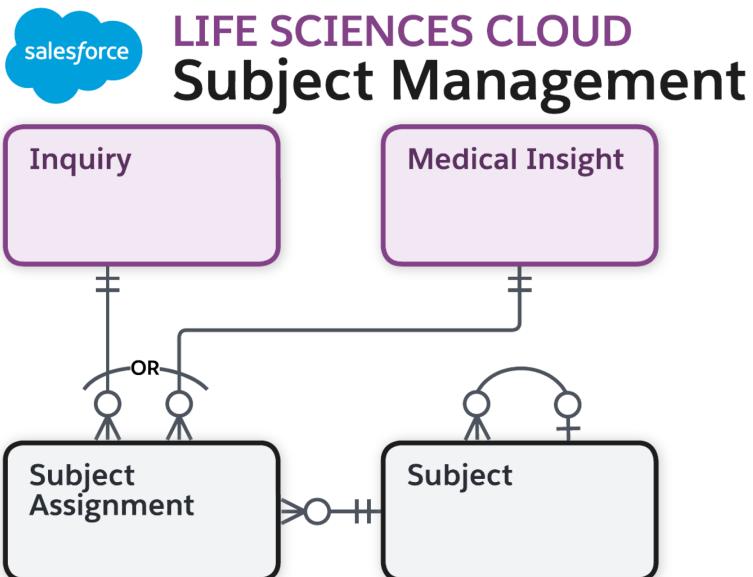
Field	Details
ActionableListId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The actionable list associated with the group assignment. This field is a relationship field.</p> <p>Relationship Name ActionableList</p> <p>Refers To ActionableList</p>
AssignmentReferenceRecId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The assortment or provider sample limit template associated with the group assignment. This field is a polymorphic relationship field.</p> <p>Relationship Name AssignmentReferenceRec</p> <p>Refers To ProviderSampleLimitTemplate</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the life sciences account group assignment.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>

Field	Details
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>

Subject Management

Use Subjects to organize and manage information across various functions. Users can add topics to medical inquiries as subjects, facilitating automatic queue assignments and building a knowledge repository. Subjects can also be applied to medical insights and email templates for easy searching by subject filtering.



Life Sciences Cloud Object Salesforce Standard Object

Last modified: Sep 9, 2025

For more details and a larger image, visit the [Data Model Gallery](#).

Subject

Represents a topic of a managed event. This object is available in API version 65.0 and later.

SubjectAssignment

Represents a junction between a subject and the inquiry that the subject belongs to. This object is available in API version 65.0 and later.

Subject

Represents a topic of a managed event. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describesObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
DeliveryMode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the mode in which the subject is presented.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the subject.</p>
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date and time of the subject. The end date indicates the date until which the subject is considered relevant.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates whether the subject is active. Subjects are active when they're either in use, relevant in the current market, or are ongoing. The default value is <code>false</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the subject.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentSubjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The parent subject that the subject is a part of. The parent and subject relationship enables hierarchical organization of related subjects.</p> <p>This field is a relationship field.</p>
	<p>Relationship Name ParentSubject</p> <p>Refers To Subject</p>
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The start date and time of the subject. The start date indicates the date from which the subject is considered relevant.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Specifies the status of the subject in relation to an inquiry.</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies the business area that the subject belongs to. Possible values are:<ul style="list-style-type: none">• Inquiry</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[SubjectFeed on page 1429](#)

Feed tracking is available for the object.

[SubjectHistory on page 1434](#)

History is available for tracked fields of the object.

SubjectShare on page 1434

Sharing is available for the object.

SubjectAssignment

Represents a junction between a subject and the inquiry that the subject belongs to. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AssignmentId	Type reference Properties Create, Filter, Group, Sort, Update Description The ID of the medical inquiry that the subject belongs to. This field is a polymorphic relationship field. Relationship Name Assignment Refers To MedicalInquiry

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

SubjectAssignmentFeed on page 1429

Feed tracking is available for the object.

SubjectAssignmentHistory on page 1434

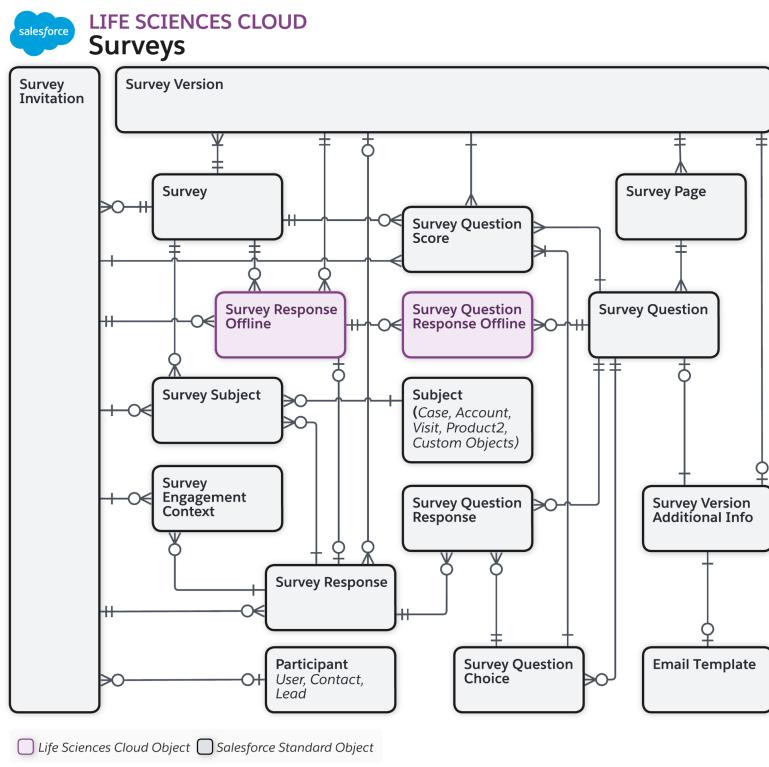
History is available for tracked fields of the object.

SubjectAssignmentShare on page 1438

Sharing is available for the object.

Surveys

Surveys provide Life Science companies with an easy-to-use solution for creating, distributing, and completing surveys. Surveys help ensure regulatory compliance, support accurate data management, and deliver actionable insights that enhance research outcomes and enable informed decision-making. Additionally, Surveys include an offline survey capability in the Life Sciences Cloud mobile app, allowing users to collect responses without an internet connection. When back online, data is automatically synced, ensuring seamless integration with the feedback and analytics processes.



For more details and a larger image, visit the [Data Model Gallery](#).

[SurveyQstnResponseOffline](#)

Represents a participant's answer to a specific survey question, for both offline and staging environments. This object is available in API version 65.0 and later.

[SurveyResponse](#)

Standard and custom fields extend the standard Survey Response object to represent information about a participant's response to a survey. This object is available in API version 65.0 and later.

[SurveyResponseOffline](#)

Represents information about a participant's offline survey response, including the response status, participant location, and completion time, for both offline and staging environments. This object is available in API version 65.0 and later.

[SurveyQstnResponseOffline](#)

Represents a participant's answer to a specific survey question, for both offline and staging environments. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
Datatype	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the data type of the question response. Possible values are:</p> <ul style="list-style-type: none"> • Boolean • Date • Double • Int • Number • String
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The identifier of the offline or staging question response record.</p>

Field	Details
ResponseValue	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The response provided by a participant for a question.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
SurveyQuestionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the survey question responded by the participant. This field is a relationship field.</p> <p>Relationship Name SurveyQuestion</p> <p>Refers To SurveyQuestion</p>
SurveyResponseOfflineId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the survey response offline record that's associated with the survey question response offline record. This field is a relationship field.</p>

Field	Details
Relationship Name	SurveyResponseOffline
Relationship Type	Master-detail
Refers To	SurveyResponseOffline

SurveyResponse

Standard and custom fields extend the standard Survey Response object to represent information about a participant's response to a survey. This object is available in API version 65.0 and later.

Supported Calls

`delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete()`

Fields

Field	Details
SurveyResponseOfflineId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The survey response offline record associated with the survey response. This field is a relationship field.</p> <p>Relationship Name SurveyResponseOffline</p> <p>Refers To SurveyResponseOffline</p>

SEE ALSO:

[Object Reference for the Salesforce Platform: SurveyResponse](#)

SurveyResponseOffline

Represents information about a participant's offline survey response, including the response status, participant location, and completion time, for both offline and staging environments. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
CompletionDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time that the participant completed the survey.</p>
EstimatedDuration	<p>Type int</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The total time, in seconds, taken by the participant to provide a response to the survey.</p>
InvitationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the survey invitation that's associated with this response. This field is a relationship field.</p> <p>Relationship Name Invitation</p> <p>Refers To SurveyInvitation</p>
Language	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description The combined language and locale ISO code, which controls the language of the offline survey response.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The identifier of the offline or staging response record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of this offline survey response record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Response	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The participant's offline response to the survey.</p>

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the survey. Possible values are:</p> <ul style="list-style-type: none"> • Completed • CompletedAndMigrated • NotStarted • PartiallyCompleted • Paused • Started
SubmitterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the user who is submitting the response for the survey. This field is a polymorphic relationship field.</p> <p>Relationship Name Submitter</p> <p>Refers To Contact, Lead, User</p>

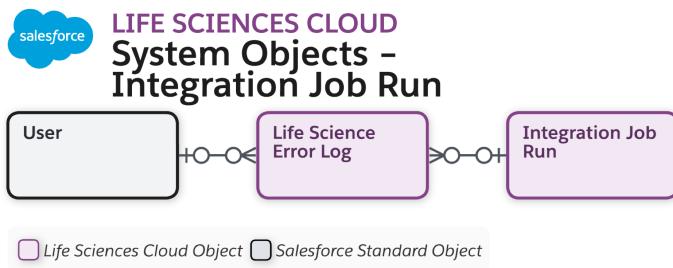
Field	Details
SurveyCompletionPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description "The percentage of the survey completed by the participant."</p>
SurveyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the survey that the participant completed. This field is a relationship field.</p> <p>Relationship Name Survey</p> <p>Refers To Survey</p>
SurveyName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the survey that the participant completed.</p>
SurveyVersionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the version of the survey that the participant completed. This field is a relationship field.</p> <p>Relationship Name SurveyVersion</p> <p>Refers To SurveyVersion</p>

System Objects

System objects are related to core system functionality used by Life Sciences Cloud for Commercial Engagement.

Integration Job Run

Stores details of scheduled integration jobs, including start and end times, job status, and a summary of records processed. This information enables administrators to monitor job performance, identify issues promptly, and maintain integration workflows efficiently by providing a centralized view of job statuses and outcomes. For example, store details of an integration job that syncs healthcare provider and healthcare organization records from an external system to the Salesforce Life Sciences data model.



For more details and a larger image, visit the [Data Model Gallery](#).

Trigger Handlers

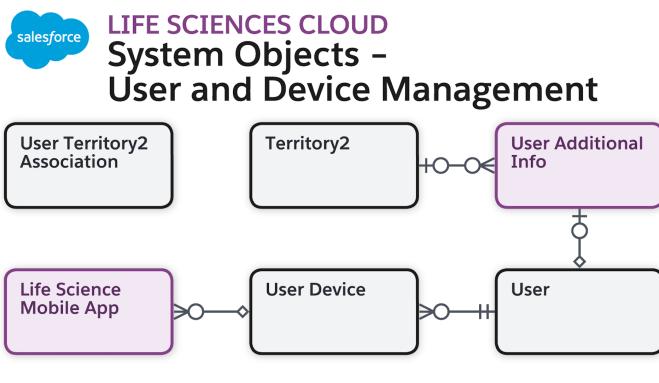
Triggers handlers respond to specific events or triggers within the Life Sciences Cloud. A trigger is an event that signals the need for some action to occur, and the handler is the function that executes in response to that event.



For more details and a larger image, visit the [Data Model Gallery](#).

User and Device Management

The user and device management objects store additional information about users and mobile devices associated with users.



For more details and a larger image, visit the [Data Model Gallery](#).

IntegrationJobRun

Represents the statistical details of asynchronous integration jobs that are run on the system. This object is available in API version 65.0 and later.

LifeScienceMobileApp

Represents information about a mobile device associated with a user. This object is available in API version 65.0 and later.

LifeScienceTriggerHandler

Represents a collection of fields to set up the trigger handlers to run for each Life Sciences object. This object is available in API version 65.0 and later.

UserAdditionalInfo

Represents information about a user such as additional identifiers, user preferences, and a return address. This object is available in API version 65.0 and later.

IntegrationJobRun

Represents the statistical details of asynchronous integration jobs that are run on the system. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
ChangeEndRange	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	The identifier for the end of the incremental execution of the job.
ChangeStartRange	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The identifier for the start of the incremental execution of the job.
EndDateTime	Type dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date when the job was completed.
JobAdditionalInfo	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Additional information on the job, for example, the country to which the job is applied.
JobExectionSummary	Type textarea
	Properties
	Create, Nillable, Update
	Description
	The summary of the job, such as the downloaded record types with the count and number of failed records.
JobIdentifier	Type string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The MuleSoft identifier for the job.
JobName	Type string

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name of the integration job.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description Timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description Timestamp when the current user last viewed the record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the integration job run.</p>
Origin	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The feature from which the job is initiated.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the integration job run.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date when the job was started.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the job.</p>
TotalRecordsFailed	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total number of failed records in the job.</p>
TotalRecordsProcessed	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total number of processed records in the job.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[IntegrationJobRunFeed](#) on page 1429

Feed tracking is available for the object.

IntegrationJobRunHistory on page 1434

History is available for tracked fields of the object.

IntegrationJobRunShare on page 1438

Sharing is available for the object.

LifeScienceMobileApp

Represents information about a mobile device associated with a user. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ApplicationVersion	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The version of the mobile app.
DeviceLastLocation	Type location Properties Nillable Description The latitude and longitude coordinates of the most recent sync location.
DeviceMetadataVersion	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The version of the metadata that's used by the mobile app.
IsDownloadSyncSuccessful	Type boolean

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description Indicates whether the most recent download succeeded (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
<code>IsFullSyncEnforced</code>	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether to force a full synchronization for the mobile app (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
<code>IsUploadSyncSuccessful</code>	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the most recent upload succeeded (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
<code>LastDownloadSyncDate</code>	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The timestamp of the most recent download.</p>
<code>LastReferencedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
<code>LastUploadSyncDate</code>	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The timestamp of the most recent upload.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the mobile app record.</p>
UserDeviceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The user device associated with the mobile app. This field is a relationship field.</p> <p>Relationship Name UserDevice</p> <p>Relationship Type Master-detail</p> <p>Refers To UserDevice (the master object)</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[LifeScienceMobileAppFeed](#) on page 1429

Feed tracking is available for the object.

[LifeScienceMobileAppHistory](#) on page 1434

History is available for tracked fields of the object.

LifeScienceTriggerHandler

Represents a collection of fields to set up the trigger handlers to run for each Life Sciences object. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Describes the behavior of the concrete trigger handler.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the trigger handler is active (true) or not (false). The default value is <code>false</code>.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language used in the trigger handler.</p>
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Label for this object value. This display value is the internal label that doesn't get translated.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix with a 15 character limit. You can refer to a component in a managed package by using the namespacePrefix__componentName notation. The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> • In Developer Edition orgs, NamespacePrefix is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer. • In orgs that aren't Developer Edition orgs, NamespacePrefix is set only for objects that are part of an installed managed package. All other objects have no namespace prefix. NamespacePrefix is null if the publisher is Salesforce.
ObjectApiName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the object associated with the handler.</p>

UserAdditionalInfo

Represents information about a user such as additional identifiers, user preferences, and a return address. This object is available in API version 65.0 and later.

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AdministeredTerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For an administrator, the ID of the territory that the user can administer. If the territory is a parent record, the user can administer the parent territory and its child territories. This field is a relationship field.</p> <p>Relationship Name AdministeredTerritory</p> <p>Relationship Type Lookup</p> <p>Refers To Territory2</p>
AdministeredTerritoryName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For an administrator, the name of the territory that the user can administer. If the territory is a parent record, the user can administer the parent territory and its child territories.</p>
AvailableCountries	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description The countries where the user does business.</p>
BusinessGroup	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Represents the business group with which a user is associated.</p>
GoogleIdentifier	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The user's Google identifier.</p>
IsLoggingEnabled	<p>Type boolean</p>
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description Indicates whether to upload the debug mobile application logs generated by the user to an external service (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p>
	<p>Properties Filter, Nillable, Sort</p>
	<p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>
	<p>Properties Filter, Nillable, Sort</p>
	<p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
LinkedInIdentifier	<p>Type string</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The user's LinkedIn identifier.</p>
MdmUnsubscribedDownloadCnt	<p>Type double</p>
	<p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The number of records downloaded by the user that aren't included in the user's contract.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the user additional info record.</p>
PhoneticName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The phonetic spelling of the user's name.</p>
Preference	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description User preferences in JSON format.</p>
PreferredCountry	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country where the user prefers to do business.</p>
ProductReturnAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The return shipping address for products and product samples associated with the user.</p>
ProductReturnCity	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	The return shipping city for products and product samples associated with the user.
ProductReturnCountry	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The return shipping country for products and product samples associated with the user.
ProductReturnGeocodeAccuracy	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The geocode of the return shipping address for products and product samples associated with the user.
ProductReturnLatitude	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The latitude of the return shipping address for products and product samples associated with the user.
ProductReturnLongitude	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The longitude of the return shipping address for products and product samples associated with the user.
ProductReturnPostalCode	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The postal code of the return shipping address for products and product samples associated with the user.

Field	Details
ProductReturnState	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The state of the return shipping address for products and product samples associated with the user.</p>
ProductReturnStreet	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The street of the return shipping address for products and product samples associated with the user.</p>
ProfileIdentifier	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Required. The ID of the user profile. This is a read-only field and you can't specify or update its value.</p>
SecondaryEmail	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user's secondary email address.</p>
SecondaryPhone	<p>Type phone</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user's home phone number.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
	<p>Description An external ID from the source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source system for data integrations.</p>
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The user associated with the additional info. This field is a relationship field.</p> <p>Relationship Name User</p> <p>Relationship Type Master-detail</p> <p>Refers To User (the master object)</p>
UserPictureUrl	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The URL for the user's profile image.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[UserAdditionalInfoFeed on page 1429](#)

Feed tracking is available for the object.

[UserAdditionalInfoHistory on page 1434](#)

History is available for tracked fields of the object.

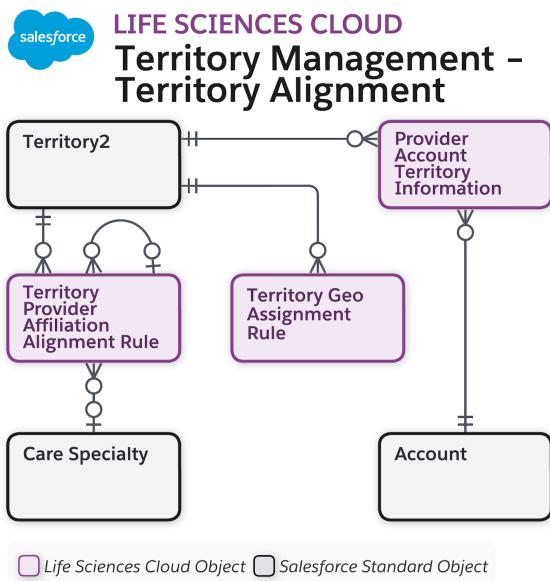
Territory Management

Territory Management supports strategically organizing territories and aligning healthcare providers (HCPs) and healthcare organizations (HCOs) to territories. Use Territory Management to optimize resource allocation and improve engagement with HCPs/HCOs. Life Sciences Cloud enables industry-specific territory management features that are integrated with Salesforce Enterprise Territory Management.

Additional territory-related objects capture territory or user downtime as well as assignments of document templates to territories for use in business activities like emails and invitations.

Territory Alignment

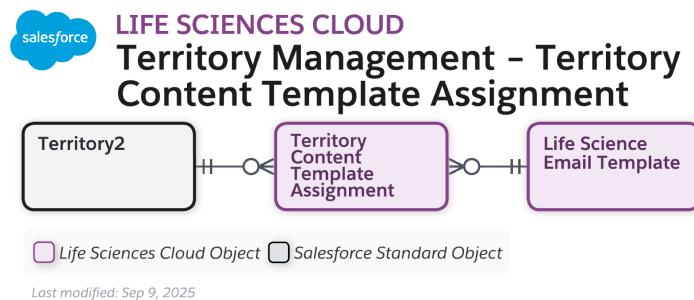
Territory Alignment provides for efficient distribution of Healthcare Providers (HCPs) and Healthcare Organizations (HCOs) among an organization's territories. Assign users to territories and align accounts to territories. HCPs and HCOs can be aligned to territories through various alignment rules such as explicit customer alignment, geographical alignment, and affiliation alignment. Life Sciences Cloud jobs process the alignment rules to generate territory alignments including the sharing of account-related data with users and creation of provider account territory info records.



For more details and a larger image, visit the [Data Model Gallery](#).

Territory Content Template Assignment

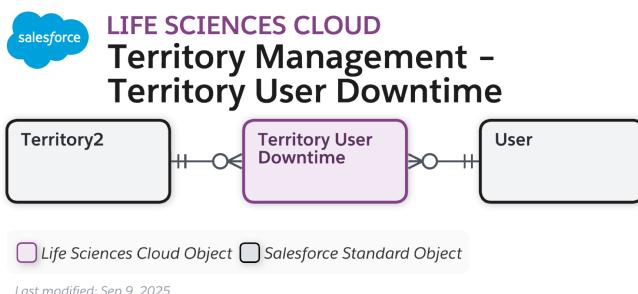
Territory Content Template Assignments store a link between a territory and a template such as email templates or other documents, enable the assignment of relevant content to specific territories.



For more details and a larger image, visit the [Data Model Gallery](#).

Territory User Downtime

Enable users to log and manage time away from their assigned territories. Track time spent that's not directly related to customer-facing activities. Sales representatives can block off time during normal business hours for various reasons, such as vacation, sick days, and trainings. Configure overlapping rules for different types of time-off territory events to prevent scheduling conflicts.



For more details and a larger image, visit the [Data Model Gallery](#).

[TerrProvAffilAssignRule](#)

Represents a rule for aligning the affiliated accounts to the existing set of aligned accounts, based on their role, specialty, and account type. This object is available in API version 65.0 and later.

[TerrGeoAssignmentRule](#)

Represents alignment rules that assign accounts to specific territories based on geocodes. This object is available in API version 65.0 and later.

[TerritoryContentTmplAsgmt](#)

Stores a link between a territory and a template allowing for the assignment of relevant content to specific territories. This object is available in API version 65.0 and later.

[TerritoryUserDowntime](#)

Defines the blocks of time during normal business hours for various types of reasons when sales representatives are out of their territories. This object is available in API version 65.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: Territory2](#)

[Object Reference for the Salesforce Platform: ProviderAcctTerritoryInfo](#)

TerrProvAffilAssignRule

Represents a rule for aligning the affiliated accounts to the existing set of aligned accounts, based on their role, specialty, and account type. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`,
`retrieve()`, `search()`, `update()`, `upsert()`

Fields

Field	Details
AccountType	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account type for which the assignment rule is defined.</p>
AffiliationRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The affiliation role for which the assignment rule is defined.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The name of the territory provider affiliation assignment rule.
OwnerId	Type
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The ID of the user who owns this record.
	This field is a polymorphic relationship field.
	Relationship Name
	Owner
	Refers To
	Group, User
ParentId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The parent mapping through which the current mapping is generated.
	This field is a relationship field.
	Relationship Name
	Parent
	Refers To
	TerrProvAffilAssignRule
SourceSystemIdentifier	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the record in the external system.
SourceSystemName	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description The name of the external system that generated the record.</p>
SpecialityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The affiliation specialty which the assignment rule is defined. This field is a relationship field.</p> <p>Relationship Name Specialty</p> <p>Refers To CareSpecialty</p>
Territory2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The territory reference for which the rule is defined. This field is a relationship field.</p> <p>Relationship Name Territory2</p> <p>Refers To Territory2</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[TerrProvAffilAssignRuleChangeEvent on page 1426](#)

Change events are available for the object.

[TerrProvAffilAssignRuleFeed on page 1429](#)

Feed tracking is available for the object.

[TerrProvAffilAssignRuleHistory on page 1434](#)

History is available for tracked fields of the object.

[TerrProvAffilAssignRuleShare on page 1438](#)

Sharing is available for the object.

TerrGeoAssignmentRule

Represents alignment rules that assign accounts to specific territories based on geocodes. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `update()`, `upsert()`

Fields

Field	Details
EffectiveEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date from which the assignment rule becomes effective.</p>
EffectiveStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date on which the assignment rule is no longer effective.</p>
GeoCode	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The value of the geographic code determined by the selected geocode type.</p>
GeoCodeType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of the geographic code used for the assignment rule.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • BrickToTerritory—Brick To Territory • GeoGroup1—Geo Group 1 • GeoGroup2—Geo Group 2

Field	Details
	<ul style="list-style-type: none"> ZipToTerritory—Zip To Territory <p>The default value is BrickToTerritory.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the territory geo assignment rule.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p>

Field	Details
	<p>Description The ID of the record in the external system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external system that generated the record.</p>
Territory2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the territory for which the assignment rule is defined. This field is a relationship field.</p> <p>Relationship Name Territory2</p> <p>Refers To Territory2</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The usage context for the defined territory geo assignment rule. Possible values are:<ul style="list-style-type: none"> • Life Sciences The default value is Life Sciences.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[TerrGeoAssignmentRuleChangeEvent on page 1426](#)

Change events are available for the object.

[TerrGeoAssignmentRuleFeed on page 1429](#)

Feed tracking is available for the object.

TerrGeoAssignmentRuleHistory on page 1434

History is available for tracked fields of the object.

TerrGeoAssignmentRuleShare on page 1438

Sharing is available for the object.

TerritoryContentTmplAsgnt

Stores a link between a territory and a template allowing for the assignment of relevant content to specific territories. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferencedDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. Name of the territory content template assignment.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
TemplateReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Required. Reference to the related life science email template or other specified template type, to assign relevant templates to the territory. This field is a polymorphic relationship field.</p> <p>Relationship Name TemplateReferenceRecord</p> <p>Refers To LifeSciEmailTemplate</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Required. Indicates the specific territory associated with this template, to identify the related territory for content distribution. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>

TerritoryUserDowntime

Defines the blocks of time during normal business hours for various types of reasons when sales representatives are out of their territories. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()`

Fields

Field	Details
DowntimeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Stores the type of territory user downtime. Possible values are:</p> <ul style="list-style-type: none"> • CivicActivity—Civic Activity • Disciplinary • Holiday • PersonalAbsence—Personal Absence • Training • Unexcused • Vacation
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Stores the end date and time of the territory user downtime.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
Description	
	<p>The timestamp when the current user last viewed this record or list view.</p> <p>If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Territory user downtime name.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner or creator of this object.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SlotType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Stores the selected slot for territory user downtime.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Afternoon • AllDay • Evening • Morning
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
	<p>Description The ID of the record in the external source system for data integrations.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external source system from which the record was imported.</p>
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Stores the start date and time of the territory user downtime.</p>
TerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Stores the sales representative's territory for the downtime. This field is a relationship field.</p> <p>Relationship Name Territory</p> <p>Refers To Territory2</p>
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The user who logs the territory user downtime event. This field is a relationship field.</p> <p>Relationship Name User</p> <p>Refers To User</p>

Patient Engagement

These objects are available for Life Sciences Cloud for Patient Engagement.

[Advanced Therapy Management](#)

Advanced Therapy Management helps streamline complex procedures that involve multiple appointments across different locations. Use Advanced Therapy Management's Multi-Step Scheduling solution for easy scheduling of appointments for program participants. Configure procedure steps based on lead times and set up affiliated service territories to establish where work types are sequentially performed.

[Care Program Management](#)

Drive increased adherence and improve patient outcomes using the care program management data model. Now you can enroll and manage patients to achieve the maximum impact of your programs.

[Clinical Data Model](#)

Patient data and healthcare records are important in the healthcare industry. Without accurate information, performing and managing care becomes difficult. These records are readily available if a patient seeks care from the same provider every time. However, in reality, a patient's healthcare journey takes them to multiple providers and hospitals at different times. Because the patient's health hinges on the accuracy of their medical records, it's crucial for the systems used by different providers and hospitals to be interoperable. And to make this interoperability possible, it's vital to have some industry-recognized standards for how these records are structured, stored, and transferred. That's where the standards defined by Health Level 7 (HL7) come in.

[Electronic Signatures](#)

Manage electronic signatures by using Digital Verifications. Set up signature trails for records or workflows that require users to verify key updates. Define signature details such as the order of designated verifiers and whether designated verifiers belong to a user group or have a specific participant role.

[Financial Assistance Program](#)

The financial assistance program data model helps life sciences organizations implement several financial assistance programs for eligible patients to receive assistance with their out of pocket medical expenses.

[Health Insurance](#)

The health insurance data model provides objects for managing the ways care is paid for. It represents information about participants such as employment, insurance coverage, and dependents. You can manage details of the benefits provided by plans to members and treatment preauthorization requests made by members or providers.

[Intelligent Document Automation](#)

Use the Intelligent Document Automation data objects to simplify the document management process, reduce manual data entry, and get patients the right care and services faster by managing patient and member forms all in one place, from intake through processing.

[Patient Program Outcome Management](#)

Patient Program Outcome Management data model helps you to improve patient and program outcomes by defining and measuring program outcomes, linking patient progress to program outcomes. Program Leads can define outcomes for a care program, and can generate a program and patient outcome summary. Additionally, case agents can generate a patient outcome summary.

[Pharmacy Benefits Verification](#)

Pharmacy Benefits Verification uses a data model that's FHIR-CARIN and NCPDP aligned to store its data and make it interoperable. The pharmacy benefits verification data model supports drug manufacturers, providers, pharmacists, and life sciences organizations in determining pharmacy benefits coverage for the medications prescribed to the patients under a care program.

[Provider Relationship Management](#)

Use the Provider Relationship Management data model along with standard Salesforce objects to manage your provider relationships.

Social Determinants

The social determinants data model represents the barriers, health determinants, and interventions for a patient or member. Available in API version 45.0 and later.

Timeline

Use Timeline to configure a chronological view of records from multiple objects.

Advanced Therapy Management

Advanced Therapy Management helps streamline complex procedures that involve multiple appointments across different locations.

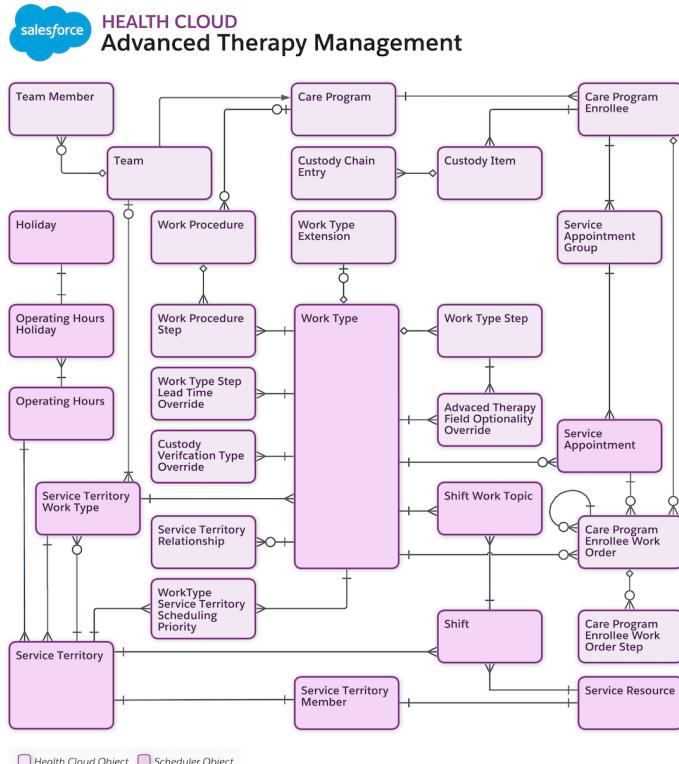
Use Advanced Therapy Management's Multi-Step Scheduling solution for easy scheduling of appointments for program participants.

Configure procedure steps based on lead times and set up affiliated service territories to establish where work types are sequentially performed.

Advanced Therapy Management's Multi-Step Scheduling is powered by Salesforce Scheduler to search for available slots at affiliated service territories. With the combined help of new Advanced Therapy Management objects and existing Scheduler objects, Multi-Step Scheduling provides a centralized platform that helps users book, reschedule, and cancel slots for various procedure steps.

Advanced Therapy Management helps pharmaceutical companies conduct complex therapies like cell and gene therapy with ease. Treatment center coordinators can schedule appointments for procedure steps like apheresis, manufacturing, and infusion at one go. Service territory relationships streamline search results by defining relationships between affiliated sites where consecutive therapy steps are performed. Salesforce Scheduler's existing objects support effective slot management by helping users configure service resources, assets, and their availabilities at designated locations.

Advanced Therapy Management objects are available to users with the Multi-Step Scheduling permission set and permission set license. Admins must also purchase the Asset Scheduler Add-On license for each asset assigned to a service territory.



For more details and a larger image, visit the [Data Model Gallery](#).

[AdvTherapyFieldOptOverride](#)

Represents a list of fields with changed optionality, based on certain parameters. This object is available in API version 59.0 and later.

[CarePgmEnrolleeWorkOrder](#)

Represents information about the work order that's executed for the care program enrollee. This object is available in API version 58.0 and later.

[CarePgmEnrolleeWkOrdStep](#)

Represents information about the step in a work order that's executed for the care program enrollee. This object is available in API version 58.0 and later.

[CareProgramEnrollee](#)

Represents a participant enrolled in a care program.

[CustodyChainEntry](#)

Represents information about an entry or event in the chain of custody. This object is available in API version 59.0 and later.

[CustodyItem](#)

Represents information about an item in the custody chain. This object is available in API version 59.0 and later.

[CustodyVerfcTypeOverride](#)

Represents information about the verification of an entry in the chain of custody. This object is available in API version 59.0 and later.

[ServiceAppointmentGroup](#)

Stores information about a group of related service appointments. This object is available in API version 56.0 and later.

[ServiceTerritoryRelationship](#)

Represents the relationship between service territories based on work types performed. This object is available in API version 56.0 and later.

[Team](#)

Represents the team of members associated with an organization. This object is available in API version 58.0 and later.

[TeamMember](#)

Represents the member associated with a team. This object is available in API version 58.0 and later.

[WorkProcedure](#)

Represents information about a procedure or process that's part of a program, such as a care program in Health Cloud or Life Sciences Cloud.

[WorkProcedureStep](#)

Represents information about the work type that's a part of a work procedure.

[WorkTypeExtension](#)

Represents additional information about a work type.

[WorkTypeStep](#)

Represents each step within a work type.

[WorkTypeStepLdTimeOvride](#)

Represents the lead time that's used to override the default lead time required for the work procedure, work type, or work type step that's performed at a service territory in a country. This object is available in API version 59.0 and later.

[WorkTypeSvcTerrSchdPrio](#)

Represents the priority of the combination of the service territory, work type, and work procedure while fetching appointment slots. This object is available in API version 59.0 and later.

SEE ALSO:

Salesforce Scheduler Developer Guide: Salesforce Scheduler Standard Objects

AdvTherapyFieldOptOverride

Represents a list of fields with changed optionality, based on certain parameters. This object is available in API version 59.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CountryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The country for which the override is applicable. This field is a relationship field.</p> <p>Relationship Name Country</p> <p>Relationship Type Lookup</p> <p>Refers To GeoCountry</p>
FieldList	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description The list of fields with optionality that's overruled based on the priority of the conditions.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the field optionality override record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the field optionality override record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Priority	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The priority of each condition.</p>

Field	Details
ServiceTerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The service territory condition for which the override is applicable. This field is a relationship field.</p> <p>Relationship Name ServiceTerritory</p> <p>Relationship Type Lookup</p> <p>Refers To ServiceTerritory</p>
TaskName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The task condition for which the override is applicable.</p>
WorkProcedureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work procedure condition for which the override is applicable. This field is a relationship field.</p> <p>Relationship Name WorkProcedure</p> <p>Relationship Type Lookup</p> <p>Refers To WorkProcedure</p>
WorkTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work type condition for which the override is applicable.</p>

Field	Details
	This field is a relationship field.
	Relationship Name WorkType
	Relationship Type Lookup
	Refers To WorkType
WorkTypeStepId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work type step condition for which the override is applicable. This field is a relationship field.</p> <p>Relationship Name WorkTypeStep</p> <p>Relationship Type Lookup</p> <p>Refers To WorkTypeStep</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AdvTherapyFieldOptOverrideChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[AdvTherapyFieldOptOverrideFeed](#)

Feed tracking is available for the object.

[AdvTherapyFieldOptOverrideHistory](#)

History is available for tracked fields of the object.

[AdvTherapyFieldOptOverrideOwnerSharingRule](#)

Sharing rules are available for the object.

[AdvTherapyFieldOptOverrideShare](#)

Sharing is available for the object.

CarePgmEnrolleeWorkOrder

Represents information about the work order that's executed for the care program enrollee. This object is available in API version 58.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CareProgramEnrolleeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description This field represents the care program enrollee for whom the work order record is created. This field is a relationship field.</p> <p>Relationship Name CareProgramEnrollee</p> <p>Relationship Type Master-Detail</p> <p>Refers To CareProgramEnrollee</p>
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date and time for the execution of the care program enrollee work order.</p>
IsCustodyCompleted	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether all the custody chain entries for the work order are completed (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the work order record.</p>
NextWorkOrderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description This field represents next work order that's executed for the associated care program enrollee. This field is a relationship field.</p> <p>Relationship Name NextWorkOrder</p> <p>Relationship Type Lookup</p> <p>Refers To CarePgmEnrolleeWorkOrder</p>
PreviousWorkOrderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The previous work order that's executed for the associated care program enrollee. This field is a relationship field.</p> <p>Relationship Name PreviousWorkOrder</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To CarePgmEnrolleeWorkOrder</p>
ServiceAppointmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description This field represents the service appointment that's associated with the work type. This field is a relationship field.</p> <p>Relationship Name ServiceAppointment</p> <p>Relationship Type Lookup</p> <p>Refers To ServiceAppointment</p>
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start date and time for the execution of the care program enrollee work order.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description This field specifies the execution status of the care program enrollee work order. Possible values are:</p> <ul style="list-style-type: none"> • Canceled • Completed • InProgress • NotStarted
WorkTypeId	<p>Type reference</p>

Field	Details
Properties	Create, Filter, Group, Sort, Update
Description	This field represents work type for which the work order of the care program enrollee is created.
	This field is a relationship field.
Relationship Name	WorkType
Relationship Type	Lookup
Refers To	WorkType

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CarePgmEnrolleeWorkOrderChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CarePgmEnrolleeWorkOrderFeed](#)

Feed tracking is available for the object.

[CarePgmEnrolleeWorkOrderHistory](#)

History is available for tracked fields of the object.

CarePgmEnrolleeWkOrdStep

Represents information about the step in a work order that's executed for the care program enrollee. This object is available in API version 58.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ActionPlanTemplateId	Type reference

Properties

Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	<p>Represents the action plan template containing the tasks related to each work order step.</p> <p>This field is a relationship field.</p>
	Relationship Name
	ActionPlanTemplate
	Relationship Type
	Lookup
	Refers To
	ActionPlanTemplate
AreAllTasksCompleted	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Determine whether all the child tasks for the step are completed (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
EndDateTime	Type
	dateTime
	Properties
	Create, Filter, Nullable, Sort, Update
	Description
	Represents the end date and time for the execution of the work order step.
IsCustodyCompleted	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Determine whether all the custody chain entries for the step and the related tasks are completed (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nullable, Sort
	Description
	The most recent date on which a user referenced the record.

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Represents the name of the step associated with the care program enrollee work order record.</p>
ParentEnrolleeWorkOrderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Represents the parent work order of the care program enrollee that's associated with the step. This field is a relationship field.</p> <p>Relationship Name ParentEnrolleeWorkOrder</p> <p>Relationship Type Master-Detail</p> <p>Refers To CarePgmEnrolleeWorkOrder</p>
SequenceNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Represents the sequence in which the work order step will be executed.</p>
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description Represents the start date and time for the execution of the work order step.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the execution status of the work order step. Possible values are:</p> <ul style="list-style-type: none"> • Canceled • Completed • InProgress • NotStarted
WorkTypeStepId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work type step for which the work order step of the care program enrollee is created. This field is a polymorphic relationship field.</p> <p>Relationship Name WorkTypeStep</p> <p>Relationship Type Lookup</p> <p>Refers To WorkTypeStep</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CarePgmEnrolleeWkOrdStepChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CarePgmEnrolleeWkOrdStepFeed on page 1429](#)

Feed tracking is available for the object.

CareProgramEnrollee

Represents a participant enrolled in a care program.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field Name	Details
AccountId	<p>Type Lookup(Account)</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Person Account representing the enrollee</p>
BenefitCoverageType	<p>Type Picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description Specifies the coverage status of the enrollee under both Medicare and Medicaid. Possible values are:<ul style="list-style-type: none"> • ContinuedEnrollee • NewEnrollee </p>
CareProgramId	<p>Type Master-Detail(Care Program)</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Look up for Care Program.</p>
ClinicalServiceRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The clinical service request associated with the care program enrollee. This field is a relationship field and is available in API version 60.0 and later.</p>

Field Name	Details
	Relationship Name
	ClinicalServiceRequest
	Relationship Type
	Lookup
	Refers To
	ClinicalServiceRequest
CurrentWorkOrderId	Type
	reference
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	The work order that's currently being executed for the care program enrollee.
	This field is a relationship field and is available for the Advanced Therapy Management feature in API version 58.0 and later.
	Relationship Name
	CurrentWorkOrder
	Relationship Type
	Lookup
	Refers To
	CarePgmEnrolleeWorkOrder
CurrentWorkOrderStepId	Type
	reference
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	The work order step that's currently being executed for the care program enrollee.
	This field is a relationship field and is available for the Advanced Therapy Management feature in API version 58.0 and later.
	Relationship Name
	CurrentWorkOrderStep
	Relationship Type
	Lookup
	Refers To
	CarePgmEnrolleeWkOrdStep
EnrolledAtId	Type
	reference
	Properties
	Create, Filter, Group, Nullable, Sort, Update

Field Name	Details
	<p>Description</p> <p>The site, location, or territory where the enrollee enrolled in the care program.</p> <p>This field is available in API version 64.0 when Site Management is enabled.</p> <p>This field is a polymorphic relationship field.</p>
	<p>Relationship Name</p> <p>EnrolledAt</p>
	<p>Refers To</p> <p>CareProgramSite</p>
EnrolleeType	<p>Type</p> <p>Picklist</p>
	<p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>
	<p>Description</p> <p>Specifies whether the enrollee is a new enrollee or a continued enrollee.</p>
	<p>Possible values are:</p> <ul style="list-style-type: none"> • FullBenefitDual • PartialBenefitDual • NonDual • Dual
EnrollmentLocationId	<p>Type</p> <p>reference</p>
	<p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p> <p>The service territory where an advanced therapy care program is executed.</p>
	<p>This field is a relationship field and is available for the Advanced Therapy Management feature in API version 59.0 and later.</p>
	<p>Relationship Name</p> <p>EnrollmentLocation</p>
	<p>Relationship Type</p> <p>Lookup</p>
	<p>Refers To</p> <p>ServiceTerritory</p>
FlowInterviewId	<p>Type</p> <p>reference</p>
	<p>Properties</p> <p>Filter, Group, Nillable, Sort</p>

Field Name	Details
	Description
	Runtime instance of the associated flow.
	This field is a relationship field.
	Relationship Name
	FlowInterview
	Refers To
	FlowInterview
FlowOrchestrationInstanceId	Type
	reference
	Properties
	Filter, Group, Nillable, Sort
	Description
	Runtime instance of the associated flow orchestration.
	This field is a relationship field.
	Relationship Name
	FlowOrchestrationInstance
	Refers To
	FlowOrchestrationInstance
IsPatientInLtrmCareFacility	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates that the patient was at a long-term healthcare facility during outreach or enrollment to the care program. This field is available for the Medication Management feature in API version 56.0 and later.
	The default value is <code>false</code> .
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type
	dateTime

Field Name	Details
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LeadId	Type
	Lookup(Lead)
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Lead representing the enrollee.
Name	Type
	string
	Properties Create, Filter, Group, Sort, Update
	Description Name of the enrollee.
OptOutPeriodEndDateTime	Type
	dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date on which the patient's opt-out from the care program ends. This field is available in API version 56.0 and later.
OptOutPeriodStartTime	Type
	dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date that the patient opted out of the care program. This field is available in API version 56.0 and later.
OptOutReasonType	Type
	picklist
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
ResearchStudyCandidateId	Description The reason why the patient opted out of the care program. This field is available in API version 56.0 and later.
OwnerId	Type reference
SourceSystem	Properties Create, Filter, Group, Nillable, Sort, Update
SourceSystemIdentifier	Relationship Name ResearchStudyCandidate
Status	Refers To ResearchStudyCandidate
SourceSystem	Type reference
SourceSystemIdentifier	Properties Create, Defaulted on create, Filter, Group, Sort, Update
Status	Description The UserId for the record owner. This field is a polymorphic relationship field.
SourceSystem	Description System from which the enrollee record was sourced.
SourceSystemIdentifier	Type string
Status	Properties Create, Filter, Group, Nillable, Sort, Update
SourceSystem	Description ID of the system from which the enrollee record was sourced.
SourceSystemIdentifier	Type picklist

Field Name	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of the enrollee. Possible values are:<ul style="list-style-type: none">• Active• Inactive</p>
UserId	<p>Type Lookup(User)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description User representing the enrollee.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramEnrolleeChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramEnrolleeFeed](#)

Feed tracking is available for the object.

[CareProgramEnrolleeHistory](#)

History is available for tracked fields of the object.

[CareProgramEnrolleeOwnerSharingRule \(API version 58.0\)](#)

Sharing rules are available for the object.

[CareProgramEnrolleeShare \(API version 58.0\)](#)

Sharing is available for the object.

CustodyChainEntry

Represents information about an entry or event in the chain of custody. This object is available in API version 59.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AssessmentTaskId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The assessment task for which a custody chain entry is created. This field is a relationship field.</p> <p>Relationship Name AssessmentTask</p> <p>Relationship Type Lookup</p> <p>Refers To AssessmentTask</p>
CustodianId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user, organization, or location that has custody of the item. This field is a polymorphic relationship field.</p> <p>Relationship Name Custodian</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact, ServiceTerritory, User</p>
CustodyItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent custody item that's associated with the custody chain entry record. This field is a relationship field.</p> <p>Relationship Name CustodyItem</p> <p>Relationship Type Master-Detail</p>

Field	Details
	<p>Refers To CustodyItem</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the custody chain entry record of the item.</p>
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date and time of custody chain entry the item.</p>
EnrolleeWorkOrderId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The care program enrollee work order for which a custody chain entry is created. This field is a relationship field.</p> <p>Relationship Name EnrolleeWorkOrder</p> <p>Relationship Type Lookup</p> <p>Refers To CarePgmEnrolleeWorkOrder</p>
EnrolleeWorkOrderStepId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The care program enrollee work order step for which a custody chain entry is created. This field is a relationship field.</p> <p>Relationship Name EnrolleeWorkOrderStep</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To CarePgmEnrolleeWkOrdStep</p>
ItemCustodySiteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The place where the item is held in custody. This field is a polymorphic relationship field.</p> <p>Relationship Name ItemCustodySite</p> <p>Relationship Type Lookup</p> <p>Refers To Address, Location, ServiceTerritory</p>
ItemVerificationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of verification for the item. Possible values are:</p> <ul style="list-style-type: none"> • DualSignature • FiveSignatures • FourSignatures • NoSignature • NotApplicable • SingleSignature • ThreeSignatures
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the custody chain entry record.</p>
RecordUpdateInformation	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Stores information about the update in the custody chain entry for which the record was created.</p>
ReferenceObjectApiName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The API name of the reference object storing the stage, step, or task, or the custom object record for which the custody chain entry is created. For internal use only. Possible values are:</p> <ul style="list-style-type: none"> • <code>AssessmentTask</code>—Assessment Task • <code>CarePgmEnrolleeWkOrdStep</code>—Care Program Enrollee Work Order Step • <code>CarePgmEnrolleeWorkOrder</code>—Care Program Enrollee Work Order • <code>ForecastingItem_hd</code>—Forecasting Item (Historical)
ReferenceRecordID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The stage, step, task, or any custom object for which the custody entry is created.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceRecord</p> <p>Relationship Type Lookup</p> <p>Refers To AssessmentTask, CarePgmEnrolleeWkOrdStep, CarePgmEnrolleeWorkOrder</p>
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The start date and time of custody chain entry for the item.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the custody entry record. Possible values are:<ul style="list-style-type: none"> • Completed • New • Rejected </p>
StatusCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description Specifies the category of the custody entry record's status. Possible values are:<ul style="list-style-type: none"> • Completed • New • Rejected </p>
VerificationProcessType	<p>Type picklist</p>

Field	Details
Properties	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
Description	<p>Specifies the type of process in which a verification is performed.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Parallel • Sequential

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CustodyChainEntryChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CustodyChainEntryFeed on page 1429](#)

Feed tracking is available for the object.

[CustodyChainEntryHistory on page 1434](#)

History is available for tracked fields of the object.

CustodyItem

Represents information about an item in the custody chain. This object is available in API version 59.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Category	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Specifies the category of the item that's in custody.</p>
CollectionDateTime	<p>Type</p> <p>dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the custody item was collected.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the item that's in custody.</p>
ExternalIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The external identifier for the custody item or the custody chain.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the item that's in custody.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ReferenceItemObjectApiName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The API name of the reference object that stores the record of the item that's in custody. For internal use only. Possible values are:</p> <ul style="list-style-type: none"> • CareProgramEnrollee • The API name of any custom object created in the org.
ReferenceItemRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the reference object that stores the record of the item that's in custody. This field is a relationship field.</p> <p>Relationship Name ReferenceltemRecord</p> <p>Relationship Type Lookup</p> <p>Refers To CareProgramEnrollee</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Specifies the status of the item that's in custody.</p>
SubjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The subject for which a custody item is collected. This field is a polymorphic relationship field.</p> <p>Relationship Name Subject</p> <p>Relationship Type Lookup</p> <p>Refers To CareProgramEnrollee</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The usage of the custody item in an application or cloud. For internal use only. Possible values are:</p> <ul style="list-style-type: none"> • Healthcare

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CustodyItemChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CustodyItemFeed](#)

Feed tracking is available for the object.

[CustodyItemHistory](#)

History is available for tracked fields of the object.

[CustodyItemOwnerSharingRule](#)

Sharing rules are available for the object.

[CustodyItemShare](#)

Sharing is available for the object.

CustodyVerfcTypeOverride

Represents information about the verification of an entry in the chain of custody. This object is available in API version 59.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CountryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country for which the custody event is configured. This field is a relationship field.</p> <p>Relationship Name Country</p> <p>Relationship Type Lookup</p> <p>Refers To GeoCountry</p>
CustodyVerificationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of verification required for a custody event. Possible values are:</p> <ul style="list-style-type: none"> • DualSignature • FiveSignatures • FourSignatures • NoSignature • NotApplicable • SingleSignature • ThreeSignatures
DigitalVerificationSetupId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The digital verification setup associated with the override. This field is a relationship field.</p> <p>Relationship Name DigitalVerificationSetup</p> <p>Relationship Type Lookup</p> <p>Refers To DigitalVerificationSetup</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the custody verification override record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the custody verification override record. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Priority	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The priority number assigned to the conditions that apply to the custody verification.</p>
ServiceTerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The service territory for which custody is being configured. This field is a relationship field.</p> <p>Relationship Name ServiceTerritory</p> <p>Relationship Type Lookup</p> <p>Refers To ServiceTerritory</p>
TaskName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The task for which the custody event is being configured.</p>
WorkProcedureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work procedure for which custody is being configured.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name WorkProcedure</p> <p>Relationship Type Lookup</p> <p>Refers To WorkProcedure</p>
WorkTypeID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work type for which custody is being configured.</p> <p>This field is a relationship field.</p> <p>Relationship Name WorkType</p> <p>Relationship Type Lookup</p> <p>Refers To WorkType</p>
WorkTypeStepID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work type step for which custody is being configured.</p> <p>This field is a relationship field.</p> <p>Relationship Name WorkTypeStep</p> <p>Relationship Type Lookup</p> <p>Refers To WorkTypeStep</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

CustodyVerfcTypeOverrideChangeEvent (API version 60.0)

Change events are available for the object.

CustodyVerfcTypeOverrideFeed

Feed tracking is available for the object.

CustodyVerfcTypeOverrideHistory

History is available for tracked fields of the object.

CustodyVerfcTypeOverrideOwnerSharingRule

Sharing rules are available for the object.

CustodyVerfcTypeOverrideShare

Sharing is available for the object.

ServiceAppointmentGroup

Stores information about a group of related service appointments. This object is available in API version 56.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AppointmentGroupType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the type of appointment group associated with the service appointment group. Possible values are:</p> <ul style="list-style-type: none"> • Multi-Step • Recurring
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores information about the service appointment group.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the service appointment group.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the record associated with the service appointment group. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name ReferenceRecord</p> <p>Relationship Type Lookup</p> <p>Refers To Account, CareProgramEnrollee, Case, Opportunity</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the service appointment group. Possible values are:<ul style="list-style-type: none">• Awaiting Approval• Canceled• None• ScheduledThe default value is None.</p>
StatusCode	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the status code used for scheduling the service appointment group. Possible values are:<ul style="list-style-type: none">• Canceled• Processed• Proposed</p>
WorkProcedureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the work procedure associated with the service appointment group. This field is a relationship field.</p> <p>Relationship Name WorkProcedure</p>

Field	Details
Relationship Type	Lookup
Refers To	WorkProcedure

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ServiceAppointmentChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[ServiceAppointmentGroupFeed](#)

Feed tracking is available for the object.

[ServiceAppointmentGroupHistory](#)

History is available for tracked fields of the object.

[ServiceAppointmentGroupShare](#)

Sharing is available for the object.

ServiceTerritoryRelationship

Represents the relationship between service territories based on work types performed. This object is available in API version 56.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p>

Field	Details
	<p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the service territory relationship.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
RelatedServiceTerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The related service territory that's associated with a work type. This field is a relationship field.</p> <p>Relationship Name RelatedServiceTerritory</p> <p>Relationship Type Lookup</p> <p>Refers To ServiceTerritory</p>
ServiceTerritoryId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The service territory that's associated with a work type. This field is a relationship field.</p> <p>Relationship Name ServiceTerritory</p> <p>Relationship Type Lookup</p> <p>Refers To ServiceTerritory</p>
WorkTypeID	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The work type that's performed at a service territory. This field is a relationship field.</p> <p>Relationship Name WorkType</p> <p>Relationship Type Lookup</p> <p>Refers To WorkType</p>

Usage

Create a service territory relationship record to map affiliated sites where consecutive work types are performed. Select a service territory where a work type—such as apheresis—is held. In Related Service Territory, select the service territory where the next work type—such as manufacturing—is held.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ServiceTerritoryRelationshipChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[ServiceTerritoryRelationshipFeed](#)

Feed tracking is available for the object.

ServiceTerritoryRelationshipHistory

History is available for tracked fields of the object.

ServiceTerritoryRelationshipShare

Sharing is available for the object.

Team

Represents the team of members associated with an organization. This object is available in API version 58.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the team.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the record owner.</p>

Field	Details
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
Status	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description This field specifies the status of the team. Possible values are: <ul style="list-style-type: none"> • Active • Entered-in-Error • Inactive • Proposed • Suspended

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[TeamChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[TeamFeed](#)

Feed tracking is available for the object.

[TeamHistory](#)

History is available for tracked fields of the object.

[TeamShare](#)

Sharing is available for the object.

TeamMember

Represents the member associated with a team. This object is available in API version 58.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
MemberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description This field represents the user that's part of the team. This field is a polymorphic relationship field.</p> <p>Relationship Name Member</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact, User</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the team member.</p>
RoleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Represents the role associated with the member. This field is a relationship field.</p>
	<p>Relationship Name Role</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To ParticipantRole</p>
TeamId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description This field represents the team that's associated with the member. This field is a relationship field.</p> <p>Relationship Name Team</p> <p>Relationship Type Master-Detail</p> <p>Refers To Team</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[TeamMemberChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[TeamMemberFeed](#)

Feed tracking is available for the object.

[TeamMemberHistory](#)

History is available for tracked fields of the object.

WorkProcedure

Represents information about a procedure or process that's part of a program, such as a care program in Health Cloud or Life Sciences Cloud.

Special Access Rules

Available in API version 61.0 and later with Life Sciences Cloud.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AssociatedFlowOrchestratorName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the flow orchestrator associated with the work procedure.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the work procedure.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active (<code>true</code>) or not (<code>false</code>).</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The most recent date on which a user viewed the record.</p>
LeadTimeUnitType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The unit of measure for the lead time required to complete the work procedure.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Days • Hours • Minutes
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the work procedure.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The record ID of the object associated with this work procedure.</p>

Field	Details
	This field is a polymorphic relationship field.
Relationship Name	
	ReferenceRecord
Relationship Type	
	Lookup
Refers To	
	CareProgram

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[WorkProcedureChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[WorkProcedureFeed](#)

Feed tracking is available for the object.

[WorkProcedureHistory](#)

History is available for tracked fields of the object.

[WorkProcedureShare](#)

Sharing is available for the object.

WorkProcedureStep

Represents information about the work type that's a part of a work procedure.

Special Access Rules

Available in API version 61.0 and later with Life Sciences Cloud.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AssociatedFlowName	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nullable, Sort, Update</p>

Field	Details
	<p>Description Represents the flow definition that associated with the work procedure step.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
LeadTime	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The time required before a work procedure step can begin.</p>
LeadTimeUnitType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The unit of measure used to calculate the lead time. Possible values are:</p> <ul style="list-style-type: none"> • Days • Hours • Minutes
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the work procedure step.</p>

Field	Details
SequenceNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the sequence in which the work type will be performed.</p>
WorkProcedureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent work procedure that's associated with the step. This field is a relationship field.</p> <p>Relationship Name WorkProcedure</p> <p>Relationship Type Master-Detail</p> <p>Refers To WorkProcedure</p>
WorkTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work type that's associated with the work procedure step. This field is a relationship field.</p> <p>Relationship Name WorkType</p> <p>Relationship Type Lookup</p> <p>Refers To WorkType</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[WorkProcedureStepChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

WorkProcedureStepFeed

Feed tracking is available for the object.

WorkProcedureStepHistory

History is available for tracked fields of the object.

WorkTypeExtension

Represents additional information about a work type.

Special Access Rules

Available in API version 61.0 and later with Life Sciences Cloud.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`,
`retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
IconUrl	Type url Properties Create, Filter, Group, Nillable, Sort, Update Description The URL of the image related to the work type.
IsNonStandard	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the work type is nonstandard, that is, the work type can also be performed at child service territories that aren't part of the parent service territory. The default value is FALSE.
IsSchedulingRequired	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether a work type requires scheduling. The default value is FALSE.

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the work type extension.</p>
ParentWorkTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the parent record of the work type for which information is being added. This field is a relationship field.</p> <p>Relationship Name ParentWorkType</p> <p>Relationship Type Lookup</p> <p>Refers To WorkType</p>
WorkTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Represents the work type for which information is being added.</p>

Field	Details
	This field is a relationship field.
Relationship Name	
WorkType	
Relationship Type	
Master-Detail	
Refers To	
WorkType	

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[WorkTypeExtensionChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[WorkTypeExtensionFeed](#)

Feed tracking is available for the object.

[WorkTypeExtensionHistory](#)

History is available for tracked fields of the object.

WorkTypeStep

Represents each step within a work type.

Special Access Rules

Available in API version 61.0 and later with Life Sciences Cloud.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ActionPlanTemplateId	
Type	
reference	
Properties	
Create, Filter, Group, Nullable, Sort, Update	
Description	
The action plan template associated with the work type step.	
This field is a relationship field.	

Field	Details
	<p>Relationship Name ActionPlanTemplate</p> <p>Relationship Type Lookup</p> <p>Refers To ActionPlanTemplate</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
LeadTime	<p>Type int</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The lead time required, in hours or days, to complete the work type step.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the work type step record.</p>
ParentWorkTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The work type associated with the step.</p>

Field	Details
	This field is a relationship field.
	Relationship Name
	ParentWorkType
	Relationship Type
	Master-Detail
	Refers To
	WorkType
SequenceNumber	Type int
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The sequence number in which the work type step is performed.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[WorkTypeChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[WorkTypeStepFeed](#)

Feed tracking is available for the object.

[WorkTypeStepHistory](#)

History is available for tracked fields of the object.

WorkTypeStepLdTimeOvride

Represents the lead time that's used to override the default lead time required for the work procedure, work type, or work type step that's performed at a service territory in a country. This object is available in API version 59.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CountryId	Type reference

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country for which priority is being defined. This field is a relationship field.</p> <p>Relationship Name Country</p> <p>Relationship Type Lookup</p> <p>Refers To GeoCountry</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
LeadTime	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The time taken, in hours or days, for the combination of work procedure, work type, work type step, country, and service territory.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the work type step lead time override record.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the work type step lead time override record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Priority	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The priority of the conditions for a lead time.</p>
ServiceTerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The service territory for which priority is being defined. This field is a relationship field.</p> <p>Relationship Name ServiceTerritory</p> <p>Relationship Type Lookup</p> <p>Refers To ServiceTerritory</p>
WorkProcedureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work procedure for which priority is being defined.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name WorkProcedure</p> <p>Relationship Type Lookup</p> <p>Refers To WorkProcedure</p>
WorkTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work type for which priority is being defined. This field is a relationship field.</p> <p>Relationship Name WorkType</p> <p>Relationship Type Lookup</p> <p>Refers To WorkType</p>
WorkTypeStepId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The work type step for which priority is being defined. This field is a relationship field.</p> <p>Relationship Name WorkTypeStep</p> <p>Relationship Type Lookup</p> <p>Refers To WorkTypeStep</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

WorkTypeStepLdTimeOvrideChangeEvent (API version 60.0)

Change events are available for the object.

WorkTypeStepLdTimeOvrideFeed

Feed tracking is available for the object.

WorkTypeStepLdTimeOvrideHistory

History is available for tracked fields of the object.

WorkTypeStepLdTimeOvrideOwnerSharingRule

Sharing rules are available for the object.

WorkTypeStepLdTimeOvrideShare

Sharing is available for the object.

WorkTypeSvcTerrSchdPrio

Represents the priority of the combination of the service territory, work type, and work procedure while fetching appointment slots. This object is available in API version 59.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the work type service territory scheduling priority record.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the work type service territory scheduling priority record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParentServiceTerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the parent service territory condition for which priority is being defined. This field is a relationship field.</p> <p>Relationship Name ParentServiceTerritory</p> <p>Relationship Type Lookup</p> <p>Refers To ServiceTerritory</p>
Priority	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The combined priority of all the conditions for a service territory.</p>
ServiceTerritoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Represents the service territory condition for which priority is being defined.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name ServiceTerritory</p> <p>Relationship Type Lookup</p> <p>Refers To ServiceTerritory</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The usage type of the scheduling priority in an application or cloud. For internal use only. Possible values are:<ul style="list-style-type: none">• Healthcare</p>
WorkProcedureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the work procedure condition for which priority is being defined. This field is a relationship field.</p> <p>Relationship Name WorkProcedure</p> <p>Relationship Type Lookup</p> <p>Refers To WorkProcedure</p>
WorkTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Represents the work type condition for which priority is being defined. This field is a relationship field.</p> <p>Relationship Name WorkType</p>

Field	Details
Relationship Type	Lookup
Refers To	WorkType

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[WorkTypeSvcTerrSchdPrioChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[WorkTypeSvcTerrSchdPrioFeed](#)

Feed tracking is available for the object.

[WorkTypeSvcTerrSchdPrioHistory](#)

History is available for tracked fields of the object.

[WorkTypeSvcTerrSchdPrioOwnerSharingRule](#)

Sharing rules are available for the object.

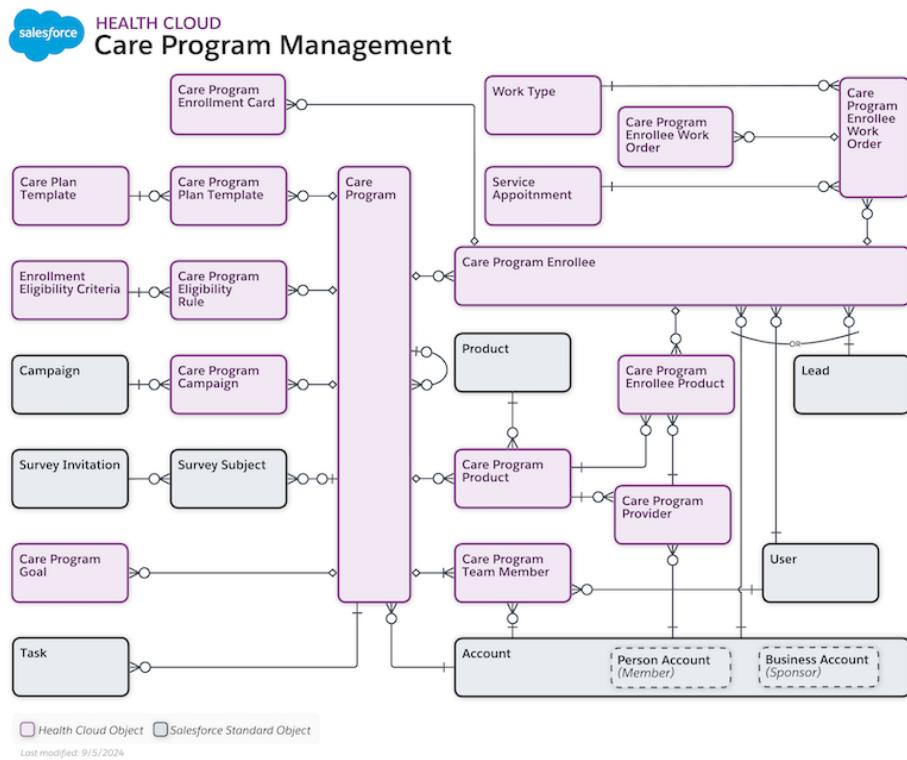
[WorkTypeSvcTerrSchdPrioShare](#)

Sharing is available for the object.

Care Program Management

Drive increased adherence and improve patient outcomes using the care program management data model. Now you can enroll and manage patients to achieve the maximum impact of your programs.

The program management data model represents the entire picture of a program—from products and providers to enrollment eligibility of the enrollee. Available in API version 46.0 and later.



For more details and a larger image, visit the [Data Model Gallery](#).

[CarePgmProvHealthcareProvider](#)

Represents a junction object identifying the primary healthcare professional associated with a care program provider and to look up all healthcare professionals for care program providers. This object is available in API version 49.0 and later.

[CareProgram](#)

Represents a set of activities, such as a patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.

[CareProgramCampaign](#)

Represents a relationship between the Care Program object and the Campaign object. This junction object enables admins to associate one or more campaigns to a program.

[CareProgramEligibilityRule](#)

Represents a rule defining the criteria for patient care program enrollment eligibility. This entity creates an association between Care Program and an Enrollment Eligibility Criteria.

[CareProgramEnrollee](#)

Represents a participant enrolled in a care program.

[CareProgramEnrolleeProduct](#)

Represents the affiliation between a care program enrollee and a care program product, a care program provider, or both.

[CareProgramEnrollmentCard](#)

Represents a care program membership card that includes a membership number or enrollment code.

[CareProgramGoal](#)

Represents a business or clinical goal related to a care program.

[CareProgramProduct](#)

Represents the affiliation between a care program and a care program product, care program provider, or both.

[CareProgramProvider](#)

Represents a business account that is the service provider for a care program product.

[CareProgramTeamMember](#)

Represents a person who delivers services under a program, such as a program manager or care coordinator.

[CareRegisteredDevice](#)

Represents a device or device registration information for a patient or a care program enrollee. This object is available in API version 49.0 and later.

[CareSystemFieldMapping](#)

Represents a mapping from source system fields to Salesforce target entities and attributes.

[EnrollmentEligibilityCriteria](#)

Represents criteria that define patient enrollment eligibility for one or more care programs.

CarePgmProvHealthcareProvider

Represents a junction object identifying the primary healthcare professional associated with a care program provider and to look up all healthcare professionals for care program providers. This object is available in API version 49.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareProgramProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the care program provider that is associated with the healthcare provider (healthcare professional).</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from when this association record is effective.</p>
EffectiveTo	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when this association record is no longer effective.</p>
HealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the healthcare provider (healthcare professional) that is associated with the care program provider.</p>
IsPrimaryProvider	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates that the healthcare provider (healthcare professional) is the primary provider for the care program provider.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p>Description The name for this association between a care program provider and a healthcare provider (healthcare professional).</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the system from which the record was sourced.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[CarePgmProvHealthcareProviderChangeEvent on page 1426 \(API Version 62.0\)](#)

Change events are available for the object.

[CarePgmProvHealthcareProviderFeed](#)

Feed tracking is available for the object.

[CarePgmProvHealthcareProviderHistory](#)

History is available for tracked fields of the object.

CareProgram

Represents a set of activities, such as a patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field Name	Details
ActiveSiteCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of active sites for conducting the research study. This field is available in API version 64.0 and later when Site Management is enabled.</p>
BudgetAmount	<p>Type Currency</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Approved budget for the care program.</p>
CareProgramName	<p>Type Text</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the care program.</p>
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Represents the category of the care program. Possible values are:</p> <ul style="list-style-type: none"> • AdvancedTherapy • TrialManagement (This field is available for the Participant Management feature in API version 61.0 and later.) • Patient Services (This field is available with Patient Program Outcome Management permission set in API version 62.0 and later.)
CurrentEnrolleeCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	Description
	<p>The number of enrollees who have joined the care program to date. This field is available for the Participant Management feature in API version 61.0 and later.</p>
Description	Type
	Long Text Area
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A short description explaining the program.
EndDate	Type
	Date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Program termination date.
EnrollmentDurationMeasureId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The unit of measure for the participant enrollment duration. This field is available in API version 64.0 and later when Site Management is enabled.
	This field is a relationship field.
	Relationship Name
	EnrollmentDurationMeasure
	Refers To
	UnitOfMeasure
EnrollmentRate	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The rate of the participant enrollment at the site. This is calculated by dividing the target enrollment count by the target enrollment duration and the number of planned sites. This field is available in API version 64.0 and later when Site Management is enabled.

Field Name	Details
FirstSiteClosedOutDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the first site is closed out.</p>
FirstSiteActivatedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the first site is activated for conducting research studies. This field is available in API version 64.0 and later when Site Management is enabled.</p>
LastSiteActivatedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the last site is activated for conducting research studies. This field is available in API version 64.0 and later when Site Management is enabled.</p>
LastSiteClosedOutDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the last site is closed out. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ParentProgram	<p>Type Lookup(Care Program)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of another program that this program is a part of, if any.</p>
ProgramSponsor	<p>Type Lookup(Account)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	Description
	Name of the third-party program sponsor, if any.
SourceSystemIdentifier	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	ID of the system from which the record was sourced.
StartDate	Type
	Date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Effective start date of the program.
Status	Type
	Pick list
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	Status of the program.
TargetEnrollmentDuration	Type
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The duration in which the enrollment for the targeted number of participants must be completed. This field is available in API version 64.0 and later when Site Management is enabled.
TargetEnrolleeCount	Type
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The target enrollee count of the care program. This field is available for the Participant Management feature in API version 61.0 and later.

Field Name	Details
TargetSiteCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of sites planned for conducting the research study. This field is available in API version 64.0 and later when Site Management is enabled.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramFeed](#)

Feed tracking is available for the object.

[CareProgramHistory](#)

History is available for tracked fields of the object.

[CareProgramShare](#)

Sharing is available for the object.

CareProgramCampaign

Represents a relationship between the Care Program object and the Campaign object. This junction object enables admins to associate one or more campaigns to a program.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field Name	Details
CampaignId	<p>Type Lookup(Campaign)</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The campaign associated to the care program.</p>

Field Name	Details
CareProgram	<p>Type Master-Detail(Care Program)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the care program.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description A short name for the care program campaign.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the care program campaign was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p>Description ID of the system from which the record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The status of the care program campaign record.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[CareProgramCampaignChangeEvent on page 1426 \(API Version 62.0\)](#)

Change events are available for the object.

[CareProgramCampaignFeed](#)

Feed tracking is available for the object.

[CareProgramCampaignHistory](#)

History is available for tracked fields of the object.

CareProgramEligibilityRule

Represents a rule defining the criteria for patient care program enrollment eligibility. This entity creates an association between Care Program and an Enrollment Eligibility Criteria.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field	Details
CareProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Identifier of a care program. Represents a set of activities, such as therapy, wellness, or a fitness plan, offered to participants by a healthcare provider, life sciences organization, employer, or insurer.</p>

Field	Details
EligibilityCriteriaId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Criteria that define patient enrollment eligibility for a care program.</p>
IsInclusionRule	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the rule is included or excluded when determining care program eligibility. This field is available in API version 62.0 and later. The default value is false.</p>
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the care program eligibility rule is required.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description Name for the care program eligibility rule.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Defines whether the eligibility rule is in force or not.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of the eligibility Rule. This field is available for the Participant Management feature in API version 61.0 and later. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • Inclusion Rule • Exclusion Rule • Age Rule • Gender Rule

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramEligibilityRuleChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramEligibilityRuleFeed](#)

Feed tracking is available for the object.

[CareProgramEligibilityRuleHistory](#)

History is available for tracked fields of the object.

[CareProgramEligibilityRuleOwnerSharingRule](#)

Sharing rules are available for the object.

[CareProgramEligibilityRuleShare](#)

Sharing is available for the object.

CareProgramEnrollee

Represents a participant enrolled in a care program.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field Name	Details
AccountId	<p>Type Lookup(Account)</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Person Account representing the enrollee</p>

Field Name	Details
BenefitCoverageType	<p>Type Picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the coverage status of the enrollee under both Medicare and Medicaid.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • ContinuedEnrollee • NewEnrollee
CareProgramId	<p>Type Master-Detail(Care Program)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Look up for Care Program.</p>
ClinicalServiceRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The clinical service request associated with the care program enrollee. This field is a relationship field and is available in API version 60.0 and later.</p> <p>Relationship Name ClinicalServiceRequest</p> <p>Relationship Type Lookup</p> <p>Refers To ClinicalServiceRequest</p>
CurrentWorkOrderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work order that's currently being executed for the care program enrollee. This field is a relationship field and is available for the Advanced Therapy Management feature in API version 58.0 and later.</p>

Field Name	Details
Relationship Name	CurrentWorkOrder
Relationship Type	Lookup
Refers To	CarePgmEnrolleeWorkOrder
CurrentWorkOrderStepId	Type reference
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The work order step that's currently being executed for the care program enrollee.
	This field is a relationship field and is available for the Advanced Therapy Management feature in API version 58.0 and later.
Relationship Name	CurrentWorkOrderStep
Relationship Type	Lookup
Refers To	CarePgmEnrolleeWkOrdStep
EnrolledAtId	Type reference
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The site, location, or territory where the enrollee enrolled in the care program.
	This field is available in API version 64.0 when Site Management is enabled.
	This field is a polymorphic relationship field.
Relationship Name	EnrolledAt
Refers To	CareProgramSite
EnrolleeType	Type Picklist
Properties	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
Description	Specifies whether the enrollee is a new enrollee or a continued enrollee.

Field Name	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • FullBenefitDual • PartialBenefitDual • NonDual • Dual
EnrollmentLocationId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The service territory where an advanced therapy care program is executed.
	<p>This field is a relationship field and is available for the Advanced Therapy Management feature in API version 59.0 and later.</p>
	Relationship Name
	EnrollmentLocation
	Relationship Type
	Lookup
	Refers To
	ServiceTerritory
FlowInterviewId	Type
	reference
	Properties
	Filter, Group, Nillable, Sort
	Description
	Runtime instance of the associated flow.
	<p>This field is a relationship field.</p>
	Relationship Name
	FlowInterview
	Refers To
	FlowInterview
FlowOrchestrationInstanceId	Type
	reference
	Properties
	Filter, Group, Nillable, Sort
	Description
	Runtime instance of the associated flow orchestration.
	<p>This field is a relationship field.</p>

Field Name	Details
	Relationship Name
	FlowOrchestrationInstance
	Refers To
	FlowOrchestrationInstance
IsPatientInLtrmCareFacility	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates that the patient was at a long-term healthcare facility during outreach or enrollment to the care program. This field is available for the Medication Management feature in API version 56.0 and later.
	The default value is <code>false</code> .
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LeadId	Type
	Lookup(Lead)
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Lead representing the enrollee.
Name	Type
	string

Field Name	Details
	Properties Create, Filter, Group, Sort, Update
	Description Name of the enrollee.
OptOutPeriodEndDateTime	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date on which the patient's opt-out from the care program ends. This field is available in API version 56.0 and later.
OptOutPeriodStartTime	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date that the patient opted out of the care program. This field is available in API version 56.0 and later.
OptOutReasonType	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The reason why the patient opted out of the care program. This field is available in API version 56.0 and later.
ResearchStudyCandidateId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The related Research Study Candidate record of the care program enrollee.
	This field is a relationship field.
	Relationship Name
	ResearchStudyCandidate
	Refers To
	ResearchStudyCandidate

Field Name	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The UserId for the record owner. This field is a polymorphic relationship field. This field is available in API version 58.0 and later.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the enrollee record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the enrollee record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of the enrollee. Possible values are:<ul style="list-style-type: none">• Active• Inactive</p>
UserID	<p>Type Lookup(User)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description User representing the enrollee.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramEnrolleeChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramEnrolleeFeed](#)

Feed tracking is available for the object.

[CareProgramEnrolleeHistory](#)

History is available for tracked fields of the object.

[CareProgramEnrolleeOwnerSharingRule \(API version 58.0\)](#)

Sharing rules are available for the object.

[CareProgramEnrolleeShare \(API version 58.0\)](#)

Sharing is available for the object.

CareProgramEnrolleeProduct

Represents the affiliation between a care program enrollee and a care program product, a care program provider, or both.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
<code>CareProgramEnrolleeId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The care program enrollee associated with this care program product or care program provider.</p>
<code>CareProgramProductId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care program product associated with this care program enrollee and care program provider.</p>
<code>CareProgramProviderId</code>	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care program provider associated with this care program enrollee and care program product.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the product the enrollee participates in.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
ProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The program that offers financial assistance for this product.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>This field is available in API version 62.0 and later with the Manage Financial Assistance Program permission set.</p>
Relationship Name	Program
Refers To	Program
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the care program product or service related to the care program provider and the recipient of the product or service.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramEnrolleeProductChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramEnrolleeProductFeed](#)

Feed tracking is available for the object.

[CareProgramEnrolleeProductHistory](#)

History is available for tracked fields of the object.

CareProgramEnrolleeProductOwnerSharingRule

Sharing rules are available for the object.

CareProgramEnrolleeProductShare

Sharing is available for the object.

CareProgramEnrollmentCard

Represents a care program membership card that includes a membership number or enrollment code.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
CardNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique card number for a care program. Often a membership number or enrollment code on a physical card assigned to the care program enrollee.</p>
CareProgramEnrolleeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The care program enrollee with whom this care program card is associated.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description Name for the care program enrollment card.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of a card in relation to a care program enrollee.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramEnrollmentCardChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramEnrollmentCardFeed](#)

Feed tracking is available for the object.

[CareProgramEnrollmentCardHistory](#)

History is available for tracked fields of the object.

[CareProgramEnrollmentCardOwnerSharingRule](#)

Sharing rules are available for the object.

[CareProgramEnrollmentCardShare](#)

Sharing is available for the object.

CareProgramGoal

Represents a business or clinical goal related to a care program.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
CareProgramId	Type reference Properties Create, Filter, Group, Sort, Update Description The care program associated with a corresponding goal.
CompletionDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The completion date of a care program goal.
Description	Type textarea Properties Create, Nillable, Update

Field	Details
	<p>Description A detailed description of the care program goal.</p>
DueDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The due date for a care program goal.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description Name of the care program goal.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
Priority	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The priority of the care program goal.</p>
ProgressPercentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage completion of the care program goal.</p>
SequenceNumber	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The order or sequence of the care program goal relative to other care program goals.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date for a care program goal.</p>
Status	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of a care program goal.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the care program goal.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[CareProgramGoalChangeEvent on page 1426 \(API Version 62.0\)](#)

Change events are available for the object.

[CareProgramGoalFeed](#)

Feed tracking is available for the object.

[CareProgramGoalHistory](#)

History is available for tracked fields of the object.

[CareProgramGoalOwnerSharingRule](#)

Sharing rules are available for the object.

[CareProgramGoalShare](#)

Sharing is available for the object.

CareProgramProduct

Represents the affiliation between a care program and a care program product, care program provider, or both.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
Availability	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The default availability of the product to an enrollee in the context of a care program. For example, some products or services are available to all enrollees, others are limited to special circumstances, and others are no longer available.</p>
CareProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifier for the care program associated with a care program product.</p>
CareProgramPrice	<p>Type currency</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A standard list price for a given product in the context of a care program.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the care program product.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifier of the product associated with a care program</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the care program product was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the care program product was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the product in the context of a care program.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramProductChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

CareProgramProductFeed

Feed tracking is available for the object.

CareProgramProductHistory

History is available for tracked fields of the object.

CareProgramProductOwnerSharingRule

Sharing rules are available for the object.

CareProgramProductShare

Sharing is available for the object.

CareProgramProvider

Represents a business account that is the service provider for a care program product.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account/business entity that is providing the care program product/service to a care program enrollee.</p>
CareProgramContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The primary person a patient can contact about the care program.</p>
CareProgramProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care program product to which this care program provider is associated.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the provider associated with the care program.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
Role	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of organization delivering the services included in the program.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of a care program provider in relation to a care program product.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramProviderChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramProviderFeed](#)

Feed tracking is available for the object.

[CareProgramProviderHistory](#)

History is available for tracked fields of the object.

[CareProgramProviderOwnerSharingRule](#)

Sharing rules are available for the object.

[CareProgramProviderShare](#)

Sharing is available for the object.

[CareProgramTeamMember](#)

Represents a person who delivers services under a program, such as a program manager or care coordinator.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field Name	Details
AccountId	Type Lookup(Account)
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Person account representing the team member.
CareProgramId	Type Master-Detail(CareProgram)
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Lookup for the care program.
Category	Type multipicklist
	Properties Create, Filter, Nillable, Update
	Description Specifies the category that the member belongs to. This field is available for the Participant Management feature in API version 61.0 and later.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field Name	Details
MemberId	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	The team member associated with the care program team member. This field is available for the Participant Management feature in API version 61.0 and later.
Name	Type string
	Properties Create, Filter, Group, Sort, Update
	Description
	Name of the care program team member.
Role	Type Picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	Role of the team member.
SourceSystem	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	System from which the record was sourced.
SourceSystemIdentifier	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	ID of the system from which the record was sourced.
UserId	Type Lookup(User)
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	User representing the team member.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramTeamMemberChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramTeamMemberFeed](#)

Feed tracking is available for the object.

[CareProgramTeamMemberHistory](#)

History is available for tracked fields of the object.

CareRegisteredDevice

Represents a device or device registration information for a patient or a care program enrollee. This object is available in API version 49.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareProgramEnrolleeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the care program enrollee to whom this device is registered.</p>
DeviceId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The asset ID for the device.</p> <p>Referenced Objects Asset</p>

Field	Details
DeviceTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the type of the device. Examples: Cystoscope, oxygen tent</p> <p>Referenced Objects CodeSet</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of this device registration record.</p>
PatientId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account ID of the patient to whom this device is registered.</p> <p>Referenced Objects Account</p>

Field	Details
RegistrationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when this device was registered.</p>
SafetyInformation	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The health and safety information about with the device.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the system from which the record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Indicates whether the device registration is active. Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive
SupportContactDetail	<p>Type textarea</p>

Field	Details
	Properties
	Create, Nillable, Update
	Description
	Contact details of the person or organization that provides support for the device.
UniqueDeviceId1	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Unique device identifier (UDI) assigned to device label or package. It identifies the labeler and the specific version or model of a device. A device may have multiple UDIs since it could have been sold in multiple jurisdictions.
UniqueDeviceId1Issuer	Type
	url
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The organization that issued the UDI1 for the device.
UniqueDeviceId2	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Unique device identifier (UDI) assigned to device label or package. It identifies the labeler and the specific version or model of a device. A device may have multiple UDIs since it could have been sold in multiple jurisdictions.
UniqueDeviceId2Issuer	Type
	url
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The organization that issued the UDI2 for the device.
UniqueDeviceId3	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description Unique device identifier (UDI) assigned to device label or package. It identifies the labeler and the specific version or model of a device. A device may have multiple UDIs since it could have been sold in multiple jurisdictions.</p>
UniqueDeviceId3Issuer	<p>Type url</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The organization that issued the UDI3 for the device.</p>

Additional Information for CareRegisteredDevice in Other Objects

In addition to creating a record using these fields, you can add more details to your CareRegisteredDevice record by creating records in certain other objects, and referencing your CareRegisteredDevice record as the parent record. Here's the list of objects you can associate to CareRegisteredDevice in this way, the type of information they add, and the field they use to reference CareRegisteredDevice.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the CareRegisteredDevice record. This identifier is not the same as the device's UID.	ParentRecordId

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[CareRegisteredDeviceChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CareRegisteredDeviceFeed](#)

Feed tracking is available for the object.

[CareRegisteredDeviceHistory](#)

History is available for tracked fields of the object.

[CareSystemFieldMapping](#)

Represents a mapping from source system fields to Salesforce target entities and attributes.

Supported Calls

create(), delete(), describeSObjects(), query(), retrieve(), update(), upsert()

Fields

Field Name	Details
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the record in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. This field is automatically generated but you can supply your own value if you create the record using the API.</p>
ExternalIdField	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the field in the external system.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Nillable</p> <p>Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <i>namespacePrefix__componentName</i> notation. The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> In Developer Edition orgs, NamespacePrefix is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer.

Field Name	Details
MasterLabel	<ul style="list-style-type: none"> In orgs that are not Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
Role	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The label for this care system field mapping.</p> <p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The role that the entity represents. Picklist values <code>RemoteMonitoringDevice</code> and <code>RemoteMonitoringPatient</code> are available from API version 49.0 and later. Possible values are:</p> <ul style="list-style-type: none"> <code>Patient</code>—When the <code>role</code> field is set to <code>Patient</code>, the Enrollment API uses the value of <code>externalIdField</code> as the patient ID. This role can be used when <code>targetObject</code> is set to <code>Account</code>. <code>RemoteMonitoringDevice</code>—Indicates which <code>externalIdField</code> on the Asset object maps to the <code>Device</code> field in the CareObservation object. This role can be used when <code>targetObject</code> is set to <code>Asset</code>. <code>RemoteMonitoringPatient</code>—Indicates which <code>externalIdField</code> on the Account object maps to the <code>ObservedSubject</code> field in the Care Observation object. This role is used when <code>targetObject</code> is set to <code>Account</code>. <code>ServiceProvider</code>—The Enrollment API uses the value of <code>externalIdField</code> as the provider ID. This role is used when <code>targetObject</code> is set to <code>Account</code>. <code>NotApplicable</code>—This role is used when <code>targetObject</code> is set to <code>CareProgram</code> or <code>Product</code>, which means that there is no applicable role.
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p>Description System from which the record was sourced.</p>
TargetObject	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the parent entity for the external ID.</p>

EnrollmentEligibilityCriteria

Represents criteria that define patient enrollment eligibility for one or more care programs.

Supported Calls

```
create(), delete(), describeLayout(), describesObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Description	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description A comprehensive description of the enrollment eligibility criteria.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description A short name for the enrollment eligibility criteria.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[EnrollmentEligibilityCriteriaChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[EnrollmentEligibilityCriteriaFeed](#)

Feed tracking is available for the object.

EnrollmentEligibilityCriteriaHistory

History is available for tracked fields of the object.

EnrollmentEligibilityCriteriaOwnerSharingRule

Sharing rules are available for the object.

EnrollmentEligibilityCriteriaShare

Sharing is available for the object.

Clinical Data Model

Patient data and healthcare records are important in the healthcare industry. Without accurate information, performing and managing care becomes difficult. These records are readily available if a patient seeks care from the same provider every time. However, in reality, a patient's healthcare journey takes them to multiple providers and hospitals at different times. Because the patient's health hinges on the accuracy of their medical records, it's crucial for the systems used by different providers and hospitals to be interoperable. And to make this interoperability possible, it's vital to have some industry-recognized standards for how these records are structured, stored, and transferred. That's where the standards defined by Health Level 7 (HL7) come in.

Two standards defined by HL7 for this purpose are the Fast Health Interoperability Resources (FHIR) v4.0 and HL7 (the standard) 2.3. The Clinical Data Model is built from the ground up to align with FHIR v4.0, and also supports many of the HL7 v2.3 message types.

To enable these objects in your org, go to **FHIR R4 Support Settings** in **Setup** and enable the **FHIR-Aligned Clinical Data Model** org pref.

 **Note:** Some of these objects are available in your org even before enabling this org pref because they're part of other data models in Health Cloud and Life Sciences Cloud.

 **Note:** To use the Clinical Data Model objects on an Experience Cloud site, community users need the FHIR R4 for Experience Cloud Sites permission set.

Here's the list of objects that need the org pref to be enabled versus a list of objects that don't require the org pref.

Org Pref Required	Org Pref Not Required
<ul style="list-style-type: none"> • AllergyIntolerance • CarePerformer • ClinicalAlert • ClinicalEncounter • ClinicalEncounterDiagnosis • ClinicalEncounterFacility • ClinicalEncounterIdentifier • ClinicalEncounterProvider • ClinicalEncounterReason • ClinicalEncounterSvcRequest • ClinicalServiceRequest • ClinicalServiceRequestDetail • DiagnosticSummary • HealthCondition 	<ul style="list-style-type: none"> • CareObservation • CareObservationComponent • CareProviderFacilitySpecialty • CodeSet • CodeSetBundle • HealthcareFacility • HealthcarePractitionerFacility • HealthcareProvider • Identifier • Medication • Medication Administration • Medication Administration Detail • PersonLanguage • PersonName

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions

Org Pref Required	Org Pref Not Required
<ul style="list-style-type: none"> • MedicationRequest • MedicationStatement • PatientHealthReaction • PatientImmunization • PatientMedicalProcedure • PatientMedicalProcedureDetail • PatientMedicationDosage 	<ul style="list-style-type: none"> • ProblemDefinitionRelationship • Specimen

And here's the list of fields added to standard objects when you enable this org pref.

- ContactPointPhone.PreferenceRank
- ContactPointPhone.UsageType
- ContactPointEmail.PreferenceRank
- ContactPointEmail.UsageType
- ContactPointAddress.PreferenceRank
- ContactPointAddress.UsageType
- Account.IsActive
- Account.EffectiveDate
- Account.SourceSystemIdentifier
- Account.SourceSystemModifiedDate
- Account.EndDate
- Contact.MaritalStatus
- Contact.Gender
- Contact.DeceasedDate
- Contact.SequenceInMultipleBirth



Note:

- Starting with the Spring '23 release, new customers won't be able to create records in the packaged EHR objects that have counterpart standard objects in the FHIR R4-aligned data model.
- All future development will be built on the FHIR R4-aligned data model. The packaged objects in the EHR data model won't be used for future development.

ActivityTiming

Represents detailed information about an activity that's repeated in regular intervals over a period of time. This object is available in API version 52.0 and later.

AllergyIntolerance

Represents a clinical assessment of a patient's allergy or intolerance. This object is available in API version 51.0 and later.

[AuthorNote](#)

Stores notes associated with different types of records along with information about the author of the note and the time the note was authored. The author isn't necessarily the person who created a record. The author is the person who provided the information in the note. This object is available in API version 52.0 and later.

[CarePerformer](#)

Represents the person performing care in observations, procedure, and immunizations. This person may be a physician, the patient's contact, or anyone who administered any sort of care to the patient in the context of the concerned care event. This object is available in API version 51.0 and later.

[CareRegisteredDevice](#)

Represents a device or device registration information for a patient or a care program enrollee. This object is available in API version 49.0 and later.

[DiagnosticSummary](#)

Represents the findings, interpretations, and summaries of tests performed on patients. This object is available in API version 51.0 and later.

[ClinicalAlert](#)

Represents a warning or notification of significance related to different healthcare entities. The subject of the alert may be a patient, a location, a provider, a procedure, or even a medication. This object is available in API version 51.0 and later.

[ClinicalDetectedIssue](#)

Represents information about a detected issue resulting from a clinical activity. This object is available in API version 55.0 and later.

[ClinicalDetectedIssueDetail](#)

Represents additional information about a clinical detected issue. This object is available in API version 55.0 and later.

[ClinicalEncounter](#)

Represents a healthcare related encounter of a patient with a care provider. This is a broad object that covers multiple phases of a patient's healthcare service experience, all the way from pre-admission to stay to discharge, and everything in between. This object is available in API version 51.0 and later.

[ClinicalServiceRequest](#)

Represents requests for a procedure or diagnostic service that needs to be planned, proposed, or performed as part of the patient's healthcare. This object is available in API version 51.0 and later.

[CodeSet](#)

Represents various industry defined codes in the context of their systems and versions of those systems. These codes are used in all sorts of digital records. This object is available in API version 50.0 and later.

[CodeSetBundle](#)

Represents a group of code sets across multiple systems and versions. All of these code sets refer to the same conceptual entity. This object is available in API version 50.0 and later.

[HealthcareFacility](#)

Represents a healthcare facility and all its related details. These details may be physical, functional, geographic, or business details. This object is available in API version 51.0 and later.

[HealthCondition](#)

Represents a clinical condition, problem, or any clinically relevant occurrence that is a matter of concern. This object is available in API version 51.0 and later.

[Identifier](#)

Represents identifier information for multiple objects. This object is available in API version 51.0 and later.

Medication

Represents detailed information about different medications. This object is available in API version 51.0 and later.

MedicationDispense

Represents the dispense of a medication to a patient in response to a medication request or order. This object also includes the instructions for how the medication is to be administered. This object is available in API version 54.0 and later.

MedicationRequest

Represents a request or order for the supply of medication, along with information about how it should be administered. This object is available in API version 51.0 and later.

MedicationStatement

Represents a record of medication that the patient is currently taking or has taken in the past. This object is available in API version 51.0 and later.

PatientHealthReaction

Represents a patient's adverse reaction to an allergy, intolerance, or immunization. This object is available in API version 51.0 and later.

PatientImmunization

Represents information about a patient's immunizations. This object is available in API version 51.0 and later.

PatientMedicalProcedure

Represents detailed information about a healthcare procedure the patient has undergone, is undergoing or will undergo. This object is available in API version 51.0 and later.

PatientMedicationDosage

Represents dosage information for medication. This object is primarily used to add dosage information in MedicationStatement, MedicationRequest, or MedicationDispense records. This object is available in API version 51.0 and later.

ActivityTiming

Represents detailed information about an activity that's repeated in regular intervals over a period of time. This object is available in API version 52.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ActivityCountPerRepetition	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The recommended number of times the activity should be performed in a repetition cycle.</p>

Field	Details
ActivityDuration	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The length of time that the activity should be performed during each occurrence.</p>
ActivityDurationUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of the length of time that the activity should be performed during each occurrence. This is a relationship field.</p> <p>Referenced Object UnitOfMeasure</p>
ActivityTime	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The approximate time of day or a daily event that acts as a point of reference for when the activity should be performed. Possible values are:</p> <ul style="list-style-type: none"> • Default
ActivityTimeOffset	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of minutes before or after the reference point specified in <code>ActivityTime</code> when the activity should be performed.</p>
CountInPeriod	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The recommended number of times the activity should be performed in the specified period.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
MaxActivityCountPerRepetition	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum number of times the activity should be performed in a repetition cycle.</p>
MaxActivityDuration	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The maximum length of time that the activity should be performed during each occurrence.</p>
MaxCountInPeriod	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum number of times the activity should be performed in the specified period.</p>
MaxRepetitionCycleLength	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The maximum length of each cycle of repetition.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the ActivityTiming record. This value is generated automatically.</p>
OwnerId	<p>Type Polymorphic reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the ActivityTiming record.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Referenced Object Group, User</p>
PeriodEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date of the period during which this activity should be performed.</p>
PeriodLength	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The length of the period during which this activity should be performed.</p>
PeriodLengthLowerLimit	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The lower limit of the length of the period during which this activity should be performed.</p>

Field	Details
PeriodLengthUnitID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of the period's length. This field is used to specify the unit for PeriodLength, PeriodLengthLowerLimit, and PeriodLengthUpperLimit.</p> <p>Referenced Object UnitOfMeasure</p>
PeriodLengthUpperLimit	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The upper limit of the length of the period during which this activity should be performed.</p>
PeriodStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start date of the period during which this activity should be performed.</p>
RepetitionCycleLength	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The recommended length of each cycle of repetition.</p>
RepetitionCycleUnitID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of the length of each cycle of repetition.</p> <p>Referenced Object UnitOfMeasure</p>

Field	Details
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system the record came from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the record was last changed in the source system.</p>
TimingCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the timing information of an activity. This code is expected to be a complete statement of what is specified in the other fields of this object, and either this code or the data in the other fields may be used to interpret the timing of an activity. This is a relationship field.</p> <p>Referenced Object CodeSet</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of activity the timing information is used for. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • CareObservation—Care Observation • ClinicalServiceRequest—Clinical Service Request • MedicationDosage—Medication Dosage
WeeklyActivityTimeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The day and time of the week when this activity should be performed.</p> <p>Referenced Object OperatingHours</p>

Usage

ActivityTiming records are referenced from MedicationDosage records to specify the timing of their activities. Here's an example of an activity's timing information and how an ActivityTiming record would represent that information.

Scenario: Let's say your doctor tells you that you have to run for 10 minutes every 2 days, 30 minutes after your meals. You need to run at least 5 times in the span of those 2 days. You have to do this for 3 to 4 weeks. You're also told that you shouldn't run for more than 15 minutes at a time, and that you shouldn't do it more than 7 times in 3 days. So in those 3-4 weeks, you should run somewhere between 60-84 times.

Sample Record:

```

Id: 1CDR000000000060AA
OwnerId: 005R0000000dNImIAM
IsDeleted: false
Name: AT-3147
CreatedDate: 2021-04-15T10:48:14.000+0000
CreatedBy: 005R0000000dNImIAM
LastModifiedDate: 2021-04-15T10:49:47.000+0000
LastModifiedBy: 005R0000000dNImIAM
SystemModstamp: 2021-04-15T10:49:47.000+0000
LastViewedDate: 2021-04-15T11:14:26.000+0000
LastReferencedDate: 2021-04-15T11:14:26.000+0000
TimingCodeId: null
PeriodStartTime: null
PeriodEndTime: null
PeriodLength: null
PeriodLengthLowerLimit: 3
PeriodLengthUpperLimit: 4
PeriodLengthUnitId: 0hER0000000001VMAQ
CountInPeriod: 60
MaxCountInPeriod: 84
ActivityDuration: 10
MaxActivityDuration: 15
ActivityDurationUnitId: 0hER0000000001aMAA
ActivityCountPerRepetition: 5

```

```

MaxActivityCountPerRepetition: 7
RepetitionCycleLength: 2
MaxRepetitionCycleLength: 3
RepetitionCycleUnitId: 0hER0000000001fMAA
ActivityTime: AfterMeal
ActivityTimeOffset: 30
WeeklyActivityTimeId: 0OHR00000000HanOAE
UsageType: MedicationDosage
SourceSystem: WWHR
SourceSystemIdentifier: 763851
SourceSystemModified: 2021-04-05T23:00:00.000+0000

```

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ActivityTimingChangeEvent on page 1426 \(API Version 62.0\)](#)

Change events are available for the object.

[ActivityTimingFeed on page 1429](#)

Feed tracking is available for the object.

[ActivityTimingHistory on page 1434](#)

History is available for tracked fields of the object.

[ActivityTimingShare on page 1438](#)

Sharing is available for the object.

AllergyIntolerance

Represents a clinical assessment of a patient's allergy or intolerance. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AssertionSourceId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the person who asserted the information about the allergy or intolerance.</p> <p>Example The patient or the provider who assessed the patient's condition.</p>

Field	Details
Referenced Objects	
	<ul style="list-style-type: none"> • Account • HealthcareProvider
Category	
	<p>Type multipicklist</p> <p>Properties Create, Filter, Nullable, Update</p> <p>Description Specifies the categories the allergy or intolerance belongs to. Possible values are:</p> <ul style="list-style-type: none"> • Biologic • Environment • Food • Medication
ClinicalEncounterId	
	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The encounter where the allergy or intolerance was asserted.</p> <p>Example The encounter record for a patient's ER visit after a bee sting.</p>
CodeId	
	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The system-defined code that represents the allergy or intolerance.</p>
LastOccurrenceDateTime	
	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date of the last occurrence of the allergy or intolerance.</p> <p>Example 1993-11-09T21:45:00.384Z</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the AllergyIntolerance record.</p>
OnsetEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end of the estimated onset period.</p> <p>Example 1993-11-09T23:50:00.384Z</p>
OnsetStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The onset date of the allergy intolerance or the estimated start date of the allergy intolerance's onset.</p> <p>Example 1993-11-09T21:45:00.384Z</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the allergy intolerance record. Available in API version 56.0 and later. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To</p> <ul style="list-style-type: none"> • Group • User
PatientId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The patient who has the allergy or intolerance.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
RecordCreationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The time the record for the allergy or intolerance was created.</p>
RecordCreatorId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who created the record for the allergy or intolerance.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account • HealthcareProvider

Field	Details
Severity	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the severity of the allergy or intolerance. Possible values are:</p> <ul style="list-style-type: none"> • High • Low • Unable to assess
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system from where the record was brought into Salesforce.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the record was last modified in its source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the allergy or intolerance. Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive

Field	Details
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies whether the record is about an allergy or an intolerance. Possible values are:</p> <ul style="list-style-type: none"> • Allergy • Intolerance
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies whether the allergy or intolerance has been verified. Possible values are:</p> <ul style="list-style-type: none"> • Confirmed • Entered in error • Refuted • Unconfirmed

Additional Information for AllergyIntolerance in Other Objects

In addition to creating a record using these fields, you can add more details to your AllergyIntolerance record by creating records in certain other objects, and referencing your AllergyIntolerance record as the parent record. Here's the list of objects you can relate to AllergyIntolerance in this way, the type of information they add, and the field they use to reference AllergyIntolerance.

Object	Type of Information	Reference Field
PatientMedicalReaction	Specifies the information about the patient's adverse reaction linked to the allergy or intolerance.	ParentId
Identifier	Associates an identifier value to the allergy intolerance.	ParentRecordId

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

AllergyIntoleranceChangeEvent (API version 58.0)

Change events are available for the object.

AllergyIntoleranceOwnerSharingRule (API version 56.0)

Sharing rules are available for the object.

AllergyIntoleranceShare (API version 56.0)

Sharing is available for the object.

AuthorNote

Stores notes associated with different types of records along with information about the author of the note and the time the note was authored. The author isn't necessarily the person who created a record. The author is the person who provided the information in the note. This object is available in API version 52.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AuthorId	<p>Type Preference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description References the author of the note. This is a polymorphic relationship field.</p> <p>Relationship Name Author</p> <p>Relationship Type Lookup</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account • Contact • HealthcareProvider • User—This value is available in API version 55.0 and later.
AuthorName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p>

Field	Details
	Description
	The name of the author of the note.
AuthoredDateTime	Type
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date and time when the note was authored.
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The most recent date on which a user referenced the record.
LastViewedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The most recent date on which a user viewed the record.
Name	Type
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The name of the AuthorNote record. This value is generated automatically.
NoteText	Type
	textarea
	Properties
	Create, Update
	Description
	The contents of the note.
OwnerId	Type
	Polymorphic reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	<p>Description The owner of the AuthorNote record.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Referenced Objects Group, User</p>
ParentRecordId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description References the parent record that the note is associated with.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account • AllergyIntolerance • CareObservation • CareRegisteredDevice • ClinicalDetectedIssue—This value is available in API version 55.0 and later. • ClinicalServiceRequest • HealthCondition • MedicationRequest • MedicationStatement • PatientImmunization • PatientMedicalProcedure
RecipientType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of recipient for an author note. Possible values are:</p> <ul style="list-style-type: none"> • Patient • Provider <p>This field is available in API version 55.0 and later.</p>

Field	Details
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system the record came from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the record was last changed in the source system.</p>

Usage

When a record requires a related note with the information about the author of that note, that information is stored in an AuthorNote record. This AuthorNote record references the parent record it's associated with using the ParentRecordId field.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AuthorNoteFeed](#)

Feed tracking is available for the object.

[AuthorNoteHistory](#)

History is available for tracked fields of the object.

[AuthorNoteShare](#)

Sharing is available for the object.

[AuthorNoteChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

CarePerformer

Represents the person performing care in observations, procedure, and immunizations. This person may be a physician, the patient's contact, or anyone who administered any sort of care to the patient in the context of the concerned care event. This object is available in API version 51.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AffiliatedOrganizationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the business account of the organization the care performer is affiliated to in the context of the care event.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> Account
CareSpecialtyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the CareSpecialty record that represents the performer's specialty.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CareSpecialty
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was referenced.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the CarePerformer record.</p>
ParentRecordId	<p>Type Polymorphic master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description References the care observation, procedure, or immunization that this performer was involved in.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> PatientMedicalProcedure CareObservation PatientImmunization MedicationDispense—This value is available in API version 55.0 and later.
PersonId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description References the person who performed care.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> Account HealthcareProvider User—This value is available in API version 55.0 and later.
RoleId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The system-defined code that specifies the care performer's role in the care event.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSet • CodeSetBundle

Usage

This object is used to record the relevant details of a care performer in the context of specific care events. The performed care is connected to the procedure, observation, or immunization care event using the `ParentRecordId` field.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

CarePerformerFeed

Feed tracking is available for the object.

CarePerformerHistory

History is available for tracked fields of the object.

CarePerformerChangeEvent on page 1426 (API version 61.0)

Change events are available for the object.

CareRegisteredDevice

Represents a device or device registration information for a patient or a care program enrollee. This object is available in API version 49.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareProgramEnrolleeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the care program enrollee to whom this device is registered.</p>

Field	Details
DeviceId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The asset ID for the device.</p> <p>Referenced Objects Asset</p>
DeviceTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The system-defined code that represents the type of the device. Examples: Cystoscope, oxygen tent</p> <p>Referenced Objects CodeSet</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of this device registration record.</p>

Field	Details
PatientId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account ID of the patient to whom this device is registered.</p> <p>Referenced Objects Account</p>
RegistrationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when this device was registered.</p>
SafetyInformation	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The health and safety information about with the device.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the system from which the record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Indicates whether the device registration is active.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive
SupportContactDetail	<p>Type</p> <p>textarea</p>
	<p>Properties</p> <p>Create, Nullable, Update</p>
	<p>Description</p> <p>Contact details of the person or organization that provides support for the device.</p>
UniqueDeviceId1	<p>Type</p> <p>string</p>
	<p>Properties</p> <p>Create, Filter, Group, Nullable, Sort, Update</p>
	<p>Description</p> <p>Unique device identifier (UDI) assigned to device label or package. It identifies the labeler and the specific version or model of a device. A device may have multiple UDIs since it could have been sold in multiple jurisdictions.</p>
UniqueDeviceId1Issuer	<p>Type</p> <p>url</p>
	<p>Properties</p> <p>Create, Filter, Nullable, Sort, Update</p>
	<p>Description</p> <p>The organization that issued the UDI1 for the device.</p>
UniqueDeviceId2	<p>Type</p> <p>string</p>
	<p>Properties</p> <p>Create, Filter, Group, Nullable, Sort, Update</p>
	<p>Description</p> <p>Unique device identifier (UDI) assigned to device label or package. It identifies the labeler and the specific version or model of a device. A device may have multiple UDIs since it could have been sold in multiple jurisdictions.</p>
UniqueDeviceId2Issuer	<p>Type</p> <p>url</p>
	<p>Properties</p> <p>Create, Filter, Nullable, Sort, Update</p>

Field	Details
	<p>Description The organization that issued the UDI2 for the device.</p>
UniqueDeviceId3	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Unique device identifier (UDI) assigned to device label or package. It identifies the labeler and the specific version or model of a device. A device may have multiple UDIs since it could have been sold in multiple jurisdictions.</p>
UniqueDeviceId3Issuer	<p>Type url</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The organization that issued the UDI3 for the device.</p>

Additional Information for CareRegisteredDevice in Other Objects

In addition to creating a record using these fields, you can add more details to your CareRegisteredDevice record by creating records in certain other objects, and referencing your CareRegisteredDevice record as the parent record. Here's the list of objects you can associate to CareRegisteredDevice in this way, the type of information they add, and the field they use to reference CareRegisteredDevice.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the CareRegisteredDevice record. This identifier is not the same as the device's UID.	ParentRecordId

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[CareRegisteredDeviceChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CareRegisteredDeviceFeed](#)

Feed tracking is available for the object.

[CareRegisteredDeviceHistory](#)

History is available for tracked fields of the object.

DiagnosticSummary

Represents the findings, interpretations, and summaries of tests performed on patients. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AttachmentLanguage	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Records the language of the attached document.</p>
BasedOnId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the medication or clinical service request that the diagnostic summary is based on.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • MedicationStatement • ClinicalServiceRequest
CareObservationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the care observation that's a part of the diagnostic summary.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalServiceRequest
Category	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p>

Field	Details
	<p>Description Specifies the category of the department or service that the diagnostic summary is a product of. Possible values are:</p> <ul style="list-style-type: none"> • Community • Inpatient • Outpatient • Patient Specified
ClinicalEncounterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the encounter that the diagnostic summary is about.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
CodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The system-defined code that describes the diagnostic summary.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The case associated with the diagnostic summary. This field is a relationship field.</p> <p>Relationship Name Case</p> <p>Refers To Case</p>

Field	Details
ContentDocumentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The content document associated with diagnostic summary. You can include up to 5 documents in the PDF format. This field is available in API version 62.0 and later. This field is a relationship field.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> ContentDocument
EffectiveEndTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date and time of the clinically relevant period of the summary.</p>
EffectiveStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start date and time of the clinically relevant period of the summary.</p>
ImageComments1	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Comments about the first image linked in the report.</p>
ImageComments2	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Comments about the second image linked in the report.</p>
ImageComments3	<p>Type string</p>

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Comments about the third image linked in the report.
ImageComments4	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Comments about the fourth image linked in the report.
ImageComments5	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Comments about the fifth image linked in the report.
ImageUrl1	Type url
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The link to a key image associated with the diagnostic summary.
ImageUrl2	Type url
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The link to a key image associated with the diagnostic summary.
ImageUrl3	Type url
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The link to a key image associated with the diagnostic summary.
ImageUrl4	Type url

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The link to a key image associated with the diagnostic summary.</p>
ImageUrl	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The link to a key image associated with the diagnostic summary.</p>
InterpretedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the person or organization responsible for interpreting the diagnostic summary and its conclusions.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CarePerformer
IssuedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care performer that issues the diagnostic summary.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CarePerformer
IssuedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the diagnostic summary was issued.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the diagnostic summary record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the diagnostic summary record. Available in API version 56.0 and later. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To</p> <ul style="list-style-type: none"> ● Group ● User
PatientId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description References the patient who is the subject of the diagnostic summary.</p>

Field	Details
Referenced Objects	
	<ul style="list-style-type: none"> Account
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system from where the record was brought into Salesforce.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the record was last modified in its source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of the diagnostic summary. Possible values are:</p> <ul style="list-style-type: none"> Active Completed Entered-in-error Intended Not-taken On-hold Stopped Unknown

Field	Details
Summary	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The clinical conclusion of the tests performed in the diagnostic service.</p>
SummaryCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the clinical conclusion of the tests as reported in the diagnostic service.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the information in the record represents a diagnostic summary or a document reference. Possible values are:</p> <ul style="list-style-type: none"> DiagnosticSummary—Diagnostic Summary DocumentReference—Document Reference

Usage

DiagnosticSummary is used to store records representing both DiagnosticReport and DocumentReference type information from FHIR-based systems. You can use the UsageType field to specify which records represent diagnostic reports and which records represent document references.

For document reference records, you can also use the DiagnosticSummaryDetail child object to associate authors, related documents, and related encounters to your DiagnosticSummary record.

Additional Information for DiagnosticSummary in Other Objects

In addition to creating a record using these fields, you can add more details to your DiagnosticSummary record by creating records in certain other objects, and referencing your DiagnosticSummary record as the parent record. Here's the list of objects you can associate to DiagnosticSummary in this way, the type of information they add, and the field they use to reference DiagnosticSummary.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the diagnostic summary.	ParentRecordId
DiagnosticSummaryDetail	Associates document reference-type DiagnosticSummary records with various other records and defines the nature of association. For instance, authors, related documents, and related encounters.	DiagnosticSummaryId

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[DiagnosticSummaryChangeEvent \(API version 58.0\)](#)

Change events are available for the object.

[DiagnosticSummaryFeed](#)

Feed tracking is available for the object.

[DiagnosticSummaryHistory](#)

History is available for tracked fields of the object.

[DiagnosticSummaryOwnerSharingRule \(API version 56.0\)](#)

Sharing rules are available for the object.

[DiagnosticSummaryShare \(API version 56.0\)](#)

Sharing is available for the object.

[DiagnosticSummaryDetail](#)

Represents additional information associated with document reference-type DiagnosticSummary records. This additional information may be related documents, authors, or related encounters. This object is available in API version 52.0 and later.

DiagnosticSummaryDetail

Represents additional information associated with document reference-type DiagnosticSummary records. This additional information may be related documents, authors, or related encounters. This object is available in API version 52.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
DetailRecordId	Type Polymorphic reference

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References a record that adds information to a DiagnosticSummary record.</p> <p>Referenced Objects Account, CareRegisteredDevice, ClinicalEncounter, DiagnosticSummary, HealthcareProvider</p>
DetailType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the relation between the DiagnosticSummary record and the detail record. Possible values are:</p> <ul style="list-style-type: none"> • Author • ClinicalEncounter—Clinical Encounter • RelatedDocument—Related Document • Specimen
DiagnosticSummaryId	<p>Type Master-Detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent DiagnosticSummary record that the detail record is associated to.</p> <p>Referenced Objects DiagnosticSummary</p>
DocumentRelationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description If the detail type is Related Document, then this field specifies the type of relationship between the two documents. Possible values are:</p> <ul style="list-style-type: none"> • Addition • Conversion • Replacement • Signature

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced the record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed the record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the DiagnosticSummaryDetail record.</p>

Usage

- Use the DiagnosticSummaryId field to reference the parent DiagnosticSummary record that the additional information is being associated to.
- Use the DetailType picklist to specify the type of information that's being associated to the DiagnosticSummary record.
- Use the DetailRecordId field to reference the record with the associated information. The records that correspond to each detail type are as follows.
 - **Author:** Account, CareRegisteredDevice, and HealthcareProvider
 - **ClinicalEncounter:** ClinicalEncounter
 - **RelatedDocument:** DiagnosticSummary
- If the detail type is related document, then use the DocumentRelationType picklist to specify the type of the relation between the two documents.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[DiagnosticSummaryDetailFeed on page 1429](#)

Feed tracking is available for the object.

[DiagnosticSummaryDetailHistory on page 1434](#)

History is available for tracked fields of the object.

[DiagnosticSummaryDetailChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

ClinicalAlert

Represents a warning or notification of significance related to different healthcare entities. The subject of the alert may be a patient, a location, a provider, a procedure, or even a medication. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Categories	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the category that the alert belongs to. Possible values are:</p> <ul style="list-style-type: none"> • Clinical • Diet • Drug • Lab • Subject Contact
CodeDescription	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the alert.</p>
CodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The system-defined code that represents the alert.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the alert was deactivated.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the clinical alert record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The user that this record belongs to.</p>

Field	Details
RaisedById	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person or facility that raised the alert.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • HealthcareProvider • HealthcarePractitionerFacility • CareRegisteredDevice
RelatedEncounterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The encounter that this alert is related to.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system from where the record was brought into Salesforce.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the record was last modified in its source system.</p>

Field	Details
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time when the alert was activated.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of the clinical alert.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Entered-In-Error • Inactive
SubjectId	<p>Type polymorphic reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The person or entity the alert is about.</p> <p>Examples</p> <ul style="list-style-type: none"> • A patient experiencing kidney failure. • A location with an avian flu outbreak. • A practitioner flagged from referrals. • A medication that's flagged for special circumstances. <p>Referenced Objects</p> <ul style="list-style-type: none"> • Location • HealthcareProvider • Medication • PatientMedicalProcedure • Account

Additional Information for Clinical Alert in Other Objects

In addition to creating a record using these fields, you can add more details to your clinical alert record by creating records in certain other objects, and referencing your ClinicalAlert record as the parent record. Here's the list of objects you can associate to ClinicalAlert in this way, the type of information they add, and the field they use to reference ClinicalAlert.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the clinical alert.	ParentRecordId

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ClinicalAlertFeed

Feed tracking is available for the object.

ClinicalAlertHistory

History is available for tracked fields of the object.

ClinicalAlertShare

Sharing is available for the object.

ClinicalAlertChangeEvent on page 1426 (API version 61.0)

Change events are available for the object.

ClinicalDetectedIssue

Represents information about a detected issue resulting from a clinical activity. This object is available in API version 55.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CategoryCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The code of the category associated with the issue. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name CategoryCode</p> <p>Relationship Type Lookup</p> <p>Refers To CodeSet, CodeSetBundle</p>
Description	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description Additional information about the issue.</p>
IdentificationEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time when the issue identification was complete.</p>
IdentificationStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time when the issue was identified.</p>
IdentifiedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The account, healthcare provider, user, or device that detected the issue. This field is a polymorphic relationship field.</p> <p>Relationship Name IdentifiedBy</p> <p>Relationship Type Lookup</p> <p>Refers To Account, CareRegisteredDevice, HealthcareProvider, User</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the clinical detected issue record.</p>
PatientId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The patient associated with the issue. This field is a relationship field.</p> <p>Relationship Name Patient</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
ReferenceUri	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p>

Field	Details
	<p>Description The medical references available on the issue.</p>
SeverityLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the impact level of the issue. Possible values are:</p> <ul style="list-style-type: none"> • High • Low • Moderate
SourceSysModifiedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the record was last modified in its source system.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system from where the record was brought into Salesforce.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier for the record in its source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the status of the issue.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Amended • Cancelled • Corrected • Entered in Error • Final • Preliminary • Registered • Unknown

Usage

Indicates an actual or potential clinical issue associated with a clinical action for a patient. The category of the clinical issue, for example, drug-drug interactions or duplicate therapy, is stored in the Category Code field that has a lookup to the CodeSetBundle and CodeSet objects.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ClinicalDetectedIssueFeed](#)

Feed tracking is available for the object.

[ClinicalDetectedIssueHistory](#)

History is available for tracked fields of the object.

[ClinicalDetectedIssueChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

[ClinicalDetectedIssueDetail](#)

Represents additional information about a clinical detected issue. This object is available in API version 55.0 and later.

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ClinicalDetectedIssueId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent clinical detected issue associated with the issue detail. This field is a relationship field.</p> <p>Relationship Name ClinicalDetectedIssue</p> <p>Relationship Type Lookup</p> <p>Refers To ClinicalDetectedIssue</p>
DetailCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The code associated with the Clinical Detected Issue Detail record. This field is a polymorphic relationship field.</p> <p>Relationship Name DetailCode</p> <p>Relationship Type Lookup</p> <p>Refers To CodeSet, CodeSetBundle</p>
DetailRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reference to a record that adds information to a Clinical Detected Issue record. This field is a polymorphic relationship field.</p> <p>Relationship Name DetailRecord</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Account, ClinicalEncounterDiagnosis, DiagnosticSummary, HealthcareProvider</p>
DetailType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the relation between the Clinical Detected Issue record and the detail record. Possible values are:</p> <ul style="list-style-type: none"> • Evidence • Implicated • Mitigation
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
MitigationAuthorId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The owner who is responsible for creating and executing the mitigation plan. This field is a polymorphic relationship field.</p> <p>Relationship Name MitigationAuthor</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcarePractitionerFacility, HealthcareProvider, User</p>

Field	Details
MitigationAuthoringDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time of authoring the mitigation details.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the clinical detected issue detail record.</p>

Usage

- Use the `ClinicalDetectedIssueId` field to reference the parent `ClinicalDetectedIssue` record that the additional information is being associated to.
- Use the `DetailRecordId` field to reference the record with the associated information. This field looks up to the following objects:
 - Account
 - ClinicalEncounterDiagnosis
 - DiagnosticSummary
 - HealthcareProvider
- Use the `DetailType` picklist to specify the type of information that's being associated to the `ClinicalDetectedIssue` record.
- If the detail type is Evidence, specify either a detail code or detail record or both. If the detail type is Implicated, specify a detail record, but do not add a detail code. If the detail type is Mitigation, specify a detail code, but do not add a detail record.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ClinicalDetectedIssueDetailFeed](#)

Feed tracking is available for the object.

[ClinicalDetectedIssueDetailHistory](#)

History is available for tracked fields of the object.

[ClinicalDetectedIssueDetailChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

ClinicalEncounter

Represents a healthcare related encounter of a patient with a care provider. This is a broad object that covers multiple phases of a patient's healthcare service experience, all the way from pre-admission to stay to discharge, and everything in between. This object is available in API version 51.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AdmissionSource	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the source of the admission. Possible values are:</p> <ul style="list-style-type: none"> • Another Hospital • Emergency Department • General Practitioner Referral • In-Hospital Birth • Nursing Home • Other • Other Medical Practitioner Referral • Outpatient Department • Psychiatric Hospital • Rehabilitation Facility
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The case associated with the clinical encounter of a patient with a care provider. This field is a relationship field.</p> <p>Relationship Name Case</p> <p>Refers To Case</p>

Field	Details
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the classification of the encounter.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Ambulatory • Emergency • Home Health • Inpatient Encounter
DestinationFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The facility to which the patient is transferred.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • HealthcareFacility
DestinationOrganizationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The organization to which the patient is transferred.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
DietPreference	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description The diet preferences of the patient.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Dairy-Free • Gluten-Free

Field	Details
	<ul style="list-style-type: none"> • Halal • Kosher • Nut-Free • Vegan • Vegetarian
DischargeDispositionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the patient at discharge.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
Duration	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The duration of the patient encounter, in the given unit of measure.</p>
DurationUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measurement for the encounter duration.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • UnitOfMeasure
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the encounter ended.</p>
FacilityId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The facility where the encounter took place.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • HealthcareFacility
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the clinical encounter record.</p>
PatientId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The patient receiving the treatment.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
PreAdmissionIdentifierId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The identifier for the encounter pre-admission.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> ClinicalEncounterIdentified
PreviousFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The patient's location before the admission.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> HealthcareFacility
PreviousOrganizationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the organization where the patient was previously located.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> Account
PriorityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the priority associated with the urgency of the encounter.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
ReadmissionCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code for the readmission.</p>

Field	Details
	<p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
RelatedClinicalEncounterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies an encounter that is related to this encounter.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> ClinicalEncounter
ServiceAppointment	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The appointment associated with this clinical encounter.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> ServiceAppointment
ServiceType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the classification of the type of service. Possible values are:</p> <ul style="list-style-type: none"> Homoeopathy Meditation Naturopathy Reflexology
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this record came from.</p>

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of this record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this item was last changed in the source system.</p>
SpecialCourtesy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies a class of courtesy extended to the patient. Possible values are:</p> <ul style="list-style-type: none"> • Extended • Normal • Professional • Staff • Unknown • VIP
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date on which the encounter began.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Specifies the status of the patient encounter.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Arrived • Cancelled • Finished • In Progress • Planned • Triage
TypeId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nullable, Sort, Update</p> <p>Description</p> <p>The system-defined code that represents the type of the encounter.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle

Additional Information for ClinicalEncounter in Other Objects

In addition to creating a record using these fields, you can add more details to your ClinicalEncounter record by creating records in certain other objects, and referencing your ClinicalEncounter record as the parent record. Here's the list of objects you can associate to ClinicalEncounter in this way, the type of information they add, and the field they use to reference ClinicalEncounter.

Object	Type of Information	Reference Field
ClinicalEncounterDiagnosis	Specifies the different diagnoses from an encounter, and other diagnosis-related information.	ClinicalEncounterId
ClinicalEncounterFacility	Specifies the different healthcare facilities involved in an encounter, and other details relevant to the facility and the encounter.	ClinicalEncounterId
ClinicalEncounterIdentifier	Specifies identifiers for the encounter. The object is very similar to the standard Identifier object, but is exclusive to ClinicalEncounter.	ClinicalEncounterId
ClinicalEncounterProvider	Specifies the different providers involved in an encounter and the details of their involvement.	ClinicalEncounterId

Object	Type of Information	Reference Field
ClinicalEncounterReason	Specifies the reasons for why the encounter happened or was required.	ClinicalEncounterId
ClinicalEncounterSvcRequest	Specifies service requests that the encounter was based on.	ClinicalEncounterId

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ClinicalEncounterChangeEvent \(API version 58.0\)](#)

Change events are available for the object.

[ClinicalEncounterFeed](#)

Feed tracking is available for the object.

[ClinicalEncounterHistory](#)

History is available for tracked fields of the object.

[ClinicalEncounterDiagnosis](#)

Represents a diagnosis related to a clinical encounter. This object is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

[ClinicalEncounterFacility](#)

Represents information about the different facilities involved in an encounter, the time spent at those facilities, and other relevant details. This is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

[ClinicalEncounterIdentifier](#)

Represents the identifier information for a clinical encounter. This object is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

[ClinicalEncounterProvider](#)

Represents the providers involved in an encounter. This object is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

[ClinicalEncounterReason](#)

Represents the reasons for why the encounter was required. This object is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

[ClinicalEncounterSvcRequest](#)

Represents the service requests related to a clinical encounter. This object is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

[ClinicalEncounterDiagnosis](#)

Represents a diagnosis related to a clinical encounter. This object is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ClinicalEncounterId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description References the parent clinical encounter record the diagnosis belongs to.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
DiagnosisId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description References the condition or procedure relevant to the encounter.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • HealthCondition • PatientMedicalProcedure
DiagnosisRank	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Specifies the rank of a particular diagnosis among multiple diagnoses for an encounter.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date and time when the record was referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date and time when the record was viewed.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description A system-generated name for the ClinicalEncounterDiagnosis record.</p>
UsageTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The system-defined code that represents the role the diagnosis plays in context of the encounter.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle

Usage

Once the diagnosis-related information is recorded in the ClinicalEncounterDiagnosis record, the parent ClinicalEncounter record is referenced using the `ClinicalEncounterId` field.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ClinicalEncounterDiagnosisChangeEvent](#) on page 1426 (API Version 62.0)

Change events are available for the object.

[ClinicalEncounterDiagnosisFeed](#)

Feed tracking is available for the object.

[ClinicalEncounterDiagnosisHistory](#)

History is available for tracked fields of the object.

[ClinicalEncounterFacility](#)

Represents information about the different facilities involved in an encounter, the time spent at those facilities, and other relevant details. This is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ClinicalEncounterId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent clinical encounter that the clinical encounter facility record is related to,</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
Duration	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The duration of time that the patient was present at the facility.</p>
DurationUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of time for the Duration field.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • UnitOfMeasure
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date and time of the patient's time at the facility during the encounter.</p>
FacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The healthcare facility where the encounter occurred.</p>

Field	Details
	<p>Referenced Objects</p> <ul style="list-style-type: none"> HealthcareFacility
FacilityTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The system-defined code that represents the type of the facility, in the context of its physical structure.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The date and time when the record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The last date and time when the record was viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the ClinicalEncounterFacility record.</p>
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The start date and time of the patient's time at the facility during the encounter.</p>

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the patient's presence at the facility in the context of the patient's encounter.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Completed • Planned • Reserved

Usage

Once the facility-related information is recorded in the ClinicalEncounterFacility record, the parent ClinicalEncounter record is referenced using the `ClinicalEncounterId` field.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ClinicalEncounterFacilityFeed](#)

Feed tracking is available for the object.

[ClinicalEncounterFacilityHistory](#)

History is available for tracked fields of the object.

[ClinicalEncounterFacilityChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

[ClinicalEncounterIdentifier](#)

Represents the identifier information for a clinical encounter. This object is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describesObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
<code>ClinicalEncounterId</code>	<p>Type Master-detail reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description The parent clinical encounter that this identifier belongs to.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
EffectiveDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time from when the identifier is in effect.</p>
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time from when the identifier is no longer in effect.</p>
IdTypeID	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The system-defined code that represents the type of the identifier.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSet • CodeSetBundle
IdUsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Specifies the type of use of the identifier. Possible values are:</p> <ul style="list-style-type: none"> • Official • Old

Field	Details
	<ul style="list-style-type: none"> Secondary Temp Usual
<code>IdValue</code>	Type string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The unique value of the identifier. No two ClinicalEncounterIdentifier records in an org can share the same <code>IdValue</code> .
<code>IssuingAuthorityId</code>	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The authority or organization that issued the identifier.
	Referenced Objects
	<ul style="list-style-type: none"> Account
<code>LastReferencedDate</code>	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date and time when the record was last referenced.
<code>LastViewedDate</code>	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date and time when the record was last viewed.
<code>Name</code>	Type string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The system-generated name of the ClinicalEncounterIdentifier record.

Field	Details
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system that the identifier belongs to.</p>

Usage

Once the identifier-related information is recorded in the ClinicalIdentifier record, the parent ClinicalEncounter record is referenced using the `ClinicalEncounterId` field.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ClinicalIdentifierFeed](#)

Feed tracking is available for the object.

[ClinicalIdentifierHistory](#)

History is available for tracked fields of the object.

[ClinicalIdentifierChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

[ClinicalProvider](#)

Represents the providers involved in an encounter. This object is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ClinicalEncounterId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent clinical encounter that the ClinicalProvider record belongs to.</p>

Field	Details
Referenced Objects	
	<ul style="list-style-type: none"> ClinicalEncounter.
<hr/>	
Duration	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The duration of the performer's participation in the encounter.</p>
<hr/>	
DurationUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measurement for the duration field.</p>
<hr/>	
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the provider's participation in the encounter ended.</p>
<hr/>	
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
<hr/>	
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
<hr/>	
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the ClinicalEncoderProvider record.</p>
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The person who is performing care in the encounter.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> HealthcareProvider
PractitionerTypeID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the role of the practitioner in the encounter. For example, admirer, attender discharger, or escort.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the provider's participation in the encounter started.</p>

Usage

Once the provider-related information is recorded in the ClinicalEncoderProvider record, the parent ClinicalEncoder record is referenced using the `ClinicalEncoderId` field.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ClinicalEncoderProviderFeed](#)

Feed tracking is available for the object.

[ClinicalEncounterProviderHistory](#)

History is available for tracked fields of the object.

[ClinicalEncounterProviderChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

[ClinicalEncounterReason](#)

Represents the reasons for why the encounter was required. This object is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ClinicalEncounterId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent ClinicalEncounter record that this ClinicalEncounterReason record belongs to.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of this encounter reason.</p>
ReasonCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that indicates the reason why the encounter took place.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
ReasonReferenceId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason for the encounter.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> HealthCondition CareObservation PatientMedicalProcedure

Usage

Once the reasons for the encounter is recorded in the ClinicalEncounterReason record using the ReasonCodeId and ReasonReferenceId fields, the parent ClinicalEncounter record is referenced using the ClinicalEncounterId field.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ClinicalEncounterReasonFeed](#)

Feed tracking is available for the object.

[ClinicalEncounterReasonHistory](#)

History is available for tracked fields of the object.

[ClinicalEncounterReasonChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

ClinicalEncounterSvcRequest

Represents the service requests related to a clinical encounter. This object is a child object of ClinicalEncounter. This object is available in API version 51.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
<code>ClinicalEncounterId</code>	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent ClinicalEncounter record that this ClinicalEncounterSvcRequest record belongs to.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
<code>ClinicalServiceRequestId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The service request that the encounter is based on.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalServiceRequest
<code>LastReferencedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
<code>LastViewedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p>

Field	Details
	<p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the clinical encounter service request record.</p>

Usage

Once the service request-related information is recorded in the ClinicalEncounterSvcRequest record, the parent ClinicalEncounter record is referenced using the `ClinicalEncounterId` field.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ClinicalEncounterSvcRequestFeed](#)

Feed tracking is available for the object.

[ClinicalEncounterSvcRequestHistory](#)

History is available for tracked fields of the object.

[ClinicalEncounterSvcRequestChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

ClinicalServiceRequest

Represents requests for a procedure or diagnostic service that needs to be planned, proposed, or performed as part of the patient's healthcare. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
BodySiteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	The system-defined code that represents site of the body associated with the service request.
	Referenced Objects
	<ul style="list-style-type: none"> CodeSetBundle
CategoryId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The system-defined code that represents the category of the service request.
	Referenced Objects
	<ul style="list-style-type: none"> CodeSetBundle
ConditionId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The condition that justifies the service request.
	Referenced Objects
	<ul style="list-style-type: none"> HealthCondition
DateSigned	Type
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date the service request was signed.
DiagnosticReportId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The diagnosis that justifies the service request.
	Referenced Objects
	<ul style="list-style-type: none"> ClinicalEncounterDiagnosis

Field	Details
DiseaseInvestigationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The disease investigation related to the clinical service request. This field is a relationship field.</p> <p>Relationship Name Diseaselnvestigation</p> <p>Refers To Diseaselnvestigation</p>
EncounterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The encounter related to the service request.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date and time for the service request.</p>
FacilityCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-generated code for the facility where the service request is to be performed.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
FacilityId	<p>Type reference</p>

Field	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The facility where the service request is to be performed.
	Referenced Objects
	<ul style="list-style-type: none"> • HealthcareFacility
HasPrerequisites	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether there are any prerequisites for the service request. If the value of this field is <code>true</code> , then you can't select a <code>PrerequisiteCodeId</code> .
IsAccepted	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the clinical service request is accepted (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
IsIgnored	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the request should be ignored.
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The most recent date on which a user referenced this record.
LastViewedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort

Field	Details
	<p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the clinical service request.</p>
ObservationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The observation that justifies the service request.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalObservation
OriginalRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description A reference to the original service request the service request replaces.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalServiceRequest
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the clinical service request record. Available in API version 56.0 and later. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To</p> <ul style="list-style-type: none"> • Group • User <p> Note: To enable queues for the Clinical Service Request object, change the sharing settings for the object from Controlled By Parent to Private.</p>
PatientId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The patient associated with the service request.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
PatientInstruction	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Instructions for the patient.</p>
PerformerId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person or device that performs the service request.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account • Asset • HealthcareProvider • CareRegisteredDevice
PerformerTypeID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	<p>The system-defined code that represents the type or role of the person performing the service request.</p>
	Referenced Objects
	<ul style="list-style-type: none"> CodeSetBundle
PrerequisiteCodeId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The system-generated code that represents the prerequisites for the service request. You can't select a record for this field if the <code>HasPrerequisites</code> field is set to <code>true</code>.</p>
	Referenced Objects
	<ul style="list-style-type: none"> CodeSetBundle
Priority	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>Specifies the priority of the service request.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> ASAP Routine Stat Urgent
QuantityDenominator	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	<p>The denominator value of the quantity associated with the service request.</p>
QuantityNumerator	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update

Field	Details
Description	The numerator value of the quantity associated with the service request.
QuantityNumeratorUnitId	Type reference
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The unit of the numerator value of the quantity associated with the service request.
Referenced Objects	<ul style="list-style-type: none"> • UnitOfMeasure
QuantityType	Type picklist
Properties	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
Description	Indicates the type of quantity related to the service request.
Possible values are:	<ul style="list-style-type: none"> • Range • Ratio
ReasonCodeId	Type reference
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The system-defined code that represents the justification for the service request.
Referenced Objects	<ul style="list-style-type: none"> • CodeSetBundle
RequestCodeId	Type reference
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The system-defined code that represents the service request.
Referenced Objects	<ul style="list-style-type: none"> • CodeSetBundle

Field	Details
RequesterId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person or device raising a service request.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account • Asset • HealthcareProvider • CareRegisteredDevice
ServiceRequestGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifier that ties the service request to its batch of requests.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Identifier
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this record came from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The date on which this item was last changed in the source system.</p>
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The start date and time for the service request.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The status of the service request. Possible values are:</p> <ul style="list-style-type: none"> • Active • Completed • Draft • Entered-in-Error • On-Hold • Revoked • Unknown
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of the service request. Possible values are:</p> <ul style="list-style-type: none"> • Directive • Filler-Order • Instance-Order • Option • Order • Original-Order • Plan

Field	Details
	<ul style="list-style-type: none"> • Proposal • Reflex-Order

Additional Information for ClinicalServiceRequest in Other Objects

In addition to creating a record using these fields, you can add more details to your ClinicalServiceRequest record by creating records in certain other objects, and referencing your ClinicalServiceRequest record as the parent record. Here's the list of objects you can associate to ClinicalServiceRequest in this way, the type of information they add, and the field they use to reference ClinicalServiceRequest.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the service request.	ParentRecordId
ClinicalServiceRequestDetail	Associates the service request with various other records and defines the nature of the association. For instance, if the service request is based on an associated record.	ClinicalServiceRequestId

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ClinicalServiceRequestFeed](#)

Feed tracking is available for the object.

[ClinicalServiceRequestHistory](#)

History is available for tracked fields of the object.

[ClinicalServiceRequestOwnerSharingRule \(API version 56.0\)](#)

Sharing rules are available for the object.

[ClinicalServiceRequestShare \(API version 56.0\)](#)

Sharing is available for the object.

[ClinicalServiceRequestChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

[ClinicalServiceRequestDetail](#)

Associates records from different objects to a clinical service request record to add more information to it. This is a multi-object junction object. This object is available in API version 51.0 and later.

[ClinicalServiceRequestDetail](#)

Associates records from different objects to a clinical service request record to add more information to it. This is a multi-object junction object. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ClinicalServiceRequestId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description References the parent service request record.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalServiceRequest
DetailCodeId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References a code set or code set bundle that adds information to a clinical service request record.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSet • CodeSetBundle
DetailRecordId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References a record that adds information to a clinical service request record.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalServiceRequest • MedicationRequest • HealthcareFacility • CareObservation • HealthCondition • DiagnosticSummary • Specimen

Field	Details
DetailType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the relation between the service request and the detail record. Possible values are:</p> <ul style="list-style-type: none"> • Based On • Body Site • Reason Reference • Request Facility • Specimen
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the clinical service request detail record.</p>

Usage

ClinicalServiceRequestDetail records add additional information to ClinicalServiceRequest records. This information may be of the following types, referencing the following types of records:

- Based On: Clinical service requests or medication requests
- Body Site: Code sets or code set bundles

- Reason Reference: Health conditions, care observations, or diagnostic summaries
- Request Facility: Healthcare facilities, code sets, or code set bundles

The records providing this additional information is selected using either the `DetailCodeId` or `DetailRecordId` fields, and then the type of information is specified using the `DetailType` field. This information is then connected to the clinical service request record it belongs to using the `ClinicalServiceRequestId` field.

One record of `ClinicalServiceRequestDetail` can specify only one type and piece of information. If multiple detail types or detail instances are required in the parent clinical service request record, multiple records of `ClinicalServiceRequestDetail` are required.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ClinicalServiceRequestDetailFeed](#)

Feed tracking is available for the object.

[ClinicalServiceRequestDetailHistory](#)

History is available for tracked fields of the object.

[ClinicalServiceRequestDetailChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

CodeSet

Represents various industry defined codes in the context of their systems and versions of those systems. These codes are used in all sorts of digital records. This object is available in API version 50.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Code	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The system-defined code that's represented by this code set.</p>
CodeDescription	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information associated with the code set.</p>

Field	Details
CodeSetKey	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Represents a unique key that identifies the concept represented by code sets across different systems and versions. This key isn't case-sensitive.</p>
CodeSetType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of the code set.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the code set's effective period.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the code set is an active code set.</p>
IsCustomCode	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the code set is defined by a specific organization, as opposed to recognized across the industry.</p>
IsPrimary	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether the code set is the primary code set for the concept. That is, it was selected manually by a user instead of being selected by an automated process.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The textual representation of the meaning of the code.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description A reference to the person who owns the code set record.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system that sets the context for the code and defines its meaning.</p>
StartDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the code set's effective period.</p>
SystemVersion	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The version of the source system the code belongs to.</p>

Usage

Code sets are used across multiple features and objects to represent coded, system-defined information about various entities. These codes are usually industry recognized codes from systems like LOINC or SNOMED.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

CodeSetChangeEvent (API version 59.0)

Change events are available for the object.

CodeSetBundle

Represents a group of code sets across multiple systems and versions. All of these code sets refer to the same conceptual entity. This object is available in API version 50.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CodeSet10Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A code set that represents the conceptual entity represented by the code set bundle.</p>

Field	Details
CodeSet11Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A code set that represents the conceptual entity represented by the code set bundle.</p>
CodeSet12Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A code set that represents the conceptual entity represented by the code set bundle.</p>
CodeSet13Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A code set that represents the conceptual entity represented by the code set bundle.</p>
CodeSet14Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A code set that represents the conceptual entity represented by the code set bundle.</p>
CodeSet15Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A code set that represents the conceptual entity represented by the code set bundle.</p>
CodeSet1Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A code set that represents the conceptual entity represented by the code set bundle.</p>

Field	Details
CodeSet2Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description A code set that represents the conceptual entity represented by the code set bundle.
CodeSet3Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description A code set that represents the conceptual entity represented by the code set bundle.
CodeSet4Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description A code set that represents the conceptual entity represented by the code set bundle.
CodeSet5Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description A code set that represents the conceptual entity represented by the code set bundle.
CodeSet6Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description A code set that represents the conceptual entity represented by the code set bundle.
CodeSet7Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description A code set that represents the conceptual entity represented by the code set bundle.

Field	Details
CodeSet8Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A code set that represents the conceptual entity represented by the code set bundle.</p>
CodeSet9Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A code set that represents the conceptual entity represented by the code set bundle.</p>
CodeSetBundleKey	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description A unique key that represents the concept referenced by the bundled code sets. This value is unique, but not case sensitive.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p>Description The name of a conceptual entity referenced by the different code sets grouped together in the bundle.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description References the user who owns the code set bundle record.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of the code set bundle. This field can be used to group together code set bundles of similar types. Add values to this picklist as needed for your business functions.</p>

Usage

The different code sets that represent the same conceptual entity are referenced using the different `CodeSetId` fields, and then given a unique `CodeSetBundleKey`. This object can't have more than one record referencing the same group of code sets. Though the industry defines code set bundles as supporting infinite references to code sets, the Salesforce implementation supports a maximum of fifteen code set references in a bundle.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CodeSetBundleChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

HealthcareFacility

Represents a healthcare facility and all its related details. These details may be physical, functional, geographic, or business details. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description References the business account of the facility.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
AreResearchStudiesConducted	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether research studies are conducted in the healthcare facility (<code>true</code>) or not (<code>false</code>). This field is available in API version 63.0 when Site Management is enabled. The default value is <code>false</code>.</p>
AvailabilityExceptions	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The times when the facility isn't available. Only non-standard time-offs are recorded in this field.</p> <p>Examples Facility time off because of a natural disaster.</p>
AverageActualPtcpEnrlDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The average actual number of days spent enrolling participants at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
AverageAct1PtcpEnrlRate	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	The average actual participant enrollment rate for all research studies at the site. This field is available in API version 64.0 and later when Site Management is enabled.
AverageOpdPatientCount	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The average count of the patients that visit the OPD at the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled.
AvgActualPtcpEnrlCount	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The average actual number of participants that are enrolled for the research study at the site. This field is available in API version 62.0 and later when Site Management is enabled.
AvgClnclTrialAgreeDrtn	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The average time taken to execute the clinical trial agreement. This field is available in API version 62.0 and later when Site Management is enabled.
AvgInvtglProductReleaseDrtn	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The average number of days between the start of the site activation process to the release of the investigational product at the site. This field is available in API version 62.0 and later when Site Management is enabled.
AvgProjectedPtcpEnrlCount	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	The average number of participants that are expected to enroll for the research study at the site. This field is available in API version 62.0 and later when Site Management is enabled.
AvgProjectedPtcpEnrlDrttn	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The average projected number of days to enroll participants at the site. This field is available in API version 62.0 and later when Site Management is enabled.
AvgProtocolDeviationCount	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The average number of protocol deviations reported during the research study at the site. This field is available in API version 62.0 and later when Site Management is enabled.
AvgQualVstToInitVstDrttn	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The average number of days between the site qualification visit and site initiation visit. This field is available in API version 62.0 and later when Site Management is enabled.
AvgRegltyDocTrnarnndDrttn	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The average turnaround time for the preparation of the regulatory documents for Institutional Review Board (IRB) or the Ethics Committee (EC) submission. This field is available in API version 62.0 and later when Site Management is enabled.
AvgRsrchEthicalReviewDrttn	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	<p>Description</p> <p>Specifies the average duration required for an approval for the clinical trial at the healthcare facility from the Institutional Review Board (IRB) or Ethics Committee (EC). This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • 30 – 60 Days • 61 – 90 Days • 91 – 120 Days • Greater than 120 Days • Less than 30 Days
AvgSiteActvToFstPtcpDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The average number of days between the site activation and the first participant visit to the site.</p>
AvgSiteActvToLastPtcpDrtn	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The average number of days between the site activation and the last participant visit to the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
Classification	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the classification of the healthcare facility, such as Previous Partner, Key Opinion Leader, and Novice Member. This field is available in API version 63.0 and later when Site Management is enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Key Opinion Leader • Novice Member. • Previous Partner

Field	Details
ClinicalTrialAgreementType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the type of clinical trial agreement that can be done with the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled. Possible values are:</p> <ul style="list-style-type: none"> • Tetra-Partite • Tripartite
HealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The healthcare provider associated with the facility. This field is a relationship field. This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>Relationship Name HealthcareProvider</p> <p>Refers To HealthcareProvider</p>
InvestigationalProductType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the type of investigational product available at the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled. Possible values are:</p> <ul style="list-style-type: none"> • Biologic • Device • Diagnostic • Drug • Others • Palliative • Vaccine

Field	Details
InvtgtlProdtDestructionCpb1	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the type of Investigational Product disposal capability. This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Off-Site • On-Site • Others
InvtgtlProdtPreparationCpb1	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the list of handling equipment available at the facility for the investigational product. This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Extemporaneous Preparation • Horizontal Laminar Flow Hood • Non-Vented Glove Box • Other • Vented Glove Box • Vertical Laminar Flow Hood
InvtgtlProductStorageCpb1	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the features of the investigational product store available at the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Access Controlled • Back-Up Power • Minimum and Maximum Temperature Monitoring • Temperature Alarm

Field	Details
	<ul style="list-style-type: none"> Temperature Monitoring Temperature Monitoring Log Generation
IsAfflWithSiteMgmtOrg	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Indicates whether the healthcare facility is affiliated to the site management organization. This field is available in API version 62.0 and later when Site Management is enabled.</p>
	The default value is <code>false</code> .
FacilityTypeID	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The system-defined code that represents the type of the facility in terms of that functions performed.</p>
	Referenced Objects
	<ul style="list-style-type: none"> CodeSetBundle
IsAlwaysOpen	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the facility is open during all hours.
IsDedResearchStudyRoomAvl	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Indicates whether a dedicated room is available at the healthcare facility to conduct the research study. This field is available in API version 62.0 and later when Site Management is enabled.</p>
	The default value is <code>false</code> .
IsDedRsrchStdyMntrRmAvl	Type
	boolean

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description Indicates whether a dedicated room is available at the healthcare facility to monitor the research study. This field is available in API version 62.0 and later when Site Management is enabled. The default value is <code>false</code>.</p>
<code>IsGoodClnclPracTrnPrvd</code>	<p>Type boolean</p>
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description Indicates whether good clinical practice training is provided at the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled. The default value is <code>false</code>.</p>
<code>IsPgxCpcmnCollAvl</code>	<p>Type boolean</p>
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description Indicates whether the pharmacogenomic specimen collection is available at the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled. The default value is <code>false</code>.</p>
<code>IsPkpdSpcmnCollStrgAvl</code>	<p>Type boolean</p>
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description Indicates whether PKPD specimen collection and storage is available at the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled. The default value is <code>false</code>.</p>
<code>IsRsrchEthicalRvwSbmsSupp</code>	<p>Type boolean</p>
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Indicates whether the facility supports the regulatory document submission to the Institutional Review Board (IRB) or Ethics Committee (EC). This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>The default value is <code>false</code>.</p>
IsRsrchStudyMtrlStoreAvl	<p>Type</p> <p>boolean</p>
	<p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description</p> <p>Indicates whether a store is available at the healthcare facility to keep the research study materials, such as laboratory kits. This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>The default value is <code>false</code>.</p>
IsSatelliteSite	<p>Type</p> <p>boolean</p>
	<p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description</p> <p>Indicates whether the healthcare facility is a satellite site of another healthcare facility (<code>true</code>) or not (<code>false</code>). This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>The default value is <code>false</code>.</p>
IsTrainingProvided	<p>Type</p> <p>boolean</p>
	<p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description</p> <p>Indicates whether a training is provided to the research staff at the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p>
	<p>Properties</p> <p>Filter, Nullable, Sort</p>
	<p>Description</p> <p>The last date that the record was referenced.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The last date that the record was viewed.</p>
LicensedBedCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of licensed beds the facility has.</p>
LocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the location record representing the facility's geolocation.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Location
LocationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of the facility in terms of its physical structure. Possible values are:</p> <ul style="list-style-type: none"> • Building • Facility • House • ICU Ward
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p>Description The name of the healthcare facility record.</p>
ParentHealthcareFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent facility that the facility is a part of.</p> <p>Examples The hospital that an ER wing is a part of.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • HealthcareFacility
PatientAgeRange	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the age range of the patients at the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled. Possible values are:</p> <ul style="list-style-type: none"> • 18 to 64 • Greater than or Equal to 65 • Less than or Equal to 17
RegulatoryViolationCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of regulatory violations reported during the research study at the site. This field is available in API version 62.0 and later when Site Management is enabled.</p>
ResearchStudyMethod	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the method of conducting the study at the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Hybrid • Traditional • Virtual
ResearchStudyPhase	Type
	multipicklist
	Properties
	Create, Filter, Nillable, Restricted picklist, Update
	Description
	<p>Specifies the phases under which the study is conducted. This field is available in API version 62.0 and later when Site Management is enabled.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Phase 1 • Phase 2 • Phase 3 • Phase 4
ResearchStudyStartYear	Type
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The start year of the research study at the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled.</p>
ResearchStudyType	Type
	multipicklist
	Properties
	Create, Filter, Nillable, Restricted picklist, Update
	Description
	<p>Specifies the type of research study conducted at the healthcare facility. This field is available in API version 62.0 and later when Site Management is enabled.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Expanded Access • Interventional • Observational
RsrchEthicalRvwComteType	Type
	multipicklist

Field	Details
	<p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the type of the Institutional Review Board (IRB) or Ethics Committee (EC). This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • 30 – 60 Days • 61 – 90 Days • 91 – 120 Days • Greater than 120 Days • Less than 30 Days
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system from where the record was brought into Salesforce.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the record was last modified in its source system.</p>
UnitOfMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measure that's used to calculate the duration of a specific activity at the facility. This field is available in API version 62.0 and later when Site Management is enabled.</p> <p>This field is a relationship field.</p>

Field	Details
Relationship Name	UnitOfMeasure
Refers To	UnitOfMeasure

Additional Information for HealthcareFacility in Other Objects

In addition to creating a record using these fields, you can add more details to your HealthcareFacility record by creating records in certain other objects, and referencing your HealthcareFacility record as the parent record. Here's the list of objects you can associate to HealthcareFacility in this way, the type of information they add, and the field they use to reference HealthcareFacility.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the facility.	ParentRecordId

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[HealthcareFacilityChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[HealthcareFacilityFeed](#)

Feed tracking is available for the object.

[HealthcareFacilityHistory](#)

History is available for tracked fields of the object.

HealthCondition

Represents a clinical condition, problem, or any clinically relevant occurrence that is a matter of concern. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AbatementEndDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update

Field	Details
Description	The end date and time of the abatement period.
AbatementStartTime	Type dateTime
Properties	Create, Filter, Nillable, Sort, Update
Description	The start date and time of the abatement period or the specific date and time when the condition abated.
AssertionSourceId	Type Polymorphic reference
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The person made the assertion about the condition. This may be a physician, a patient, or even the patient's contact.
Referenced Objects	<ul style="list-style-type: none"> • Account • HealthcareProvider
CaseId	Type reference
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The case associated with the health condition of the disease outbreak.
This field is a relationship field.	
Relationship Name	Case
Refers To	Case
ClinicalEncounterId	Type reference
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The clinical encounter that the immunization was a part of.

Field	Details
Referenced Objects	
	<ul style="list-style-type: none"> • ClinicalEncounter
<hr/>	
ConditionCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The system-defined code that represents the condition.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
<hr/>	
ConditionStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the condition. Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive • Recurrence • Relapse • Remission • Resolved
<hr/>	
DiagnosticStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The diagnostic status of the condition. Possible values are:</p> <ul style="list-style-type: none"> • Confirmed • Differential • Entered in error • Provisional • Refuted • Unconfirmed

Field	Details
ExtlProblemDefIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the external problem definition in the source system.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the health condition record.</p>
OnsetEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date and time of the onset period.</p>
OnsetStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The start date and time of the onset period or the specific date and time when the condition manifested.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the health condition record. Available in API version 56.0 and later. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To</p> <ul style="list-style-type: none"> • Group • User
PatientId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The patient who is afflicted with the condition.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
ProblemDefinitionId	<p>Type Lookup</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the problem definition in the PGI library that was used to instantiate the HealthCondition record in a care plan. This field is available from version 57.0. This field is a relationship field.</p> <p>Relationship Name ProblemDefinition</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To ProblemDefinition</p>
ProblemDescription	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description for the condition as a problem in a care plan. This field is available from version 57.0</p>
ProblemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the condition as a problem in a care plan. This field is available from version 57.0</p>
RecordCreationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the record of the condition was created.</p>
RecordCreatorId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who created the record of the condition.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account • HealthcareProvider
RelatedHealthConditionId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The health condition associated with the primary health condition. This field is a relationship field.</p> <p>Relationship Name RelatedHealthCondition</p> <p>Refers To HealthCondition</p>
RelatedHealthConditionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of health condition based on which the primary and related health conditions are associated. Possible values are:</p> <ul style="list-style-type: none"> • Coinfection
ReportDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date the health condition was reported.</p>
Severity	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the severity of the condition. Possible values are:</p> <ul style="list-style-type: none"> • Mild • Moderate • Severe
SiteId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the site of the condition on the patient's body.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system from where the record was brought into Salesforce.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier for the record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the record was last modified in its source system.</p>
StageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the stage of the condition.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The contextual type of the condition.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Encounter Diagnosis • Problem List Item
DiagnosticStatusCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the category of a patient's diagnosis status.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Confirmed • Probable • Suspected • Unknown

Additional Information for HealthCondition in Other Objects

In addition to creating a record using these fields, you can add more details to your HealthCondition record by creating records in certain other objects, and referencing your HealthCondition record as the parent record. Here's the list of objects you can associate to HealthCondition in this way, the type of information they add, and the field they use to reference HealthCondition.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the health condition.	ParentRecordId

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[HealthConditionChangeEvent \(API version 58.0\)](#)

Change events are available for the object.

[HealthConditionOwnerSharingRule \(API version 56.0\)](#)

Sharing rules are available for the object.

[HealthConditionShare \(API version 56.0\)](#)

Sharing is available for the object.

[HealthConditionDetail](#)

This child object is used to associate body site and laterality codes to HealthCondition records. This object is available in API version 52.0 and later.

HealthConditionDetail

This child object is used to associate body site and laterality codes to HealthCondition records. This object is available in API version 52.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
DetailCodeId	<p>Type Polymorphic Master-Detail reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References a code set or code set bundle that adds information to a HealthCondition record.</p> <p>Referenced Objects CodeSet, CodeSetBundle</p>
DetailType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of information represented by the detail code that's associated to the HealthCondition record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Body Site • Laterality
HealthConditionId	<p>Type Master-Detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent HealthCondition record to which the body site and laterality information is being added.</p>

Field	Details
	<p>Referenced Objects HealthCondition</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the HealthConditionDetail record.</p>

Usage

- Use the HealthConditionId field to reference the parent HealthCondition record that the additional information is being associated to.
- Use the DetailType picklist to specify the type of code that's being associated to the HealthCondition record.
- Use the DetailCodeId field to reference the code set or code set bundle record with the associated information.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[HealthConditionDetailFeed on page 1429](#)

Feed tracking is available for the object.

[HealthConditionDetailHistory on page 1434](#)

History is available for tracked fields of the object.

[HealthConditionDetailChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

Identifier

Represents identifier information for multiple objects. This object is available in API version 51.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`,
`retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description related to the identifier.</p>
EffectiveDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time from when the identifier is valid.</p>
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time from when the identifier is no longer valid.</p>
IdTypeID	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the type of ID the identifier is.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSet

Field	Details
	<ul style="list-style-type: none"> CodeSetBundle
IdUsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of use of the ID. Possible values are:</p> <ul style="list-style-type: none"> Official Old Secondary Temp Usual
IdValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value of the identifier.</p>
IdentifierKey	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description A unique key assigned to the identifier record. This is a calculated field.</p>
IssuingAuthorityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The authorized body that issued the identifier.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> Account

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name for the identifier record.</p>
ParentRecordId	<p>Type Polymorphic master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent entity associated with the identifier.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account • BoardCertification • Contact • CareRegisteredDevice • Medication • HealthCondition • AllergyIntolerance • PatientMedicalProcedure • PatientImmunization • MedicationStatement • ClinicalEncounter • HealthcareFacility

Field	Details
	<ul style="list-style-type: none"> • HealthcareProvider • ClinicalAlert • MedicationRequest • DiagnosticSummary • HealthcarePractitionerFacility • ClinicalServiceRequest • ClinicalDetectedIssue—This value is available in API version 55.0 and later.
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system from which the identifier record was brought into Salesforce.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the identifier record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the identifier record was last modified in its source system.</p>

Usage

The identifier object is used to assign identifiers to records in various other objects. Here's a list of the objects whose records you can add identifiers to:

- Account
- Contact
- Board Certification
- Medication
- HealthCondition
- AllergyIntolerance
- PatientMedicalProcedure

- PatientImmunization
- MedicationStatement
- ClinicalEncounter
- HealthcareFacility
- ClinicalAlert
- MedicationRequest
- DiagnosticSummary
- HealthcarePractitionerFacility
- ClinicalServiceRequest
- ClinicalDetectedIssue

You connect the identifier record to its related record in any of the listed objects by referencing that record using the `ParentRecordId` field.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

IdentifierChangeEvent on page 1426 (API version 61.0)

Change events are available for the object.

Medication

Represents detailed information about different medications. This object is available in API version 51.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`,
`retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
BatchNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the batch number of the medication.</p>
BrandNameAlternative	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The branded alternative for a generic medication. This field is available in API version 56.0 and later.</p>
ExpirationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Specifies the expiration date of the medication.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
ManufacturerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The company that makes the medicine.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
MedicationCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The category of the medication. This field is available in API version 56.0 and later.</p> <p>Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • Branded Product • Generic Product • Innovator Product • Therapeutic Moeity
MedicationCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The system-defined code that identifies a medication.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
MedicationFormId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code for the dosage form this medication is manufactured in.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the medication.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The user who owns the medication record.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The product that's associated with the medication. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Financial Assistance Program permission set.</p>
QuantityDenominator	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total volume of the medication contained in the packaged product.</p>
QuantityNumerator	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount of the medication contained in the packaged product.</p>
QuantityUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The measurement unit for the quantity.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> UnitOfMeasure
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this record came from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The ID of this record on its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this item was last changed on the source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the medication.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Entered in error • Inactive

Additional Information for Medication in Other Objects

In addition to creating a record using these fields, you can add more details to your Medication record by creating records in certain other objects, and referencing your Medication record as the parent record. Here's the list of objects you can associate to Medication in this way, the type of information they add, and the field they use to reference Medication.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the medication record.	ParentRecordId
MedicinalIngredient	Adds information about the different ingredients used in the medication.	ParentRecordId

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

MedicationChangeEvent (API version 59.0)

Change events are available for the object.

[MedicinalIngredient](#)

MedicinalIngredient is a child object of Medication that represents substances or drugs that are used as ingredients in the medication. This object is available in API version 52.0 and later.

MedicinalIngredient

MedicinalIngredient is a child object of Medication that represents substances or drugs that are used as ingredients in the medication. This object is available in API version 52.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
IngredientId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The substance that's used as an ingredient in the medication. If the ingredient is another medication or drug, reference a Medication record. If the ingredient is not a medication, reference a code set bundle record with the system-defined code that represents the ingredient.</p> <p>Referenced Objects Medication, CodeSetBundle</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the ingredient is an active ingredient in the medication. An active ingredient affects the therapeutic action of the medication. The default value is 'false'.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the record.</p>
OwnerId	<p>Type Polymorphic reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the record.</p> <p>Referenced Objects Group, User</p>
ParentRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The medication that this ingredient is a part of. This is a relationship field.</p> <p>Referenced Objects Medication</p>
StrengthDenominator	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The denominator value of the ingredient's strength or quantity in the medication.</p>

Field	Details
StrengthDenominatorUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of StrengthDenominator</p> <p>Referenced Objects UnitOfMeasure</p>
StrengthNumerator	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The numerator value of the ingredient's strength or quantity in the medication.</p>
StrengthNumeratorUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of StrengthNumerator This is a relationship field.</p> <p>Refers To UnitOfMeasure</p>

Usage

Ingredients are added to a medication record by creating MedicinalIngredient records to represent each ingredient, and then referencing the medication record using the ParentRecordId field in all the MedicinalIngredient records.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[MedicinalIngredientChangeEvent on page 1426 \(API Version 62.0\)](#)

Change events are available for the object.

[MedicinalIngredientFeed](#)

Feed tracking is available for the object.

[MedicinalIngredientHistory on page 1434](#)

History is available for tracked fields of the object.

[MedicinalIngredientShare on page 1438](#)

Sharing is available for the object.

MedicationDispense

Represents the dispense of a medication to a patient in response to a medication request or order. This object also includes the instructions for how the medication is to be administered. This object is available in API version 54.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describesObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CollectedBy	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The contact, account, or a healthcare provider who collected the dispensed medication. This field is available in API version 55.0 and later. This field is a polymorphic relationship field.</p> <p>Relationship Name CollectedBy</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact, HealthcareProvider</p>
ContextId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The encounter that establishes the context for the dispense of a medication.</p> <p>Refers To</p> <ul style="list-style-type: none"> • ClinicalEncounter

Field	Details
DeliveryLocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The location where the dispensed medication will be delivered. This field is available in API version 55.0 and later. This field is a polymorphic relationship field.</p> <p>Relationship Name DeliveryLocation</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareFacility, Location</p>
DispenseTypeCodeId	<p>Type Polymorphic lookup</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that identifies the dispense event type. For instance, a first fill, trial fill, or refill.</p> <p>Refers To</p> <ul style="list-style-type: none"> • CodeSet • CodeSetBundle
DispensedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the medication was handed over.</p>
HealthcareFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The location where the dispense occurred.</p>

Field	Details
	<p>Refers To</p> <ul style="list-style-type: none"> HealthcareFacility
IsSubstituted	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Indicates whether a substitute medication was dispensed.</p> <p>The default value is <code>false</code>.</p> <p>This field is available in API version 55.0 and later.</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The date and time when the record was last referenced.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The date and time when the record was last viewed.</p>
MedAdministrationSettingCategory	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Specifies the setting in which the medication is expected to be administered to the patient.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Inpatient Outpatient Community Discharge
MedicationCodeId	<p>Type</p> <p>reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that identifies the medication that's dispensed.</p> <p>Refers To</p> <ul style="list-style-type: none"> • CodeSet • CodeSetBundle
MedicationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The medication that's dispensed.</p> <p>Relationship Name Medication</p> <p>Relationship Type Lookup</p> <p>Refers To</p> <ul style="list-style-type: none"> • Medication
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
PatientId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The patient for whom the medication is dispensed.</p> <p>Refers To</p> <ul style="list-style-type: none"> • Account
PreparedDateTime	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the medication was prepared for dispense.</p>
PrimaryDetectedIssueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The primary clinical issue associated with the medication dispensation. This field is available in API version 55.0 and later. This field is a relationship field.</p> <p>Relationship Name PrimaryDetectedIssue</p> <p>Relationship Type Lookup</p> <p>Refers To ClinicalDetectedIssue</p>
PrimaryMedicationRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The primary medication request that authorized the dispense of the medication.</p> <p>Refers To</p> <ul style="list-style-type: none"> • MedicationRequest
PrimaryProcedureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The primary medical procedure associated with the medication dispensation. This field is available in API version 55.0 and later. This field is a relationship field.</p> <p>Relationship Name PrimaryProcedure</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To PatientMedicalProcedure</p>
Quantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The quantity of medication that was dispensed.</p>
QuantityUnitID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of the quantity of medication that was dispensed.</p> <p>Refers To</p> <ul style="list-style-type: none"> • UnitOfMeasure
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this record came from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in its source system.</p>
SourceSystemModifiedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when this item was last changed in the source system.</p>

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the dispense event. Possible values are:</p> <ul style="list-style-type: none"> • Cancelled • Completed • Declined • Entered-In-Error • In-Progress • On-Hold • Preparation • Stopped • Unknown
StatusReasonCodeId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that specifies the reason for the specified status.</p> <p>Refers To</p> <ul style="list-style-type: none"> • CodeSet • CodeSetBundle
StatusReasonRelatedIssueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies clinical issue that resulted in the status of the medication dispensation. This field is available in API version 55.0 and later. This field is a relationship field.</p> <p>Relationship Name StatusReasonRelatedIssue</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To ClinicalDetectedIssue</p>
SubstitutedByld	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the user or healthcare provider who substituted the medication. This field is available in API version 55.0 and later. This field is a polymorphic relationship field.</p> <p>Relationship Name SubstitutedBy</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareProvider, User</p>
SubstitutionReason	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the reason for substituting the medication. Possible values are: <ul style="list-style-type: none"> • Continuing therapy • Formulary policy • Out of stock • Regulatory requirement This field is available in API version 55.0 and later.</p>
SubstitutionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of substitution done for the medication. Possible values are: <ul style="list-style-type: none"> • Brand composition • Equivalent </p>

Field	Details
	<ul style="list-style-type: none"> Equivalent composition Formulary Generic composition None Therapeutic alternative Therapeutic brand Therapeutic generic <p>This field is available in API version 55.0 and later.</p>
SupplyDaysCount	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The number of days that the dispensed supply is expected to last.</p>

Additional Information for MedicationStatement in Other Objects

In addition to creating a record using these fields, you can add more details to your MedicationDispense record by creating records in certain other objects, and referencing your MedicationDispense record as the parent record. Here's the list of objects you can associate to MedicationStatement in this way, the type of information they add, and the field they use to reference MedicationStatement.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the medication dispense.	ParentRecordId

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

MedicationDispenseChangeEvent (API version 59.0)

Change events are available for the object.

MedicationDispenseFeed

Feed tracking is available for the object.

MedicationDispenseHistory

History is available for tracked fields of the object.

MedicationRequest

Represents a request or order for the supply of medication, along with information about how it should be administered. This object is available in API version 51.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AllowedSubstitutionTypeCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the type of substitution that's allowed. This field can't be used if the <code>CanSubstitute</code> field is set to <code>true</code>.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
CanSubstitute	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether substitution is acceptable. If the value for this field is set to <code>true</code>, then the <code>AllowedSubstitutionTypeCodeId</code> field can't be selected.</p>
CarePlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care plan related to this medication request. This field is a relationship field.</p> <p>Relationship Name CarePlan</p> <p>Relationship Type Lookup</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CarePlan
CaseId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The case associated with the medication request. This field is a relationship field.</p> <p>Relationship Name Case</p> <p>Refers To Case</p>
ClinicalEncounterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The clinical encounter related to the medication request.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
ClinicalServiceRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the service request related to the medication request.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalServiceRequest
DispenseInterval	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The minimum interval required between refills.</p>
DispenseIntervalUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	The unit for that interval.
	Referenced Objects
	<ul style="list-style-type: none"> • UnitOfMeasure
DispenserId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The person who provides the medication.
	Referenced Objects
	<ul style="list-style-type: none"> • Account
FillDurationUnitId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The unit for the fill duration.
	Referenced Objects
	<ul style="list-style-type: none"> • UnitOfMeasure
FillQuantityUnitId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The unit of the fill quantity.
	Referenced Objects
	<ul style="list-style-type: none"> • UnitOfMeasure
InitialFillDuration	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The length of time the first fill is expected to last.

Field	Details
InitialFillQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The quantity to be filled in the first dispense.</p>
IsIgnored	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the request should be ignored.</p>
IsSecondaryInformation	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the request is based on information from a secondary source instead of a primary one. If this field is set to <code>true</code>, then the <code>SecondarySourceId</code> field can't be selected.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
MedicationAdministrationContextId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	<p>The system-defined code that represents the setting in which the medication is administered.</p>
	Referenced Objects
	<ul style="list-style-type: none"> CodeSetBundle
MedicationCodeId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The system-defined code that specifies the medication requested. A record can select either a MedicationId or a MedicationCodeId, but not both.</p>
	Referenced Objects
	<ul style="list-style-type: none"> CodeSetBundle
MedicationId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>Lookup to the medication record for the medicine requested. A record can select either a MedicationId or a MedicationCodeId, but not both.</p>
	Referenced Objects
	<ul style="list-style-type: none"> Medication
MedicationRequestGroupId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>A shared identifier common to all medication requests that were authorized more or less simultaneously by a single author.</p>
	Referenced Objects
	<ul style="list-style-type: none"> Identifier
Name	Type
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	<p>Description The system-generated name of the medication request record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the medication request record. Available in API version 56.0 and later. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Group • User
PatientId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The person who needs the medicine.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
PerformerId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who administers the medicine.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account • HealthcareProvider • CareRegisteredDevice
PerformerTypeID	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the performer's role. For instance, the cardiologist, neurosurgeon, and so on.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
PrescribedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and optionally the time when the prescription was initially written or authored on.</p>
PrescriptionPeriodEnd	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date for the prescription's validity.</p>
PrescriptionPeriodStart	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start date for the prescription's validity.</p>
PreviousPrescriptionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reference to previous prescriptions.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> MedicationRequest
Priority	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the priority of the request. Possible values are:</p> <ul style="list-style-type: none"> • ASAP • Routine • Stat • Urgent
ReasonCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The code for why the medicine was requested.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
ReasonReferenceId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reference to the condition or observation that warranted this medicine.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • HealthCondition • CareObservation
RefillDuration	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description How long the refill is expected to last.</p>
RefillQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The quantity in each refill.</p>
RefillsAllowed	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of refills that are allowed.</p>
RelatedRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A plan or request that is fulfilled in whole or in part by this medication request.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> MedicationRequest
RequesterId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who raised the request.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> Account HealthcareProvider CareRegisteredDevice
SecondarySourceId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the person who gave the information for the request. This field can't be selected if the <code>IsSecondarySource</code> field is set to <code>true</code>.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> Account HealthcareProvider

Field	Details
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this record came from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this item was last changed in the source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of the medication request. Possible values are:</p> <ul style="list-style-type: none"> • Active • Cancelled • Completed • Draft • Entered-in-Error • On-Hold • Stopped • Unknown
StatusReasonCodeId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that specifies the reason for the status.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
SubstitutionReasonCodeID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies why a substitution is required.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
TherapyDuration	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the overall pattern of the administration of the medication to the patient. For instance, Continuous, Acute, Seasonal. Possible values are:</p> <ul style="list-style-type: none"> Continuous Seasonal Short Term
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of the request. Possible values are:</p> <ul style="list-style-type: none"> Filler Order Instance Order Option Order

Field	Details
	<ul style="list-style-type: none"> Original Order Plan Proposal Reflex Order

Additional Information for MedicationRequest in Other Objects

In addition to creating a record using these fields, you can add more details to your MedicationRequest record by creating records in certain other objects, and referencing your MedicationRequest record as the parent record. Here's the list of objects you can associate to MedicationRequest in this way, the type of information they add, and the field they use to reference MedicationRequest.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the medication request.	ParentRecordId
PatientMedicationDosage	Associates dosage-related information for the medication in the medication request record.	ParentRecordId

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

MedicationRequestChangeEvent (API version 59.0)

Change events are available for the object.

MedicationRequestFeed

Feed tracking is available for the object.

MedicationRequestHistory

History is available for tracked fields of the object.

MedicationRequestOwnerSharingRule (API version 56.0)

Sharing rules are available for the object.

MedicationRequestShare (API version 56.0)

Sharing is available for the object.

MedicationStatement

Represents a record of medication that the patient is currently taking or has taken in the past. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AssertionDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time the medication statement was made.</p>
CareObservationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The observation that warranted this medication.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CareObservation
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The case associated with the patient's medication statement. This field is a relationship field.</p> <p>Relationship Name Case</p> <p>Refers To Case</p>
ClinicalEncounterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The encounter related to the medication statement.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
DeliverySetting	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the setting in which the medication was administered. Possible values are:</p> <ul style="list-style-type: none"> • Community • Inpatient • Outpatient • PatientSpecified
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The stated end date and time for the medication.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
MedicationCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that identifies a medication. A record can select either a MedicationId or a MedicationCodeId, but not both.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle

Field	Details
MedicationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The medication associated with this medication statement. A record can select either a MedicationId or a MedicationCodeId, but not both.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Medication
MedicationReasonCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that specifies the reason this medication was taken.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
MedicationReasonId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The observation, condition, or diagnostic report that warranted the medication.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • HealthCondition • CareObservation
MedicationRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A medication request associated with the medication statement.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • MedicationRequest
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the medication statement record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the medication statement record. Available in API version 56.0 and later. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To</p> <ul style="list-style-type: none"> • Group • User
ParentMedicationStatementId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The parent medication statement associated with the medication statement.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • MedicationStatement
PatientId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description A patient that the medication statement refers to.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
ProcedureId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The procedure associated with this medication statement.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> PatientMedicalProcedure
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this record came from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this item was last changed in the source system.</p>
StartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The stated start date and time for the medication.</p>
StatementSourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who made the medication statement.</p>

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the medication in this statement.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Completed • Entered-in-error • Intended • Not-taken • On-hold • Review Pending - This picklist value is available for the Home Health feature in API version 59.0 and later. • Stopped • Unknown
StatusReasonCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that specifies the reason for the status.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle

Additional Information for MedicationStatement in Other Objects

In addition to creating a record using these fields, you can add more details to your MedicationStatement record by creating records in certain other objects, and referencing your MedicationStatement record as the parent record. Here's the list of objects you can associate to MedicationStatement in this way, the type of information they add, and the field they use to reference MedicationStatement.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the medication statement.	ParentRecordId
PatientMedicationDosage	Associates dosage related information for the medication in the medication statement record.	ParentRecordId

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

MedicationStatementChangeEvent (API version 58.0)

Change events are available for the object.

MedicationStatementFeed

Feed tracking is available for the object.

MedicationStatementHistory

History is available for tracked fields of the object.

MedicationStatementOwnerSharingRule (API version 56.0)

Sharing rules are available for the object.

MedicationStatementShare (API version 56.0)

Sharing is available for the object.

MedicationStatementDetail

Represents additional information associated with MedicationStatement records. This object is available in API version 54.0 and later.

MedicationStatementDetail

Represents additional information associated with MedicationStatement records. This object is available in API version 54.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
DetailCodeId	Type Polymorphic Master-Detail reference Properties Create, Filter, Group, Nillable, Sort, Update Description References a code set or code set bundle that adds information to a MedicationStatement record. Referenced Objects <ul style="list-style-type: none">• CodeSet• CodeSetBundle
DetailRecordId	Type Polymorphic reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description References a record that adds information to a MedicationStatement record</p> <p>Refers To</p> <ul style="list-style-type: none"> • CareObservation • ClinicalServiceRequest • DiagnosticSummary • HealthCondition • MedicationDispense • MedicationRequest • MedicationStatement • PatientMedicalProcedure
DetailType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of information added to the MedicationStatement record. Possible values are:</p> <ul style="list-style-type: none"> • Based On • Part Of • Status Reason • Reason Code • Reason Reference • Derived From
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last viewed.</p>

Field	Details
MedicationStatementId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent MedicationStatement record to which additional information is being added. This is a relationship field.</p> <p>Refers To</p> <ul style="list-style-type: none"> • MedicationStatement
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>

Usage

- Use the MedicationStatementId field to reference the parent MedicationStatement record that the additional information is being associated to.
- Use the DetailType picklist to specify the type of detail that's being associated to the MedicationStatement record. Here's how the associated record types are mapped to values in the DetailType field.
 - Based On - MedicationRequest, ServiceRequest
 - Part Of - MedicationDispense, MedicationStatement, PatientMedicalProcedure, CareObservation
 - Status Reason - CodeSet, CodeSetBundle
 - Reason Code - CodeSet, CodeSetBundle
 - Reason Reference - HealthCondition, CareObservation, DiagnosticSummary
 - Derived From - CareObservation, ClinicalServiceRequest, DiagnosticSummary, HealthCondition, MedicationDispense, MedicationRequest, MedicationStatement, PatientMedicalProcedure
- Use the DetailCodeId and DetailRecordId fields to reference the records with the associated information.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[MedicationStatementDetailChangeEvent on page 1426 \(API Version 62.0\)](#)

Change events are available for the object.

PatientHealthReaction

Represents a patient's adverse reaction to an allergy, intolerance, or immunization. This object is available in API version 51.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CausativeSubstanceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The system-defined code that represents the substance that triggered the reaction.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
Details	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Additional information about the reaction and, if required, the manifested symptoms.</p>
ExposureRouteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the route of exposure related to the reaction.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
IsSelfReported	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether the reaction was reported by the patient.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The date and time when the record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The date and time when the record was last viewed.</p>
ManifestedSymptomID	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The system-defined code that represents the manifested symptom.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the PatientHealthReaction record.</p>
ObservationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The observation that provides additional information about the reaction.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CareObservation

Field	Details
ParentId	<p>Type Polymorphic master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The immunization or allergy intolerance that this reaction is a result of.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • AllergyIntolerance • PatientImmunization
ReactionDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time of the reaction.</p>
Severity	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Specifies the severity of the reaction. Possible values are:</p> <ul style="list-style-type: none"> • Mild • Moderate • Severe

Usage

PatientHealthReaction records are used to add more information to AllergyIntolerance and PatientImmunization records in the event of the patient experiencing an adverse reaction related to those events. The PatientHealthReaction record is associated to the AllergyIntolerance or PatientImmunization records using the ParentId field.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

PatientHealthReactionFeed

Feed tracking is available for the object.

PatientHealthReactionHistory

History is available for tracked fields of the object.

PatientHealthReactionChangeEvent on page 1426 (API version 61.0)

Change events are available for the object.

PatientImmunization

Represents information about a patient's immunizations. This object is available in API version 51.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CareObservationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The observation that determined the need for the immunization.</p> <p>Referenced Objects</p> <ul style="list-style-type: none">• CareObservation
ClinicalEncounterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The clinical encounter that the immunization was a part of.</p> <p>Referenced Objects</p> <ul style="list-style-type: none">• ClinicalEncounter
CurrentDose	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The current dose the patient is on in the total number of doses recommended for immunization.</p>
DiagnosticSummaryId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The diagnostic summary that determined the need for the immunization.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> DiagnosticSummary
Dose	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount of vaccine that was administered.</p>
DoseUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of the amount of vaccine that was administered.</p> <p>Referenced Object UnitOfMeasure</p>
ExpirationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the immunization is expected to expire.</p>
FacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The healthcare facility where the immunization was performed.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> HealthcareFacility
HealthConditionId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The health condition that determined the need for the immunization.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • HealthCondition
ImmunizationRecommendation	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The protocol that was followed for the immunization.</p>
InformationSourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the source that provided information about the immunization.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
IsRecordedByVaccinator	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the immunization record was recorded by the vaccinator.</p>
IsSubpotent	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the vaccination dose was sub-potent.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last viewed.</p>
LotNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The lot number of the vaccine.</p>
Manufacturer	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the vaccine's manufacturer.</p>
ManufacturerAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the organization that manufactured the vaccine.</p> <p>Referenced Objects Account</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the patient immunization record.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the patient immunization record. Available in API version 56.0 and later. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To</p> <ul style="list-style-type: none"> • Group • User
PatientId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The patient who was immunized.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
ReasonCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the reason for the immunization.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
RecommendedDoses	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Total number of doses recommended to achieve immunity.</p>

Field	Details
RecommendngAuthority	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The authority or organization that recommended the vaccination protocol that was followed.</p>
RecordCreationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the patient immunization record was created.</p>
RouteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the route followed in the vaccine administration.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
SiteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the site of the vaccine administration on the patient's body.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system from where the immunization record was brought into Salesforce.</p>

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the immunization record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the immunization record was last modified in its source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the status of the vaccination. Possible values are:</p> <ul style="list-style-type: none"> • Completed • Entered in Error • Not Done
StatusReasonCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the reason for the status of the vaccination.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
SubpotencyReasonCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the reason for why the vaccination was sub-potent.</p>

Field	Details
	Referenced Objects <ul style="list-style-type: none"> CodeSetBundle
TargetDiseaseCodeId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The system-defined code that represents the disease that was targeted in the immunization.
	Referenced Objects <ul style="list-style-type: none"> CodeSetBundle
VaccinationDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description
	The date and time of the vaccination. If you specify a vaccination date, you can't specify a vaccination period.
VaccinationPeriod	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The period of time during which the vaccination happened. If you specify a vaccination period, you can't specify a vaccination date.
VaccineCodeId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description
	The system-defined code that represents vaccine that was administered in the immunization.
	Referenced Objects <ul style="list-style-type: none"> CodeSetBundle

Additional Information for PatientImmunization in Other Objects

In addition to creating a record using these fields, you can add more details to your PatientImmunization record by creating records in certain other objects, and referencing your PatientImmunization record as the parent record. Here's the list of objects you can associate to PatientImmunization in this way, the type of information they add, and the field they use to reference PatientImmunization.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the patient immunization.	ParentRecordId
Patient Health Reaction	Adds information about a patient's adverse reaction to an immunization, if any.	ParentId
Patient Immunization Protocol	Adds information about this protocols followed by a provider during the immunization. This object enables the support of one-to-many values between immunization and protocols applied.	PatientImmunizationId

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PatientImmunizationChangeEvent \(API version 58.0\)](#)

Change events are available for the object.

[PatientImmunizationFeed](#)

Feed tracking is available for the object.

[PatientImmunizationHistory](#)

History is available for tracked fields of the object.

[PatientImmunizationOwnerSharingRule \(API version 56.0\)](#)

Sharing rules are available for the object.

[PatientImmunizationShare \(API version 56.0\)](#)

Sharing is available for the object.

[PatientImmunizationProtocol](#)

Represents the protocol followed by a provider for a patient's immunization and its related details. The protocol defines the set of recommendations that are followed while a vaccine is administered. This object is a child of the `PatientImmunization` object. This object is available in API version 56.0 and later.

[PatientImmunizationProtocol](#)

Represents the protocol followed by a provider for a patient's immunization and its related details. The protocol defines the set of recommendations that are followed while a vaccine is administered. This object is a child of the `PatientImmunization` object. This object is available in API version 56.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CurrentDose	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The current dose the patient is on in the total number of doses recommended for immunization.</p>
ImmunizationRecommendation	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the protocol that was followed for the immunization.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the PatientImmuizationProtocol record.</p>

Field	Details
OwnerId	<p>Type Polymorphic lookup</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the record.</p> <p>Relationship Name Owner</p> <p>Refers To</p> <ul style="list-style-type: none"> ● Group ● User
PatientImmunizationId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent PatientImmunization record that the applied protocol is a part of.</p> <p>Relationship Name PatientImmunization</p> <p>Refers To PatientImmunization</p>
RecommendedDoses	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p>
RecommendingAuthority	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Total number of doses recommended to achieve immunity.</p>
TargetDisease1CodeId	<p>Type Lookup</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
TargetDisease1CodeId	Description The system-defined code that represents a disease that was targeted in the immunization
TargetDisease2CodeId	Relationship Name TargetDisease1Code
TargetDisease3CodeId	Refers To CodeSetBundle
TargetDisease4CodeId	Type Lookup
TargetDisease1Code	Properties Create, Filter, Group, Nullable, Sort, Update
TargetDisease2Code	Description The system-defined code that represents a disease that was targeted in the immunization
TargetDisease3Code	Relationship Name TargetDisease2Code
TargetDisease4Code	Refers To CodeSetBundle
TargetDisease1Code	Type Lookup
TargetDisease2Code	Properties Create, Filter, Group, Nullable, Sort, Update
TargetDisease3Code	Description The system-defined code that represents a disease that was targeted in the immunization
TargetDisease4Code	This field is a relationship field.
TargetDisease1Code	Relationship Name TargetDisease3Code
TargetDisease2Code	Refers To CodeSetBundle

Field	Details
TargetDisease5CodeId	<p>Type Lookup</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents a disease that was targeted in the immunization This field is a relationship field.</p> <p>Relationship Name TargetDisease5Code</p> <p>Refers To CodeSetBundle</p>
TargetDisease6CodeId	<p>Type Lookup</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents a disease that was targeted in the immunization This field is a relationship field.</p> <p>Relationship Name TargetDisease6Code</p> <p>Refers To CodeSetBundle</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PatientImmunizationProtocolFeed](#) on page 1429

Feed tracking is available for the object.

[PatientImmunizationProtocolHistory](#) on page 1434

History is available for tracked fields of the object.

[PatientImmunizationProtocolOwnerSharingRule](#) (API version 57.0)

Sharing rules are available for the object.

[PatientImmunizationProtocolShare](#) (API version 57.0)

Sharing is available for the object.

[PatientImmunizationProtocolChangeEvent](#) on page 1426 (API version 61.0)

Change events are available for the object.

PatientMedicalProcedure

Represents detailed information about a healthcare procedure the patient has undergone, is undergoing or will undergo. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AssertionSourceId	<p>Type Polymorphic Reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who made the statement about the procedure.</p> <p>Example The patient or the provider who assessed the patient's condition.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account • HealthcareProvider
ClinicalEncounterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The patient's clinical encounter that the procedure is a part of.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalEncounter
CodeId	<p>Type Reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that identifies a procedure.</p> <p>Example The SNOMED code for frontal sinusectomy.</p>

Field	Details
	<p>Referenced Object CodeSetBundle</p>
DurationTimeString	<p>Type String</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The duration of the procedure in string format.</p> <p>Example 2 hours</p>
EndDate	<p>Type DateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time that the procedure ended or the end date of the estimated period within which the procedure was performed.</p> <p>Example 1993-11-09T18:30:00.384Z</p>
FacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The healthcare facility where the procedure is performed.</p> <p>Referenced Object HealthcareFacility</p>
LastReferencedDate	<p>Type DateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time the last time this record was referenced.</p>
LastViewedDate	<p>Type DateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The date and time the last time this record was viewed.</p>
Name	<p>Type Dtring</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record. This is automatically generated when the record is saved.</p> <p>Example PMP-7396</p>
Outcome	<p>Type Picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the outcome for the procedure. Possible values are:</p> <ul style="list-style-type: none"> • Partially successful • Successful • Unsuccessful
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the patient medical procedure record. Available in API version 56.0 and later. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To</p> <ul style="list-style-type: none"> • Group • User

Field	Details
PatientId	<p>Type Master-Detail Reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The patient on whom the procedure was performed.</p> <p>Example Charles Green</p> <p>Referenced Object Account</p>
PerformedAgeRangeUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measure for the performed at age upper and lower limit fields.</p> <p>Referenced Object UnitOfMeasure</p>
PerformedAtAge	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The patient's age when the procedure was performed.</p>
PerformedAtAgeLowerLimit	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The lower limit for the range of the patient's age when the procedure was performed</p>
PerformedAtAgeUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measure for the PerformedAtAge field.</p>

Field	Details
	<p>Referenced Object UnitOfMeasure</p>
PerformedAtAgeUpperLimit	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The upper limit for the range of the patient's age when the procedure was performed</p>
ReasonCodeId	<p>Type Reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that specifies the reason for the procedure.</p> <p>Example The SNOMED code for paraparesis.</p> <p>Referenced Object CodeSetBundle</p>
ReasonReferenceId	<p>Type Reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The event that warranted the procedure.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • HealthCondition • CareObservation • PatientMedicalProcedure • DiagnosticSummary <p>Example Chronic sinusitis, a record in HealthCondition.</p>
RecordCreatorId	<p>Type Reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who created the record.</p>

Field	Details
	<p>Referenced Objects</p> <ul style="list-style-type: none"> • Account • HealthcareProvider <p>Example Dr. Carol Peterson</p>
ReportId	<p>Type Reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The report associated with this procedure..</p> <p>Example Charles Green's sinusectomy report.</p> <p>Referenced Object DiagnosticSummary</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system from where the record was brought into Salesforce.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the record in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the record was last modified in its source system.</p>
StartDate	<p>Type DateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time that the procedure began or the start date of the estimated period within which the procedure was performed.</p> <p>This field can be used in two ways to indicate the date and time of the procedure:</p> <ul style="list-style-type: none"> • If you want to specify a single date as either the actual or estimated date of the procedure, enter that date and time in this field. • If you want to specify a period in which the procedure was estimated to have happened, use this field to specify that start of the period, and the <code>EndDate</code> field to specify the end of the period. <p>Example 1993-11-09T21:45:00.384Z</p>
Status	<p>Type Picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the procedure.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Completed • Entered in error • In Progress • Not Done • On Hold • Preparation • Stopped • Unknown
StatusReasonCodeId	<p>Type Reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that specifies the reason for the status.</p> <p>Example The SNOMED code for 'Procedure not ordered'</p> <p>Referenced Object CodeSetBundle</p>

Field	Details
TypeId	<p>Type Reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that specifies the procedure's type.</p> <p>Example The SNOMED code for 'Surgical procedure'</p> <p>Referenced Object CodeSetBundle</p>

Additional Information for PatientMedicalProcedure in Other Objects

In addition to creating a record using these fields, you can add more details to your PatientMedicalProcedure record by creating records in certain other objects, and referencing your PatientMedicalProcedure record as the parent record. Here's the list of objects you can associate to PatientMedicalProcedure in this way, the type of information they add, and the field they use to reference PatientMedicalProcedure.

Object	Type of Information	Reference Field
CarePerformer	Specifies the person who performed the procedure.	ParentRecordId
Identifier	Associates an identifier value to the procedure.	ParentRecordId
PatientMedicalProcedureDetail	Associates the procedure with various other records and defines the nature of association. For instance, if the procedure is based on, part of, or a follow up of the associated record, and so on.	PatientMedicalProcedureId

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PatientMedicalProcedureChangeEvent \(API version 58.0\)](#)

Change events are available for the object.

[PatientMedicalProcedureOwnerSharingRule \(API version 56.0\)](#)

Sharing rules are available for the object.

[PatientMedicalProcedureShare \(API version 56.0\)](#)

Sharing is available for the object.

[PatientMedicalProcedureDetail](#)

Associates records from different objects to a patient medical procedure record to add more information to the procedure record. This is a multi-object junction object. This object is available in API version 51.0 and later.

PatientMedicalProcedureDetail

Associates records from different objects to a patient medical procedure record to add more information to the procedure record. This is a multi-object junction object. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
DetailCodeId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References a code set or code set bundle that adds information to a patient medical procedure record.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSet CodeSetBundle
DetailRecordId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References a record that adds information to a patient medical procedure record.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> PatientMedicalProcedure CareObservation HealthCondition ClinicalServiceRequest CareRegisteredDevice
DetailType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of information added to the patient medical procedure record. Possible values are:</p> <ul style="list-style-type: none"> • Based On • Body Site • Complication • Complication Detail • Follow Up • Part Of
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the patient medical procedure detail record.</p>
PatientMedicalProcedureId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The patient medical procedure to which details are being added.</p>

Field	Details
Referenced Objects	
	<ul style="list-style-type: none"> PatientMedicalProcedure

Usage

PatientMedicalProcedureDetail records add additional information to PatientMedicalProcedure records. This information may be of the following types, referencing the following types of records:

- Based On: Clinical service requests
- Body Site: Code sets or code set bundles
- Complication: Code sets or code set bundles
- Complication Detail: Health conditions
- Follow Up: Code sets or code set bundles
- Part Of: Patient medical procedures or clinical observations

The records providing this additional information is selected using either the `DetailCodeId` or `DetailRecordId` fields, and then the type of information is specified using the `DetailType` field. This information is then connected to the patient medical procedure record it belongs to using the `PatientMedicalProcedureId` field.

One record of PatientMedicalProcedureDetail can specify only one type and piece of information. If multiple detail types or detail instances are required in the parent procedure record, multiple records of PatientMedicalProcedureDetail are required.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[PatientMedicalProcedureDetailChangeEvent on page 1426 \(API Version 62.0\)](#)

Change events are available for the object.

[PatientMedicalProcedureDetailFeed](#)

Feed tracking is available for the object.

[PatientMedicalProcedureDetailHistory](#)

History is available for tracked fields of the object.

PatientMedicationDosage

Represents dosage information for medication. This object is primarily used to add dosage information in MedicationStatement, MedicationRequest, or MedicationDispense records. This object is available in API version 51.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AdditionalInstruction	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The supplemental instructions or warnings associated with the medication for the patient.</p>
Comments	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The comments associated with the medication dosage for the patient.</p>
DosageDefinitionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies how the dosage was determined. Possible values are:<ul style="list-style-type: none"> • Calculated • Ordered </p>
DosageQuantityDenominator	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The denominator value for the quantity of medication per dose. This field can be used to record a simple quantity or a quantity range.</p>
DosageQuantityNumerator	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The numerator value for the quantity of medication per dose. This field can be used to record a simple quantity or a quantity range.</p>

Field	Details
DosageQuantityType	<p>Type Static picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of dosage quantity recorded in DosageQuantityNumerator and DosageQuantityDenominator.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Dose • Dose Range
DosageRateDenominator	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The denominator value for the rate of medication in the dosage. That is, amount of medication per unit of time. This field can be used to record a simple rate, a rate ratio, or a rate range.</p>
DosageRateNumerator	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The numerator value for the rate of medication in the dosage. That is, amount of medication per unit of time. This field can be used to record a simple rate, a rate ratio, or a rate range.</p>
DosageRateType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of dosage rate recorded in DosageRateNumerator and DosageRateDenominator.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Frequency • Frequency Range • Frequency Ratio
DosageRateUnitId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of the dosage rate recorded using <code>DosageRateNumerator</code> and <code>DosageRateDenominator</code>.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> UnitOfMeasure
DosageUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of the dosage rate recorded using <code>DosageQuantityNumerator</code> and <code>DosageQuantityDenominator</code>.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> UnitOfMeasure
DosePrerequisiteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the conditions that are to be met for the dosage to be taken.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
IsAsNeeded	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the medication is taken on an as-needed basis.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last referenced.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last viewed.</p>
MethodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the method of dosage administration.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the PatientMedicationDosage record.</p>
ParentRecordId	<p>Type Master-detail polymorphic reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The MedicationStatement, MedicationRequest, or the MedicationDispense record that the PatientMedicationDosage record belongs to.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> MedicationDispense—This value is available in API version 55.0 and later. MedicationStatement MedicationRequest MedicationAdministration
PatientInstruction	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p>

Field	Details
	<p>Description The patient or consumer instructions associated with this medication.</p>
RouteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the route of dosage administration.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
Sequence	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The position of this medication in the sequence of medications prescribed to a patient.</p>
SiteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the site of dosage administration.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source system from where the dosage record was brought into Salesforce.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the dosage record in its source system.</p>

Field	Details
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the dosage record was last modified in its source system.</p>
TimingId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The timing information for when and how frequent the medication dosage should be taken.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> ActivityTiming

Usage

PatientMedicationDosage records are used to add more dosage-related information to MedicationStatement, MedicationRequest, and MedicationDispense records. The PatientMedicationDosage record is associated to the MedicationStatement, MedicationRequest, and MedicationDispense records using the `ParentRecordId` field.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PatientMedicationDosageChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

Electronic Signatures

Manage electronic signatures by using Digital Verifications. Set up signature trails for records or workflows that require users to verify key updates. Define signature details such as the order of designated verifiers and whether designated verifiers belong to a user group or have a specific participant role.

The Digital Verification standard objects are visible to users with the Health Cloud Advanced Therapy Orchestration permission set license and the Health Cloud Advanced Therapy Orchestration permission set. Available in API version 60.0 and later.

[DigitalVerification](#)

Stores information about the verification of a related record. This object is available in API version 60.0 and later.

[DigitalVerificationSetup](#)

Stores information about a digital verification setup, such as the number of signatures needed and the record action that's related to the verification. This object is available in API version 60.0 and later.

[DigitalVerfSetupDetail](#)

Stores contextual details of a digital verification setup, such as the user who does the verification, and the messages that display at the time of verification. This object is available in API version 60.0 and later.

DigitalVerification

Stores information about the verification of a related record. This object is available in API version 60.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Comment	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description Stores additional comments about the verification.</p>
DesignatedVerifierId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The user or user group who can provide verification for a parent reference record. This field is a polymorphic relationship field.</p> <p>Relationship Name DesignatedVerifier</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
DigitalVerificationSetupDetailId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The details associated with the digital verification setup record.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name DigitalVerificationSetupDetail</p> <p>Relationship Type Lookup</p> <p>Refers To DigitalVerfSetupDetail</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a record indirectly; for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the digital verification record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParentReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The parent reference record that is verified. This field is a polymorphic relationship field.</p> <p>Relationship Name ParentReferenceRecord</p> <p>Relationship Type Lookup</p> <p>Refers To ClinicalTrial__c, CustodyChainEntry, DemoObject__c, HC24_AccountAccountRelation__c, HC24_CandidatePatient__c, HC24_CardView_Dropdown__c, HC24_CarePlanGoal__c, HC24_CarePlanProblem__c, HC24_CarePlanTemplateGoal__c, HC24_CarePlanTemplateProblem__c, HC24_CarePlanTemplateTask__c, HC24_CarePlanTemplate__c, HC24_CareProgramPlanTemplate__c, HC24_Clinical_Assessment_Response__c, HC24_CommunityProfileName__c, HC24_ConditionToHCCCodeMapping__c, HC24_ContactContactRelation__c, HC24_CrossObjectRelationship__c, HC24_CustomFieldSets__c, HC24_CustomLabelConfig__c, HC24_EHRProcedurePerformer__c, HC24_EHRProcedureRequest__c, HC24_EHRProcedure__c, HC24_EhrAllergyIntolerance__c, HC24_EhrCarePlanActivity__c, HC24_EhrCarePlanConcern__c, HC24_EhrCarePlanGoal__c, HC24_EhrCarePlanParticipant__c, HC24_EhrCarePlan__c, HC24_EhrConditionRelatedItem__c, HC24_EhrCondition__c, HC24_EhrDevice__c, HC24_EhrDosageInstruction__c, HC24_EhrEncounterAccomodation__c, HC24_EhrEncounterParticipant__c, HC24_EhrEncounter__c, HC24_EhrImmunizationReaction__c, HC24_EhrImmunization__c, HC24_EhrMedicationPrescription__c, HC24_EhrMedicationStatement__c, HC24_EhrObservation__c, HC24_EhrPatientCareProvider__c, HC24_EhrPatientContact__c, HC24_EhrPatient__c, HC24_EhrPractitionerIdentity__c, HC24_EhrPractitionerQualification__c, HC24_EhrPractitionerRole__c, HC24_EhrPractitioner__c, HC24_EhrRelatedObservation__c, HC24_EhrRelatedPerson__c, HC24_EhrVaccinationProtocol__c, HC24_EhrVirtualDeviceChannel__c, HC24_EhrVirtualDevice__c, HC24_FilterColumn__c, HC24_FilterCondition__c, HC24_FilterCriterion__c, HC24_HcFlexibleCarePlanTabs__c, HC24_HealthCloudFeatureToggle__c, HC24_HousingAssessment__c, HC24_IndustriesAppConfig__c, HC24_IndustriesSettings__c,</p>

Field	Details
	HC24__PatientCardViewConfiguration__c, HC24__ProgramPatientAffiliation__c, HC24__ProgramPatientSummary__c, HC24__Program__c, HC24__Provider__c, HC24__ReciprocalRole__c, HC24__TaskGroups__c, HC24__TimelineViewConfiguration__c, HC24__UsePersonAccount__c, HC24__individualExcludedFields__c, custom_sk__c, vlocity_lwc20__CardFrameworkConfiguration__c, vlocity_lwc20__DRBatchQueue__c, vlocity_lwc20__DRBulkData__c, vlocity_lwc20__DREncryption__c, vlocity_lwc20__DRWorker__c, vlocity_lwc20__Interface_DRGeneric__c, vlocity_lwc20__TestResult__c, vlocity_lwc20__TriggerSetup__c, vlocity_lwc20__UISettings__c, vlocity_lwc20__VlocityDataPack__c, vlocity_lwc20__VlocityDocuSignTemplate__c, vlocity_lwc20__VlocityErrorLogEntry__c, vlocity_lwc20__VlocityScheduledJob__c, vlocity_lwc20__VlocityTrackingEntry__c
PostVerificationMessage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The message that is displayed after a verification is performed.</p>
PreVerificationMessage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The message that is displayed before a verification is performed.</p>
VerificationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the verification of the related record was done.</p>
VerificationRequestDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the verification was requested.</p>
VerificationSite	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Nillable, Update</p> <p>Description The place where the verification is done.</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of verification for the parent reference record.</p>
VerificationStatusCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status category of the verification for the parent reference record. Possible values are:</p> <ul style="list-style-type: none"> • Completed • OnHold • ReadyForSigning • RejectedClosed • RejectedOpen
VerifiedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user who performed the verification. This field is a polymorphic relationship field.</p> <p>Relationship Name VerifiedBy</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>

Field	Details
VerifierOrder	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The order of the verifier who performed the verification.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • FifthVerifier • FirstVerifier • FourthVerifier • SecondVerifier • ThirdVerifier

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[DigitalVerificationHistory on page 1434](#)

History is available for tracked fields of the object.

[DigitalVerificationShare on page 1438](#)

Sharing is available for the object.

DigitalVerificationSetup

Stores information about a digital verification setup, such as the number of signatures needed and the record action that's related to the verification. This object is available in API version 60.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp when the current user last viewed a record indirectly; for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the digital verification setup record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Record ActionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description Specifies the record action applicable for the digital verification setup, such as Create and Edit. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • Create • Edit
ReferenceObjectApiName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The parent object for which the digital verification setup is applicable. Possible values are:</p> <ul style="list-style-type: none"> • CarePgmEnrolleeWorkOrder • CarePgmEnrolleeWkOrdStep • The API name of any custom object created in the org.
VerificationProcessType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the process type of the verification, such as sequential or parallel. Possible values are:</p> <ul style="list-style-type: none"> • Parallel • Sequential
VerificationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the process type of the digital verification setup. Possible values are:</p> <ul style="list-style-type: none"> • DualSignature • FiveSignatures • FourSignatures • NoSignature • NotApplicable • SingleSignature • ThreeSignatures

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[DigitalVerificationSetupHistory](#) on page 1434

History is available for tracked fields of the object.

[DigitalVerificationSetupOwnerSharingRule](#) on page 1436

Sharing rules are available for the object.

[DigitalVerificationSetupShare](#) on page 1438

Sharing is available for the object.

DigitalVerfSetupDetail

Stores contextual details of a digital verification setup, such as the user who does the verification, and the messages that display at the time of verification. This object is available in API version 60.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
DesignatedVerifierId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The role, user or user group associated with the digital verification setup detail. This field is a polymorphic relationship field. Relationship Name DesignatedVerifier Relationship Type Lookup Refers To Group, ParticipantRole
DigitalVerificationSetupId	Type reference Properties Create, Filter, Group, Sort Description The parent digital verification setup associated with the digital verification setup detail.

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name DigitalVerificationSetup</p> <p>Relationship Type Lookup</p> <p>Refers To DigitalVerificationSetup</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a record indirectly; for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the digital verification setup detail record.</p>
PostVerificationMessage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The message that is displayed after a verification is performed.</p>
PreVerificationMessage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p>

Field	Details
	<p>Description The message that is displayed before a verification is performed.</p>
VerifierRank	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the rank of the verifier that provides the verification.</p> <p>Possible values are:</p> <ul style="list-style-type: none">• FifthVerifier• FirstVerifier• FourthVerifier• SecondVerifier• ThirdVerifier

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[DigitalVerfSetupDetailHistory](#) on page 1434

History is available for tracked fields of the object.

Financial Assistance Program

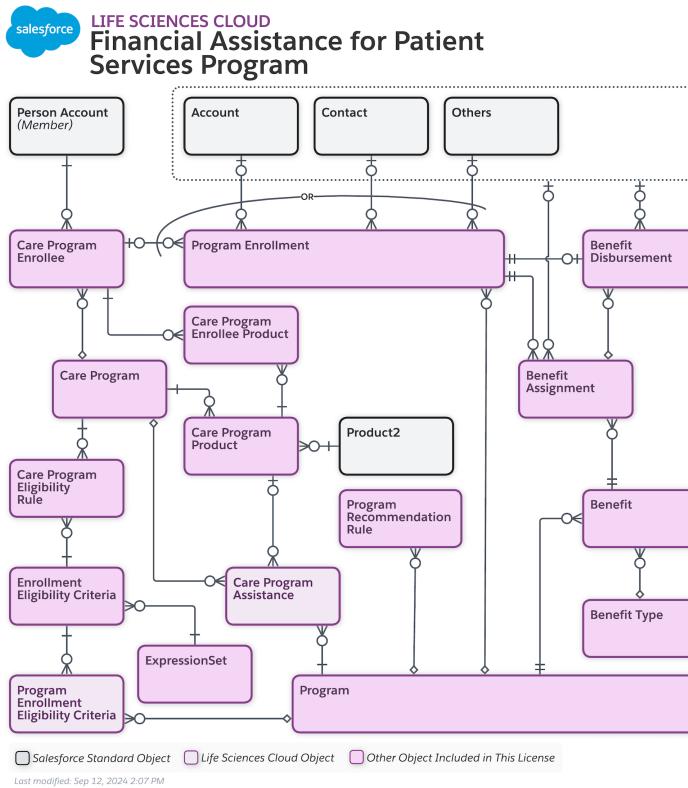
The financial assistance program data model helps life sciences organizations implement several financial assistance programs for eligible patients to receive assistance with their out of pocket medical expenses.

The financial assistance program objects are available to users with Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) and the Manage Financial Assistance Program permission set. The objects are available in API version 61.0 and later.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences or Health Cloud



For more details and a larger image, visit the [Data Model Gallery](#).

Applicant

Specify the care program enrollee represented as an applicant. This object is available in API version 59.0 and later.

Benefit

Represents information about benefits associated with the financial assistance program. Benefits are mapped to the members based on the program rules. This object is available in API version 51.0 and later.

BenefitType

Represents information about the type of benefits, such as Financial Assistance Program, available to the care program enrollee. This object is available in API version 51.0 and later.

ProgramEnrollment

Represents details of enrollment for benefits in a program. This object is available in API version 57.0 and later.

CareProgramAssistance

Represents a junction between Care Program and Program objects. This object is available in API version 61.0 and later.

ProgramEnrlEligibilityCrit

Represents a junction between Program and Enrollment Eligibility Criteria objects. This object is available in API version 61.0 and later.

ProgramRecommendationRule

Represents the eligibility criteria and recommendation for a program. This object is available in API version 61.0 and later.

Applicant

Specify the care program enrollee represented as an applicant. This object is available in API version 59.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The account ID associated with the applicant. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
ApplicationFormId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The application that's submitted for a product request. This field is a relationship field.</p> <p>Relationship Name ApplicationForm</p> <p>Relationship Type Lookup</p> <p>Refers To ApplicationForm</p>
BirthDate	<p>Type date</p>

Field	Details
CareProgramEnrolleeId	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date of birth of the applicant.</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description This field is a relationship field.</p>
Email	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The related contact ID associated with the account.</p> <p>This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
FirstName	<p>Type email</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The email address of the applicant.</p>
	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The first name of the applicant.</p>

Field	Details
LastName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The last name of the applicant.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MiddleName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The middle name of the applicant.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description A unique number that represents the applicant.</p>
PartyProfileId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The party profile requesting a product with the application form. This field is a relationship field.</p>
	<p>Relationship Name PartyProfile</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To PartyProfile</p>
Phone	<p>Type phone</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The applicant's phone number.</p>
Suffix	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The suffix of the applicant.</p>
UniqueReferenceNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The customer reference number of the applicant.</p>

Associated Objects

This object has these associated objects. If the API version isn't specified, they're available in the same API version as this object. Otherwise, they're available in the specified API version and later.

[ApplicantChangeEvent on page 1426](#)

Change events are available for the object.

[ApplicantFeed on page 1429](#)

Feed tracking is available for the object.

[ApplicantHistory on page 1434](#)

History is available for tracked fields of the object.

ApplicantOwnerSharingRule on page 1436

Sharing rules are available for the object.

ApplicantShare on page 1438

Sharing is available for the object.

Benefit

Represents information about benefits associated with the financial assistance program. Benefits are mapped to the members based on the program rules. This object is available in API version 51.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
BenefitTypeID	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the benefit type. This field is a relationship field.</p> <p>Relationship Name BenefitType</p> <p>Relationship Type Lookup</p> <p>Refers To BenefitType</p>
BudgetAmountUsed	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The budget amount used by an employee after enrolling in a corresponding program.</p>
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p>

Field	Details
	Description
	The end date of the benefit.
EnrolleeAmountLimit	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount limit allocated to enrollee for a corresponding program.
EnrolleeLimitFrequency	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The assigned frequency for an enrollee limit for a corresponding program.
	Possible values are:
	<ul style="list-style-type: none"> • Monthly • Monthly, Yearly , Annual, Weekly, Quarterly • Yearly
EnrolleeTrxnAmountLimit	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The enrollee transaction amount limit for a corresponding program.
IsActive	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Required. Indicates whether the program benefit is active.
MaxBenefitAmount	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The maximum amount that can be disbursed for a period.

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the benefit.</p>
PayoutFrequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Possible values are:</p> <ul style="list-style-type: none"> • Annual • BiWeekly - Bi-Weekly • Monthly • OnDemand - On-Demand • Quaterly • Weekly
ProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the program that's associated with the benefit. This field is a relationship field.</p>

BenefitType

Represents information about the type of benefits, such as Financial Assistance Program, available to the care program enrollee. This object is available in API version 51.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Benefit Type Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the benefit type.</p>
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The category of the benefit type. Picklist values aren't provided for this field and must be added based on the requirements of the organization.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of benefit type.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
ProcessType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description Required. The process type associated with the benefit. The possible value is: <ul style="list-style-type: none"> • Financial Assistance Program This value is available in API version 61.0 and later.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The process type associated with the benefit. Possible values are: <ul style="list-style-type: none"> • Monetary • Service • Goods </p>
UnitofMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measure for the benefit. This is a polymorphic relationship field.</p> <p>Relationship Type UnitofMeasure</p> <p>Refers To UnitofMeasure</p>

Associated Objects

This object has these associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

BenefitTypeOwnerSharingRule

Sharing rules are available for the object.

BenefitTypeShare

Sharing is available for the object.

ProgramEnrollment

Represents details of enrollment for benefits in a program. This object is available in API version 57.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the account that's associated with an organization enrolled in the program. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
ApplicationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the enrollee applied to the program.</p>
CareProgramEnrolleeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care program enrollee associated with the program enrollment. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name CareProgramEnrollee</p> <p>Refers To CareProgramEnrollee</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the contact that's associated with an individual enrolled in the program. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the enrollment in the program. This field is accessible if you enabled Data Protection and Privacy in Setup.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the enrollment for the participant in the program is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. This field is accessible if you enabled Data Protection and Privacy in Setup.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p>Description The name of the program enrollment record.</p>
ProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The identifier of the program that's associated with the enrollee. This field is a relationship field.</p> <p>Relationship Name Program</p> <p>Relationship Type Master-Detail</p> <p>Refers To Program</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the enrollment in the program. This field is accessible if you enabled Data Protection and Privacy in Setup.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The enrollment status of the enrollee for the program. This field is accessible if you enabled Data Protection and Privacy in Setup.</p>

Associated Objects

This object has these associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProgramEnrollmentFeed](#)

Feed tracking is available for the object.

[ProgramEnrollmentHistory](#)

History is available for tracked fields of the object.

ProgramEnrollmentOwnerSharingRule

Sharing rules are available for the object.

ProgramEnrollmentShare

Sharing is available for the object.

CareProgramAssistance

Represents a junction between Care Program and Program objects. This object is available in API version 61.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareProgramId	Type reference Properties Create, Filter, Group, Sort Description The care program associated with the care program assistance. This field is a relationship field. Relationship Name CareProgram Relationship Type Master-detail Refers To CareProgram (the master object)
CareProgramProductId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The care program product associated with the care program assistance. This field is a relationship field. Relationship Name CareProgramProduct Refers To CareProgramProduct

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the care program assistance.</p>
ProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The program associated with the care program assistance. This field is a relationship field.</p> <p>Relationship Name Program</p> <p>Refers To Program</p>

ProgramEnrlEligibilityCrit

Represents a junction between Program and Enrollment Eligibility Criteria objects. This object is available in API version 61.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Special Access Rules

Fields

Field	Details
EnrollmentEligibilityCritId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The enrollment eligibility criteria associated with the program enrollment eligibility criteria. This field is a relationship field.</p> <p>Relationship Name EnrollmentEligibilityCrit</p> <p>Refers To EnrollmentEligibilityCriteria</p>
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether an enrollment eligibility criterion is mandatory (true) or optional (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the program enrollment eligibility criteria.</p>
ProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The program associated with the program enrollment eligibility criteria. This field is a relationship field.</p> <p>Relationship Name Program</p> <p>Relationship Type Master-detail</p> <p>Refers To Program (the master object)</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the program enrollment eligibility criteria.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of enrollment eligibility criteria.</p>

ProgramRecommendationRule

Represents the eligibility criteria and recommendation for a program. This object is available in API version 61.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Country	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country where the program is eligible for implementation.</p>
HasActiveCommercialIns	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this program has an active commercial insurance. The default value is <code>false</code>.</p>
IsInclusionRule	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether it's an inclusion rule (true) or an exclusion rule (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MaximumAge	<p>Type int</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum age for enrolling in the program.</p>
MinimumAge	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The minimum age for enrolling in the program.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the program recommendation rule.</p>
ProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The program associated with the program recommendation rule. This field is a relationship field.</p> <p>Relationship Name Program</p> <p>Relationship Type Master-detail</p> <p>Refers To Program (the master object)</p>
ProgramType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of program associated with the program recommendation rule. Possible values are:</p> <ul style="list-style-type: none"> • Copay

Field	Details
	<ul style="list-style-type: none"> Patient Assistance Program Quick Start
RecommendedProgramPriority	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The recommended priority of the program.</p>
RuleType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates the type of rule. Possible values are:</p> <ul style="list-style-type: none"> Eligibility Recommendation

Health Insurance

The health insurance data model provides objects for managing the ways care is paid for. It represents information about participants such as employment, insurance coverage, and dependents. You can manage details of the benefits provided by plans to members and treatment preauthorization requests made by members or providers.

The health insurance data model includes standard objects and record types. You need the Health Cloud Starter permission set to create, edit, and delete records in the data model.

CarePreauth

Represents the details of preauthorizations for care under a member's plan.

CarePreauthItem

Represents the details of items included in a preauthorization for care under a member's plan.

CoverageBenefit

Represents the benefits provided to a covered member by a purchaser's plan.

CoverageBenefitItem

Specific service covered by the insurance plan. This object is available in API version 53.0 and later.

Member

A member is a person who is the primary subscriber, a dependent, or anyone else who is covered under the insurance plan.

MemberPlan

Represents details about the insurance coverage for a member or subscriber.

Payer

A payer is a health insurance company that helps cover the cost of member care. payer is represented by records on the Account object.

PlanBenefit

Represents the standard benefits available under a plan that the purchaser offers to their members.

PlanBenefitItem

Represents the details of a benefit available under a purchaser's plan that is offered to their members.

Purchaser

A purchaser is the organization (an employer) that is providing medical insurance plans for their members (employees).

Purchaser Group

A purchaser group is a subset of the purchaser. For example, your company may have individual employee groups in different regions of the country. Each purchaser group can have separate options for insurance plans.

Purchaser Group Member Association

An association that records the members who belong to a purchaser group. This association is represented by records on the AccountContactRelation object.

PurchaserPlan

Represents the payer plan that a purchaser makes available to its members and members' dependents.

PurchaserPlanAssn

Represents a junction object that associates the purchaser to the plans they offer to members.

Purchaser Payer Association

An association that records the purchasers who purchase plans from payers. This association is represented by records on the AccountAccountRelation object.

CarePreauth

Represents the details of preauthorizations for care under a member's plan.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field Name	Details
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The date from which this preauthorization is effective.</p>

Field Name	Details
EffectiveTo	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The date after which this preauthorization is no longer effective.
LastReferencedDate	Type datetime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type datetime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
MemberPlanId	Type reference
	Properties Create, Filter, Group, Sort
	Description The ID of the member plan for which this preauthorization is being provided.
Name	Type string
	Properties Create, Filter, Group, Sort, Update
	Description The name of this preauthorization.
Notes	Type textarea
	Properties Create, Nillable, Update

Field Name	Details
	Description
	Notes about this preauthorization.
PayerId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the payer covering the cost of this treatment.
PreauthIdentifier	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	An identifier provided by the insurance company for preauthorization of a service.
ReferringPhysician	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the doctor who referred the member for this treatment.
SourceSystem	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the system this preauthorization record was obtained from.
SourceSystemIdentifier	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of this preauthorization record on its source system.
SourceSystemModified	Type
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update

Field Name	Details
	<p>Description The date on which this preauthorization was last changed on its source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The status of this preauthorization record. The default the picklist values are:</p> <ul style="list-style-type: none"> • Active • Inactive

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[CarePraauthChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CarePraauthFeed](#)

Feed tracking is available for the object.

[CarePraauthHistory](#)

History is available for tracked fields of the object.

[CarePraauthOwnerSharingRule](#)

Sharing rules are available for the object.

[CarePraauthShare](#)

Sharing is available for the object.

[CarePraauthItem](#)

Represents the details of items included in a preauthorization for care under a member's plan.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field Name	Details
CarePraauthId	<p>Type reference</p>

Field Name	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the care preauthorization this item details.</p>
EndingServiceCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ending service code for the category of care being provided.</p>
LastReferencedDate	<p>Type datetime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type datetime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Laterality	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The side of the body receiving care.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of this preauthorized care item.</p>

Field Name	Details
Notes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Notes about this preauthorized care item.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
PreauthitemSequence	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Sequence of this item among the preauthorized care items.</p>
Quantity	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Quantity being preauthorized.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this preauthorization record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this preauthorization record on its source system.</p>

Field Name	Details
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this preauthorization was last changed on its source system.</p>
StartingServiceCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The starting service code for the category of care being provided.</p>
Unit	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Units by which the preauthorized quantity is measured.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[CarePreauthItemChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CarePreauthItemFeed](#)

Feed tracking is available for the object.

[CarePreauthItemHistory](#)

History is available for tracked fields of the object.

[CarePreauthItemOwnerSharingRule](#)

Sharing rules are available for the object.

[CarePreauthItemShare](#)

Sharing is available for the object.

[CoverageBenefit](#)

Represents the benefits provided to a covered member by a purchaser's plan.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field Name	Details
BenefitNotes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information about the benefits available to the member under this plan's coverage.</p>
BenefitPeriodEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Last day of the coverage benefit period.</p>
BenefitPeriodStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description First day of the coverage benefit period.</p>
CareBenefitVerifyRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care benefit verify request associated with the coverage benefit. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name CareBenefitVerifyRequest</p> <p>Relationship Type Lookup</p>

Field Name	Details
	<p>Refers To CareBenefitVerifyRequest</p>
CoinsuranceNotes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information about the contribution the member makes towards treatment.</p>
CopayNotes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information on the copayment amounts members contributes.</p>
CoverageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description General category of service covered. Possible values are:</p> <ul style="list-style-type: none"> • Dental • Medical • Vision • Home Health - This picklist value is available for the Home Health feature in API version 59.0 and later. • Pharmacy - This picklist value is available for the Pharmacy Benefits Verification feature in API version 63.0 and later. See Activate Picklist Value for Coverage Benefit to activate this value.
DeductibleNotes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information about the member's deductibles under this plan.</p>

Field Name	Details
Disclaimer	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Overall plan benefit disclaimers.</p>
EmergencyDepartmentCopay	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The amount the member contributes towards emergency treatment.</p>
FamilyInNetworkDeductibleApplied	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The amount the member has paid for health care provided by the health plan's preferred providers for all family members.</p>
FamilyInNetworkDeductibleLimit	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The amount the member is required to pay for health care provided by the health plan's preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment.</p>
FamilyInNetworkDeductibleRemaining	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The remaining amount the member still has to pay for health care provided by the health plan's preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment.</p>
FamilyInNetworkOutofPocketApplied	<p>Type currency</p>

Field Name	Details
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount of the member has paid in this coverage year for health care provided by the health plan's preferred providers for all family members. It includes deductibles, copayments, and coinsurance, but excludes premiums.
FamilyInNetworkOutOfPocketLimit	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The most the member pays during the coverage year for health care provided by the health plan's preferred providers for all family members. It includes deductibles, copayments, and coinsurance, but excludes premiums.
FamilyInNetworkOutOfPocketRemaining	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The remaining amount for the member to pay during this coverage year for care provided by the plan's preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment. It includes deductibles, copayments, and coinsurance, but excludes premiums.
FamilyOutOfNetworkDeductibleApplied	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount the member has paid for health care provided by non-preferred providers for all family members.
FamilyOutOfNetworkDeductibleLimit	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The total amount the member has to pay for health care provided by non-preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment.

Field Name	Details
FamilyOutOfNetworkDeductibleRemaining	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The amount the member still has to pay for health care provided by non-preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment.
FamilyOutOfNetworkOutOfPocketApplied	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The amount of the member has paid in this coverage year for health care provided by non-preferred providers for all family members. It includes deductibles, copayments, and coinsurance, but excludes premiums.
FamilyOutOfNetworkOutOfPocketLimit	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The most the member pays during the coverage year for health care provided by non-preferred providers for all family members. It includes deductibles, copayments, and coinsurance, but excludes premiums.
FamilyOutOfNetworkOutOfPocketRemaining	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The remaining amount for the member to pay during this coverage period for health care provided by non-preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment. It includes deductibles, copayments, and coinsurance, but excludes premiums.
FinalCoverageStatusCodeId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	<p>The code that's determined after considering the restrictions and other status types that apply to the coverage benefit.</p>
	<p>This field is a relationship field.</p>
	<p>This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p>
	Relationship Name
	FinalCoverageStatusCode
	Relationship Type
	Lookup
	Refers To
	CodeSet
FrequencyType	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	<p>The frequency type of the coverage benefit associated with the home healthcare visit.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Daily • Fortnightly • Monthly • Quarterly • Weekly • Yearly
	<p>This field is available in API version 66.0 and later with the Home Health add-on license.</p>
IndividualInNetworkDeductibleApplied	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	<p>The amount the member has paid for health care provided by the health plan's preferred providers to the most costly family member.</p>
IndividualInNetworkDeductibleLimit	Type
	currency

Field Name	Details
	Properties Create, Filter, Nillable, Sort, Update
	Description The amount the member has to pay for health care provided by the plan's preferred providers for any family member. When this amount is reached, the plan starts to contribute towards treatment.
IndividualInNetworkDeductibleRemaining	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The remaining amount the member has to pay for care during the coverage year provided by the plan's preferred providers for any family member. When this amount is reached, the plan starts to contribute towards treatment.
IndividualInNetworkOutOfPocketApplied	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The amount of the member has paid in this coverage year for health care provided by the plan's preferred providers to any one family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.
IndividualInNetworkOutOfPocketLimit	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The most the member pays during the coverage year for health care provided by the health plan's preferred providers for any family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.
IndividualInNetworkOutOfPocketRemaining	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The amount remaining for the member to pay during the coverage year for care provided by the plan's preferred providers for any family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.

Field Name	Details
IndividualOutOfNetworkDeductibleApplied	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The amount the member has paid for health care provided by non-preferred providers to the most costly family member.
IndividualOutOfNetworkDeductibleLimit	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The amount the member has to pay for health care provided by non-preferred providers to any one family member. When this amount is reached, the plan starts to contribute towards treatment.
IndividualOutOfNetworkDeductibleRemain	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The remaining amount the member has to pay for health care during the coverage year provided by non-preferred providers to any family member. When this amount is reached, the plan starts to contribute towards treatment.
IndividualOutOfNetworkOutOfPocketApplied	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The amount of the member has paid in this coverage period for health care provided by non-preferred providers to any family members. It includes deductibles, copayments, and coinsurance, but excludes premiums.
IndividualOutOfNetworkOutOfPocketLimit	Type currency
	Properties Create, Filter, Nillable, Sort, Update

Field Name	Details
IndividualOutofNetworkOutOfPocketRemaining	<p>Description The most the member pays during the coverage year for health care provided by non-preferred providers to any family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
InNetworkCoinsuranceAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount remaining for the member to pay during the coverage year for health care provided by non-preferred providers to any family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
InNetworkLifetimeMaximum	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the member contributes towards treatment undertaken by the health plan's preferred providers.</p>
InNetworkCoinsurancePercentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of treatment cost the member pays for treatment undertaken by the health plan's preferred providers.</p>
IsActive	<p>Type boolean</p>

Field Name	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Specifies whether the coverage benefit is currently in force. The default value is 'false'.
LastReferencedDate	Type datetime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type datetime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LifetimeMaximumNotes	Type textarea
	Properties Create, Nillable, Update
	Description Additional information on the lifetime maximum payments the member Will be expected to make.
MemberId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the member receiving these benefits.
MemberPlanId	Type reference
	Properties Create, Filter, Group, Sort

Field Name	Details
	Description
	The ID of the member plan receiving these benefits.
Name	Type string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Name of these coverage benefits.
OutcomeStatusCodeId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The outcome code set associated with the coverage benefit.
	This field is a relationship field.
	This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.
	Relationship Name
	OutcomeStatusCode
	Relationship Type
	Lookup
	Refers To
	CodeSet
OutofNetworkCoinsuranceAmount	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount the member contributes towards treatment undertaken by non-preferred providers.
OutofNetworkCoinsurancePercentage	Type percent
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The percentage of treatment cost the member pays for treatment undertaken by non-preferred providers.

Field Name	Details
OutofNetworkLifetimeMaximum	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the member has to pay during lifetime coverage under this plan after which the plan provider covers all costs for treatment provided by its non-preferred providers. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
OutofPocketNotes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information about the out-of-pocket payment the member makes.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
PharmaCopayAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the member contributes towards the pharma products. This field is available in API version 62.0 and later with the Manage Financial Assistance Program permission set.</p>
PrimaryCareCopay	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the member contributes towards primary care treatment.</p>

Field Name	Details
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this benefits record was obtained from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this benefits record on its source system.</p>
SourceSystemModified	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which these benefits were last changed on their source system.</p>
SpecialistCopay	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the member contributes towards specialist consultations.</p>
StatusCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status code set associated with the coverage benefit. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name StatusCode</p> <p>Relationship Type Lookup</p>

Field Name	Details
	<p>Refers To CodeSet</p>
TotalBenefitAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount of the coverage benefit associated with the home healthcare visit. This field is available in API version 66.0 and later with the Home Health add-on license.</p>
UrgentCareCopay	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the member contributes towards urgent care.</p>
VerificationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date on which the benefit was verified.</p>

Associated Objects

This object has these associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

CoverageBenefitChangeEvent (API version 59.0)

Change events are available for the object.

CoverageBenefitFeed

Feed tracking is available for the object.

CoverageBenefitHistory

History is available for tracked fields of the object.

CoverageBenefitOwnerSharingRule

Sharing rules are available for the object.

CoverageBenefitShare

Sharing is available for the object.

CoverageBenefitItem

Specific service covered by the insurance plan. This object is available in API version 53.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
BenefitCategory	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the category this benefit is in.</p>
CodeSetServiceTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of a Code Set Service Type in the Code Set object. This is a relationship field.</p> <p>Relationship Name CodeSetServiceType</p> <p>Relationship Type Lookup</p> <p>Refers To CodeSet</p>
CoverageBenefitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the covered benefit this item belongs to. This is a relationship field.</p> <p>Relationship Name CoverageBenefit</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To CoverageBenefit</p>
CoverageLevel	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of the level of coverage provided by this item.</p>
DoesDeductibleApply	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Specifies whether the benefit item requires a prior expenditure by the patient. The default value is 'false'.</p>
FrequencyType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The frequency type of the coverage benefit item associated with the home healthcare visit. Possible values are:</p> <ul style="list-style-type: none"> • Daily • Fortnightly • Monthly • Quarterly • Weekly • Yearly <p>This field is available in API version 66.0 and later with the Home Health add-on license.</p>
InNetworkCoverage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p>

Field	Details
	<p>Description Description of the in network coverage provided by this item.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Specifies whether the benefit item is currently available. The default value is 'false'.</p>
IsInPlanNetwork	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the benefit is available only in-network (<code>true</code>) or both in-network and out-of-network (<code>false</code>). The default value is 'false'.</p>
IsPreauthorizationRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Specifies whether the service must be approved before use. The default value is 'false'.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MemberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the member receiving this benefit item. This is a relationship field.</p> <p>Relationship Name Member</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of this coverage benefit item.</p>
Notes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information about this coverage benefit item.</p>
OutofNetworkCoverage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Description of the coverage for non-preferred providers.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ServiceType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of service this plan benefit item provides.</p>
ServiceTypeCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The code for the type of service this plan benefit item provides.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this coverage benefits item record came from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the CoverageBenefitItem in its source system.</p>

Field	Details
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The ID of this coverage benefits item record on its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this coverage benefits item was last changed on the source system.</p>
TimePeriod	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A description of the period this plan benefit item covers.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

CoverageBenefitItemChangeEvent (API version 59.0)

Change events are available for the object.

Member

A member is a person who is the primary subscriber, a dependent, or anyone else who is covered under the insurance plan.

Members are represented with an Account object record of record type Person Account.

MemberPlan

Represents details about the insurance coverage for a member or subscriber.

 **Note:** The primary member on the plan is called the subscriber. The other members are dependents.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field Name	Details
Affiliation	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description An affiliation to a government service, such as the army or navy.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this member plan is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this member plan ceases to be effective.</p>
ExternalIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier used to identify the record outside the Salesforce org.</p>
GroupNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The group number or policy number of the primary member.</p>
IssuerNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	Description
	Reference number for the issuer of the plan.
LastReferencedDate	Type
	datetime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastVerification	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date on which this plan was last verified.
LastViewedDate	Type
	datetime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
MemberId	Type
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The ID of the member's record.
MemberNumber	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The member's reference number for this plan.

Field Name	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name by which the member knows this plan.</p>
Notes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Notes about this member plan.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
PayerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the payer's Account object record.</p>
PayerNetworkId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The payer insurance plan or network that is associated with the patient. This field is a relationship field.</p> <p>Relationship Name PayerNetwork</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcarePayerNetwork</p>

Field Name	Details
PlanID	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Lookup of the Purchaser Plan ID.
PrimaryCarePhysician	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The name of the physician providing primary care under this plan.
PrimarySecondaryTertiary	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Whether this plan is the primary, secondary, or tertiary plan.
RelationshipToSubscriber	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The relationship of this member to the plan's subscriber. Valid options are: <ul style="list-style-type: none"> • Self • Spouse • Child • Unknown • Other Relationship
SourceSystem	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The name of the system this plan record came from.

Field Name	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this plan record on its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this plan record was last changed on the source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates whether the plan is active.</p>
SubscriberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the subscriber's record.</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the plan's verification. Valid options are:</p> <ul style="list-style-type: none"> • Active - Verified • Rejected • Not Checked • Unknown • Inactive

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

MemberPlanChangeEvent (API version 57.0)

Change events are available for the object.

MemberPlanFeed

Feed tracking is available for the object.

MemberPlanHistory

History is available for tracked fields of the object.

MemberPlanOwnerSharingRule

Sharing rules are available for the object.

MemberPlanShare

Sharing is available for the object.

Payer

A payer is a health insurance company that helps cover the cost of member care. payer is represented by records on the Account object.

To learn more, see [Account](#).

PlanBenefit

Represents the standard benefits available under a plan that the purchaser offers to their members.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field Name	Details
BenefitNotes	Type textarea Properties Create, Nillable, Update Description Additional information about the benefits available to members under this plan's coverage.
CoinuranceNotes	Type textarea Properties Create, Nillable, Update

Field Name	Details
	Description
	Information about the contribution a member makes towards treatment.
CopayNotes	Type
	textarea
	Properties
	Create, Nillable, Update
	Description
	Additional information on the copayment amounts that members contribute.
DeductibleNotes	Type
	textarea
	Properties
	Create, Nillable, Update
	Description
	Additional information about a member's deductibles.
DocumentLocation	Type
	url
	Properties
	Create, Nillable, Update
	Description
	Hyperlink to internal or external resources.
EffectiveDate	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date on which these benefits are communicated to plan members.
EffectiveFrom	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date on which these benefits become effective.
EffectiveTo	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
EmergencyDepartmentCopay	Description The date on which these benefits ceased to be effective.
FamilyInNetworkDeductible	Type currency Properties Create, Filter, Nillable, Sort, Update Description Patient's portion of payment for using emergency department services.
FamilyInNetworkOutofPocket	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount a member pays for health care provided by the health plan's preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment.
FamilyOutofNetworkDeductible	Type currency Properties Create, Filter, Nillable, Sort, Update Description The most a member pays during a coverage year for health care provided by the health plan's preferred providers for all family members. It includes deductibles, copayments, and coinsurance, but is in addition to premiums.
FamilyOutofNetworkOutofPocket	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount a member pay for health care provided by non-preferred providers for all family members before this plan starts to contribute towards treatment.

Field Name	Details
	Description
	<p>The most a member pays during a coverage year for health care provided by non-preferred providers for all family members. It includes deductibles, copayments, and coinsurance, but is in addition to premiums.</p>
FrequencyType	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	<p>The frequency type of the plan benefit associated with the home healthcare visit.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Daily • Fortnightly • Monthly • Quarterly • Weekly • Yearly
	<p>This field is available in API version 66.0 and later with the Home Health add-on license.</p>
IndividualInNetworkDeductible	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	<p>The amount a member pays for health care provided by the health plan's preferred providers to any one family member. When this amount is reached, the plan starts to contribute towards treatment.</p>
IndividualInNetworkOutofPocket	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	<p>The most a member pays during a coverage year for health care provided by the health plan's preferred providers for any one family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
IndividualOutofNetworkDeductible	Type
	currency

Field Name	Details
IndividualOutOfNetworkOutOfPocket	<p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The amount a member pays for health care provided by non-preferred providers to any one family member before this plan starts to contribute towards treatment.</p>
InNetworkCoinsuranceAmount	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The most a member pays during a coverage year for health care provided by non-preferred providers for any one family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
InNetworkCoinsurancePercentage	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The amount a member contributes towards each treatment undertaken by the health plan's preferred providers.</p>
InNetworkLifetimeMaximum	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The percentage of treatment cost the member pays for each treatment undertaken by the health plan's preferred providers.</p>
LastReferencedDate	<p>Type datetime</p>

Field Name	Details
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type datetime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LifetimeMaximumNotes	Type textarea
	Properties Create, Nillable, Update
	Description Additional information about a member's maximum lifetime payments.
Name	Type string
	Properties Create, Filter, Group, Sort, Update
	Description Name of these plan coverage benefits.
OutofNetworkCoinsuranceAmount	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The amount a member contributes towards treatment undertaken by non-preferred providers.
OutofNetworkCoinsurancePercentage	Type double
	Properties Create, Filter, Nillable, Sort, Update

Field Name	Details
	<p>Description The percentage of treatment cost the member pays for treatment undertaken by non-preferred providers.</p>
OutofNetworkLifetimeMaximum	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The most a member pays during the lifetime membership on this plan for health care provided by non-preferred providers. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
OutofPocketNotes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information about the out-of-pocket payment a member makes.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
PrimaryCareCopay	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount a member contributes towards primary care treatment.</p>
PurchaserPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the purchaser plan offering these benefits.</p>

Field Name	Details
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this benefits record came from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this benefits record on its source system.</p>
SourceSystemModified	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which these benefits were last changed on their source system.</p>
SpecialistCopay	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount a member contributes towards specialist consultations.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of these benefits. The default the picklist values are:</p> <ul style="list-style-type: none"> • Active • Inactive
TotalBenefitAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field Name	Details
	<p>Description The total amount of the plan benefit associated with the home healthcare visit.</p> <p>This field is available in API version 66.0 and later with the Home Health add-on license.</p>
UrgentCareCopay	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount a member contributes towards urgent care.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[PlanBenefitChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[PlanBenefitFeed](#)

Feed tracking is available for the object.

[PlanBenefitHistory](#)

History is available for tracked fields of the object.

[PlanBenefitOwnerSharingRule](#)

Sharing rules are available for the object.

[PlanBenefitShare](#)

Sharing is available for the object.

PlanBenefitItem

Represents the details of a benefit available under a purchaser's plan that is offered to their members.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field Name	Details
BenefitCategory	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	Description
	Name of the benefit category this item belongs to.
CoverageLevel	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Description of the level of coverage provided.
FrequencyType	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The frequency type of the plan benefit item associated with the home healthcare visit.
	Possible values are:
	<ul style="list-style-type: none"> • Daily • Fortnightly • Monthly • Quarterly • Weekly • Yearly
	This field is available in API version 66.0 and later with the Home Health add-on license.
InNetworkCoverage	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount available to contribute towards treatment costs for each treatment undertaken by the health plan's preferred providers.
IsInPlanNetwork	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates if the benefit is only available in the plan network.

Field Name	Details
ItemCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The code of the plan benefit item. This field is a polymorphic relationship field. This field is available in API version 64.0 and later.</p> <p>Relationship Name ItemCode</p> <p>Refers To CodeSet, CodeSetBundle</p>
LastReferencedDate	<p>Type datetime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type datetime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of this benefit item.</p>
Notes	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p>

Field Name	Details
	Description
	Additional information about this benefit item.
OutofNetworkCoverage	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount available to contribute towards treatment costs for each treatment undertaken by non-preferred providers.
OwnerId	Type reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The ID of the user who owns this record.
PauthRequirementEndDate	Type dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date from which preauthorization for the plan benefit item is required or not.
	This field is available in API version 64.0 and later.
PauthRequirementStartDate	Type dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The last date for which preauthorization for the plan benefit item is required or not.
	This field is available in API version 64.0 and later.
PlanBenefitId	Type reference
	Properties
	Create, Filter, Group, Sort

Field Name	Details
PreauthorizationTypeCodeId	Description The ID of the benefit this item belongs to.
ServiceType	Type reference
ServiceTypeCode	Properties Create, Filter, Group, Nillable, Sort, Update
SourceSystem	Description The code which represents the type of preauthorization that the plan benefit item requires.
SourceSystemIdentifier	Type string
SourceSystemIdentifier	Properties Create, Filter, Group, Nillable, Sort, Update
SourceSystemIdentifier	Description This field is a relationship field.
SourceSystemIdentifier	Type CodeSet
SourceSystemIdentifier	Properties Create, Filter, Group, Nillable, Sort, Update
SourceSystemIdentifier	Description This field is available in API version 64.0 and later.
SourceSystemIdentifier	Relationship Name PreauthorizationTypeCode
SourceSystemIdentifier	Refers To CodeSet
SourceSystemIdentifier	Type string
SourceSystemIdentifier	Properties Create, Filter, Group, Nillable, Sort, Update
SourceSystemIdentifier	Description The type of service this plan benefit item provides for.
SourceSystemIdentifier	Type string
SourceSystemIdentifier	Properties Create, Filter, Group, Nillable, Sort, Update
SourceSystemIdentifier	Description The code for the type of service this plan benefit item provides for.
SourceSystemIdentifier	Type string
SourceSystemIdentifier	Properties Create, Filter, Group, Nillable, Sort, Update
SourceSystemIdentifier	Description The name of the system this benefits item record came from.

Field Name	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this benefits item record on its source system.</p>
SourceSystemModified	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this benefits item was last updated from the source system.</p>
TimePeriod	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A description of the period during which services under this plan benefit item are to be rendered or continued.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[PlanBenefitItemChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[PlanBenefitItemFeed](#)

Feed tracking is available for the object.

[PlanBenefitItemHistory](#)

History is available for tracked fields of the object.

[PlanBenefitItemOwnerSharingRule](#)

Sharing rules are available for the object.

[PlanBenefitItemShare](#)

Sharing is available for the object.

Purchaser

A purchaser is the organization (an employer) that is providing medical insurance plans for their members (employees).

A purchaser is represented by records on the Account object of record type Business.

Purchaser Group

A purchaser group is a subset of the purchaser. For example, your company may have individual employee groups in different regions of the country. Each purchaser group can have separate options for insurance plans.

A purchaser group is represented by records on the Account object of record type Business.

See Also:

- [Account](#)

Purchaser Group Member Association

An association that records the members who belong to a purchaser group. This association is represented by records on the AccountContactRelation object.

PurchaserPlan

Represents the payer plan that a purchaser makes available to its members and members' dependents.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field Name	Details
Affiliation	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description An affiliation to a government service, such as the army or navy.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this purchaser plan is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this purchaser plan ceases to be effective.</p>

Field Name	Details
IsVerifiable	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether a benefits verification can be performed on this plan.</p>
LineOfBusiness	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The category of insurance policy that the purchaser plan belongs to. For example, whether the plan is a group health insurance, individual health insurance, etc. This field is available in API version 64.0 and later.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name of this plan.</p>
Notes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Notes about this payer.</p>
Payer	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the payer's Account object record.</p>
PlanNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	Description
	<p>The plan's reference number.</p>
PlanStatus	Type
	<p>picklist</p>
	Properties
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	Description
	<p>Indicates whether the plan is active.</p>
PlanType	Type
	<p>picklist</p>
	Properties
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	Description
	<p>The type of plan, with the following default options:</p>
	<ul style="list-style-type: none"> • PPO • HMO • Medicare • Medicaid • Workers Comp
ServiceType	Type
	<p>string</p>
	Properties
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	Description
	<p>The description of the service type offered by this plan.</p>
SourceSystem	Type
	<p>string</p>
	Properties
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	Description
	<p>The name of the system this plan record came from.</p>
SourceSystemIdentifier	Type
	<p>string</p>
	Properties
	<p>Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p>Description The ID of this plan record on its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this plan record was last changed on the source system.</p>
SponsorType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of sponsor for the plan. For example, if it's self-sponsored, government-sponsored, or company-sponsored. This field is available in API version 64.0 and later.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

PurchaserPlanFeed

Feed tracking is available for the object.

PurchaserPlanHistory

History is available for tracked fields of the object.

PurchaserPlanOwnerSharingRule

Sharing rules are available for the object.

PurchaserPlanShare

Sharing is available for the object.

PurchaserPlanChangeEvent

Change data capture is available for this object.

PurchaserPlanAssn

Represents a junction object that associates the purchaser to the plans they offer to members.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field Name	Details
LastReferencedDate	<p>Type datetime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type datetime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, Sort</p> <p>Description The name of this purchaser to purchaser plan association.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
PurchaserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the plan purchaser's Account object record.</p>
PurchaserPlanId	<p>Type reference</p>

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the associated plan on the Purchaser Plan object.
Role	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Indicates whether the purchaser plays a primary or secondary role in the plan.
SourceSystem	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The name of the system this record came from.
SourceSystemIdentifier	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of this record on its source system.
SourceSystemModified	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date on which this item was last changed on the source system.
Status	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Indicates whether this purchaser plan relationship is active.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[PurchaserPlanAssnChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[PurchaserPlanAssnFeed](#)

Feed tracking is available for the object.

[PurchaserPlanAssnHistory](#)

History is available for tracked fields of the object.

[PurchaserPlanAssnOwnerSharingRule](#)

Sharing rules are available for the object.

[PurchaserPlanAssnShare](#)

Sharing is available for the object.

Purchaser Payer Association

An association that records the purchasers who purchase plans from payers. This association is represented by records on the AccountAccountRelation object.

Intelligent Document Automation

Use the Intelligent Document Automation data objects to simplify the document management process, reduce manual data entry, and get patients the right care and services faster by managing patient and member forms all in one place, from intake through processing.

The Intelligent Document Automation data objects are visible to users with the Health Cloud Starter permission set. Available in API version 47.0 and later.

[ReceivedDocument](#)

Contains a request for an operation to be performed on a document, such as rotating, splitting, or text extraction. This object is available in API version 50.0 and later.

[ReceivedDocumentType](#)

Represents a junction object between Received Document and Document Type. This object is available in API version 58.0 and later.

[ReceivedDocument](#)

Contains a request for an operation to be performed on a document, such as rotating, splitting, or text extraction. This object is available in API version 50.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Direction	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the org is receiving or sending the document. Possible values are:</p> <ul style="list-style-type: none"> • INCOMING—Incoming • OUTGOING—Outgoing
DocumentNumber	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Unique document identification number.</p>
HasAutoOcrDisabled	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort</p> <p>Description Determines whether text is extracted from the document automatically. Default is False.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Specifies whether the document is being processed.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the received document.</p>
OcrStatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Current state of the text extraction process. Possible values are: Draft, Approved, In Approval, In Review, Obsolete, Superseded, Archived. Default is Draft.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The user who owns the ReceivedDocument record.</p>
Priority	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Determines the order in which the document is processed when it is part of a queue. Possible values are:</p> <ul style="list-style-type: none"> • ONE—1 • THREE—3 • TWO—2

Field	Details
Source	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Origin of the incoming document. Can be used to specify processing priority.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Current stage of processing.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • APPROVED • ARCHIVED • COMPLETED—Document processing is complete. • DRAFT • IN REVIEW • NEEDS REVIEW—Document requires review, for example because processing couldn't be completed. • OBSOLETE • PROCESSING—Document processing is in progress. • SUPERSEDED
StatusReason	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Reason for the status when processing and transforming the document.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ReceivedDocumentChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

ReceivedDocumentType

Represents a junction object between Received Document and Document Type. This object is available in API version 58.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
DocumentTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the document type for the document checklist item. This field is a relationship field.</p> <p>Relationship Name DocumentType</p> <p>Relationship Type Lookup</p> <p>Refers To DocumentType</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the received document type.</p>
PageNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Page number of the received document.</p>
ReceivedDocumentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the received document for the received document type. This field is a relationship field.</p> <p>Relationship Name ReceivedDocument</p> <p>Relationship Type Lookup</p> <p>Refers To ReceivedDocument</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ReceivedDocumentTypeChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

Patient Program Outcome Management

Patient Program Outcome Management data model helps you to improve patient and program outcomes by defining and measuring program outcomes, linking patient progress to program outcomes. Program Leads can define outcomes for a care program, and can generate a program and patient outcome summary. Additionally, case agents can generate a patient outcome summary.

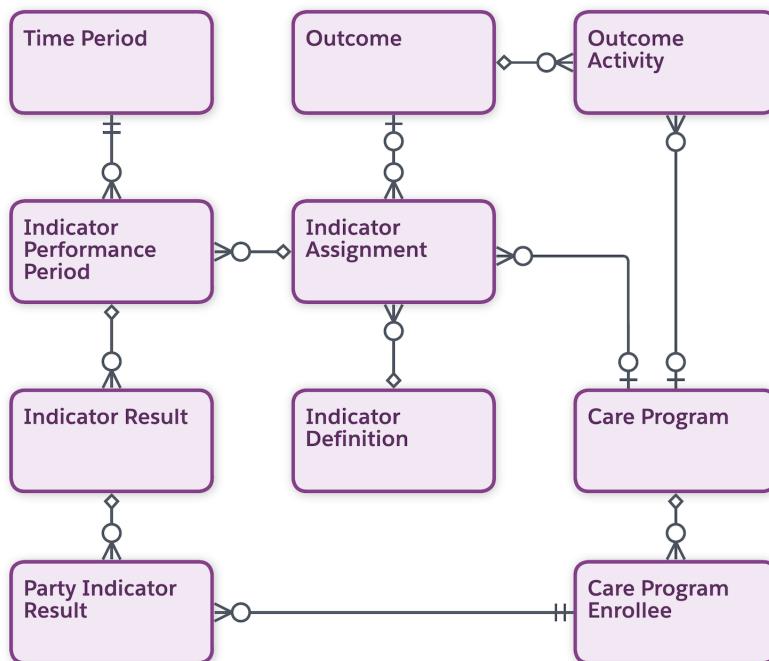
Patient Program Outcome Management reuses Care Program Management standard objects to calculate the outcomes at a care program level. To learn more about Care Program Management objects, refer [Care Program Management Standard Objects](#).

The patient program outcome management objects are available to users with Health Cloud Starter and Patient Program Outcome Management permission set. Available in API version 61.0 and later.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud



To view a larger version, right-click or control-click the image and select **Open Image in New Tab**.

[CareProgram](#)

Represents a set of activities, such as a patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.

[CareProgramEnrollee](#)

Represents a participant enrolled in a care program.

[IndicatorAssignment](#)

Represents the assignment of an indicator definition that's used to measure the performance of an outcome or a related activity. This object is available in API version 59.0 and later.

[IndicatorDefinition](#)

Represents information about the indicator assignment and the process of measuring and calculating the indicator results. This object is available in API version 59.0 and later.

[IndicatorPerformancePeriod](#)

Represents information about a specified time period including the frequency at which indicator results should be calculated and the baseline value of the indicator. This object is available in API version 59.0 and later.

[IndicatorResult](#)

Represents the result of an indicator assignment for the specified time period that can be used to track the performance of the indicator. This object is available in API version 59.0 and later.

[Outcome](#)

Represents information about the expected change in participants that is driven by the organization's activity. This object is available in API version 59.0 and later.

[OutcomeActivity](#)

Represents a junction between Outcome and the object that's related to the activity undertaken by an organization to achieve that outcome. This object is available in API version 59.0 and later.

[PartyIndicatorResult](#)

Represents information about a party for which the indicator result is calculated. This object is available in API version 62.0 and later.

[TimePeriod](#)

Represents the time period that's used to calculate the indicator performance and result. This object is available in API version 59.0 and later.

CareProgram

Represents a set of activities, such as a patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field Name	Details
ActiveSiteCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of active sites for conducting the research study. This field is available in API version 64.0 and later when Site Management is enabled.</p>
BudgetAmount	<p>Type Currency</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	Description
	<p>Approved budget for the care program.</p>
CareProgramName	Type
	Text
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The name of the care program.</p>
Category	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	<p>Represents the category of the care program.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • AdvancedTherapy • TrialManagement (This field is available for the Participant Management feature in API version 61.0 and later.) • Patient Services (This field is available with Patient Program Outcome Management permission set in API version 62.0 and later.)
CurrentEnrolleeCount	Type
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The number of enrollees who have joined the care program to date. This field is available for the Participant Management feature in API version 61.0 and later.</p>
Description	Type
	Long Text Area
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>A short description explaining the program.</p>
EndDate	Type
	Date

Field Name	Details
EnrollmentDurationMeasureId	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Program termination date.</p>
EnrollmentRate	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measure for the participant enrollment duration. This field is available in API version 64.0 and later when Site Management is enabled. This field is a relationship field.</p>
FirstSiteClosedOutDate	<p>Relationship Name EnrollmentDurationMeasure</p> <p>Refers To UnitOfMeasure</p>
FirstSiteActivatedDate	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The rate of the participant enrollment at the site. This is calculated by dividing the target enrollment count by the target enrollment duration and the number of planned sites. This field is available in API version 64.0 and later when Site Management is enabled.</p>
FirstSiteActivatedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the first site is closed out.</p>
FirstSiteActivatedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the first site is activated for conducting research studies. This field is available in API version 64.0 and later when Site Management is enabled.</p>

Field Name	Details
LastSiteActivatedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the last site is activated for conducting research studies. This field is available in API version 64.0 and later when Site Management is enabled.</p>
LastSiteClosedOutDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the last site is closed out. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ParentProgram	<p>Type Lookup(Care Program)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of another program that this program is a part of, if any.</p>
ProgramSponsor	<p>Type Lookup(Account)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the third-party program sponsor, if any.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>
StartDate	<p>Type Date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p>Description Effective start date of the program.</p>
Status	<p>Type Pick list</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of the program.</p>
TargetEnrollmentDuration	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The duration in which the enrollment for the targeted number of participants must be completed. This field is available in API version 64.0 and later when Site Management is enabled.</p>
TargetEnrolleeCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The target enrollee count of the care program. This field is available for the Participant Management feature in API version 61.0 and later.</p>
TargetSiteCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of sites planned for conducting the research study. This field is available in API version 64.0 and later when Site Management is enabled.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

CareProgramFeed

Feed tracking is available for the object.

CareProgramHistory

History is available for tracked fields of the object.

CareProgramShare

Sharing is available for the object.

CareProgramEnrollee

Represents a participant enrolled in a care program.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field Name	Details
AccountId	<p>Type Lookup(Account)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Person Account representing the enrollee</p>
BenefitCoverageType	<p>Type Picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the coverage status of the enrollee under both Medicare and Medicaid.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • ContinunedEnrollee • NewEnrollee
CareProgramId	<p>Type Master-Detail(Care Program)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p>Description Look up for Care Program.</p>
ClinicalServiceRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The clinical service request associated with the care program enrollee. This field is a relationship field and is available in API version 60.0 and later.</p> <p>Relationship Name ClinicalServiceRequest</p> <p>Relationship Type Lookup</p> <p>Refers To ClinicalServiceRequest</p>
CurrentWorkOrderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The work order that's currently being executed for the care program enrollee. This field is a relationship field and is available for the Advanced Therapy Management feature in API version 58.0 and later.</p> <p>Relationship Name CurrentWorkOrder</p> <p>Relationship Type Lookup</p> <p>Refers To CarePgmEnrolleeWorkOrder</p>
CurrentWorkOrderStepId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The work order step that's currently being executed for the care program enrollee. This field is a relationship field and is available for the Advanced Therapy Management feature in API version 58.0 and later.</p>

Field Name	Details
	Relationship Name
	CurrentWorkOrderStep
	Relationship Type
	Lookup
	Refers To
	CarePgmEnrolleeWkOrdStep
EnrolledAtId	Type
	reference
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	The site, location, or territory where the enrollee enrolled in the care program.
	This field is available in API version 64.0 when Site Management is enabled.
	This field is a polymorphic relationship field.
	Relationship Name
	EnrolledAt
	Refers To
	CareProgramSite
EnrolleeType	Type
	Picklist
	Properties
	Create, Filter, Group, Nullable, Restricted picklist, Sort, Update
	Description
	Specifies whether the enrollee is a new enrollee or a continued enrollee.
	Possible values are:
	<ul style="list-style-type: none"> • FullBenefitDual • PartialBenefitDual • NonDual • Dual
EnrollmentLocationId	Type
	reference
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	The service territory where an advanced therapy care program is executed.
	This field is a relationship field and is available for the Advanced Therapy Management feature in API version 59.0 and later.

Field Name	Details
	Relationship Name EnrollmentLocation
	Relationship Type Lookup
	Refers To ServiceTerritory
FlowInterviewId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description Runtime instance of the associated flow. This field is a relationship field.
	Relationship Name FlowInterview
	Refers To FlowInterview
FlowOrchestrationInstanceId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description Runtime instance of the associated flow orchestration. This field is a relationship field.
	Relationship Name FlowOrchestrationInstance
	Refers To FlowOrchestrationInstance
IsPatientInLtrmCareFacility	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates that the patient was at a long-term healthcare facility during outreach or enrollment to the care program. This field is available for the Medication Management feature in API version 56.0 and later. The default value is <code>false</code> .

Field Name	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LeadId	<p>Type Lookup(Lead)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Lead representing the enrollee.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the enrollee.</p>
OptOutPeriodEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the patient's opt-out from the care program ends. This field is available in API version 56.0 and later.</p>
OptOutPeriodStartTime	<p>Type dateTime</p>

Field Name	Details
	Properties Create, Filter, Nullable, Sort, Update
	Description The date that the patient opted out of the care program. This field is available in API version 56.0 and later.
OptOutReasonType	Type picklist
	Properties Create, Filter, Group, Nullable, Sort, Update
	Description The reason why the patient opted out of the care program. This field is available in API version 56.0 and later.
ResearchStudyCandidateId	Type reference
	Properties Create, Filter, Group, Nullable, Sort, Update
	Description The related Research Study Candidate record of the care program enrollee. This field is a relationship field.
	Relationship Name ResearchStudyCandidate
	Refers To ResearchStudyCandidate
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The User Id for the record owner. This field is a polymorphic relationship field. This field is available in API version 58.0 and later.
SourceSystem	Type string
	Properties Create, Filter, Group, Nullable, Sort, Update
	Description System from which the enrollee record was sourced.

Field Name	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the enrollee record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of the enrollee. Possible values are:<ul style="list-style-type: none">• Active• Inactive</p>
UserId	<p>Type Lookup(User)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description User representing the enrollee.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramEnrolleeChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramEnrolleeFeed](#)

Feed tracking is available for the object.

[CareProgramEnrolleeHistory](#)

History is available for tracked fields of the object.

[CareProgramEnrolleeOwnerSharingRule \(API version 58.0\)](#)

Sharing rules are available for the object.

[CareProgramEnrolleeShare \(API version 58.0\)](#)

Sharing is available for the object.

IndicatorAssignment

Represents the assignment of an indicator definition that's used to measure the performance of an outcome or a related activity. This object is available in API version 59.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Special Access Rules

This object is available in products where the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud), and Patient Program Outcome Management permission sets are assigned to users.

Fields

Field	Details
CareProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care program associated with the indicator assignment. This field is a relationship field. This field is available in API version 61.0 and later with the Patient Program Outcome Management permission set.</p> <p>Relationship Name CareProgram</p> <p>Relationship Type Lookup</p> <p>Refers To CareProgram</p>
IndicatorAssignmentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the object that the indicator assignment measures. Possible values are:</p> <ul style="list-style-type: none">• Outcome• Care Program—This value is available from API version 61.0 and later.

Field	Details
IndicatorDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The indicator definition that's associated with the indicator assignment. This field is a relationship field.</p> <p>Relationship Name IndicatorDefinition</p> <p>Relationship Type Master-Detail</p> <p>Refers To IndicatorDefinition</p>
IndicatorImprvGuideline	<p>Type textarea</p> <p>Properties Create,Nillable, Update</p> <p>Description The guidelines to improve the indicator score. This field is available in API version 62.0 and later with the Patient Program Outcome Management permission set.</p>
IntendedDirection	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the parent indicator definition. Possible values are:</p> <ul style="list-style-type: none"> • Decrease • Increase • Maintain
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the indicator assignment.</p>
OutcomeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The outcome that the indicator assignment measures. This field is a relationship field.</p> <p>Relationship Name Outcome</p> <p>Relationship Type Lookup</p> <p>Refers To Outcome</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of this indicator assignment. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To Group, User</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the status of the indicator assignment. Possible values are:</p> <ul style="list-style-type: none"> • Active • Canceled • Completed • Planned

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

IndicatorAssignmentFeed

Feed tracking is available for the object.

IndicatorAssignmentHistory

History is available for tracked fields of the object.

IndicatorAssignmentOwnerSharingRule

Sharing rules are available for the object.

IndicatorAssignmentShare

Sharing is available for the object.

IndicatorDefinition

Represents information about the indicator assignment and the process of measuring and calculating the indicator results. This object is available in API version 59.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Special Access Rules

This object is available in products where the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud), and Patient Program Outcome Management permission sets are assigned to users.

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description of the indicator definition.</p>
FlowDefinitionApiName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the flow definition associated with the indicator definition. This field is available from API version 60.0 and later.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when a user last referenced this indicator definition.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when a user last viewed this indicator definition.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the indicator definition.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns the outcome. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the status of the indicator definition. Possible values are:</p> <ul style="list-style-type: none"> • Active • Canceled • Completed • Planned
UnitOfMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unit of measure for the target, baseline, and result values that are associated with this indicator definition. This field is a relationship field.</p> <p>Relationship Name UnitOfMeasure</p> <p>Relationship Type Lookup</p> <p>Refers To UnitOfMeasure</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

IndicatorDefinitionFeed

Feed tracking is available for the object.

IndicatorDefinitionHistory

History is available for tracked fields of the object.

IndicatorDefinitionOwnerSharingRule

Sharing rules are available for the object.

IndicatorDefinitionShare

Sharing is available for the object.

IndicatorPerformancePeriod

Represents information about a specified time period including the frequency at which indicator results should be calculated and the baseline value of the indicator. This object is available in API version 59.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Special Access Rules

This object is available in products where the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud), and Patient Program Outcome Management permission sets are assigned to users.

Fields

Field	Details
BaselineDescription	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the baseline value.
BaselineValue	Type double Properties Create, Filter, Nillable, Sort, Update

Field	Details
	<p>Description The value of the indicator assignment at the beginning of the indicator performance period.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description of the indicator performance period.</p>
IndicatorAssignmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The indicator assignment that's associated with the indicator performance period. This field is a relationship field.</p> <p>Relationship Name IndicatorAssignment</p> <p>Relationship Type Master-Detail</p> <p>Refers To IndicatorAssignment</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastResultMeasurementDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date when the last result value was measured. This field is a calculated field.</p>

Field	Details
LastResultValue	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The result value from the most recently measured indicator result. This field is a calculated field.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the indicator performance period.</p>
TargetProgress	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the progress of the target within the time period. Possible values are:</p> <ul style="list-style-type: none"> • At Risk • Complete • Not Met • Not Started • On Track
TargetValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The target value of the indicator assignment within the time period.</p>
TimePeriodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The time period that is associated with the indicator performance period. This field is a relationship field.</p> <p>Relationship Name TimePeriod</p> <p>Relationship Type Lookup</p> <p>Refers To TimePeriod</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

IndicatorPerformancePeriodFeed

Feed tracking is available for the object.

IndicatorPerformancePeriodHistory

History is available for tracked fields of the object.

IndicatorResult

Represents the result of an indicator assignment for the specified time period that can be used to track the performance of the indicator. This object is available in API version 59.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Special Access Rules

This object is available in products where the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud), and Patient Program Outcome Management permission sets are assigned to users.

Fields

Field	Details
CalculationMethod	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Determines whether the indicator result was added manually or calculated by automation. This field is available from API version 60.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • AutomaticallyCalculated • Manual
Denominator	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort</p> <p>Description The denominator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description of the indicator result.</p>
FlowDefinitionApiName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The API name of the flow definition associated with this indicator result. This field is available from API version 60.0 and later.</p>
FlowVersion	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The version of the flow that calculated this result. This field is available from API version 60.0 and later.</p>
IndicatorPerformancePeriodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The indicator performance period for which the result is defined. This field is a relationship field.</p> <p>Relationship Name IndicatorPerformancePeriod</p> <p>Relationship Type Master-Detail</p> <p>Refers To IndicatorPerformancePeriod</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description Date and time when a user last referenced this indicator result.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description Date and time when a user last viewed this indicator result.</p>
MeasurementDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date on which the indicator result is measured.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the indicator result.</p>
Numerator	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort</p> <p>Description The numerator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.</p>
ResultValue	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The result for the indicator performance period.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of the result for the time period. Possible values are:</p> <ul style="list-style-type: none"> • Final • Interim

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

IndicatorResultFeed

Feed tracking is available for the object.

IndicatorResultHistory

History is available for tracked fields of the object.

Outcome

Represents information about the expected change in participants that is driven by the organization's activity. This object is available in API version 59.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Special Access Rules

This object is available in products where the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud), and Patient Program Outcome Management permission sets are assigned to users.

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description of the outcome.</p>
IntendedDirection	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the outcome. Possible values are:</p> <ul style="list-style-type: none">DecreaseIncreaseMaintain
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when a user last referenced this outcome.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when a user last viewed this outcome.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the outcome.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns the outcome. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
SourceName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the source that initially defined the outcome. For example, United Nations Sustainable Development Goals (UNSDG).</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Specifies the status of the outcome.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Canceled • Completed • Planned
Term	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the term for which the outcome is defined.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Long-Term • Medium-Term • Short-Term

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

OutcomeFeed

Feed tracking is available for the object.

OutcomeHistory

History is available for tracked fields of the object.

OutcomeOwnerSharingRule

Sharing rules are available for the object.

OutcomeShare

Sharing is available for the object.

OutcomeActivity

Represents a junction between Outcome and the object that's related to the activity undertaken by an organization to achieve that outcome. This object is available in API version 59.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Special Access Rules

This object is available in products where the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud), and Patient Program Outcome Management permission sets are assigned to users.

Fields

Field	Details
CareProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care program associated with the outcome activity. This field is a relationship field. This field is available in API version 61.0 and later with the Patient Program Outcome Management permission set.</p> <p>Relationship Name CareProgram</p> <p>Relationship Type Lookup</p> <p>Refers To CareProgram</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when a user last referenced this outcome activity.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when a user last viewed this outcome activity.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the outcome activity.</p>
OutcomeActivityType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of activity that's associated with the outcome, such as care program. Possible values are:<ul style="list-style-type: none">• Care Program—This value is available from API version 61.0 and later.</p>
OutcomeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The outcome that's associated with the outcome activity. This field is a relationship field.</p> <p>Relationship Name Outcome</p> <p>Relationship Type Master-Detail</p> <p>Refers To Outcome</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[OutcomeActivityFeed](#)

Feed tracking is available for the object.

[OutcomeActivityHistory](#)

History is available for tracked fields of the object.

PartyIndicatorResult

Represents information about a party for which the indicator result is calculated. This object is available in API version 62.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Special Access Rules

This object is available in products where the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud), and Patient Program Outcome Management permission sets are assigned to users.

Fields

Field	Details
CareProgramEnrolleeId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the care program enrollee record associated with the party indicator result. This field is a relationship field.</p> <p>Relationship Name CareProgramEnrollee</p> <p>Refers To CareProgramEnrollee</p>
IndicatorResultId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the indicator result record associated with the party. This field is a relationship field.</p> <p>Relationship Name IndicatorResult</p> <p>Refers To IndicatorResult</p>
MeasurementDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date when the party indicator result is measured.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the party indicator result.</p>
PartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The object for which the indicator result is calculated. This field is a relationship field.</p> <p>Relationship Name Party</p> <p>Refers To CareProgramEnrollee</p>
ResultValue	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The result value that's used to score the party.</p>

Usage

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PartyIndicatorResultFeed on page 1429](#)

Feed tracking is available for the object.

[PartyIndicatorResultHistory](#)

History is available for tracked fields of the object.

PartyIndicatorResultShare

Sharing is available for the object.

TimePeriod

Represents the time period that's used to calculate the indicator performance and result. This object is available in API version 59.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Special Access Rules

This object is available in products where the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud), and Patient Program Outcome Management permission sets are assigned to users.

Fields

Field	Details
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The end date and time of the time period.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when a user last referenced this time period.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when a user last viewed this time period.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the time period.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns the time period. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The start date and time of the time period.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

TimePeriodFeed

Feed tracking is available for the object.

TimePeriodHistory

History is available for tracked fields of the object.

TimePeriodOwnerSharingRule

Sharing rules are available for the object.

TimePeriodShare

Sharing is available for the object.

Pharmacy Benefits Verification

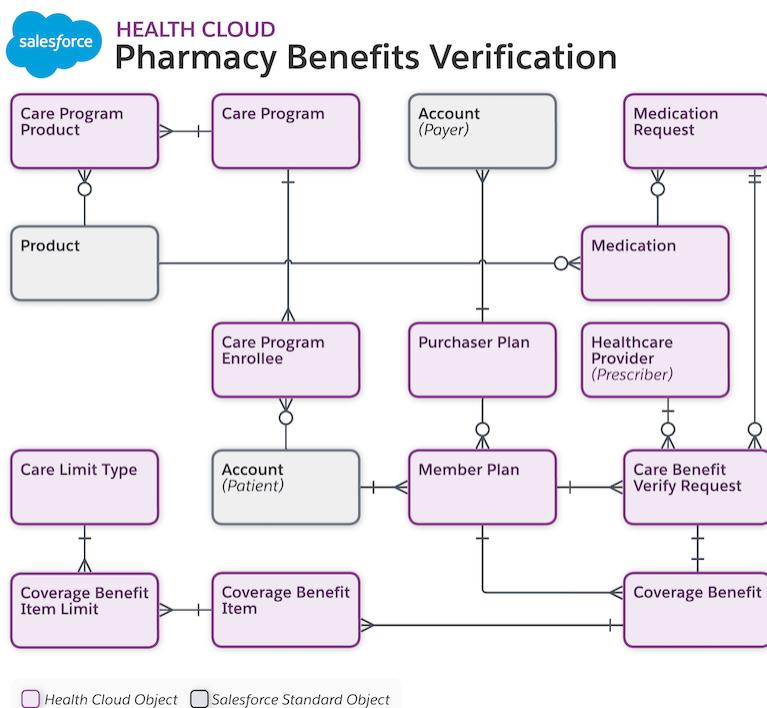
Pharmacy Benefits Verification uses a data model that's FHIR-CARIN and NCPDP aligned to store its data and make it interoperable. The pharmacy benefits verification data model supports drug manufacturers, providers, pharmacists, and life sciences organizations in determining pharmacy benefits coverage for the medications prescribed to the patients under a care program.

The pharmacy benefits verification objects are available to users with the Health Cloud Starter and Manage Pharmacy Benefits Verification permission set. Available in API version 61.0 and later.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences or Health Cloud



For more details and a larger image, visit the [Data Model Gallery](#).

[AssessmentEnvelope](#)

Represents information about an envelope that contains the assessments related to a user. For example, you can create an envelope that contains assessments for a patient or a caregiver related to depression or anxiety. This object is available in API version 58.0 and later.

[AssessmentEnvelopeItem](#)

Represents information about an item in an envelope that contains the assessments related to a user. For example, you can create an item that contains an assessment for depression or anxiety. This object is available in API version 58.0 and later.

[CareBenefitVerifyRequest](#)

Request for verification of benefits. This object is available in API version 53.0 and later.

CareProgram

Represents a set of activities, such as a patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.

CareProgramEnrollee

Represents a participant enrolled in a care program.

CareProgramProduct

Represents the affiliation between a care program and a care program product, care program provider, or both.

CoverageBenefit

Represents the benefits provided to a covered member by a purchaser's plan.

CoverageBenefitItem

Specific service covered by the insurance plan. This object is available in API version 53.0 and later.

CoverageBenefitItemLimit

Allows you to track details associated with a specific benefit as it relates to expenditures, limits, coverage levels, eligibility, and exclusion. This object is available in API version 53.0 and later.

HealthcareProvider

Represents business-level details about the healthcare organization or the practitioner.

Medication

Represents detailed information about different medications. This object is available in API version 51.0 and later.

MedicationRequest

Represents a request or order for the supply of medication, along with information about how it should be administered. This object is available in API version 51.0 and later.

MemberPlan

Represents details about the insurance coverage for a member or subscriber.

PurchaserPlan

Represents the payer plan that a purchaser makes available to its members and members' dependents.

UnitOfMeasure

Represents the unit of measures for care metrics and care observations. This object is available in API version 49.0 and later.

AssessmentEnvelope

Represents information about an envelope that contains the assessments related to a user. For example, you can create an envelope that contains assessments for a patient or a caregiver related to depression or anxiety. This object is available in API version 58.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The recipient of the assessment envelope, such as a patient. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The recipient of the assessment envelope, such as a caregiver. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
ExpirationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time of assessment envelope expiration.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
LastViewedDate	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
Properties	Filter, Nillable, Sort
Description	The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string
Properties	Create, Filter, Group, idLookup, Sort, Update
Description	The name of the assessment envelope.
NotificationStatus	Type picklist
Properties	Create, Filter, Group, Restricted picklist, Sort, Update
Description	The sent status of the assessment envelope
Possible values are:	<ul style="list-style-type: none"> • NotSent • Sent
OwnerId	Type reference
Properties	Create, Defaulted on create, Filter, Group, Sort, Update
Description	The ID of the user who owns this record.
This field is a polymorphic relationship field.	
Relationship Name	Owner
Relationship Type	Lookup
Refers To	Group, User

Field	Details
RequestReferenceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reference to the context of the assessment envelope request. This field is a polymorphic relationship field.</p> <p>Relationship Name RequestReference</p> <p>Relationship Type Lookup</p> <p>Refers To Case, ClinicalEncounter, ClinicalServiceRequest, ServiceAppointment</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the envelope that contains the assessments Possible values are:</p> <ul style="list-style-type: none"> • Completed • InProgress—In Progress • NotStarted—Not Started

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AssessmentEnvelopeChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[AssessmentEnvelopeFeed](#)

Feed tracking is available for the object.

[AssessmentEnvelopeHistory](#)

History is available for tracked fields of the object.

[AssessmentEnvelopeOwnerSharingRule](#)

Sharing rules are available for the object.

[AssessmentEnvelopeShare](#)

Sharing is available for the object.

AssessmentEnvelopeItem

Represents information about an item in an envelope that contains the assessments related to a user. For example, you can create an item that contains an assessment for depression or anxiety. This object is available in API version 58.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AssessmentEnvelopeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The assessment envelope that is associated with the item. This field is a relationship field.</p> <p>Relationship Name AssessmentEnvelope</p> <p>Relationship Type Lookup</p> <p>Refers To AssessmentEnvelope</p>
AssessmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The identifier for the assessment envelope item. This field is a relationship field.</p> <p>Relationship Name Assessment</p> <p>Relationship Type Lookup</p> <p>Refers To Assessment</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the assessment envelope item.</p>
OmniProcessId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represent the related OmniProcess. This field is a relationship field.</p> <p>Relationship Name OmniProcess</p> <p>Relationship Type Lookup</p> <p>Refers To OmniProcess</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Indicates the status of the assessment envelope item. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> Completed InProgress NotStarted

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AssessmentEnvelopeItemChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[AssessmentEnvelopeItemFeed](#)

Feed tracking is available for the object.

[AssessmentEnvelopeItemHistory](#)

History is available for tracked fields of the object.

CareBenefitVerifyRequest

Request for verification of benefits. This object is available in API version 53.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AssignedToId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The user assigned to the care benefit verify request. This field is a relationship field. This field is available in API version 62.0 and later.</p> <p>Relationship Name AssignedTo</p> <p>Refers To User</p>

Field	Details
AuthorizedPrescriptionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The authorized prescription associated with the care benefit verify request. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name AuthorizedPrescription</p> <p>Relationship Type Lookup</p> <p>Refers To MedicationRequest</p>
BenefitCategoryCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The benefit category code associated with the care benefit verify request. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name BenefitCategoryCode</p> <p>Relationship Type Lookup</p> <p>Refers To CodeSet</p>
BillablePrdEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time when billable period ended. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p>

Field	Details
BillablePrdStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The date and time when billable period started. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p>
CareProgramEnrolleeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The care program enrollee associated with the care benefit verify request. This field is a relationship field. This field is available in API version 62.0 and later.</p> <p>Relationship Name CareProgramEnrollee</p> <p>Refers To CareProgramEnrollee</p>
CareProgramId	<p>Type reference</p> <p>Properties Filter, Group, Nullable, Sort</p> <p>Description The care program associated with the care benefit verify request. This field is a relationship field. This field is available in API version 62.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name CareProgram</p> <p>Refers To CareProgram</p>
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p>

Field	Details
	<p>Description Identifies the associated case. This field is a relationship field.</p> <p>Relationship Name Case</p> <p>Relationship Type Lookup</p> <p>Refers To Case</p>
CoverageBenefitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Identifies the set of services covered by the insurance plan. This field is a relationship field.</p> <p>Relationship Name CoverageBenefit</p> <p>Relationship Type Lookup</p> <p>Refers To CoverageBenefit</p>
InitialFillDuration	<p>Type double</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The initial fill duration of the authorized prescription. This field is available in API version 62.0 and later with the Manage Pharmacy Benefits Verification permission set.</p>
InitialFillQuantity	<p>Type double</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The initial fill quantity of the authorized prescription. This field is available in API version 62.0 and later with the Manage Pharmacy Benefits Verification permission set.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MemberPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Identifies the member plan that includes the benefit item being verified. This field is a relationship field.</p> <p>Relationship Name MemberPlan</p> <p>Relationship Type Lookup</p> <p>Refers To MemberPlan</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the care benefit verification request.</p>
OriginalPrescriptionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The original prescription associated with the care benefit verify request. This field is a polymorphic relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name OriginalPrescription</p> <p>Relationship Type Lookup</p> <p>Refers To MedicationRequest</p>
PayerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The payer associated with the care benefit verify request. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name Payer</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
PlanId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The purchaser plan from the member plan associated with the care program enrollee. This field is a relationship field. This field is available in API version 62.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name Plan</p>

Field	Details
	<p>Refers To PurchaserPlan</p>
PrescriberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The prescriber associated with the care benefit verify request. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name Prescriber</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareProvider</p>
PrescriptionMedicationId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The medication code or medication name of the authorized prescription. This field is a polymorphic relationship field. This field is available in API version 62.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name PrescriptionMedication</p> <p>Refers To CodeSetBundle, Medication</p>
PriorityCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The priority code associated with the care benefit verify request. This field is a relationship field.</p>

Field	Details
	<p>This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name PriorityCode</p> <p>Relationship Type Lookup</p> <p>Refers To CodeSet</p>
ProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The provider of the care benefit verify request. This field is a polymorphic relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name Provider</p> <p>Relationship Type Lookup</p> <p>Refers To Account, HealthcareProvider</p>
RelatedCareBnftVerifyRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The original care benefit verify request from which the current request is cloned. This field is a relationship field. This field is available in API version 62.0 and later.</p> <p>Relationship Name RelatedCareBnftVerifyRequest</p> <p>Refers To CareBenefitVerifyRequest</p>
Request	<p>Type textarea</p>

Field	Details
	<p>Properties Nillable</p> <p>Description The JSON request body sent to an external system for care benefit verification.</p>
RequestDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date of verification request.</p>
RequestedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Person or organization requesting verification. This field is a relationship field.</p> <p>Relationship Name RequestedBy</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
RequesterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The requester associated with the care benefit verify request. This field is a polymorphic relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name Requester</p> <p>Relationship Type Lookup</p> <p>Refers To Account, HealthcareProvider</p>

Field	Details
ResponseBody	<p>Type base64</p> <p>Properties Create, Nillable, Update</p> <p>Description Full JSON response from external system.</p>
ResponseContentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The content type of the response from the external system.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • application/html • application/java-archive • application/javascript • application/json • application/msword • application/octet-stream • application/octet-stream;type=unknown • application/oxp • application/pdf • application/postscript • application/rtf • application/vnd.box.notes • application/vnd.google-apps.document • application/vnd.google-apps.drawing • application/vnd.google-apps.form • application/vnd.google-apps.presentation • application/vnd.google-apps.script • application/vnd.google-apps.spreadsheet • application/vnd.ms-excel • application/vnd.ms-excel.sheet.macroEnabled.12 • application/vnd.ms-infopath • application/vnd.ms-powerpoint • application/vnd.ms-powerpoint.presentation.macroEnabled.12 • application/vnd.ms-word.document.macroEnabled.12 • application/vnd.oasis.opendocument.presentation

Field	Details
	<ul style="list-style-type: none">• application/vnd.oasis.opendocument.spreadsheet• application/vnd.oasis.opendocument.text• application/vnd.openxmlformats-officedocument.presentationml.presentation• application/vnd.openxmlformats-officedocument.presentationml.slideshow• application/vnd.openxmlformats-officedocument.presentationml.template• application/vnd.openxmlformats-officedocument.spreadsheetml.sheet• application/vnd.openxmlformats-officedocument.spreadsheetml.template• application/vnd.openxmlformats-officedocument.wordprocessingml.document• application/vnd.openxmlformats-officedocument.wordprocessingml.template• application/vnd.visio• application/x-gzip• application/x-java-source• application/x-javascript• application/x-shockwave-flash• application/x-sql• application/x-zip-compressed• application/xhtml+xml• application/xml• application/zip• audio/mp4• audio/mpeg• audio/ogg• audio/x-aac• audio/x-ms-wma• audio/x-ms-wmv• audio/x-wav• image/bmp• image/gif• image/jpeg• image/jpeg;type=mobile• image/png• image/svg+xml• image/tiff• image/vnd.adobe.photoshop• image/vnd.dwg• image/x-photoshop• message/rfc822• model/vnd.usdz+zip

Field	Details
	<ul style="list-style-type: none"> • text/css • text/csv • text/html • text/plain • text/rtf • text/snote • text/stypi • text/vnd.salesforce.quip-chat • text/vnd.salesforce.quip-doc • text/vnd.salesforce.quip-sheet • text/vnd.salesforce.quip-slides • text/vnd.salesforce.quip-template • text/vtt • text/webviewhtml • text/x-c • text/x-c++ • text/xml • video/mp4 • video/mpeg • video/ogg • video/quicktime • video/x-m4v • video/x-ms-asf • video/x-msvideo
ResponseLength	<p>Type int</p> <p>Properties Filter, Group, Nullable, Sort</p> <p>Description The length of the response from the external system.</p>
ResponseName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the response from the external system.</p>

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Status of the verification request.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Acknowledged • Completed • Copy • Error • Partial • Pending • Rejected • TimedOut—Timed Out • Verified • Pending Confirmation • Received Confirmation • Ready for Verification
StatusReason	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The reason for the specified status of the care benefit verification request.</p>
VerificationMode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the mode of verification used in the care benefit verify request.</p> <p>This field is available in API version 63.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Electronic • Manual

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareBenefitVerifyRequestChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CareBenefitVerifyRequestFeed](#)

Feed tracking is available for the object.

[CareBenefitVerifyRequestHistory](#)

History is available for tracked fields of the object.

CareProgram

Represents a set of activities, such as a patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field Name	Details
ActiveSiteCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of active sites for conducting the research study. This field is available in API version 64.0 and later when Site Management is enabled.</p>
BudgetAmount	<p>Type Currency</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Approved budget for the care program.</p>
CareProgramName	<p>Type Text</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the care program.</p>

Field Name	Details
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Represents the category of the care program. Possible values are:</p> <ul style="list-style-type: none"> • AdvancedTherapy • TrialManagement (This field is available for the Participant Management feature in API version 61.0 and later.) • Patient Services (This field is available with Patient Program Outcome Management permission set in API version 62.0 and later.)
CurrentEnrolleeCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of enrollees who have joined the care program to date. This field is available for the Participant Management feature in API version 61.0 and later.</p>
Description	<p>Type Long Text Area</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A short description explaining the program.</p>
EndDate	<p>Type Date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Program termination date.</p>
EnrollmentDurationMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p>Description</p> <p>The unit of measure for the participant enrollment duration. This field is available in API version 64.0 and later when Site Management is enabled.</p> <p>This field is a relationship field.</p>
	<p>Relationship Name</p> <p>EnrollmentDurationMeasure</p>
	<p>Refers To</p> <p>UnitOfMeasure</p>
EnrollmentRate	<p>Type</p> <p>double</p>
	<p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p>
	<p>Description</p> <p>The rate of the participant enrollment at the site. This is calculated by dividing the target enrollment count by the target enrollment duration and the number of planned sites. This field is available in API version 64.0 and later when Site Management is enabled.</p>
FirstSiteClosedOutDate	<p>Type</p> <p>date</p>
	<p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p> <p>The date on which the first site is closed out.</p>
FirstSiteActivatedDate	<p>Type</p> <p>date</p>
	<p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p> <p>The date on which the first site is activated for conducting research studies. This field is available in API version 64.0 and later when Site Management is enabled.</p>
LastSiteActivatedDate	<p>Type</p> <p>date</p>
	<p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description</p> <p>The date on which the last site is activated for conducting research studies. This field is available in API version 64.0 and later when Site Management is enabled.</p>

Field Name	Details
LastSiteClosedOutDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The date on which the last site is closed out. This field is available in API version 64.0 and later when Site Management is enabled.</p>
ParentProgram	<p>Type Lookup(Care Program)</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Name of another program that this program is a part of, if any.</p>
ProgramSponsor	<p>Type Lookup(Account)</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Name of the third-party program sponsor, if any.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>
StartDate	<p>Type Date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Effective start date of the program.</p>
Status	<p>Type Pick list</p> <p>Properties Create, Defaulted on create, Filter, Group, Nullable, Sort, Update</p>

Field Name	Details
	<p>Description Status of the program.</p>
TargetEnrollmentDuration	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The duration in which the enrollment for the targeted number of participants must be completed. This field is available in API version 64.0 and later when Site Management is enabled.</p>
TargetEnrolleeCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The target enrollee count of the care program. This field is available for the Participant Management feature in API version 61.0 and later.</p>
TargetSiteCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of sites planned for conducting the research study. This field is available in API version 64.0 and later when Site Management is enabled.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

CareProgramChangeEvent (API version 59.0)

Change events are available for the object.

CareProgramFeed

Feed tracking is available for the object.

CareProgramHistory

History is available for tracked fields of the object.

CareProgramShare

Sharing is available for the object.

CareProgramEnrollee

Represents a participant enrolled in a care program.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field Name	Details
AccountId	<p>Type Lookup(Account)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Person Account representing the enrollee</p>
BenefitCoverageType	<p>Type Picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the coverage status of the enrollee under both Medicare and Medicaid. Possible values are:<ul style="list-style-type: none"> • ContinuedEnrollee • NewEnrollee </p>
CareProgramId	<p>Type Master-Detail(Care Program)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Look up for Care Program.</p>
ClinicalServiceRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	Description
	The clinical service request associated with the care program enrollee.
	This field is a relationship field and is available in API version 60.0 and later.
	Relationship Name
	ClinicalServiceRequest
	Relationship Type
	Lookup
	Refers To
	ClinicalServiceRequest
CurrentWorkOrderId	Type
	reference
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	The work order that's currently being executed for the care program enrollee.
	This field is a relationship field and is available for the Advanced Therapy Management feature in API version 58.0 and later.
	Relationship Name
	CurrentWorkOrder
	Relationship Type
	Lookup
	Refers To
	CarePgmEnrolleeWorkOrder
CurrentWorkOrderStepId	Type
	reference
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	The work order step that's currently being executed for the care program enrollee.
	This field is a relationship field and is available for the Advanced Therapy Management feature in API version 58.0 and later.
	Relationship Name
	CurrentWorkOrderStep
	Relationship Type
	Lookup
	Refers To
	CarePgmEnrolleeWkOrdStep

Field Name	Details
EnrolledAtId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The site, location, or territory where the enrollee enrolled in the care program. This field is available in API version 64.0 when Site Management is enabled. This field is a polymorphic relationship field.</p> <p>Relationship Name EnrolledAt</p> <p>Refers To CareProgramSite</p>
EnrolleeType	<p>Type Picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the enrollee is a new enrollee or a continued enrollee. Possible values are:</p> <ul style="list-style-type: none"> • FullBenefitDual • PartialBenefitDual • NonDual • Dual
EnrollmentLocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The service territory where an advanced therapy care program is executed. This field is a relationship field and is available for the Advanced Therapy Management feature in API version 59.0 and later.</p> <p>Relationship Name EnrollmentLocation</p> <p>Relationship Type Lookup</p> <p>Refers To ServiceTerritory</p>

Field Name	Details
FlowInterviewId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Runtime instance of the associated flow. This field is a relationship field.</p> <p>Relationship Name FlowInterview</p> <p>Refers To FlowInterview</p>
FlowOrchestrationInstanceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Runtime instance of the associated flow orchestration. This field is a relationship field.</p> <p>Relationship Name FlowOrchestrationInstance</p> <p>Refers To FlowOrchestrationInstance</p>
IsPatientInLtrmCareFacility	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates that the patient was at a long-term healthcare facility during outreach or enrollment to the care program. This field is available for the Medication Management feature in API version 56.0 and later. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

Field Name	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LeadId	<p>Type Lookup(Lead)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Lead representing the enrollee.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the enrollee.</p>
OptOutPeriodEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which the patient's opt-out from the care program ends. This field is available in API version 56.0 and later.</p>
OptOutPeriodStartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date that the patient opted out of the care program. This field is available in API version 56.0 and later.</p>
OptOutReasonType	<p>Type picklist</p>

Field Name	Details
	Properties Create, Filter, Group, Nullable, Sort, Update
	Description The reason why the patient opted out of the care program. This field is available in API version 56.0 and later.
ResearchStudyCandidateId	Type reference
	Properties Create, Filter, Group, Nullable, Sort, Update
	Description The related Research Study Candidate record of the care program enrollee. This field is a relationship field.
	Relationship Name ResearchStudyCandidate
	Refers To ResearchStudyCandidate
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The UserId for the record owner. This field is a polymorphic relationship field. This field is available in API version 58.0 and later.
SourceSystem	Type string
	Properties Create, Filter, Group, Nullable, Sort, Update
	Description System from which the enrollee record was sourced.
SourceSystemIdentifier	Type string
	Properties Create, Filter, Group, Nullable, Sort, Update
	Description ID of the system from which the enrollee record was sourced.

Field Name	Details
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of the enrollee.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive
UserId	<p>Type Lookup(User)</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description User representing the enrollee.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

CareProgramEnrolleeChangeEvent (API version 59.0)

Change events are available for the object.

CareProgramEnrolleeFeed

Feed tracking is available for the object.

CareProgramEnrolleeHistory

History is available for tracked fields of the object.

CareProgramEnrolleeOwnerSharingRule (API version 58.0)

Sharing rules are available for the object.

CareProgramEnrolleeShare (API version 58.0)

Sharing is available for the object.

CareProgramProduct

Represents the affiliation between a care program and a care program product, care program provider, or both.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field	Details
Availability	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default availability of the product to an enrollee in the context of a care program. For example, some products or services are available to all enrollees, others are limited to special circumstances, and others are no longer available.</p>
CareProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifier for the care program associated with a care program product.</p>
CareProgramPrice	<p>Type currency</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A standard list price for a given product in the context of a care program.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the care program product.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifier of the product associated with a care program</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the care program product was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the care program product was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the product in the context of a care program.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProgramProductChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareProgramProductFeed](#)

Feed tracking is available for the object.

[CareProgramProductHistory](#)

History is available for tracked fields of the object.

[CareProgramProductOwnerSharingRule](#)

Sharing rules are available for the object.

[CareProgramProductShare](#)

Sharing is available for the object.

CoverageBenefit

Represents the benefits provided to a covered member by a purchaser's plan.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field Name	Details
BenefitNotes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information about the benefits available to the member under this plan's coverage.</p>
BenefitPeriodEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Last day of the coverage benefit period.</p>
BenefitPeriodStartDate	<p>Type date</p>

Field Name	Details
CareBenefitVerifyRequestId	<p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description First day of the coverage benefit period.</p>
CoinsuranceNotes	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The care benefit verify request associated with the coverage benefit. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name CareBenefitVerifyRequest</p> <p>Relationship Type Lookup</p> <p>Refers To CareBenefitVerifyRequest</p>
CopayNotes	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description Additional information about the contribution the member makes towards treatment.</p>
CoverageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p>

Field Name	Details
	<p>Description General category of service covered.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Dental • Medical • Vision • Home Health - This picklist value is available for the Home Health feature in API version 59.0 and later. • Pharmacy - This picklist value is available for the Pharmacy Benefits Verification feature in API version 63.0 and later. See Activate Picklist Value for Coverage Benefit to activate this value.
DeductibleNotes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information about the member's deductibles under this plan.</p>
Disclaimer	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Overall plan benefit disclaimers.</p>
EmergencyDepartmentCopay	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the member contributes towards emergency treatment.</p>
FamilyInNetworkDeductibleApplied	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the member has paid for health care provided by the health plan's preferred providers for all family members.</p>

Field Name	Details
FamilyInNetworkDeductibleLimit	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description
	<p>The amount the member is required to pay for health care provided by the health plan's preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment.</p>
FamilyInNetworkDeductibleRemaining	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description
	<p>The remaining amount the member still has to pay for health care provided by the health plan's preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment.</p>
FamilyInNetworkOutOfPocketApplied	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description
	<p>The amount of the member has paid in this coverage year for health care provided by the health plan's preferred providers for all family members. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
FamilyInNetworkOutOfPocketLimit	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description
	<p>The most the member pays during the coverage year for health care provided by the health plan's preferred providers for all family members. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
FamilyInNetworkOutOfPocketRemaining	Type currency
	Properties Create, Filter, Nillable, Sort, Update

Field Name	Details
FamilyOutofNetworkDeductibleApplied	<p>Description</p> <p>The remaining amount for the member to pay during this coverage year for care provided by the plan's preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
FamilyOutofNetworkDeductibleLimit	<p>Type</p> <p>currency</p>
FamilyOutofNetworkDeductibleRemaining	<p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p>
FamilyOutofNetworkOutofPocketApplied	<p>Description</p> <p>The amount the member has paid for health care provided by non-preferred providers for all family members.</p>
FamilyOutofNetworkOutofPocketLimit	<p>Type</p> <p>currency</p>
FamilyOutofNetworkOutofPocketRemaining	<p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p>
FamilyOutofNetworkOutofPocketRemaining	<p>Description</p> <p>The amount the member still has to pay for health care provided by non-preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment.</p>
FamilyOutofNetworkOutofPocketLimit	<p>Type</p> <p>currency</p>

Field Name	Details
	Properties Create, Filter, Nillable, Sort, Update
	Description The most the member pays during the coverage year for health care provided by non-preferred providers for all family members. It includes deductibles, copayments, and coinsurance, but excludes premiums.
FamilyOutOfNetworkOutOfPocketRemaining	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The remaining amount for the member to pay during this coverage period for health care provided by non-preferred providers for all family members. When this amount is reached, the plan starts to contribute towards treatment. It includes deductibles, copayments, and coinsurance, but excludes premiums.
FinalCoverageStatusCodeId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The code that's determined after considering the restrictions and other status types that apply to the coverage benefit. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.
	Relationship Name FinalCoverageStatusCode
	Relationship Type Lookup
	Refers To CodeSet
FrequencyType	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The frequency type of the coverage benefit associated with the home healthcare visit. Possible values are:

Field Name	Details
	<ul style="list-style-type: none"> • Daily • Fortnightly • Monthly • Quarterly • Weekly • Yearly
	<p>This field is available in API version 66.0 and later with the Home Health add-on license.</p>
IndividualInNetworkDeductibleApplied	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	<p>The amount the member has paid for health care provided by the health plan's preferred providers to the most costly family member.</p>
IndividualInNetworkDeductibleLimit	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	<p>The amount the member has to pay for health care provided by the plan's preferred providers for any family member. When this amount is reached, the plan starts to contribute towards treatment.</p>
IndividualInNetworkDeductibleRemaining	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	<p>The remaining amount the member has to pay for care during the coverage year provided by the plan's preferred providers for any family member. When this amount is reached, the plan starts to contribute towards treatment.</p>
IndividualInNetworkOutOfPocketApplied	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update

Field Name	Details
	Description
	<p>The amount of the member has paid in this coverage year for health care provided by the plan's preferred providers to any one family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
IndividualInNetworkOutOfPocketLimit	Type
	<p>currency</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>The most the member pays during the coverage year for health care provided by the health plan's preferred providers for any family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
IndividualInNetworkOutOfPocketRemaining	Type
	<p>currency</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>The amount remaining for the member to pay during the coverage year for care provided by the plan's preferred providers for any family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
IndividualOutOfNetworkDeductibleApplied	Type
	<p>currency</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>The amount the member has paid for health care provided by non-preferred providers to the most costly family member.</p>
IndividualOutOfNetworkDeductibleLimit	Type
	<p>currency</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>The amount the member has to pay for health care provided by non-preferred providers to any one family member. When this amount is reached, the plan starts to contribute towards treatment.</p>
IndividualOutOfNetworkDeductibleRemain	Type
	<p>currency</p>

Field Name	Details
IndividualOutOfNetworkOutOfPocketApplied	<p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The remaining amount the member has to pay for health care during the coverage year provided by non-preferred providers to any family member. When this amount is reached, the plan starts to contribute towards treatment.</p>
IndividualOutOfNetworkOutOfPocketType	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The amount of the member has paid in this coverage period for health care provided by non-preferred providers to any family members. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
IndividualOutOfNetworkOutOfPocketLimit	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The most the member pays during the coverage year for health care provided by non-preferred providers to any family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
IndividualOutOfNetworkOutOfPocketRemaining	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The amount remaining for the member to pay during the coverage year for health care provided by non-preferred providers to any family member. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
InNetworkCoinsuranceAmount	<p>Type currency</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The amount the member contributes towards treatment undertaken by the health plan's preferred providers.</p>

Field Name	Details
InNetworkCoinsurancePercentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of treatment cost the member pays for treatment undertaken by the health plan's preferred providers.</p>
InNetworkLifetimeMaximum	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the member has to pay during lifetime coverage under this plan after which the provider covers all costs for treatment provided by its preferred providers. It includes deductibles, copayments, and coinsurance, but excludes premiums.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Specifies whether the coverage benefit is currently in force. The default value is 'false'.</p>
LastReferencedDate	<p>Type datetime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type datetime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field Name	Details
LifetimeMaximumNotes	<p>Type textarea</p> <p>Properties Create, Nullable, Update</p> <p>Description Additional information on the lifetime maximum payments the member Will be expected to make.</p>
MemberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The ID of the member receiving these benefits.</p>
MemberPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the member plan receiving these benefits.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of these coverage benefits.</p>
OutcomeStatusCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The outcome code set associated with the coverage benefit. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name OutcomeStatusCode</p>

Field Name	Details
	Relationship Type
	Lookup
	Refers To
	CodeSet
OutofNetworkCoinsuranceAmount	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount the member contributes towards treatment undertaken by non-preferred providers.
OutofNetworkCoinsurancePercentage	Type
	percent
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The percentage of treatment cost the member pays for treatment undertaken by non-preferred providers.
OutofNetworkLifetimeMaximum	Type
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount the member has to pay during lifetime coverage under this plan after which the plan provider covers all costs for treatment provided by its non-preferred providers. It includes deductibles, copayments, and coinsurance, but excludes premiums.
OutofPocketNotes	Type
	textarea
	Properties
	Create, Nillable, Update
	Description
	Additional information about the out-of-pocket payment the member makes.
OwnerId	Type
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update

Field Name	Details
	Description
	<p>The ID of the user who owns this record.</p>
PharmaCopayAmount	Type
	<p>currency</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>The amount the member contributes towards the pharma products.</p>
	<p>This field is available in API version 62.0 and later with the Manage Financial Assistance Program permission set.</p>
PrimaryCareCopay	Type
	<p>currency</p>
	Properties
	<p>Create, Filter, Nillable, Sort, Update</p>
	Description
	<p>The amount the member contributes towards primary care treatment.</p>
SourceSystem	Type
	<p>string</p>
	Properties
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	Description
	<p>The name of the system this benefits record was obtained from.</p>
SourceSystemIdentifier	Type
	<p>string</p>
	Properties
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	Description
	<p>The ID of this benefits record on its source system.</p>
SourceSystemModified	Type
	<p>date</p>
	Properties
	<p>Create, Filter, Group, Nillable, Sort, Update</p>
	Description
	<p>The date on which these benefits were last changed on their source system.</p>

Field Name	Details
SpecialistCopay	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the member contributes towards specialist consultations.</p>
StatusCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status code set associated with the coverage benefit. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Pharmacy Benefits Verification permission set.</p> <p>Relationship Name StatusCode</p> <p>Relationship Type Lookup</p> <p>Refers To CodeSet</p>
TotalBenefitAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount of the coverage benefit associated with the home healthcare visit. This field is available in API version 66.0 and later with the Home Health add-on license.</p>
UrgentCareCopay	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount the member contributes towards urgent care.</p>

Field Name	Details
VerificationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date on which the benefit was verified.</p>

Associated Objects

This object has these associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CoverageBenefitChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CoverageBenefitFeed](#)

Feed tracking is available for the object.

[CoverageBenefitHistory](#)

History is available for tracked fields of the object.

[CoverageBenefitOwnerSharingRule](#)

Sharing rules are available for the object.

[CoverageBenefitShare](#)

Sharing is available for the object.

CoverageBenefitItem

Specific service covered by the insurance plan. This object is available in API version 53.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
BenefitCategory	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the category this benefit is in.</p>

Field	Details
CodeSetServiceTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of a Code Set Service Type in the Code Set object. This is a relationship field.</p> <p>Relationship Name CodeSetServiceType</p> <p>Relationship Type Lookup</p> <p>Refers To CodeSet</p>
CoverageBenefitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the covered benefit this item belongs to. This is a relationship field.</p> <p>Relationship Name CoverageBenefit</p> <p>Relationship Type Lookup</p> <p>Refers To CoverageBenefit</p>
CoverageLevel	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of the level of coverage provided by this item.</p>
DoesDeductibleApply	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Specifies whether the benefit item requires a prior expenditure by the patient.</p>

Field	Details
	The default value is 'false'.
FrequencyType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The frequency type of the coverage benefit item associated with the home healthcare visit. Possible values are:</p> <ul style="list-style-type: none"> • Daily • Fortnightly • Monthly • Quarterly • Weekly • Yearly <p>This field is available in API version 66.0 and later with the Home Health add-on license.</p>
InNetworkCoverage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Description of the in network coverage provided by this item.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Specifies whether the benefit item is currently available. The default value is 'false'.</p>
IsInPlanNetwork	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the benefit is available only in-network (<code>true</code>) or both in-network and out-of-network (<code>false</code>). The default value is 'false'.</p>

Field	Details
IsPreauthorizationRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Specifies whether the service must be approved before use. The default value is 'false'.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MemberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the member receiving this benefit item. This is a relationship field.</p> <p>Relationship Name Member</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p>Description Name of this coverage benefit item.</p>
Notes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Additional information about this coverage benefit item.</p>
OutofNetworkCoverage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Description of the coverage for non-preferred providers.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ServiceType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of service this plan benefit item provides.</p>
ServiceTypeCode	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The code for the type of service this plan benefit item provides.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this coverage benefits item record came from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the CoverageBenefitItem in its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The ID of this coverage benefits item record on its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this coverage benefits item was last changed on the source system.</p>
TimePeriod	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A description of the period this plan benefit item covers.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CoverageBenefitItemChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

CoverageBenefitItemLimit

Allows you to track details associated with a specific benefit as it relates to expenditures, limits, coverage levels, eligibility, and exclusion. This object is available in API version 53.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AllowedLimit	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Maximum amount that will be paid for the service.</p>
AllowedQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The maximum quantity allowed of the coverage benefit item. This field is available in API Version 62.0 and later.</p>
AllowedQuantityUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measure for the allowed quantity of the coverage benefit item. This field is a relationship field. This field is available in API Version 62.0 and later.</p>

Field	Details
	<p>Relationship Name AllowedQuantityUnit</p> <p>Refers To UnitOfMeasure</p>
AppliedLimit	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies whether the benefit has been claimed.</p>
AppliedQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The quantity of the coverage benefit item already used by the member. This field is available in API Version 62.0 and later.</p>
AppliedQuantityUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measure for the applied quantity of the coverage benefit item. This field is a relationship field. This field is available in API Version 62.0 and later.</p> <p>Relationship Name AppliedQuantityUnit</p> <p>Refers To UnitOfMeasure</p>
CareLimitTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies whether the limit is a required payment or excluded service. This is a relationship field.</p>

Field	Details
	<p>Relationship Name CareLimitType</p> <p>Relationship Type Lookup</p> <p>Refers To CareLimitType</p>
CoverageBenefitItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Specific service covered by the insurance plan. This is a relationship field.</p> <p>Relationship Name CoverageBenefitItem</p> <p>Relationship Type Lookup</p> <p>Refers To CoverageBenefitItem</p>
CoverageLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Defines the persons eligible for the benefit item. Possible values are: <ul style="list-style-type: none"> • EmployeeSpouse—Employee & Spouse • Family • Individual </p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LimitNotes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description General information about the limit.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the coverage benefit item limit.</p>
NetworkType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the benefit refers to in-network providers or out-of-network providers. Possible values are:</p> <ul style="list-style-type: none"> • In—In-network providers • NA—Not applicable • Out—Out-of-network providers <p>If the related CoverageBenefitItem record has an <code>IsInPlanNetwork</code> value of <code>true</code>, <code>NetworkType</code> is typically <code>In</code>. If the related record has an <code>IsInPlanNetwork</code> value of <code>false</code>, <code>NetworkType</code> can be any value.</p>
PriorityOrder	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description This limit's position in the sequence for calculating limits.</p>

Field	Details
TermType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of time period during which the benefit item is available. Possible values are:</p> <ul style="list-style-type: none"> • Calendar Year • Day • Month • Year to Date

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CoverageBenefitItemLimitChangeEvent](#) (API version 60.0)

Change events are available for the object.

HealthcareProvider

Represents business-level details about the healthcare organization or the practitioner.

Special Access Rules

In Life Sciences Cloud, the HealthCareProvider object and its fields are used by the Account Management and the Segmentation feature areas. This topic lists fields used in both features.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AbbreviatedName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	<p>Stores the abbreviated name of the Japanese healthcare organization (HCO) for INS-DOC records. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
AccountId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>Account that this healthcare provider is associated with. This field is a relationship field.</p>
	Relationship Name
	Account
	Refers To
	Account
AssociatedSampleLimit	Type
	textarea
	Properties
	Create, Nillable, Update
	Description
	<p>The JSON comprising the list of Sample Limits for the HealthcareProvider record. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
CaqhIdentifier	Type
	string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	<p>This field is unique within your organization. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
DataChangeComments	Type
	textarea
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	<p>Captures comments explaining the reasons or context for changes made to the data. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Field	Details
DoesDispenseMedication	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the account dispenses medication. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date from which the provider becomes effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date from which the provider is no longer effective.</p>
EhrSystem	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Name of the EHR system used at this facility or organization.</p>
HasCarrierContract	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the provider's contract follows a CMS model MA contract amendment, based on Centers for Medicare and Medicaid Services (CMS) guidelines. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Field	Details
HasSalesDataRestriction	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether access to the sales data about the healthcare provider is restricted. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
InitialStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Specifies the date when the facility first became operational or the practitioner first began practicing.</p>
IsNotSearchable	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the provider is excluded from search results. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
IsPrivacyLawEnabled	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the privacy law regulations are enabled. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
IsSpeaker	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the provider is designated as a speaker for engagement.</p>

Field	Details
	<p>The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the provider.</p>
OperatingCountryCode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the country code of the country to which the account belongs. Possible values are:</p> <ul style="list-style-type: none"> • US <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	Description
	The ID of the user who owns this record. This field is a polymorphic relationship field.
	Relationship Name
	Owner
	Refers To
	Group, User
ParentOrganizationAccountId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the ID of the parent account, used to establish the account hierarchy. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
	Relationship Name
	ParentOrganizationAccount
	Refers To
	Account
PhoneticName	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Stores the Japanese phonetic name, applicable to both HCP and HCO, which is used for sorting and text-based searches. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
PhoneticName2	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Stores the Japanese phonetic name, applicable to both HCP and HCO, which is used for sorting and text-based searches. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
PractitionerId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description The practitioner that this healthcare provider record is associated with. This field is a relationship field.</p>
	<p>Relationship Name Practitioner</p>
	<p>Refers To Contact</p>
ProfessionalDesignation	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the professional designation of the healthcare professional. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProfessionalTitle	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the professional title of the healthcare professional. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProviderClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The class of facility, such as an IPA, medical group, or solo practitioner. Possible values are:</p> <ul style="list-style-type: none"> • IPA • Medical Group • Solo Practitioner
ProviderFullName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	Description
	<p>The full name of the healthcare provider. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProviderPhotoId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The Content Document file that is a photo of the Healthcare Provider. This field is a relationship field.</p>
	Relationship Name
	ProviderPhoto
	Relationship Type
	Lookup
	Refers To
	ContentDocument
ProviderType	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>Type of provider or facility. For example, pharmacist or ambulatory care facility.</p>
	Possible values are:
	<ul style="list-style-type: none"> • Ambulatory Care • Dentist • Hospital • Laboratory • Medical Doctor • Pharmacist • Pharmacy
ReferredByContactId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>Specifies the provider who originated the referral. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Field	Details
	<p>Relationship Name ReferredByContact</p> <p>Refers To Contact</p>
RelatedHealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the HCP account associated with the INS-DOC. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name RelatedHealthcareProvider</p> <p>Refers To HealthcareProvider</p>
RelatedUserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The User record that relates to the Healthcare Provider record. This field is a relationship field.</p> <p>Relationship Name RelatedUser</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
SalesDataRstrcEffectiveDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date when the sales data restriction becomes effective. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
SourceSystem	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the system from which the record was sourced. This field is unique within your organization</p>
SourceSystemModifiedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date when the record was last updated in the source system</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the provider. Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive • Pending <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
TerminationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Termination date for this provider.</p>

Field	Details
TerminationReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reason for termination.</p>
TotalLicensedBeds	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Total number of licensed beds at this facility, if applicable.</p>
WrittenName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the Chines character name of the organization, applicable only to healthcare professionals (HCPs), which is required for INS-DOC records. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[HealthcareProviderChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[HealthcareProviderFeed](#)

Feed tracking is available for the object.

[HealthcareProviderHistory](#)

History is available for tracked fields of the object.

[HealthcareProviderOwnerSharingRule](#)

Sharing rules are available for the object.

[HealthcareProviderShare](#)

Sharing is available for the object.

Medication

Represents detailed information about different medications. This object is available in API version 51.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
BatchNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the batch number of the medication.</p>
BrandNameAlternative	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The branded alternative for a generic medication. This field is available in API version 56.0 and later.</p>
ExpirationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Specifies the expiration date of the medication.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>

Field	Details
ManufacturerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The company that makes the medicine.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
MedicationCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The category of the medication. This field is available in API version 56.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Branded Product • Generic Product • Innovator Product • Therapeutic Moeity
MedicationCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The system-defined code that identifies a medication.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
MedicationFormId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code for the dosage form this medication is manufactured in.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the medication.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The user who owns the medication record.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product that's associated with the medication. This field is a relationship field. This field is available in API version 61.0 and later with the Manage Financial Assistance Program permission set.</p>
QuantityDenominator	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total volume of the medication contained in the packaged product.</p>
QuantityNumerator	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount of the medication contained in the packaged product.</p>
QuantityUnitId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The measurement unit for the quantity.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> UnitOfMeasure
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this record came from.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record on its source system.</p>
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this item was last changed on the source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the status of the medication. Possible values are:</p> <ul style="list-style-type: none"> Active Entered in error Inactive

Additional Information for Medication in Other Objects

In addition to creating a record using these fields, you can add more details to your Medication record by creating records in certain other objects, and referencing your Medication record as the parent record. Here's the list of objects you can associate to Medication in this way, the type of information they add, and the field they use to reference Medication.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the medication record.	ParentRecordId
MedicinalIngredient	Adds information about the different ingredients used in the medication.	ParentRecordId

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

MedicationChangeEvent (API version 59.0)

Change events are available for the object.

MedicinalIngredient

MedicinalIngredient is a child object of Medication that represents substances or drugs that are used as ingredients in the medication. This object is available in API version 52.0 and later.

MedicationRequest

Represents a request or order for the supply of medication, along with information about how it should be administered. This object is available in API version 51.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AllowedSubstitutionTypeCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The system-defined code that represents the type of substitution that's allowed. This field can't be used if the CanSubstitute field is set to <code>true</code>.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle

Field	Details
CanSubstitute	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether substitution is acceptable. If the value for this field is set to <code>true</code>, then the <code>AllowedSubstitutionTypeCodeId</code> field can't be selected.</p>
CarePlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The care plan related to this medication request. This field is a relationship field.</p> <p>Relationship Name CarePlan</p> <p>Relationship Type Lookup</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CarePlan
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The case associated with the medication request. This field is a relationship field.</p> <p>Relationship Name Case</p> <p>Refers To Case</p>
ClinicalEncounterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The clinical encounter related to the medication request.</p>

Field	Details
Referenced Objects	
	<ul style="list-style-type: none"> • ClinicalEncounter
<hr/>	
ClinicalServiceRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the service request related to the medication request.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • ClinicalServiceRequest
<hr/>	
DispenseInterval	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The minimum interval required between refills.</p>
<hr/>	
DispenseIntervalUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit for that interval.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • UnitOfMeasure
<hr/>	
DispenserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who provides the medication.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
<hr/>	
FillDurationUnitId	<p>Type reference</p>

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unit for the fill duration.
	Referenced Objects <ul style="list-style-type: none"> • UnitOfMeasure
FillQuantityUnitID	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unit of the fill quantity.
	Referenced Objects <ul style="list-style-type: none"> • UnitOfMeasure
InitialFillDuration	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The length of time the first fill is expected to last.
InitialFillQuantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The quantity to be filled in the first dispense.
IsIgnored	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the request should be ignored.
IsSecondaryInformation	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description
	Indicates whether the request is based on information from a secondary source instead of a primary one. If this field is set to <code>true</code> , then the <code>SecondarySourceId</code> field can't be selected.
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The most recent date on which a user viewed this record.
MedicationAdministrationContextId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The system-defined code that represents the setting in which the medication is administered.
	Referenced Objects
	<ul style="list-style-type: none"> CodeSetBundle
MedicationCodeId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The system-defined code that specifies the medication requested. A record can select either a <code>MedicationId</code> or a <code>MedicationCodeId</code> , but not both.
	Referenced Objects
	<ul style="list-style-type: none"> CodeSetBundle
MedicationId	Type reference

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Lookup to the medication record for the medicine requested. A record can select either a MedicationId or a MedicationCodeId, but not both.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> Medication
MedicationRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A shared identifier common to all medication requests that were authorized more or less simultaneously by a single author.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> Identifier
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the medication request record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the medication request record. Available in API version 56.0 and later. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> Group User

Field	Details
PatientId	<p>Type Master-detail reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The person who needs the medicine.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account
PerformerId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who administers the medicine.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • Account • HealthcareProvider • CareRegisteredDevice
PerformerTypeID	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that represents the performer's role. For instance, the cardiologist, neurosurgeon, and so on.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
PrescribedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and optionally the time when the prescription was initially written or authored on.</p>
PrescriptionPeriodEnd	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end date for the prescription's validity.</p>
PrescriptionPeriodStart	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start date for the prescription's validity.</p>
PreviousPrescriptionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reference to previous prescriptions.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • MedicationRequest
Priority	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the priority of the request. Possible values are:</p> <ul style="list-style-type: none"> • ASAP • Routine • Stat • Urgent
ReasonCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The code for why the medicine was requested.</p>

Field	Details
	<p>Referenced Objects</p> <ul style="list-style-type: none"> CodeSetBundle
ReasonReferenceId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reference to the condition or observation that warranted this medicine.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> HealthCondition CareObservation
RefillDuration	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description How long the refill is expected to last.</p>
RefillQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The quantity in each refill.</p>
RefillsAllowed	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of refills that are allowed.</p>
RelatedRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A plan or request that is fulfilled in whole or in part by this medication request.</p>

Field	Details
Referenced Objects	
	<ul style="list-style-type: none"> MedicationRequest
<hr/>	
RequesterId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who raised the request.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> Account HealthcareProvider CareRegisteredDevice
<hr/>	
SecondarySourceId	<p>Type Polymorphic reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the person who gave the information for the request. This field can't be selected if the <code>IsSecondarySource</code> field is set to <code>true</code>.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> Account HealthcareProvider
<hr/>	
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system this record came from.</p>
<hr/>	
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of this record in its source system.</p>
<hr/>	

Field	Details
SourceSystemModified	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date on which this item was last changed in the source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The status of the medication request.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Cancelled • Completed • Draft • Entered-in-Error • On-Hold • Stopped • Unknown
StatusReasonCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The system-defined code that specifies the reason for the status.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle
SubstitutionReasonCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies why a substitution is required.</p> <p>Referenced Objects</p> <ul style="list-style-type: none"> • CodeSetBundle

Field	Details
TherapyDuration	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the overall pattern of the administration of the medication to the patient. For instance, Continuous, Acute, Seasonal.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Continuous • Seasonal • Short Term
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of the request.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Filler Order • Instance Order • Option • Order • Original Order • Plan • Proposal • Reflex Order

Additional Information for MedicationRequest in Other Objects

In addition to creating a record using these fields, you can add more details to your MedicationRequest record by creating records in certain other objects, and referencing your MedicationRequest record as the parent record. Here's the list of objects you can associate to MedicationRequest in this way, the type of information they add, and the field they use to reference MedicationRequest.

Object	Type of Information	Reference Field
Identifier	Associates an identifier value to the medication request.	ParentRecordId
PatientMedicationDosage	Associates dosage-related information for the medication in the medication request record.	ParentRecordId

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[MedicationRequestChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[MedicationRequestFeed](#)

Feed tracking is available for the object.

[MedicationRequestHistory](#)

History is available for tracked fields of the object.

[MedicationRequestOwnerSharingRule \(API version 56.0\)](#)

Sharing rules are available for the object.

[MedicationRequestShare \(API version 56.0\)](#)

Sharing is available for the object.

MemberPlan

Represents details about the insurance coverage for a member or subscriber.

 **Note:** The primary member on the plan is called the subscriber. The other members are dependents.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field Name	Details
Affiliation	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description An affiliation to a government service, such as the army or navy.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The date from which this member plan is effective.</p>
EffectiveTo	<p>Type date</p>

Field Name	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this member plan ceases to be effective.</p>
ExternalIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier used to identify the record outside the Salesforce org.</p>
GroupNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The group number or policy number of the primary member.</p>
IssuerNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reference number for the issuer of the plan.</p>
LastReferencedDate	<p>Type datetime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastVerification	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this plan was last verified.</p>

Field Name	Details
LastViewedDate	<p>Type datetime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
MemberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the member's record.</p>
MemberNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The member's reference number for this plan.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name by which the member knows this plan.</p>
Notes	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Notes about this member plan.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field Name	Details
	Description
	The ID of the user who owns this record.
PayerId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the payer's Account object record.
PayerNetworkId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The payer insurance plan or network that is associated with the patient. This field is a relationship field.
	Relationship Name
	PayerNetwork
	Relationship Type
	Lookup
	Refers To
	HealthcarePayerNetwork
PlanId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Lookup of the Purchaser Plan ID.
PrimaryCarePhysician	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the physician providing primary care under this plan.
PrimarySecondaryTertiary	Type picklist

Field Name	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Whether this plan is the primary, secondary, or tertiary plan.
RelationshipToSubscriber	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The relationship of this member to the plan's subscriber. Valid options are:
	<ul style="list-style-type: none"> • Self • Spouse • Child • Unknown • Other Relationship
SourceSystem	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the system this plan record came from.
SourceSystemIdentifier	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of this plan record on its source system.
SourceSystemModified	Type date
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date on which this plan record was last changed on the source system.
Status	Type picklist

Field Name	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Indicates whether the plan is active.
SubscriberId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the subscriber's record.
VerificationStatus	Type
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The status of the plan's verification. Valid options are:
	<ul style="list-style-type: none"> ● Active - Verified
	<ul style="list-style-type: none"> ● Rejected
	<ul style="list-style-type: none"> ● Not Checked
	<ul style="list-style-type: none"> ● Unknown
	<ul style="list-style-type: none"> ● Inactive

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[MemberPlanChangeEvent \(API version 57.0\)](#)

Change events are available for the object.

[MemberPlanFeed](#)

Feed tracking is available for the object.

[MemberPlanHistory](#)

History is available for tracked fields of the object.

[MemberPlanOwnerSharingRule](#)

Sharing rules are available for the object.

[MemberPlanShare](#)

Sharing is available for the object.

PurchaserPlan

Represents the payer plan that a purchaser makes available to its members and members' dependents.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field Name	Details
Affiliation	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description An affiliation to a government service, such as the army or navy.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this purchaser plan is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this purchaser plan ceases to be effective.</p>
IsVerifiable	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether a benefits verification can be performed on this plan.</p>
LineOfBusiness	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	Description
	<p>The category of insurance policy that the purchaser plan belongs to. For example, whether the plan is a group health insurance, individual health insurance, etc.</p>
	<p>This field is available in API version 64.0 and later.</p>
Name	Type
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	<p>The name of this plan.</p>
Notes	Type
	textarea
	Properties
	Create, Nillable, Update
	Description
	<p>Notes about this payer.</p>
Payer	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The ID of the payer's Account object record.</p>
PlanNumber	Type
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>The plan's reference number.</p>
PlanStatus	Type
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>Indicates whether the plan is active.</p>
PlanType	Type
	picklist

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The type of plan, with the following default options:
	<ul style="list-style-type: none"> • PPO • HMO • Medicare • Medicaid • Workers Comp
ServiceType	Type
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The description of the service type offered by this plan.
SourceSystem	Type
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The name of the system this plan record came from.
SourceSystemIdentifier	Type
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of this plan record on its source system.
SourceSystemModified	Type
	dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date on which this plan record was last changed on the source system.
SponsorType	Type
	picklist

Field Name	Details
	<p>Properties Create, Filter, Group, Nullable, Sort, Update</p>
	<p>Description The type of sponsor for the plan. For example, if it's self-sponsored, government-sponsored, or company-sponsored. This field is available in API version 64.0 and later.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

PurchaserPlanFeed

Feed tracking is available for the object.

PurchaserPlanHistory

History is available for tracked fields of the object.

PurchaserPlanOwnerSharingRule

Sharing rules are available for the object.

PurchaserPlanShare

Sharing is available for the object.

PurchaserPlanChangeEvent

Change data capture is available for this object.

UnitOfMeasure

Represents the unit of measures for care metrics and care observations. This object is available in API version 49.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p>
ConversionFactor	<p>Type double</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The factor or rate that's used to convert this unit of measurement to the base unit.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of this unit of measure.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
Type	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The type of the unit of measure. For example, weight, distance, period.</p>

Field	Details
Sequence	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The sequence number assigned to the unit of measure.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the unit of measure. Possible values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive
UnitCode	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The code for this unit of measure. For example, mm[Hg], mcg/mL, kgs, lbs.</p>
UnitOfMeasureClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The class associated with the unit of measurement. This field is a relationship field.</p> <p>Relationship Name UnitOfMeasureClass</p> <p>Refers To UnitOfMeasureClass</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

UnitOfMeasureChangeEvent (API version 59.0)

Change events are available for the object.

UnitOfMeasureOwnerSharingRule

Sharing rules are available for the object.

UnitOfMeasureShare

Sharing is available for the object.

Provider Relationship Management

Use the Provider Relationship Management data model along with standard Salesforce objects to manage your provider relationships.

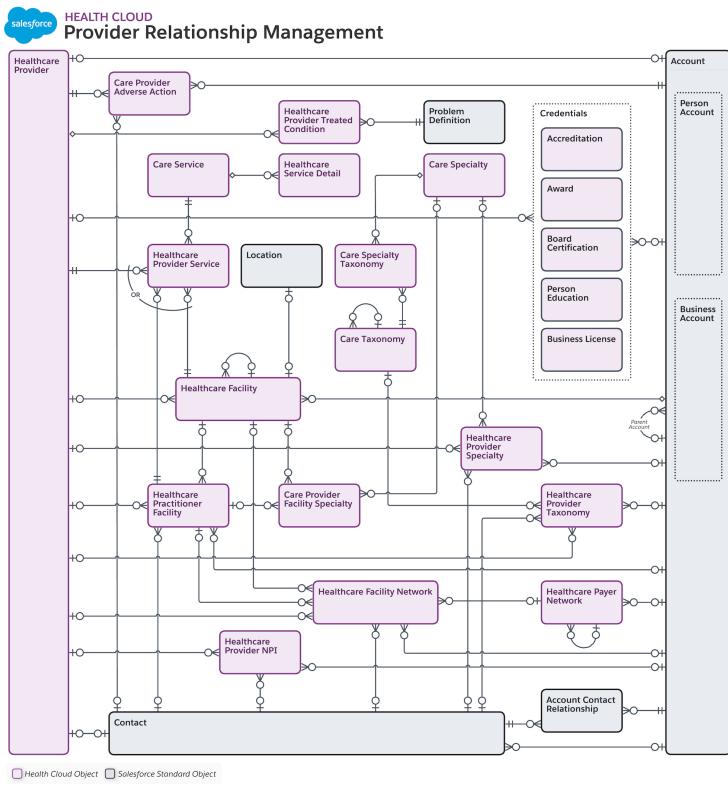
The Provider Relationship Management data model represents the practitioners, facilities, physician relationships, specialties, and organizational hierarchy for your network of providers.

- Physician and organization affiliations, such as hospitals where the physician has attending or admitting privileges
- Practicing locations and specialties offered by a practitioner at a location
- Practice administrators for healthcare facilities
- Operating hours for facilities or practitioner's hours at a particular facility
- Specialty and taxonomy attributes of a practitioner or facility
- National Provider Identifier (NPI) and other provider identifiers
- Insurance payer and plan networks
- Practitioner license, education, board certifications, awards, and accreditation information

Provider information is also represented using existing standard Salesforce objects in addition to objects only available through Health Cloud and Life Sciences Cloud.

- Account: Represents a healthcare facility or location. The account hierarchy represents the way the healthcare system is organized. Other companies, like billing companies for physicians or healthcare facilities are represented as accounts and connected to healthcare facilities or physicians using account-account or account-contact relationships.
- Contact: Represents physicians and other licensed practitioners. Other professionals, such as nurses are represented using a contact record and connected to the physician using the contact-contact relationships.
- Account Contact Relationship: Represents physician and health system business affiliations, such as attending and admitting privileges.
- Person Education: Represents the educational details of a physician or licensed practitioner.
- Identity Document: Represents all identifiers for a practitioner or facility, other than the NPI.
- Location: Represents more details of a healthcare location, such as a clinic.
- Associated Location: Represents the junction between an account and a location.
- Operating Hours: Represents the hours that a facility is open.
- Time Slot: Represents a range of time on a specified day of the week during which healthcare work can be performed. Operating hours consist of one or more time slots.

Provider Relationship Management



For more details and a larger image, visit the [Data Model Gallery](#).

Use Composite API Requests to Import Data for Provider Relationship Cards

If you're setting up provider relationship cards to show practitioner information, you can use Composite API requests to create and link multiple records.

Accreditation

Represents the professional accreditations of a facility. For example, a joint commission accredits a facility as a general acute care hospital.

Award

Represents a person's or organization's professional awards.

BoardCertification

Represents the practitioner's board certifications such as being board-certified in cardiology and cardiovascular disease.

BusinessLicense

Represents the licenses of a party role like healthcare provider or producer.

CareProviderAdverseAction

Captures adverse actions against the provider, such as malpractice lawsuits or revoked licences. This object is available in API version 47.0 and later.

CareProviderFacilitySpecialty

Represents all the specialties that the practitioner provides at a given location. For example, a physician who is board-certified in both spine and neuro may provide spine services at one location and neuro services at another.

[CareProviderSearchableField](#)

This object holds denormalized data from certain fields in the Provider Relationship Management data model. Provider search APIs query this object instead of multiple objects, which improves search performance. This object is available in API version 47.0 and later.

[CareProviderSearchConfig](#)

Represents fields that can appear in provider search results. Use this object to specify fields in arbitrary objects (source) that are made available in the search object (target). This object is available in API version 48.0 and later.

[CareService](#)

Represents a healthcare treatment, service, or procedure offered by a provider, practitioner, or facility. This object is available in API version 59.0 and later.

[CareSpecialty](#)

Represents a listing of provider specialty codes and descriptions. For example, 02 – Physician/General Surgery.

[CareSpecialtyTaxonomy](#)

The junction object between CareSpecialty and CareTaxonomy. This object is available in API version 52.0 and later.

[CareTaxonomy](#)

Represents a static list of taxonomy codes.

[HealthcareFacilityNetwork](#)

Represents a junction object identifying the insurance network that a location or business entity is a part of. Network participation records are also stored in this object.

[HealthcarePayerNetwork](#)

Represents an insurance network group. For example, an insurance company's exclusive provider organization (EPO) plans.

[HealthcarePractitionerFacility](#)

Represents the different locations in which a practitioner provides services.

[HealthcareProvider](#)

Represents business-level details about the healthcare organization or the practitioner.

[HealthcareProviderNpi](#)

Represents identifiers from the National Provider Identifier that are assigned to every facility and licensed practitioner in the United States. Also includes NPI assigned date, primary mailing address on file, and so on.

[HealthcareProviderService](#)

Represents a junction object between a HealthcareService and a HealthcareProvider or HealthcareFacility or HealthcarePractitionerFacility. This object is available in API version 59.0 and later.

[HealthcareProviderSpecialty](#)

Represents specialties for a practitioner or a service provider organization. A provider can have multiple specialties such as anesthesiology and cardiovascular.

[HealthcareProviderTaxonomy](#)

Represents taxonomy or subspecialty codes for a practitioner or facility. A provider or facility can have multiple taxonomies.

[HealthcareServiceDetail](#)

Represents a junction object between a CareService and a CodeSetBundle. For example, this object links a healthcare service such as physical therapy to a set of related codes. This object is available in API version 59.0 and later.

[HlthCareProvTreatedCondition](#)

Represents a junction object between a healthcare provider, facility, or practitioner and a problem definition that's related to a health condition, such as disease or illness. For example, this object links a doctor to the treatment of diabetes, or a facility to the treatment of spinal injuries. This object is available in API version 59.0 and later.

[PersonEducation](#)

Represents information about professional education for a person in a provider role.

[PersonEmployment](#)

Represents information about a person's employment.

[ProviderSearchSyncLog](#)

Represents a log with information about the provider search data sync status of a healthcare provider record. This object is available in API version 49.0 and later.

Use Composite API Requests to Import Data for Provider Relationship Cards

If you're setting up provider relationship cards to show practitioner information, you can use Composite API requests to create and link multiple records.

Usage

You can create records individually by using the Lightning Platform SOAP API or REST API. Or you can use the [Composite resource](#) in REST API to create and link multiple records with a single API call. This approach lets you create 200 records per call.

Example

Let's say we want to add healthcare provider Dr. Scott Kaplan to your records. This example shows how to use a single API call to create `Account`, `Contact`, `HealthcareProvider`, `PersonEducation`, `HealthcareProviderNpi`, `HealthcarePractitionerFacility`, `HealthcareProviderSpeciality`, `HealthcareFacilityNetwork`, and `HealthcareProviderTaxonomy` records with Dr. Scott Kaplan's data. It also shows how to use a composite request to link records using Dr. Kaplan's `contactId` as the `practitionerId`.

In this example, we assume that there are two `Specialty` records with `SpecialtyCode Neurology` and `Cardiology`, a `PayerNetwork` record with code `United Healthcare`, and a `Taxonomy` record with `TaxonomyCode Critical Care`. Setting `allOrNone` to `True` rolls back your request if a single record creation fails.

Execute this example using a composite request:

```
curl https://yourInstance.salesforce.com/services/data/v47.0/composite/ -H "Authorization: Bearer token" -H "Content-Type: application/json" -d "@composite.json"
```

Example request body of the `composite.json` file.

```
{
  "allOrNone" : true,
  "compositeRequest" : [
    {
      "method" : "POST",
      "url" : "/services/data/v47.0/sobjects/Account",
      "referenceId" : "scottKaplanAccount",
      "body" : { "Name" : "Dr. Scott Kaplan" }
    },
    {
      "method" : "POST",
```

```
"url" : "/services/data/v47.0/sobjects/Contact",
"referenceId" : "scottKaplanContact",
"body" : {
    "FirstName" : "Scott",
    "LastName" : "Kaplan",
    "AccountId" : "@{scottKaplanAccount.id}"
}
},
{
"method" : "POST",
"url" : "/services/data/v47.0/sobjects/HealthcareProvider",
"referenceId" : "scottKaplanProvider",
"body" : { "Name" : "Dr. Scott Kaplan",
    "PractitionerId" : "@{scottKaplanContact.id}"
}
},
{
"method" : "POST",
"url" : "/services/data/v47.0/sobjects/PersonEducation",
"referenceId" : "scottKaplanPersonEducation",
"body" : {
    "Name": "Dr. Scott Kaplan",
    "ContactId" : "@{scottKaplanContact.id}"
}
},
{
"method" : "POST",
"url" : "/services/data/v47.0/sobjects/HealthcareProviderNpi",
"referenceId" : "scottKaplanNpi",
"body" : {
    "Name": "Dr. Scott Kaplan",
    "Npi" : "1558444601",
    "PractitionerId" : "@{scottKaplanContact.id}",
    "NpiType" : "Individual"
}
},
{
"method" : "POST",
"url" : "/services/data/v47.0/sobjects/HealthcarePractitionerFacility",
"referenceId" : "scottKaplanPractitionerFacility",
"body" : {
    "Name": "Palo Alto Medical Foundation",
    "PractitionerId" : "@{scottKaplanContact.id}"
}
},
{
"method" : "POST",
"url" : "/services/data/v47.0/sobjects/HealthcareProviderSpecialty",
"referenceId" : "hcProviderSpecialtyRef1",
"body" : {
    "Name": "Cardiology",
    "Specialty" : {
        "SpecialtyCode" : "Cardiology"
    }
},
```

```

        "PractitionerId" : "@{scottKaplanContact.id}"
    }
},
{
"method" : "POST",
"url" : "/services/data/v47.0/sobjects/HealthcareProviderSpecialty",
"referenceId" : "scottKaplanSpeciality2",
"body" : {
    "Name": "Neurology",
    "Specialty" : {
        "SpecialtyCode" : "Neurology"
    },
    "PractitionerId" : "@{scottKaplanContact.id}"
}
},
{
"method" : "POST",
"url" : "/services/data/v47.0/sobjects/HealthcareFacilityNetwork",
"referenceId" : "scottKaplanFacilityNetwork",
"body" : {
    "Name": "United Healthcare",
    "PayerNetwork" : {
        "Code" : "United Healthcare"
    },
    "PractitionerId" : "@{scottKaplanContact.id}"
}
},
{
"method" : "POST",
"url" : "/services/data/v47.0/sobjects/HealthcareProviderTaxonomy",
"referenceId" : "scottKaplanTaxonomy",
"body" : {
    "Name": "Critical care",
    "Taxonomy" : {
        "TaxonomyCode" : "Critical Care"
    },
    "PractitionerId" : "@{scottKaplanContact.id}"
}
}
]
}

```

Here's a sample response:

```
{
  "compositeResponse": [
    {
      "body": {
        "id": "001RM000004MkdJYAS",
        "success": true,
        "errors": []
      },
      "httpHeaders": {
        "Location": "/services/data/v47.0/sobjects/Account/001RM000004MkdJYAS"
      }
    }
  ]
}
```

```

        },
        "httpStatusCode": 201,
        "referenceId": "scottKaplanAccount"
    }, {
        "body": {
            "id": "003RM000006Ev2AYAS",
            "success": true,
            "errors": []
        },
        "httpHeaders": {
            "Location": "/services/data/v47.0/sobjects/Contact/003RM000006Ev2AYAS"
        },
        "httpStatusCode": 201,
        "referenceId": "scottKaplanContact"
    }, {
        "body": {
            "id": "0bYRM0000004CAG2A2",
            "success": true,
            "errors": []
        },
        "httpHeaders": {
            "Location":
                "/services/data/v47.0/sobjects/HealthcareFacilityNetwork/0bYRM0000004CAG2A2"
        },
        "httpStatusCode": 201,
        "referenceId": "scottKaplanFacilityNetwork"
    }, {
        "body": {
            "id": "0bPRM0000004CAB2A2",
            "success": true,
            "errors": []
        },
        "httpHeaders": {
            "Location":
                "/services/data/v47.0/sobjects/HealthcareProviderTaxonomy/0bPRM0000004CAB2A2"
        },
        "httpStatusCode": 201,
        "referenceId": "scottKaplanTaxonomy"
    }]
}
}

```

In this example, Account ID 001RM000004MkdJYAS and Contact ID 0bYRM0000004CAG2A2 were created on execution. The same Contact ID is used as the PractitionerId where applicable.

Accreditation

Represents the professional accreditations of a facility. For example, a joint commission accredits a facility as a general acute care hospital.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Healthcare facility (Account) that this accreditation is associated with.</p>
AccreditationRating	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Rating system used by the accrediting body.</p>
AccreditingBody	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The organization that provided the accreditation.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this accreditation is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this accreditation is no longer effective.</p>
HealthcareFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The healthcare facility associated with the accreditation.</p> <p>This field is available in API version 62.0 and later when Site Management (Pilot) is enabled.</p> <p>This field is a relationship field.</p>
	<p>Relationship Name</p> <p>HealthcareFacility</p>
	<p>Refers To</p> <p>HealthcareFacility</p>
LastFullSurveyDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Date of the last full survey completed by accrediting body.</p>
LastOnsiteSurveyDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Date that accrediting body was last onsite.</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type</p> <p>string</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the accreditation.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Practitioner that this accreditation is associated with.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Accreditation status.</p>
SubType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Subtype of the accreditation.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of accreditation.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[AccreditationChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[AccreditationFeed](#)

Feed tracking is available for the object.

[AccreditationHistory](#)

History is available for tracked fields of the object.

[AccreditationOwnerSharingRule](#)

Sharing rules are available for the object.

[AccreditationShare](#)

Sharing is available for the object.

Award

Represents a person's or organization's professional awards.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(),
query(), retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description ID of the organization receiving the award. This field is a relationship field.</p>
	<p>Relationship Name Account</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To Account</p>
AwardDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date award was received.</p>
AwardedBy	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the issuing organization.</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Person who received the award and is listed as a contact. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
HealthcareProviderId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Healthcare provider that this award is associated with. This field is a relationship field.</p> <p>Relationship Name HealthcareProvider</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareProvider</p>
Identifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Issuing organization's identifier for the award recipient.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Award name.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who owns this record. This field is a relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Award status. Example values:</p> <ul style="list-style-type: none"> • Inactive • Revoked • Draft • Verified
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the person who received the award and is listed as a user. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name User</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Current award status. Example values:</p> <ul style="list-style-type: none"> • Authorized • Pending • Unverified
VerifiedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Award was validated on this date.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[AwardChangeEvent \(API version 61.0\)](#)

Change events are available for the object.

[AwardFeed on page 1429](#)

Feed tracking is available for the object.

[AwardHistory on page 1434](#)

History is available for tracked fields of the object.

[AwardOwnerSharingRule on page 1436](#)

Sharing rules are available for the object.

[AwardShare on page 1438](#)

Sharing is available for the object.

BoardCertification

Represents the practitioner's board certifications such as being board-certified in cardiology and cardiovascular disease.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Account that this healthcare provider is associated with.</p>
BoardName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the organization providing the board certification.</p>
CertificationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of certification.</p>
CurrentCertificationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of most recent board certification.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this certification is effective.</p>

Field	Details
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this certification is no longer effective.</p>
ExpirationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Update</p> <p>Description Expiration date of the board certification.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the provider.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The ID of the user who owns this record.</p>
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Practitioner that this certification is associated with.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of the certification.</p>
TerminationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Termination date for this provider.</p>
TerminationReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	Reason for termination.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

BoardCertificationChangeEvent (API version 60.0)

Change events are available for the object.

BoardCertificationFeed

Feed tracking is available for the object.

BoardCertificationHistory

History is available for tracked fields of the object.

BoardCertificationOwnerSharingRule

Sharing rules are available for the object.

BoardCertificationShare

Sharing is available for the object.

BusinessLicense

Represents the licenses of a party role like healthcare provider or producer.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the organization holding the license. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
ComplianceScope	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The scope of compliance for the business license. Possible values are:</p> <ul style="list-style-type: none"> • Address • Jurisdiction • StateDistributorLicense <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the person who holds the license and is listed as a contact. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Refers To Contact</p>
ContactPointAddressId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the person who holds the license and is listed as a contact. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name ContactPointAddress</p> <p>Refers To ContactPointAddress</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Description of the license.</p>
HealthCareFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID associated with the healthcare facility. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name HealthCareFacility</p> <p>Refers To HealthcareFacility</p>
HealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the Healthcare Provider who holds this license. This field is a relationship field. This field is a lookup to HealthcareProvider.</p> <p>Relationship Name HealthcareProvider</p> <p>Refers To HealthcareProvider</p>
Identifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Issuer's ID for the licensee. This field is unique within your organization.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the license is active (true) or not (false). The default value is false.</p>

Field	Details
IsLicenseValidated	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the business license is valid (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. This field is a calculated field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
IsPrimaryLicense	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if the license is the primary license. The default value is <code>false</code>.</p>
IssueDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date the license or certification was issued.</p>
Issuer	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description License issuer's name.</p>
JurisdictionCountry	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Country where license is valid.</p>
JurisdictionOther	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	Name of other jurisdiction.
JurisdictionState	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	State where license is valid.
JurisdictionType	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	Jurisdiction for the license.
	Possible values are:
	<ul style="list-style-type: none"> • COUNTRY • COUNTY • PROVINCE • STATE
	The default value is STATE.
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last referenced a record related to this record. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.

Field	Details
LicenseClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The class that the distributor's license belongs to.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • APN – Advanced Practice Nurse • LPN – Licensed Practical Nurse • MD – Medical Doctor (MD) • PC – Professional Counselor • PT – Physical Therapist
LicenseNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of the license.</p>
LicenseValidatedIcon	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The icon used to indicate the validation status of the business license. This field is a calculated field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
LineOfAuthority	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The line of authority that the distributor is licensed for.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Accident & Health or Sickness • Casualty • Property

Field	Details
	<p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the business or professional license.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PeriodEnd	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description License's expiration date.</p>
PeriodStart	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description License's effective start date.</p>
ResidenceStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Residence status of the producer.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Non-resident • Resident <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
SourceSystemUpdateDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the date when the record was last updated in the source system.</p>
StateDstrLicenseCategory	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The State Distributor License category for the business license.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • CategoryII—Category II • CategoryIII—Category III • LimitedCategoryII—Limited Category II • LimitedCategoryIII—Limited Category III <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Current status of the license.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Draft • Inactive • Revoked • Verified <p>The default value is <code>Inactive</code>.</p>

Field	Details
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The person who holds the license and is listed as a user. This field is a relationship field.</p> <p>Relationship Name User</p> <p>Refers To User</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Current status for the license. Possible values are:<ul style="list-style-type: none">• AuthorizedThe default value is Authorized.</p>
VerifiedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description License was validated on this date.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[BusinessLicenseFeed](#)

Feed tracking is available for the object.

[BusinessLicenseHistory](#)

History is available for tracked fields of the object.

[BusinessLicenseOwnerSharingRule](#)

Sharing rules are available for the object.

[BusinessLicenseShare](#)

Sharing is available for the object.

CareProviderAdverseAction

Captures adverse actions against the provider, such as malpractice lawsuits or revoked licences. This object is available in API version 47.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account this adverse action is associated with.</p>
AccreditationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The accreditation that might be affected by this adverse action.</p>
ActionIssueDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the adverse action was issued by the regulatory authority.</p>
ActionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of adverse action that is being taken. Possible values are:</p> <ul style="list-style-type: none"> • <code>AdministrativeDisciplinaryAction</code> • <code>CourtOrder</code> • <code>FelonyConviction</code>

Field	Details
	<ul style="list-style-type: none"> • MalpracticeJudgement • MisdemeanorConviction • ProbationaryLicense
BoardCertificationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The board certification that might be affected by this adverse action</p>
BusinessLicenseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The business license that might be affected by this adverse action.</p>
CaseNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The case number associated with this adverse action.</p>
CourtSentence	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The final sentence by the governing court, if any.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Summary of the adverse action.</p>
EffectiveFrom	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this Adverse Action is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this Adverse Action is no longer effective.</p>
HealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description HealthcareProvider that this Adverse Action is associated with</p>
IncidentDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the incident took place that resulted in the adverse action.</p>
IncidentReportedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the incident was reported to the regulatory authority.</p>
InsurancePolicyNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of the insurance policy associated with an adverse action.</p>
InsuranceProviderName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the insurance provider that issued the policy associated with an adverse action.</p>
Jurisdiction	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the court or government body that issued the legal determination.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the adverse action that is being taken.</p>
PenaltyAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The penalty amount imposed for an adverse action.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Time stamp that indicates when the current user last viewed this record.</p>
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The practitioner this adverse action record is associated with.</p>
RegulatoryBody	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the regulatory authority to which the incident was reported.</p>
RegulatoryBodyType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of regulatory authority to which the incident was reported.</p>
ReportingEntity	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the entity or organization that reported this action.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Unique record ID in source system.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the license or certification, such as "revoked" or "suspended." Possible values are:</p> <ul style="list-style-type: none"> • Active • Revoked • Suspended

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareProviderAdverseActionChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CareProviderAdverseActionFeed](#)

Feed tracking is available for the object.

[CareProviderAdverseActionHistory](#)

History is available for tracked fields of the object.

CareProviderFacilitySpecialty

Represents all the specialties that the practitioner provides at a given location. For example, a physician who is board-certified in both spine and neuro may provide spine services at one location and neuro services at another.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Facility associated with this provider facility specialty record.</p>
ActiveResearchStudyCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The count of active research studies being performed by the care provider for the specialty. This field is available in API version 62.0 and later when Site Management (Pilot) is enabled.</p>
CompletedResearchStudyCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The count of research studies completed by the care provider for the specialty. This field is available in API version 62.0 and later when Site Management (Pilot) is enabled.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this record is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this record is no longer effective.</p>
HealthcareFacilityId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the healthcare facility associated with the specialty. This field is available in API version 62.0 and later when Site Management (Pilot) is enabled. This field is a relationship field.</p> <p>Relationship Name HealthcareFacility</p> <p>Refers To HealthcareFacility</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active.</p>
IsPrimarySpecialty	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this specialty is the practitioner's primary specialty at this facility, or the facility's primary specialty.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the specialty provided at this provider facility.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
PractitionerFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Practitioner facility associated with this provider facility specialty record.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>
SpecialtyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies the specialty associated with this provider facility specialty record</p>

Field	Details
SpecialtyRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Role of the specialty for the provider or practitioner.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[CareProviderFacilitySpecialtyChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CareProviderFacilitySpecialtyFeed](#)

Feed tracking is available for the object.

[CareProviderFacilitySpecialtyHistory](#)

History is available for tracked fields of the object.

[CareProviderFacilitySpecialtyOwnerSharingRule](#)

Sharing rules are available for the object.

[CareProviderFacilitySpecialtyShare](#)

Sharing is available for the object.

CareProviderSearchableField

This object holds denormalized data from certain fields in the Provider Relationship Management data model. Provider search APIs query this object instead of multiple objects, which improves search performance. This object is available in API version 47.0 and later.

Supported Calls

`delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`

Fields

Field	Details
Address	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description Specified in <code>Account.ShippingAddress</code>.</p>
CertificationType	<p>Type textarea</p>

Field	Details
	<p>Properties Nillable</p> <p>Description Specified in <code>BoardCertification.CertificationType</code>.</p> <p> Note: <code>BoardCertification.HealthcareProvider</code> must also be specified.</p>
Condition	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description The conditions represented by the problem definitions that the healthcare provider offers treatment for.</p>
EducationLevel	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description Specified in <code>PersonEducation.EducationLevel</code>. Not applicable for a facility.</p> <p> Note: <code>Degree</code>, <code>Status</code>, <code>DegreeEarner</code>, and <code>HealthCareProvider</code> must also be specified.</p>
FacilityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Represents the facility with which the practitioner is associated. Use for practitioner records only. If the provider is a facility, set this field value to null.</p>
FacilityName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Specified in <code>Account.Name</code>.</p>
FacilityPhone	<p>Type phone</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description Facility's main contact phone number. Specified in <code>Account.Phone</code>.</p>
IsAcceptingNewPatients	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the practitioner is accepting new patients. Specified in <code>HealthcareFacilityNetwork.PanelStatus</code>, where <code>PanelStatus = Open</code> indicates <i>Accepting New Patients</i> = <code>true</code>. The default value is <code>false</code>.</p> <p> Note: This field applies only to practitioners, not facilities.</p>
IsUpdateNeeded	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether a change to data in a healthcare provider record or a related record requires a data sync (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LanguagesSpoken	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description The languages spoken by the person. Specified in <code>PersonLanguage.Language</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LicenseJurisdictionCountry	<p>Type String</p> <p>Properties Filter, Nillable</p> <p>Description The country where the license of the Healthcare Provider is registered. Specified in <code>BusinessLicense.JurisdictionCountry</code>. This field is available in API version 57.0 or later.</p>
LicenseJurisdictionRegion	<p>Type String</p> <p>Properties Filter, Nillable</p> <p>Description The region where the license of the Healthcare Provider is registered. Specified in <code>BusinessLicense.JurisdictionRegion</code>. This field is available in API version 57.0 or later.</p>
LicenseJurisdictionState	<p>Type String</p> <p>Properties Filter, Nillable</p> <p>Description The state where the license of the Healthcare Provider is registered. Specified in <code>BusinessLicense.JurisdictionState</code>. This field is available in API version 57.0 or later.</p>
LicenseName	<p>Type String</p> <p>Properties Filter, Nillable</p> <p>Description The name of the license associated with the Healthcare Provider. Specified in <code>BusinessLicense.Name</code>. This field is available in API version 57.0 or later.</p>

Field	Details
LicenseStatus	<p>Type String</p> <p>Properties Filter, Nillable</p> <p>Description Specifies the status of the license given to the Healthcare Provider. Specified in <code>BusinessLicense.Status</code>.</p> <p>This field is available in API version 57.0 or later.</p>
NationalProviderIdentifier	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Provider's unique NPI number. Specified in <code>HealthcareProviderNpi.Account</code> for a facility, and <code>HealthcareProviderNpi.Practitioner</code> for a practitioner.</p>
OperatingHoursId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Identifies a set of operating hours for this practitioner at this facility. Specified in <code>Account.OperatingHoursId</code> for a facility, or in <code>HeathcarePractitionerFacility.OperatingHoursId</code> for a practitioner-facility combination.</p>
PhotoUrl	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The URL for a photograph of the practitioner. Field is synced based on <code>Account-PhotoUrl</code> or <code>Contact.PhotoUrl</code>.</p>
PlanType	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description The type of plan, with the following default options:</p> <ul style="list-style-type: none"> • PPO

Field	Details
	<ul style="list-style-type: none"> • HMO • Medicare • Medicaid • Workers Comp <p>Specified in <code>HealthcareFacilityNetwork.Account</code> for a facility, or <code>HealthcareFacilityNetwork.PractitionerFacility</code> for a practitioner-facility combination.</p> <p> Note: <code>HealthcareFacilityNetwork.Name</code> and <code>PayerNetwork.Name</code> must also be populated.</p>
ProviderGender	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The gender of the HealthcareProvider. Specified in <code>Contact.Gender</code> or <code>Account.PersonGender</code>.</p>
ProviderId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Lookup to <code>HealthcareProvider</code>. Represents a facility or practitioner-facility combination.</p>
ProviderName	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description Name of the provider. Specified in <code>Account</code> for a facility, or in <code>Contact</code> for a practitioner.</p>
ProviderType	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Type of provider or facility. For example, a pharmacist or an ambulatory care facility. Specified in <code>HealthCareProvider.ProviderType</code>.</p>

Field	Details
Service	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description The list of services that the healthcare provider offers.</p>
ServiceCode	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description The list of codes associated with the service that the healthcare provider offers.</p>
Specialty	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description Specialty associated with the provider. Specified in <code>CareSpecialty.SpecialtyType</code>. For a facility, the Specialty is sourced from a Care Provider Facility Specialty record, which connects a facility (<code>CareProviderFacilitySpecialty.AccountId</code>) to a care specialty (<code>CareProviderFacilitySpecialty.SpecialtyId</code>). For a practitioner, the Specialty is sourced from a Care Provider Facility Specialty record, which connects a Healthcare Practitioner Facility record (<code>CareProviderFacilitySpecialty.PractitionerFacilityId</code>) to a care specialty (<code>CareProviderFacilitySpecialty.SpecialtyId</code>). The Healthcare Practitioner Facility record then connects the facility (<code>HealthcarePractitionerFacility.AccountId</code>) to a practitioner (<code>HealthcarePractitionerFacility.PractitionerId</code>). All source records must be active.</p>
SubSpecialty	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description Provider's subspecialty. Specified in <code>HealthcareProviderTaxonomy.TaxonomyType</code>. Not valid for a practitioner-facility combination.</p> <p> Note: <code>Taxonomy.TaxonomyType</code> must also be specified.</p>

Field	Details
SyncLogRecord	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The provider search sync log record that shows the data sync status of a healthcare provider record.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[CareProviderSearchableFieldChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

CareProviderSearchConfig

Represents fields that can appear in provider search results. Use this object to specify fields in arbitrary objects (source) that are made available in the search object (target). This object is available in API version 48.0 and later.

Supported Calls

create(), delete(), describeSObjects(), query(), retrieve(), update(), upsert()

Fields

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org.</p> <p> Note: Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this configuration is active.</p>

Field	Details
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language that the care provider search uses.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MappedObject	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Indicates mapped objects.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • HealthcarePractitionerFacility • HealthcareProvider
MasterLabel	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The label for the care provider.</p>
SourceField	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the field that is copied to the target object.</p>
TargetField	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the field to copy the data to.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

CareProviderSearchConfigChangeEvent (API version 60.0)

Change events are available for the object.

CareService

Represents a healthcare treatment, service, or procedure offered by a provider, practitioner, or facility. This object is available in API version 59.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description
	The description of the healthcare service.
IsAppointmentRequired	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether an appointment is required for access to this service (<code>true</code>) or not required (<code>false</code>).
	The default value is <code>false</code> .
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.
Name	Type string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	Required.
	The name of the healthcare service offered by the provider.
OwnerId	Type reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	<p>Description The ID of the owner of the record. This field is a polymorphic relationship field.</p>
	<p>Relationship Name Owner</p>
	<p>Relationship Type Lookup</p>
	<p>Refers To Group, User</p>
ReferralMethods	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the referral method for the service.</p>
ServiceProvision	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the conditions under which the service is provided. Possible values are:</p> <ul style="list-style-type: none"> • Free • Discount Available • Fees Apply

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

CareServiceHistory

History is available for tracked fields of the object.

CareServiceOwnerSharingRule

Sharing rules are available for the object.

CareServiceShare

Sharing is available for the object.

CareSpecialty

Represents a listing of provider specialty codes and descriptions. For example, 02 – Physician/General Surgery.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of the specialty.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this specialty is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this specialty is no longer effective.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup Sort, Update</p> <p>Description Name of the specialty master record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
SpecialtyCode	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Code for the specialty.</p>
SpecialtyType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of care specialty.</p>
SpecialtyUsage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates whether this specialty is related to the practitioner, the organization, or both.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareSpecialtyChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[CareSpecialtyFeed](#)

Feed tracking is available for the object.

[CareSpecialtyHistory](#)

History is available for tracked fields of the object.

[CareSpecialtyOwnerSharingRule](#)

Sharing rules are available for the object.

[CareSpecialtyShare](#)

Sharing is available for the object.

CareSpecialtyTaxonomy

The junction object between CareSpecialty and CareTaxonomy. This object is available in API version 52.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareSpecialtyId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The care specialty associated with a care specialty taxonomy. This is a relationship field.</p> <p>Relationship Name CareSpecialty</p> <p>Relationship Type Lookup</p> <p>Refers To CareSpecialty</p>
CareTaxonomyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The care taxonomy associated with a care specialty taxonomy. This is a relationship field.</p> <p>Relationship Name CareTaxonomy</p> <p>Relationship Type Lookup</p> <p>Refers To CareTaxonomy</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The system-generated name of the record.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareSpecialtyTaxonomyFeed on page 1429](#)

Feed tracking is available for the object.

[CareSpecialtyTaxonomyHistory on page 1434](#)

History is available for tracked fields of the object.

[CareSpecialtyTaxonomyChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

CareTaxonomy

Represents a static list of taxonomy codes.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of the taxonomy.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The date from which this taxonomy is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this taxonomy is no longer effective.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the taxonomy master record.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
ParentTaxonomyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent taxonomy associated with a care taxonomy. This is a relationship field.</p> <p>Relationship Name ParentTaxonomy</p> <p>Relationship Type Lookup</p> <p>Refers To CareTaxonomy</p>
TaxonomyCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Code for the taxonomy.</p>
TaxonomyType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of taxonomy.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[CareTaxonomyChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CareTaxonomyFeed](#)

Feed tracking is available for the object.

CareTaxonomyHistory

History is available for tracked fields of the object.

HealthcareFacilityNetwork

Represents a junction object identifying the insurance network that a location or business entity is a part of. Network participation records are also stored in this object.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Account associated with this facility network.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Description of the facility network.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this facility network is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this facility network is no longer effective.</p>

Field	Details
GenderRestriction	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates whether this facility network only applies to male or female patients or members instead of all patients or members.</p>
HealthcareFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description References the HealthcareFacility record associated with the network. Use this field if the associated provider is a business account. This is a relationship field.</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareFacility</p>
HealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Healthcare provider associated with this facility network.</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareProvider</p>
HighestValidAge	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the highest age of patient that this facility network is applicable for.</p>
IsActive	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LowestValidAge	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the lowest age of patient that this facility network is applicable for.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the facility network record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>

Field	Details
PanelLimit	<p>Type double</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description Indicates the maximum number of patients in the practitioner's panel for this payer network and practitioner location.</p>
PanelStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Indicates whether the practitioner is accepting new patients based on the status of their patient panel.</p>
PayerNetworkId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Payer network associated with this facility network.</p>
PractitionerFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Practitioner facility associated with this facility network. Use this field if the provider associated with the network is an individual practitioner.</p>
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The individual practitioner associated with the facility network.</p>
ProviderNetworkContractId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p>

Field	Details
	<p>Description Provider network contract associated with this facility network This is a relationship field.</p> <p>Relationship Type Lookup</p> <p>Refers To ProviderNetworkContract</p>
ProviderNetworkTierId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Provider network tier associated with this facility network. This is a relationship field.</p> <p>Relationship Type Lookup</p> <p>Refers To ProviderNetworkTier</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[HealthcareFacilityNetworkChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[HealthcareFacilityNetworkFeed](#)

Feed tracking is available for the object.

HealthcareFacilityNetworkHistory

History is available for tracked fields of the object.

HealthcareFacilityNetworkOwnerSharingRule

Sharing rules are available for the object.

HealthcareFacilityNetworkShare

Sharing is available for the object.

HealthcarePayerNetwork

Represents an insurance network group. For example, an insurance company's exclusive provider organization (EPO) plans.

Supported Calls

`create(), delete(), describeLayout(), describesObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
Code	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description Code representing the payer network.
Description	Type textarea Properties Create, Nillable, Update Description Description of the payer network.
EffectiveFrom	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date from which this payer network is effective.
EffectiveTo	Type date Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	The date on which this payer network is no longer effective.
IsActive	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the record is active.
LastReferencedDate	Type dateTime
	Properties
	Filter, Nullable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nullable, Sort
	Description
	The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LineofBusiness	Type picklist
	Properties
	Create, Filter, Group, Nullable, Restricted picklist, Sort, Update
	Description
	Specifies the line of business supported by this payer network.
	Possible values are:
	<ul style="list-style-type: none"> • Commercial for Groups • Commercial for Individuals • Exchange • Medicaid • Medicare
Name	Type string

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the payer network.</p>
NetworkType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of network, such as HMO, PPO, or EPO.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParentPayerNetworkId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent healthcare payer network associated with this payer network. This is a relationship field.</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcarePayerNetwork</p>
PayerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account associated with the payer network. This is a relationship field.</p> <p>Relationship Name Payer</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID of an external record on its source system.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[HealthcarePayerNetworkChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[HealthcarePayerNetworkFeed](#)

Feed tracking is available for the object.

[HealthcarePayerNetworkHistory](#)

History is available for tracked fields of the object.

[HealthcarePayerNetworkOwnerSharingRule](#)

Sharing rules are available for the object.

[HealthcarePayerNetworkShare](#)

Sharing is available for the object.

HealthcarePractitionerFacility

Represents the different locations in which a practitioner provides services.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Account associated with this practitioner facility. This is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this practitioner facility is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this practitioner facility is no longer effective.</p>
GenderRestriction	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Indicates whether physician sees patients of a specific gender.</p>
HealthcareFacilityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Healthcare facility associated with this healthcare practitioner facility.</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareFacility</p>
HealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Healthcare provider associated with this healthcare practitioner facility. This is a relationship field.</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareProvider</p>
HighestValidAge	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The highest age of patients that the practitioner sees at this facility</p>
InitialStartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date the practitioner started at this facility.</p>

Field	Details
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active.</p>
IsDirectoryPrint	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this facility is displayed in an online or printed directory.</p>
IsPrimaryCarePhysician	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the practitioner provides primary care services at this facility.</p>
IsPrimaryFacility	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the facility is the primary facility for the practitioner.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
LowestValidAge	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The lowest age of patients that the practitioner sees at this facility.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the practitioner facility record.</p>
OperatingHoursId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies the operating hours for this practitioner at this facility. This is a relationship field.</p> <p>Relationship Name OperatingHours</p> <p>Relationship Type Lookup</p> <p>Refers To OperatingHours</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the practitioner associated with this facility. This is a relationship field.</p> <p>Relationship Name Practitioner</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
ServiceTerritoryMember	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The service territory member associated with the record.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID of an external record on its source system.</p>

Field	Details
TerminationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date the practitioner stopped working at this facility.</p>
TerminationReasonCode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reason the practitioner facility is no longer current.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[HealthcarePractitionerFacilityFeed](#)

Feed tracking is available for the object.

[HealthcarePractitionerFacilityHistory](#)

History is available for tracked fields of the object.

[HealthcarePractitionerFacilityOwnerSharingRule](#)

Sharing rules are available for the object.

[HealthcarePractitionerFacilityShare](#)

Sharing is available for the object.

HealthcareProvider

Represents business-level details about the healthcare organization or the practitioner.

Special Access Rules

In Life Sciences Cloud, the HealthCareProvider object and its fields are used by the Account Management and the Segmentation feature areas. This topic lists fields used in both features.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AbbreviatedName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the abbreviated name of the Japanese healthcare organization (HCO) for INS-DOC records. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Account that this healthcare provider is associated with. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
AssociatedSampleLimit	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The JSON comprising the list of Sample Limits for the HealthcareProvider record. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
CaqhIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description This field is unique within your organization. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
DataChangeComments	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Captures comments explaining the reasons or context for changes made to the data. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
DoesDispenseMedication	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the account dispenses medication. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date from which the provider becomes effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the date from which the provider is no longer effective.</p>
EhrSystem	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Name of the EHR system used at this facility or organization.</p>
HasCarrierContract	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	Description
	<p>Indicates whether the provider's contract follows a CMS model MA contract amendment, based on Centers for Medicare and Medicaid Services (CMS) guidelines.</p>
	<p>The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
HasSalesDataRestriction	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Indicates whether access to the sales data about the healthcare provider is restricted.</p>
	<p>The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
InitialStartDate	Type
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	<p>Specifies the date when the facility first became operational or the practitioner first began practicing.</p>
IsNotSearchable	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Indicates whether the provider is excluded from search results.</p>
	<p>The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
IsPrivacyLawEnabled	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	<p>Indicates whether the privacy law regulations are enabled.</p>
	<p>The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Field	Details
IsSpeaker	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the provider is designated as a speaker for engagement. The default value is <code>false</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referenced a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the provider.</p>
OperatingCountryCode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the country code of the country to which the account belongs. Possible values are:</p> <ul style="list-style-type: none"> • US <p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentOrganizationAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the ID of the parent account, used to establish the account hierarchy. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name ParentOrganizationAccount</p> <p>Refers To Account</p>
PhoneticName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the Japanese phonetic name, applicable to both HCP and HCO, which is used for sorting and text-based searches. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
PhoneticName2	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the Japanese phonetic name, applicable to both HCP and HCO, which is used for sorting and text-based searches. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Field	Details
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The practitioner that this healthcare provider record is associated with. This field is a relationship field.</p> <p>Relationship Name Practitioner</p> <p>Refers To Contact</p>
ProfessionalDesignation	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the professional designation of the healthcare professional. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProfessionalTitle	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the professional title of the healthcare professional. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProviderClass	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The class of facility, such as an IPA, medical group, or solo practitioner. Possible values are:</p> <ul style="list-style-type: none"> • IPA • Medical Group • Solo Practitioner

Field	Details
ProviderFullName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The full name of the healthcare provider. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ProviderPhotoId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Content Document file that is a photo of the Healthcare Provider. This field is a relationship field.</p> <p>Relationship Name ProviderPhoto</p> <p>Relationship Type Lookup</p> <p>Refers To ContentDocument</p>
ProviderType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of provider or facility. For example, pharmacist or ambulatory care facility. Possible values are:</p> <ul style="list-style-type: none"> • Ambulatory Care • Dentist • Hospital • Laboratory • Medical Doctor • Pharmacist • Pharmacy
ReferredByContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Specifies the provider who originated the referral. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name ReferredByContact</p> <p>Refers To Contact</p>
RelatedHealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the HCP account associated with the INS-DOC. This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name RelatedHealthcareProvider</p> <p>Refers To HealthcareProvider</p>
RelatedUserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The User record that relates to the Healthcare Provider record. This field is a relationship field.</p> <p>Relationship Name RelatedUser</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
SalesDataRstrcEffectiveDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Specifies the date when the sales data restriction becomes effective. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
SourceSystem	<p>Type string</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The system from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The ID of the system from which the record was sourced. This field is unique within your organization</p>
SourceSystemModifiedDate	<p>Type date</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description Specifies the date when the record was last updated in the source system</p>
Status	<p>Type picklist</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description Specifies the status of the provider.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Active • Inactive • Pending
	<p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Field	Details
TerminationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Termination date for this provider.</p>
TerminationReason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reason for termination.</p>
TotalLicensedBeds	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Total number of licensed beds at this facility, if applicable.</p>
WrittenName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the Chinese character name of the organization, applicable only to healthcare professionals (HCPs), which is required for INS-DOC records. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[HealthcareProviderChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[HealthcareProviderFeed](#)

Feed tracking is available for the object.

[HealthcareProviderHistory](#)

History is available for tracked fields of the object.

HealthcareProviderOwnerSharingRule

Sharing rules are available for the object.

HealthcareProviderShare

Sharing is available for the object.

HealthcareProviderNpi

Represents identifiers from the National Provider Identifier that are assigned to every facility and licensed practitioner in the United States. Also includes NPI assigned date, primary mailing address on file, and so on.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the facility that this NPI belongs to.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this NPI is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this NPI is no longer effective.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates whether the record is active.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Practitioner or facility name as listed in the NPI database.</p>
Npi	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Ten-digit identifier for a provider from the National Plan and Provider Enumeration System.</p>
NpiType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Identifies whether the NPI is for an individual or an organization.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the practitioner that this NPI belongs to.</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the system from which the record was sourced.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[HealthcareProviderNpiChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[HealthcareProviderNpiFeed](#)

Feed tracking is available for the object.

[HealthcareProviderNpiHistory](#)

History is available for tracked fields of the object.

[HealthcareProviderNpiOwnerSharingRule](#)

Sharing rules are available for the object.

[HealthcareProviderNpiShare](#)

Sharing is available for the object.

HealthcareProviderService

Represents a junction object between a HealthcareService and a HealthcareProvider or HealthcareFacility or HealthcarePractitionerFacility. This object is available in API version 59.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareServiceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The ID of the healthcare service that is offered. This field is a relationship field.</p> <p>Relationship Name CareService</p> <p>Relationship Type Lookup</p> <p>Refers To CareService</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date the Healthcare Provider or Healthcare Facility or Healthcare Practitioner Facility began offering this service.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date the Healthcare Provider or Healthcare Facility or Healthcare Practitioner Facility stopped offering this service.</p>

Field	Details
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this offering is active (<code>true</code>) or not active (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of this association between a Healthcare Service and a Healthcare Provider or Healthcare Facility or Healthcare Practitioner Facility.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p>

Field	Details
	Relationship Type Lookup
	Refers To Group, User
ProviderId	Type reference Properties Create, Filter, Group, Sort, Update Description Required. The ID of the Healthcare Provider or Healthcare Facility or Healthcare Practitioner Facility that offers this service. This field is a polymorphic relationship field. Relationship Name Provider Relationship Type Lookup Refers To HealthcareFacility, HealthcarePractitionerFacility, HealthcareProvider

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[HealthcareProviderServiceHistory](#)

History is available for tracked fields of the object.

[HealthcareProviderServiceOwnerSharingRule](#)

Sharing rules are available for the object.

[HealthcareProviderServiceShare](#)

Sharing is available for the object.

[HealthcareProviderSpecialty](#)

Represents specialties for a practitioner or a service provider organization. A provider can have multiple specialties such as **anesthesiology** and **cardiovascular**.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Account associated with this specialty. This is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
ActiveResearchStudyCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The count of active research studies being performed by the healthcare provider for the specialty. This field is available in API version 62.0 and later when Site Management (Pilot) is enabled.</p>
CompletedResearchStudyCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The count of research studies completed by the healthcare provider for the specialty. This field is available in API version 62.0 and later when Site Management (Pilot) is enabled.</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date from which this provider specialty is effective.</p>
EffectiveTo	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The date on which this provider specialty is no longer effective.</p>
IsActive	<p>Type boolean</p>
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description Indicates whether the record is active.</p>
IsPrimarySpecialty	<p>Type boolean</p>
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>
	<p>Description Indicates whether the specialty is the provider's primary specialty.</p>
LastReferencedDate	<p>Type dateTime</p>
	<p>Properties Filter, Nillable, Sort</p>
	<p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p>
	<p>Properties Filter, Nillable, Sort</p>
	<p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p>
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p>
	<p>Description Name of the provider's specialty.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Practitioner associated with the specialty. This is a relationship field.</p> <p>Relationship Name Practitioner</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
ResearchStudyPhase	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the research study phase that the healthcare provider has experience with. This field is available in API version 62.0 and later when Site Management (Pilot) is enabled. Possible values are:</p> <ul style="list-style-type: none"> • Phase 1 • Phase 2 • Phase 3 • Phase 4

Field	Details
ResearchStudyType	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Restricted picklist, Update</p> <p>Description Specifies the research study type that the healthcare provider has experience with. This field is available in API version 62.0 and later when Site Management (Pilot) is enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Hybrid • Traditional • Virtual
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID of an external record on its source system.</p>
SpecialtyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Care specialty record associated with the provider. This is a relationship field.</p> <p>Relationship Name Specialty</p> <p>Relationship Type Lookup</p> <p>Refers To CareSpecialty</p>

Field	Details
SpecialtyRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Role of the specialty for the provider or practitioner.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[HealthcareProviderSpecialtyChangeEvent \(API version 59.0\)](#)

Change events are available for the object.

[HealthcareProviderSpecialtyFeed](#)

Feed tracking is available for the object.

[HealthcareProviderSpecialtyHistory](#)

History is available for tracked fields of the object.

[HealthcareProviderSpecialtyOwnerSharingRule](#)

Sharing rules are available for the object.

[HealthcareProviderSpecialtyShare](#)

Sharing is available for the object.

HealthcareProviderTaxonomy

Represents taxonomy or subspecialty codes for a practitioner or facility. A provider or facility can have multiple taxonomies.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The business account associated with the provider taxonomy. This is a relationship field.</p>

Field	Details
	<p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The date from which this taxonomy is effective.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The date on which this taxonomy is no longer effective.</p>
HealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The healthcare provider associated with the taxonomy. This field is available in API version 62.0 and later when Site Management (Pilot) is enabled. This field is a relationship field.</p> <p>Relationship Name HealthcareProvider</p> <p>Refers To HealthcareProvider</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active.</p>

Field	Details
IsPrimaryTaxonomy	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the taxonomy is the provider's primary taxonomy.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the provider taxonomy.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Group, User</p>
PractitionerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Contact record for the practitioner. This is a relationship field.</p> <p>Relationship Name Practitioner</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
SourceSystem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description System from which the record was sourced.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Record ID in source system of provider directory.</p>
TaxonomyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Care taxonomy record associated with the provider taxonomy. This is a relationship field.</p> <p>Relationship Name Taxonomy</p>

Field	Details
Relationship Type	Lookup
Refers To	CareTaxonomy

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[HealthcareProviderTaxonomyChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[HealthcareProviderTaxonomyFeed](#)

Feed tracking is available for the object.

[HealthcareProviderTaxonomyHistory](#)

History is available for tracked fields of the object.

[HealthcareProviderTaxonomyOwnerSharingRule](#)

Sharing rules are available for the object.

[HealthcareProviderTaxonomyShare](#)

Sharing is available for the object.

HealthcareServiceDetail

Represents a junction object between a CareService and a CodeSetBundle. For example, this object links a healthcare service such as physical therapy to a set of related codes. This object is available in API version 59.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CareServiceId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort</p> <p>Description</p> <p>Required.</p> <p>The ID of the healthcare service associated with the code.</p> <p>This field is a relationship field.</p>

Field	Details
	<p>Relationship Name CareService</p> <p>Relationship Type Lookup</p> <p>Refers To CareService</p>
DetailCodeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Required. The ID of the code associated with the healthcare service. This field is a polymorphic relationship field.</p> <p>Relationship Name DetailCode</p> <p>Relationship Type Lookup</p> <p>Refers To CodeSet, CodeSetBundle</p>
DetailType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of service detail. Possible values are:<ul style="list-style-type: none"> • Service_Category • Service_Type The default value is Service_Category.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of this association between a HealthcareService and a CodeSetBundle.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[HealthcareServiceDetailHistory](#)

History is available for tracked fields of the object.

[HealthcareServiceDetailOwnerSharingRule](#)

Sharing rules are available for the object.

[HealthcareServiceDetailShare](#)

Sharing is available for the object.

HlthCareProvTreatedCondition

Represents a junction object between a healthcare provider, facility, or practitioner and a problem definition that's related to a health condition, such as disease or illness. For example, this object links a doctor to the treatment of diabetes, or a facility to the treatment of spinal injuries. This object is available in API version 59.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ConditionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The ID of the health condition that's treated by a healthcare provider, facility, or practitioner. This field is a relationship field.</p> <p>Relationship Name Condition</p> <p>Relationship Type Lookup</p> <p>Refers To ProblemDefinition</p>
EffectiveFrom	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the provider began treating the condition.</p>
EffectiveTo	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the provider stopped treating the condition.</p>

Field	Details
HealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The ID of the HealthcareProvider or HealthcareFacility or PractitionerFacility associated with the record. This represents the Provider that treats the condition. This field is a relationship field.</p> <p>Relationship Name HealthcareProvider</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareProvider</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the provider is actively treating the condition (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of this association between a healthcare provider, facility, or practitioner, and a problem definition that's related to a health condition.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[HlthCareProvTreatedConditionHistory](#)

History is available for tracked fields of the object.

[HlthCareProvTreatedConditionOwnerSharingRule](#)

Sharing rules are available for the object.

[HlthCareProvTreatedConditionShare](#)

Sharing is available for the object.

PersonEducation

Represents information about professional education for a person in a provider role.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(),
query(), retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
CompletionDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Education's completion date.</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the person who earned the degree and is listed as a contact.</p>
EducationLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Level of education achieved. Example values:</p> <ul style="list-style-type: none"> • Undergraduate degree • Medical school • Internship • Residency • Fellowship
GraduationDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Graduation date from institution.</p>
Identifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID issued to the recipient by the educational institution.</p>

Field	Details
IdentifierIssuer	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Educational institution's name.</p>
IndividualId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the person who earned the degree and is listed as an individual.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the record is active.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Name of the degree earned.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record.</p>
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Education's start date.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Current status of education. Valid values:</p> <ul style="list-style-type: none"> • Inactive • Revoked • Draft • Verified <p>The default value is Inactive.</p>
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the person who earned the degree and is listed as a user.</p>
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Current educational status. Valid values:</p> <ul style="list-style-type: none"> • Authorized

Field	Details
	<ul style="list-style-type: none"> None <p>The default value is None.</p>
VerifiedDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Education was validated on this date.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PersonEducationChangeEvent \(API version 58.0\)](#)

Change events are available for the object.

[PersonEducationFeed](#)

Feed tracking is available for the object.

[PersonEducationHistory](#)

History is available for tracked fields of the object.

[PersonEducationOwnerSharingRule](#)

Sharing rules are available for the object.

[PersonEducationShare](#)

Sharing is available for the object.

PersonEmployment

Represents information about a person's employment.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AnnualIncome	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The annual income of the person.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the employment.</p>
EmployerAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The complete address of the employer.</p>
EmployerCity	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The city where the employer is located.</p>
EmployerCountry	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country where the employer is located.</p>
EmployerGeocodeAccuracy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Address

Field	Details
	<ul style="list-style-type: none"> • Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
EmployerLatitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.</p>
EmployerLongitude	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.</p>
EmployerPhone	<p>Type phone</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Employer's phone number.</p>
EmployerPostalCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The postal code of the employer's address.</p>

Field	Details
EmployerState	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The state of the employer's address.</p>
EmployerStreet	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The street address of the employer.</p>
EmploymentStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the employment status with the employer. Possible values are:</p> <ul style="list-style-type: none"> • Employed • Home Maker • Retired • Self-Employed • Student • Unemployed with Income • Unemployed without Income
EmploymentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Possible values are:</p> <ul style="list-style-type: none"> • Contract • Full-Time • Part-Time • Self-Employed

Field	Details
	<ul style="list-style-type: none"> Temporary
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The last date of employment at this job.</p>
HealthcareProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The healthcare provider associated with the person employment. This field is a relationship field.</p> <p>Relationship Name HealthcareProvider</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareProvider</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<code>LastReferencedDate</code>) but not viewed it.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name for this record.</p>
Occupation	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the person's occupation. Possible values are:</p> <ul style="list-style-type: none"> • Dental assistants • Dental hygienists • Dentists • Diagnostic related technologists and technicians • Health technologists and technicians (all) • Healthcare support occupations (all) • Licensed practical and licensed vocational nurses • Nurse midwives and nurse practitioners • Nursing, psychiatric, and home health aides • Occupational and physical therapist assistants and aides • Other occupations within the healthcare sector • Pharmacists and pharmacy aides • Phlebotomists • Physical therapists • Physician assistants • Physicians and surgeons • Registered nurses • Respiratory therapists
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The user who owns this record. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Position	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The last position of the person at this job.</p>
RelatedPersonId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The person associated with the employment. This field is a polymorphic relationship field.</p> <p>Relationship Name RelatedPerson</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of employment at this job.</p>
VerificationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date of verification of the employment.</p>

Field	Details
VerificationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of verification of the employment.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Authorized • Confirmed • Expired • In Progress • Submitted • Verified

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PersonEmploymentChangeEvent on page 1426 \(API version 61.0\)](#)

Change events are available for the object.

[PersonEmploymentFeed on page 1429](#)

Feed tracking is available for the object.

[PersonEmploymentHistory on page 1434](#)

History is available for tracked fields of the object.

[PersonEmploymentShare on page 1438](#)

Sharing is available for the object.

ProviderSearchSyncLog

Represents a log with information about the provider search data sync status of a healthcare provider record. This object is available in API version 49.0 and later.

Supported Calls

```
delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(),
search(), undelete()
```

Fields

Field	Details
FacilityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The business account of the facility. This field is a relationship field.</p> <p>Relationship Name Facility</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastSync	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp of the most recent data sync.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Message	<p>Type string</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The message returned if an error occurred during the data sync.</p>
Name	<p>Type string</p> <p>Properties Filter, Group, idLookup, Sort</p> <p>Description Name of the provider search sync log.</p>
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The ID of the owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProviderId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the healthcare organization or the practitioner. This field is a relationship field.</p> <p>Relationship Name Provider</p> <p>Relationship Type Lookup</p> <p>Refers To HealthcareProvider</p>

Field	Details
ProviderName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the healthcare provider.</p>
SyncStatus	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Sort</p> <p>Description The status of the data sync. Possible values are:<ul style="list-style-type: none"> • Failure • Success The default value is Success.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProviderSearchSyncLogChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[ProviderSearchSyncLogFeed](#)

Feed tracking is available for the object.

[ProviderSearchSyncLogHistory](#)

History is available for tracked fields of the object.

[ProviderSearchSyncLogOwnerSharingRule](#)

Sharing rules are available for the object.

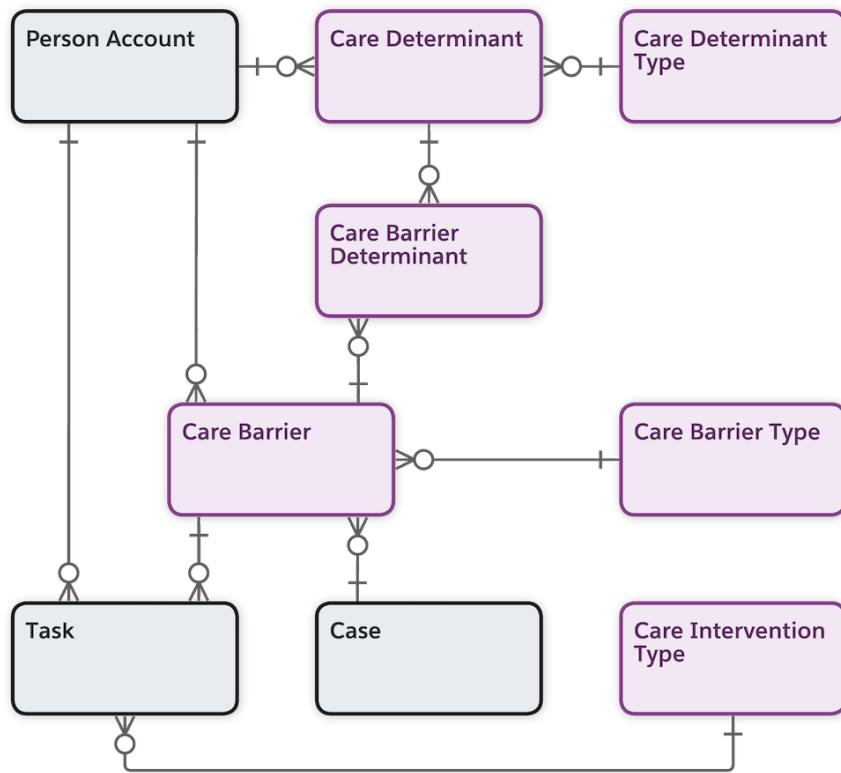
[ProviderSearchSyncLogShare](#)

Sharing is available for the object.

Social Determinants

The social determinants data model represents the barriers, health determinants, and interventions for a patient or member. Available in API version 45.0 and later.

The social determinants standard objects are visible to users with the Health Cloud Starter permission set.



Health Cloud Object Salesforce Standard Object

[CareBarrier](#)

Represents the circumstances or obstacles affecting a patient or member. Available in API version 45.0 and later.

[CareBarrierDeterminant](#)

Represents the relationship of a barrier to a determinant for a patient or member. Available in API version 45.0 and later.

[CareBarrierType](#)

Represents the standard, defined list of barriers maintained by an organization. Available in API version 45.0 and later.

[CareDeterminant](#)

Represents the determinants of health for a patient such as availability of safe housing, adequate employment, or local food markets. Available in API version 45.0 and later.

[CareDeterminantType](#)

Represents the standard, defined list of determinants of health maintained by an organization, including the domain and type. Available in API version 45.0 and later.

[CareInterventionType](#)

Represents the standard, defined list of interventions maintained by an organization. Available in API version 45.0 and later.

CareBarrier

Represents the circumstances or obstacles affecting a patient or member. Available in API version 45.0 and later.

Supported Calls

`describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search()`

Fields

Field Name	Details
CareBarrierTypeId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Identifier for the care barrier type for the patient or member. This is a relationship field.</p> <p>Relationship Name CareBarrierType</p> <p>Relationship Type Lookup</p> <p>Refers To CareBarrierType</p>
CaseId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description ID of the associated case. This is a relationship field.</p> <p>Relationship Name Case</p> <p>Relationship Type Lookup</p> <p>Refers To Case</p>
EffectiveFrom	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date on which the barrier becomes effective.</p>

Field Name	Details
EffectiveTo	Type date
	Properties Filter, Group, Nillable, Sort
	Description Termination date for the barrier.
ExtlProblemDefIdentifier	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the external problem definition in the source system.
IsActive	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates whether this barrier is active.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string
	Properties Filter, Group, idLookup, Sort

Field Name	Details
	Description
	Name of the barrier.
OwnerId	Type reference
	Properties
	Filter, Group, Sort
	Description
	The ID of the user who owns this record.
	This is a polymorphic relationship field.
	Relationship Name
	Owner
	Relationship Type
	Lookup
	Refers To
	Group, User
PatientId	Type reference
	Properties
	Filter, Group, Sort
	Description
	Identifier for the patient or member.
	This is a relationship field.
	Relationship Name
	Patient
	Relationship Type
	Lookup
	Refers To
	Account
Priority	Type picklist
	Properties
	Defaulted on create, Filter, Group, Nullable, Sort, Update
	Description
	Priority of the barrier.
	The values are:
	<ul style="list-style-type: none"> • Low
	<ul style="list-style-type: none"> • Normal

Field Name	Details
SourceSystemIdentifier	<ul style="list-style-type: none"> • High
SourceSystemModifiedDateTime	<p>Type string</p>
SourceSystemName	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
Status	<p>Description The ID of the care barrier record in the external source system.</p>
SurveyResponseID	<p>Type dateTime</p>
SurveyResponseID	<p>Properties Create, Filter, Nillable, Sort, Update</p>
SurveyResponseID	<p>Description The date and time when the care barrier record was last modified in the external source system.</p>
SurveyResponseID	<p>Type string</p>
SurveyResponseID	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
SurveyResponseID	<p>Description The name of the external source system from which the record was imported.</p>
SurveyResponseID	<p>Type picklist</p>
SurveyResponseID	<p>Properties Defaulted on create, Filter, Group, Sort</p>
SurveyResponseID	<p>Description Status of the barrier.</p>
SurveyResponseID	<p>The values are:</p>
SurveyResponseID	<ul style="list-style-type: none"> • Open
SurveyResponseID	<ul style="list-style-type: none"> • Addressed
SurveyResponseID	<p>Type reference</p>
SurveyResponseID	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
SurveyResponseID	<p>Description Identifier for the survey response related to the barrier.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareBarrierChangeEvent \(API version 58.0\)](#)

Change events are available for the object.

[CareBarrierFeed](#)

Feed tracking is available for the object.

[CareBarrierHistory](#)

History is available for tracked fields of the object.

[CareBarrierOwnerSharingRule](#)

Sharing rules are available for the object.

[CareBarrierShare](#)

Sharing is available for the object.

CareBarrierDeterminant

Represents the relationship of a barrier to a determinant for a patient or member. Available in API version 45.0 and later.

Supported Calls

```
describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search()
```

Fields

Field Name	Details
CareBarrierId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the care barrier associated with this record. This is a relationship field.</p> <p>Relationship Name CareBarrier</p> <p>Relationship Type Lookup</p> <p>Refers To CareBarrier</p>
CareDeterminantId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p>

Field Name	Details
	<p>Description</p> <p>ID of the care determinant associated with this record.</p> <p>This is a relationship field.</p>
	<p>Relationship Name</p> <p>CareDeterminant</p>
	<p>Relationship Type</p> <p>Lookup</p>
	<p>Refers To</p> <p>CareDeterminant</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nullable, Sort</p> <p>Description</p> <p>The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nullable, Sort</p> <p>Description</p> <p>The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, idLookup, Sort</p> <p>Description</p> <p>The name of the relationship between the barrier and the determinant. For example, <i>Mold growth in home - Housing</i>.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Filter, Group, Sort</p>

Field Name	Details
Description	The ID of the user who owns this record. This is a polymorphic relationship field.
Relationship Name	Owner
Relationship Type	Lookup
Refers To	Group, User

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[CareBarrierDeterminantChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CareBarrierDeterminantFeed](#)

Feed tracking is available for the object.

[CareBarrierDeterminantHistory](#)

History is available for tracked fields of the object.

[CareBarrierDeterminantOwnerSharingRule](#)

Sharing rules are available for the object.

[CareBarrierDeterminantShare](#)

Sharing is available for the object.

CareBarrierType

Represents the standard, defined list of barriers maintained by an organization. Available in API version 45.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Code	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	Medical vocabulary code for the barrier.
CodeType	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Medical vocabulary code type for the barrier.
	Possible values are:
	<ul style="list-style-type: none"> • ICD-10-CM • SNOMED CT
Description	Type
	textarea
	Properties
	Create, Nillable, Update
	Description
	Description of the barrier.
DiagnosisCodeSetId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Diagnosis code set associated with the care barrier type.
	This is a polymorphic relationship field.
	Relationship Name
	DiagnosisCodeSet
	Relationship Type
	Lookup
	Refers To
	CodeSet, CodeSetBundle
HealthCareDiagnosisId	Type
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Diagnosis code for the barrier. HealthCareDiagnosisId may be deprecated in a future release, so use DiagnosisCodeSetId instead.

Field	Details
	<p>This is a relationship field.</p> <p>Relationship Name HealthCareDiagnosis</p> <p>Relationship Type Lookup</p> <p>Refers To HealthCareDiagnosis</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this care barrier type is active. The default value is 'false'.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the care barrier type.</p>
OwnerId	<p>Type reference</p>

Field	Details
Properties	Create, Defaulted on create, Filter, Group, Sort, Update
Description	The ID of the user who owns this record.
	This is a polymorphic relationship field.
Relationship Name	Owner
Relationship Type	Lookup
Refers To	Group, User

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareBarrierTypeChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CareBarrierTypeFeed](#)

Feed tracking is available for the object.

[CareBarrierTypeHistory](#)

History is available for tracked fields of the object.

[CareBarrierTypeOwnerSharingRule](#)

Sharing rules are available for the object.

[CareBarrierTypeShare](#)

Sharing is available for the object.

CareDeterminant

Represents the determinants of health for a patient such as availability of safe housing, adequate employment, or local food markets. Available in API version 45.0 and later.

Supported Calls

`describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`

Fields

Field Name	Details
<code>CareDeterminantTypeId</code>	Type reference

Field Name	Details
	Properties
	Filter, Group, Sort
	Description
	Care determinant for the patient or member.
	This is a relationship field.
	Relationship Name
	CareDeterminantType
	Relationship Type
	Lookup
	Refers To
	CareDeterminantType
IsActive	Type
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether this care determinant is active.
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nullable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type
	dateTime
	Properties
	Filter, Nullable, Sort
	Description
	The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type
	string
	Properties
	Filter, Group, idLookup, Sort

Field Name	Details
	Description
	Name of the care determinant.
OwnerId	Type reference
	Properties
	Filter, Group, Sort
	Description
	The ID of the user who owns this record.
	This is a polymorphic relationship field.
	Relationship Name
	Owner
	Relationship Type
	Lookup
	Refers To
	Group, User
PatientId	Type reference
	Properties
	Filter, Group, Sort
	Description
	Identifier for the patient or member.
	This is a relationship field.
	Relationship Name
	Patient
	Relationship Type
	Lookup
	Refers To
	Account
Priority	Type picklist
	Properties
	Defaulted on create, Filter, Group, Nullable, Sort
	Description
	Priority of the determinant such as Low or High .
SurveyResponseId	Type reference

Field Name	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description Survey response related to the determinant.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareDeterminantChangeEvent \(API version 58.0\)](#)

Change events are available for the object.

[CareDeterminantFeed](#)

Feed tracking is available for the object.

[CareDeterminantHistory](#)

History is available for tracked fields of the object.

[CareDeterminantOwnerSharingRule](#)

Sharing rules are available for the object.

[CareDeterminantShare](#)

Sharing is available for the object.

CareDeterminantType

Represents the standard, defined list of determinants of health maintained by an organization, including the domain and type. Available in API version 45.0 and later.

Supported Calls

`describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search()`

Fields

Field Name	Details
Description	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description Description of the determinant.</p>
Domain	<p>Type picklist</p>

Field Name	Details
	<p>Properties Filter, Group, Sort</p> <p>Description The domain for the determinant.</p> <p>The values are:</p> <ul style="list-style-type: none"> • Access to health care • Child care • Clothing • Education • Employment • Finances • Food • General (non-specific) • Housing • Immigration/Migration • Incarceration • Primary Language • Race/Ethnicity • Residential Address • Safety • Social Connections/Isolation • Stress • Transportation • Utilities • Veteran Status
IsActive	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether this care determinant type is active.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

Field Name	Details
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string
	Properties Filter, Group, idLookup, Sort
	Description Name of the care determinant type.
OwnerId	Type reference
	Properties Filter, Group, Sort
	Description The ID of the user who owns this record. This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
Type	Type picklist
	Properties Defaulted on create, Filter, Group, Sort
	Description The type of determinant. The values are: <ul style="list-style-type: none"> • Social • Behavior • Genetics

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

CareDeterminantTypeChangeEvent (API version 60.0)

Change events are available for the object.

CareDeterminantTypeFeed

Feed tracking is available for the object.

CareDeterminantTypeHistory

History is available for tracked fields of the object.

CareDeterminantTypeOwnerSharingRule

Sharing rules are available for the object.

CareDeterminantTypeShare

Sharing is available for the object.

CareInterventionType

Represents the standard, defined list of interventions maintained by an organization. Available in API version 45.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field Name	Details
Code	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Medical vocabulary code for the intervention.</p>
CodeType	<p>Type picklist</p> <p>Properties Defaulted on Create, Filter, Group, Nillable, Sort</p> <p>Description Medical vocabulary code type for the intervention.</p>
Description	<p>Type textarea</p> <p>Properties Nillable</p>

Field Name	Details
	Description
	Description of the intervention.
HealthCareProcedureId	Type
	reference
	Properties
	Filter, Group, Nillable, Sort
	Description
	Procedure code for the intervention.
	This is a relationship field.
	Relationship Name
	HealthCareProcedure
	Relationship Type
	Lookup
	Refers To
	HealthCareProcedure
InterventionType	Type
	picklist
	Properties
	Filter, Group, Nillable, Sort
	Description
	The type of intervention.
IsActive	Type
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether this intervention type is active.
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type
	dateTime

Field Name	Details
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string
	Properties Filter, Group, idLookup, Sort
	Description Name of the intervention type.
OwnerId	Type reference
	Properties Filter, Group, Sort
	Description The ID of the user who owns this record. This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ProcedureCodeSetId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The procedure code set associated with the care intervention type. This is a polymorphic relationship field.
	Relationship Name ProcedureCodeSet
	Relationship Type Lookup
	Refers To CodeSet, CodeSetBundle

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[CareInterventionTypeChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

[CareInterventionTypeFeed](#)

Feed tracking is available for the object.

[CareInterventionTypeHistory](#)

History is available for tracked fields of the object.

[CareInterventionTypeOwnerSharingRule](#)

Sharing rules are available for the object.

[CareInterventionTypeShare](#)

Sharing is available for the object.

Timeline

Use Timeline to configure a chronological view of records from multiple objects.

[TimelineObjectDefinitionLocalization](#)

Represents the translated value of a timeline configuration's master label when the Translation Workbench is enabled for your organization. This object is available in API version 60.0 and later.

[TimelineObjectDefinitionLocalization](#)

Represents the translated value of a timeline configuration's master label when the Translation Workbench is enabled for your organization. This object is available in API version 60.0 and later.

For more information, see [TimelineObjectDefinitionLocalization](#).

MedTech Commercial Engagement

These objects are available for Life Sciences Cloud for MedTech Commercial Engagement.

[Intelligent Sales](#)

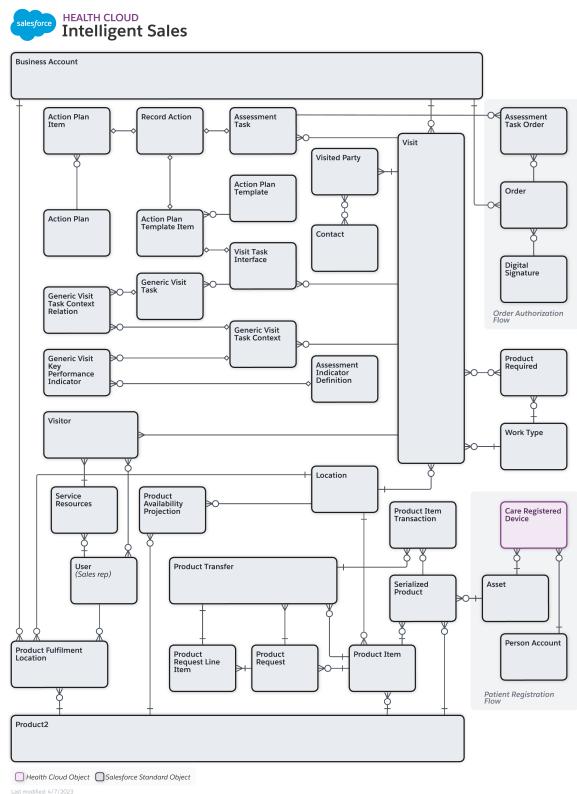
Help your sales team plan and execute sales visits and manage field inventory with Intelligent Sales.

Intelligent Sales

Help your sales team plan and execute sales visits and manage field inventory with Intelligent Sales.

EDITIONS

Available in: **Enterprise** and
Unlimited Editions



For more details and a larger image, visit the [Data Model Gallery](#).

ActionPlanTemplateItem

Represents the instance of an item on an action plan template version. This object is available in API version 44.0 and later.

actionplantemplate

Defines a template for different assessment tasks in a visit. This object is available in API version 49.0 and later.

ActionPlanTemplateItem

Represents the instance of an item on an action plan template version. This object is available in API version 44.0 and later.

Address

Represents a mailing, billing, or home address.

AssessmentTask

Perform activities such as patient registration or order authorization to capture information.

Pricebook2

Represents a price book that contains the list of products that your org sells.

Product2

Represents a product that your org sells.

Pricebookentry

Represents a product entry (an association between a price book and product) in a price book.

ProductAvailabilityProjection

Represents the projected product quantity available at an inventory location at various points in time. Records for this object are automatically created by Intelligent Sales. This object is available in API version 55.0 and later.

[ProductFulfillmentLocation](#)

Associates a business account and a product inventory with the responsible field rep. This object is available in API version 49.0 and later.

[ProductItem](#)

Represents the stock of a particular product at a particular location in field service, such as all bolts stored in your main warehouse.

[ProductRequest](#)

Represents a device request made as part of a care program.

[ProductRequestLineItem](#)

A junction object between `ProductRequest` and `ProductTransfer`. This object is available in API version 50.0 and later.

[productrequired](#)

Represents a product that is needed to complete a visit.

[producttransfer](#)

Represents the transfer of inventory between locations in field service.

[RecordAction](#)

Represents a relationship between a record and an action, such as a flow. Create a RecordAction for every action that you want to associate with a particular record. Available in API version 42.0 and later.

[SerializedProduct](#)

Records serial numbers for each individual product in an inventory. This object is available in API version 50.0 and later.

[Visit](#)

Track information related to a field rep's visit to a health care provider.

[VisitedParty](#)

Represents the contact person at the account that's being visited. This object is available in API version 49.0 and later.

[Visitor](#)

Represents the sales reps performing visits.

SEE ALSO:

https://help.salesforce.com/s/articleView?id=ind.admin_intelligent_sales.htm&type=5

https://help.salesforce.com/s/articleView?id=ind.admin_intelligent_sales_data_model.htm&type=5

ActionPlanTemplateItem

Represents the instance of an item on an action plan template version. This object is available in API version 44.0 and later.

Supported Calls

`create()` `delete()` `describeLayout()` `describeSObjects()` `getDeleted()` `getUpdated()` `query()` `retrieve()` `search()` `undelete()` `update()` `upsert()`

Fields

Field Name	Details
ActionPlanTemplateVersionId	Type reference

Field Name	Details
	Properties Create, Filter, Group, Sort,
	Description The version of the action plan template this item is for.
DisplayOrder	Type
	int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The order in which this item is displayed within the action plan template version.
IsActive	Type
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the task created from this template item is active. The default value is <code>false</code> .
IsLocked	Type
	boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates whether this action plan template item is locked or not. The default value is <code>false</code> .
IsRequired	Type
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the task created from this template item is required. The default value is <code>false</code> .
ItemEntityType	Type
	picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update

Field Name	Details
	Description
	<p>The type of action plan template item entity..</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> • Document Checklist Item • Event—This value is available in API version 63.0. • RecordAction • Task
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The most recent date on which a user referenced this record.</p>
LastViewedDate	Type
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	<p>The most recent date on which a user viewed this record.</p>
MayEdit	Type
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	<p>Indicates whether this action plan template item can be edited or not. The default value is <code>false</code>.</p>
Name	Type
	string
	Properties
	Create, Filter, Group, Sort, idLookup, Update
	Description
	<p>The unique identifier for this action plan template item record.</p>
UniqueName	Type
	string

Field Name	Details
	<p>Properties Create, Filter, Group, Sort, Update</p>
	<p>Description The unique name for this action plan template item. This field is unique within your organization.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ActionPlanTemplateItemChangeEvent](#)

Change events are available for the object.

[ActionPlanTemplateItemFeed](#)

Feed tracking is available for the object.

[ActionPlanTemplateItemHistory](#)

History is available for tracked fields of the object.

[ActionPlanTemplateItemOwnerSharingRule](#)

Sharing rules are available for the object.

[ActionPlanTemplateItemShare](#)

Sharing is available for the object.

actionplantemplate

Defines a template for different assessment tasks in a visit. This object is available in API version 49.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ActionPlanType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Specifies the type of action plan you're creating. Possible values are:</p> <ul style="list-style-type: none"> • Industries • Visit Execution

Field	Details
	<p>For Intelligent Sales, select only Visit Execution.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description for your action plan template.</p>
IsAdHocItemCreationEnabled	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether ad-hoc creation of tasks is possible.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The time stamp for the last time this record was referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The time stamp for the last time this record was viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name for your action plan template</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Reference to the owner of the record.</p>
TargetEntityType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Indicates which entity this template is being created for. Possible values are:</p> <ul style="list-style-type: none"> • Account • BusinessMilestone—Business Milestone • Case • Contact • Contract • Lead • Opportunity • PersonLifeEvent • Person Life Event • Visit <p>For Intelligent Sales, use only Visit.</p>
UniqueName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name for your action plan template.</p>

ActionPlanTemplateItem

Represents the instance of an item on an action plan template version. This object is available in API version 44.0 and later.

Supported Calls

`create() delete() describeLayout() describesObjects() getDeleted() getUpdated() query() retrieve() search() undelete() update() upsert()`

Fields

Field Name	Details
ActionPlanTemplateVersionId	Type reference
	Properties Create, Filter, Group, Sort,
	Description
	The version of the action plan template this item is for.
DisplayOrder	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The order in which this item is displayed within the action plan template version.
IsActive	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the task created from this template item is active. The default value is <code>false</code> .
IsLocked	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether this action plan template item is locked or not. The default value is <code>false</code> .
IsRequired	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the task created from this template item is required. The default value is <code>false</code> .

Field Name	Details
ItemEntityType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of action plan template item entity.. Possible values are:</p> <ul style="list-style-type: none"> • Document Checklist Item • Event—This value is available in API version 63.0. • RecordAction • Task
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
MayEdit	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether this action plan template item can be edited or not. The default value is <code>false</code>.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, idLookup, Update</p>

Field Name	Details
	Description
UniqueName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name for this action plan template item. This field is unique within your organization.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ActionPlanTemplateItemChangeEvent](#)

Change events are available for the object.

[ActionPlanTemplateItemFeed](#)

Feed tracking is available for the object.

[ActionPlanTemplateItemHistory](#)

History is available for tracked fields of the object.

[ActionPlanTemplateItemOwnerSharingRule](#)

Sharing rules are available for the object.

[ActionPlanTemplateItemShare](#)

Sharing is available for the object.

Address

Represents a mailing, billing, or home address.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Special Access Rules

The following access checks must be enabled:

- Industries Insurance
- Retail Execution
- Industries Visit
- Field Service
- Order Management

- Perms: FulfillmentOrder, OrderSummary, AdvancedOrderManagement, OrderCCS
- Prefs: OrdersEnabled, EnhancedCommerceOrders
- Public Sector
- Employee Experience
- Contact Tracing For Employees

You can create an address only when creating a location.

Fields

Field Name	Details
Address	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The full address.</p>
AddressType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Picklist of address types. The values are:</p> <ul style="list-style-type: none"> • Mailing • Shipping • Billing • Home
City	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address city.</p>
Country	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The address country.</p>

Field Name	Details
Description	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description A brief description of the address.
DrivingDirections	Type string
	Properties Create, Filter, Nillable, Sort, Update
	Description Directions to the address.
GeocodeAccuracy	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The most recent date on which a user viewed this record.
Latitude	Type double
	Properties Create, Filter, Nillable, Sort, Update

Field Name	Details
	Description
	<p>Used with <code>Longitude</code> to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.</p>
LocationType	Type
	picklist
	Properties
	Create, Defaulted on create, Filter, Filter, Group, Sort, Update
	Description
	Picklist of location types. The available values are:
	<ul style="list-style-type: none"> • Warehouse (default) • Site • Van • Plant
Longitude	Type
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	<p>Used with <code>Latitude</code> to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.</p>
Name	Type
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	Name of the address.
ParentId	Type
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	A lookup field to the parent location.
	This is a relationship field.
	Relationship Name
	Parent

Field Name	Details
	<p>Relationship Type Lookup</p> <p>Refers To Location</p>
PostalCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The address postal code.</p>
State	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The address state.</p>
Street	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The address street.</p>
TimeZone	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description Picklist of available time zones.</p>

Usage

! **Important:** “Address” in Salesforce can also refer to the Address compound field found on many standard objects. When referencing the Address object in your Apex code, always use `Schema.Address` instead of `Address` to prevent confusion with the standard Address compound field. If referencing both the address object and the Address field in the same snippet, you can differentiate between the two by using `System.Address` for the field and `Schema.Address` for the object.

Associated Object

This object has the following associated object. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AddressHistory \(API version 62.0\)](#)

History is available for tracked fields of the object.

AssessmentTask

Perform activities such as patient registration or order authorization to capture information.

Special Access Rules

In Life Sciences Cloud, standard and custom fields extend the standard AssessmentTask object to represent tasks to complete a provider engagement compliance cycle.

The AssessmentTask object and its fields are used by the Key Account Management and the Provider Engagement Compliance feature areas. This topic lists the fields used in both of these features.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AssessmentTaskDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The assessment task definition that is referenced for the task. This field is a relationship field.</p> <p>Relationship Name AssessmentTaskDefinition</p> <p>Refers To AssessmentTaskDefinition</p>
AssignedToId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the user that's assigned the task. This field is a polymorphic relationship field.</p> <p>Relationship Name AssignedTo</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To User</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Description of task that has to be performed at the store.</p>
EndTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the assessment task is completed.</p>
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicate whether a task must be completed to complete a visit. The default value is False.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Unique identification of the task.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this assessment template. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The visit associated with an assessment task. This field is a relationship field.</p> <p>Relationship Name Parent</p> <p>Refers To Visit</p>
ReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the record with which the associated task is related. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceRecord</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To CarePgmEnrolleeWkOrdStep, ActionPlan, PrvdEngmtComplianceCycle Based on the availability of objects in your org.</p>
SequenceNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The sequence in which the tasks must be performed.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Time when the task was started by a field rep.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>View the status of a task.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Completed • InProgress—In Progress • NotStarted—Not Started • Skipped <p>The default value is Not Started.</p>
TaskType	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Restricted picklist, Sort</p> <p>Description</p> <p>Type of a task that the sales rep can perform during the visit.</p> <p>In Life Sciences Cloud, the task type must match the task type of the assessment task definition.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • ComponentTask—Component Task • DeliveryTask—Delivery Task • Other • RecordAction—Record Action • SignatureTask—Signature Task

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

- [AssessmentTaskShare](#)
- [AssessmentTaskFeed](#)

Pricebook2

Represents a price book that contains the list of products that your org sells.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Text description of the price book.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the price book is active (<code>true</code>) or not (<code>false</code>). Inactive price books are hidden in many areas in the user interface. You can change this field's value as often as necessary. Label is Active.</p>
IsArchived	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the price book has been archived (true) or not (false). This field is read only.</p>
IsDeleted	<p>Type boolean</p> <p>Properties Defaulted on create, Filter</p> <p>Description Indicates whether the price book has been moved to the Recycle Bin (<code>true</code>) or not (<code>false</code>). Label is Deleted.</p>
IsStandard	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the price book is the standard price book for the org (<code>true</code>) or not (<code>false</code>). Every org has one standard price book—all other price books are custom price books.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Name of this object. This field is read-only for the standard price book. Label is Price Book Name.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

Pricebook2History

History is available for tracked fields of the object.

Product2

Represents a product that your org sells.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description A text description of this record. Label is Product Description.</p>
DisplayUrl	<p>Type url</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description URL leading to a specific version of a record in the linked external data source.</p>
ExternalDataSourceId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the related external data source.</p>
ExternalId	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier of a record in the linked external data source. For example, <i>ID #123</i>.</p>
Family	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the product family associated with this record. Product families are configured as picklists in the user interface. Label is Product Family.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this record is active.</p>
IsArchived	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicated whether the product is archived.</p>
IsSerialized	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product supports serial numbers. If an associated product item record already exists, this boolean can't be set to true unless the product item's quantity is zero.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Time stamp for the last time this record was referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Time stamp for the last time this record was viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Default name of this record. Label is Product Name.</p>
ProductCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Default product code for this record. Your org defines the product code naming pattern.</p>
QuantityUnitOfMeasure	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Unit of the product; for example, kilograms, liters, or cases. This field comes with only one value, Each, so you may want to create your own. The <code>QuantityUnitOfMeasure</code> field on <code>ProductItem</code> inherits this field's values.</p>
StockKeepingUnit	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The SKU for the product. Use in tandem with or instead of the <code>ProductCode</code> field. For example, you can track the manufacturer's identifying code in the Product Code field and assign the product a SKU when you resell it.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[Product2Feed](#)

Feed tracking is available for the object.

[Product2History](#)

History is available for tracked fields of the object.

Pricebookentry

Represents a product entry (an association between a price book and product) in a price book.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), update(), upsert()
```

Fields

Field	Details
<code>IsActive</code>	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Indicates whether this price book entry is active.</p>
<code>IsArchived</code>	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Defaulted on create, Filter, Group, Sort</p> <p>Description</p> <p>Indicates whether the price book entry has been archived (true) or not (false). This is set to <code>true</code> when the product record it's associated with is archived, or when the price book record is archived. This field is read only. Available in API version 45.0 and later. Label is Archived.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Name of this price book entry record. This read-only field references the value in the Name field of the product record. Label is Product Name.</p>
Pricebook2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. ID of the price book record with which this record is associated. This field must be specified when creating price book records. It can't be changed in an update.</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. ID of the product record with which this record is associated. This field must be specified when creating product records. It can't be changed in an update.</p>
ProductCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Product code for this record. This read-only field references the value in the ProductCode field of the associated product record.</p>
UnitPrice	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. Unit price for this price book entry. You can specify a value only if <code>UseStandardPrice</code> is set to <code>false</code>. Label is List Price.</p>
UseStandardPrice	<p>Type boolean</p>

Field	Details
Properties	Create, Defaulted on create, Filter, Group, Sort, Update
Description	Indicates whether this price book entry uses the standard price defined in the standard price book record.

Usage

Use this object to define the association between your organization's products (product) and your organization's standard price book or to other, custom-defined price books (price book). Create one PricebookEntry record for each standard or custom price and currency combination for a product in a price book.

When creating these records, you must specify the IDs of the associated price book record and product record. Once created, your client application can't update these IDs.

This object is defined only for those organizations that have products enabled as a feature.

If you delete a PriceBookEntry while a line item references it, the line item is unaffected, but the PriceBookEntry will be archived and unavailable from the API. Deleted PriceBookEntry records can't be recovered.

You must load the standard price for a product before you are permitted to load its custom price(s).

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[PricebookEntryHistory](#)

History is available for tracked fields of the object.

ProductAvailabilityProjection

Represents the projected product quantity available at an inventory location at various points in time. Records for this object are automatically created by Intelligent Sales. This object is available in API version 55.0 and later.

Supported Calls

`describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search()`

Fields

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The date and time when the record was last referenced.

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the record was last viewed.</p>
Name	<p>Type string</p> <p>Properties Filter, Group, idLookup, Sort</p> <p>Description The name of the record.</p>
OwnerId	<p>Type Lookup</p> <p>Properties Filter, Group, Sort</p> <p>Description The owner of the record.</p> <p>Refers To Group, User</p>
Product2Id	<p>Type Lookup</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The product whose quantity is available quantity is projected.</p> <p>Refers To Product2</p>
ProductLocationId	<p>Type Lookup</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The inventory location of the product with that quantity.</p> <p>Refers To Location</p>

Field	Details
ProjectedQuantity	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The quantity projected at the inventory for the specified date.</p>
ProjectionDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date for when the quantity projection is applicable.</p>
Status	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status of the inventory based on the projected quantity and the required quantity for that day. Possible values are:</p> <ul style="list-style-type: none"> • Available • ProjectedAvailable • Shortfall

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProductAvailabilityProjectionFeed on page 1429](#)

Feed tracking is available for the object.

[ProductAvailabilityProjectionHistory on page 1434](#)

History is available for tracked fields of the object.

[ProductAvailabilityProjectionShare on page 1438](#)

Sharing is available for the object.

ProductFulfillmentLocation

Associates a business account and a product inventory with the responsible field rep. This object is available in API version 49.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The business account a field rep is responsible for visiting.</p>
FulfillmentLocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The inventory location from which an order will be fulfilled.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
LocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The location of the account the field rep visits.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the Product Fulfillment Location record.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name of the product the field rep fulfills at the account.</p>
UserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The field rep responsible for the account and inventory.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ProductFulfillmentLocationHistory \(API version 63.0\)](#)

History is available for tracked fields of the object.

[ProductFulfillmentLocationOwnerSharingRule \(API version 63.0\)](#)

Sharing rules are available for the object.

[ProductFulfillmentLocationShare \(API version 63.0\)](#)

Sharing is available for the object.

ProductItem

Represents the stock of a particular product at a particular location in field service, such as all bolts stored in your main warehouse.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Special Access Rules

Field Service must be enabled.

Fields

Field Name	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The date when the product item was last modified. Its label in the user interface is Last Modified Date.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The date when the product item was last viewed.</p>
LocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Location associated with the product item. This usually indicates where the product item is stored.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The product item's owner.</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Product associated with the product item, which represents the type of product in your inventory.</p>

Field Name	Details
ProductItemNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description (Read Only) Auto-generated number identifying the product item.</p>
ProductName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description A name for the product item. Try to select a name that indicates what is being stored where; for example, Batteries in Warehouse A.</p>
QuantityOnHand	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The quantity at the location. If you want to add a serial number, this value must be 1.</p>
QuantityUnitOfMeasure	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Units of the product item; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.</p>
SerialNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A unique number for identification purposes. If you want to enter a serial number, the Quantity on Hand must be 1.</p>

Usage

Each product item is associated with a product and a location in Salesforce. If a product is stored at multiple locations, the product will be tracked in a different product item for each location.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ProductItemFeed

Feed tracking is available for the object.

ProductItemHistory

History is available for tracked fields of the object.

ProductItemOwnerSharingRule

Sharing rules are available for the object.

ProductItemShare

Sharing is available for the object.

ProductRequest

Represents a device request made as part of a care program.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Special Access Rules

Field Service must be enabled.

Authenticated external users can create and update ProductRequest objects.

Fields

Field Name	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The account associated with the product request. This is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p>

Field Name	Details
	<p>Refers To Account</p>
CareProgramEnrolleeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the care program enrollee associated with the product request. This field is available from API version 49.0 and later. This is a relationship field.</p> <p>Relationship Name CareProgramEnrollee</p> <p>Relationship Type Lookup</p> <p>Refers To CareProgramEnrollee</p>
CaseId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The case associated with the product request. This is a relationship field.</p> <p>Relationship Name Case</p> <p>Relationship Type Lookup</p> <p>Refers To Case</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description A text field for details not recorded in the provided fields.</p>
DestinationLocationId	<p>Type reference</p>

Field Name	Details
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	Where the product is delivered.
	This is a relationship field.
	Relationship Name
	DestinationLocation
	Relationship Type
	Lookup
	Refers To
	Location
LastReferencedDate	Type
	dateTime
	Properties
	Filter, Nullable, Sort
	Description
	The date when the product request was last modified. Its label in the user interface is Last Modified Date.
LastModifiedById	Type
	reference
	Properties
	Aggregatable, Defaulted on create, Filter, Group, Sort
	Description
	ID of the user who last updated this object.
NeedByDate	Type
	dateTime
	Properties
	Create, Filter, Nullable, Sort, Update
	Description
	Date the product must be delivered by.
OwnerId	Type
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The owner of the shipment.
	This is a polymorphic relationship field.

Field Name	Details
	Relationship Name
	Owner
	Relationship Type
	Lookup
	Refers To
	Group, User
ProductRequestNumber	Type
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-assigned number that identifies the shipment.
ShipToAddress	Type
	address
	Properties
	Filter, Nullable
	Description
	The address that the product is to be delivered to.
ShipToCity	Type
	string
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	The city that the product is to be delivered to.
ShipToCountry	Type
	string
	Properties
	Create, Filter, Group, Nullable, Sort, Update
	Description
	The country that the product is to be delivered to.
ShipToGeocodeAccuracy	Type
	picklist
	Properties
	Create, Filter, Group, Nullable, Restricted picklist, Sort, Update
	Description
	The accuracy of the geocode for the shipping address.

Field Name	Details
ShipToLatitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The latitude of the location where the product is to be delivered to.
ShipToLongitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The longitude of the location where the product is to be delivered to.
ShipToPostalCode	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The postal code of the address where the product is to be delivered to.
ShipToState	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The name of the state where the product is to be delivered to.
ShipToStreet	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The street address where the product is to be delivered to.
ShipmentType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The type of shipment. The picklist includes the following values by default:

Field Name	Details
	<ul style="list-style-type: none"> • None • Rush • Overnight • Next Business Day • Pick Up
SourceLocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The location the product is shipped from. This is a relationship field.</p> <p>Relationship Name SourceLocation</p> <p>Relationship Type Lookup</p> <p>Refers To Location</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of the product transfer.</p>
WorkOrderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The work order that the product request is related to. This is a relationship field.</p> <p>Relationship Name WorkOrder</p> <p>Relationship Type Lookup</p> <p>Refers To WorkOrder</p>

Field Name	Details
WorkOrderLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The work order line item that the product request is related to. This is a relationship field.</p> <p>Relationship Name WorkOrderLineItem</p> <p>Relationship Type Lookup</p> <p>Refers To WorkOrderLineItem</p>

ProductRequestLineItem

A junction object between `ProductRequest` and `ProductTransfer`. This object is available in API version 50.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The last date and time this record was referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The last date and time this record was viewed.</p>

Field	Details
NeedByDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date specified as required in a transfer request.</p>
ParentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Reference to the parent ProductRequest record.</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Reference to the product requested.</p>
ProductRequestLineItemNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of this record. This is auto-generated.</p>
QuantityRequested	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The quantity that was requested.</p>
QuantityUnitOfMeasure	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of the quantity requested.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Each

productrequired

Represents a product that is needed to complete a visit.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the product required was last modified. Its label in the user interface is Last Modified Date.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the product required was last viewed.</p>
ParentRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The work order or work order line item that the product is required for.</p>
ParentRecordType	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description Indicates whether the parent record is a work order or a work order line item.</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The required product.</p>
ProductName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the product required.</p>
ProductRequiredNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description (Read only) Auto-generated number identifying the product required.</p>
QuantityRequired	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Quantity required of the product.</p>
QuantityUnitOfMeasure	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Units of the required product</p>

Usage

Required products can be added to work types, work orders, and work order line items to ensure that the assigned service resource arrives with the right equipment.

Adding required products to work types saves you time and keeps your business processes consistent. Work orders and work order line items inherit their work type's required products. For example, if all light bulb replacement jobs require a ladder and a light bulb, add the ladder and light bulb as required products to your Light Bulb Replacement work type. When it's time to create a work order for a customer's light bulb replacement, applying that work type to the work order adds the required products.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

[ProductRequiredFeed](#)

Feed tracking is available for the object.

[ProductRequiredHistory](#)

History is available for tracked fields of the object.

producttransfer

Represents the transfer of inventory between locations in field service.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),  
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Details not recorded in the provided fields.</p>
DestinationLocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The place the product is to be delivered.</p>
ExpectedPickupDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date that the transfer is being requested for.</p>

Field	Details
IsReceived	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Checkbox identifying that the product was received.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The date when the product request was last modified. Its label in the user interface is Last Modified Date.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The date when the product request was last viewed.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Owner of the product transfer.</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description Lookup field for the product associated with the product transfer.</p>
ProductTransferNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description An auto-assigned number that identifies the product transfer.</p>
QuantityReceived	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount of product received at the destination location.</p>
QuantitySent	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Amount of product that's being requested.</p>
QuantityUnitOfMeasure	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The units of the product, for example grams, liters, or units.</p>
ReceivedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Lookup field for the person who received the product at the destination location.</p>
ShipmentExpectedDeliveryDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date for which the transfer is being accepted..</p>
SourceLocationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Reference to the location of the inventory making the transfer.</p>
SourceProductItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reference to the inventory making the transfer.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the transfer request. Possible values are:</p> <ul style="list-style-type: none"> • Accepted • Rejected • Requested

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ProductTransferFeed

Feed tracking is available for the object.

ProductTransferHistory

History is available for tracked fields of the object.

ProductTransferOwnerSharingRule

Sharing rules are available for the object.

ProductTransferShare

Sharing is available for the object.

RecordAction

Represents a relationship between a record and an action, such as a flow. Create a RecordAction for every action that you want to associate with a particular record. Available in API version 42.0 and later.



Note: Access to the RecordAction object is determined by a user's access to the associated parent record.

Supported Calls

`create()`, `delete()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`,
`undelete()`, `update()`, `upsert()`

Special Access Rules

As of Summer '20 and later, only authenticated internal and external users can access this object.

Fields

Field	Details
ActionDefinition	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Required in Lightning Flow for Service implementations that use version 44.0 or later of the API. The API name of the action to associate with the record; for example, the API name of a flow. Use this field rather than FlowDefinition. To distinguish a quick action from a flow with the same API name, we prepend "QuickAction" to the API name of every quick action.</p>
ActionType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Required in Lightning Flow for Service implementations that use version 46.0 or later of the API. The type of action. Possible values are:</p> <ul style="list-style-type: none"> • Flow (default) • QuickAction <p>For versions of the API prior to version 46.0, this field is set to Flow.</p>
FlowDefinition	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Optional in Lightning Flow for Service implementations using version 42.0 or 43.0 of the API. An upgrade to Winter '19 or later, which uses API version 44.0 or later, copies FlowDefinition to ActionDefinition. For versions 42.0 and 43.0, this field is the API name of the flow that's associated with the record.</p>
FlowInterviewId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Optional. The flow interview ID of the paused or completed flow. This field can't be set in Process Builder. This is a relationship field.</p> <p>Relationship Name FlowInterview</p> <p>Relationship Type Lookup</p> <p>Refers To FlowInterview</p>
IsMandatory	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Optional. Specifies whether the action is mandatory. The default value is false.</p> <p> Note: At runtime, we show a reminder when the user closes a mandatory flow without completing it. We don't show the reminder for quick actions.</p>
IsUiRemoveHidden	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Optional. Specifies whether the ability to remove the action is hidden in the UI. The default value is false. If true, the UI hides the ability to remove the action. However, actions can still be deleted using the API.</p>
Order	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The order of the action among all actions associated with this record.</p>
ParticipantRoleId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The participant role that's associated with the record action. This field is a polymorphic relationship field and is available in API version 58.0 and later.</p> <p>Relationship Name ParticipantRole</p> <p>Relationship Type Lookup</p> <p>Refers To ParticipantRole</p>
Pinned	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies whether the action is pinned to the top or bottom of the component. If an action is pinned, users see the Remove option in the UI unless <code>IsUiRemoveHidden</code> is set to true. Possible values are:</p> <ul style="list-style-type: none"> • None (default) • Top • Bottom
RecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Record associated with the action. In version 46.0 and above, we support most object types. To learn about supported objects, see the Lightning Flow for Service Developer's Guide. This is a relationship field.</p> <p>Relationship Name Record</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Address, Asset, AssetRelationship, AssignedResource, AssociatedLocation, Campaign, CampaignMember, CarePreauth, CarePreauthItem, Case, ChangeRequest, CollaborationGroup, Contact, ContactRequest, Contract, CoverageBenefit, CoverageBenefitItem,</p>

Field	Details
	<p>EnhancedLetterhead, Incident, Lead, Location, MemberPlan, OperatingHours, Opportunity, Order, PlanBenefit, PlanBenefitItem, Problem, Pricebook2, PricebookEntry, Product2, ProductItem, ProductItemTransaction, ProductRequest, ProductRequestLineItem, ProductRequired, ProductTransfer, PurchaserPlan, PurchaserPlanAssn, RebateMemberAggregateItem, ResourceAbsence, ResourcePreference, ReturnOrder, ReturnOrderLineItem, ServiceAppointment, ServiceResource, ServiceResourceSkill, ServiceTerritory, ServiceTerritoryMember, Shipment, SkillRequirement, SocialPersona, SocialPost, TimeSlot, User, Visit, VoiceCall, WorkOrder, WorkOrderLineItem, WorkType, WorkTypeGroup</p> <p>ChangeRequest, Incident, Problem are available in API version 53.0 and later.</p> <p>RebateMemberAggregateItem is available in API version 54.0 and later.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p>Description Required. The current state of the action. Possible values are:</p> <ul style="list-style-type: none"> • New (default) • Paused • Complete • Started • Unlinked—The action was unlinked because the flow was paused and the current record for the flow interview changed. <p>Paused and unlinked statuses do not apply to quick actions. This field can't be set in Process Builder.</p>

Usage

The RecordAction object works with the Actions & Recommendations component in Lightning Experience. Although this junction object can be used to create relationships between records and actions in Salesforce Classic, those relationships can't be displayed in Salesforce Classic.



Note: API version 44.0 added a field, ActionDefinition, so that a RecordAction in future releases can support other types of actions in addition to flows. API version 44.0 and later maintain the FlowDefinition field to support processes that reference this field in earlier API versions. Upgrading an org to Winter '19 or later, which uses API version 44.0 or later, copies the FlowDefinition field to the ActionDefinition field. FlowDefinition will be deprecated in a future release, so use ActionDefinition instead.

When an action is deleted that's referenced in an ActionDefinition or FlowDefinition, the RecordAction object is deleted. RecordAction objects are also deleted when the associated parent record is deleted, or when a flow is paused and the current record context has changed. When an action is completed, the associated RecordAction object is also deleted.

Deleted RecordActions are removed from the list when the page is refreshed.

For more information about the Actions & Recommendations component and how it works with RecordActions, see the [Lightning Flow for Service Developer Guide](#).

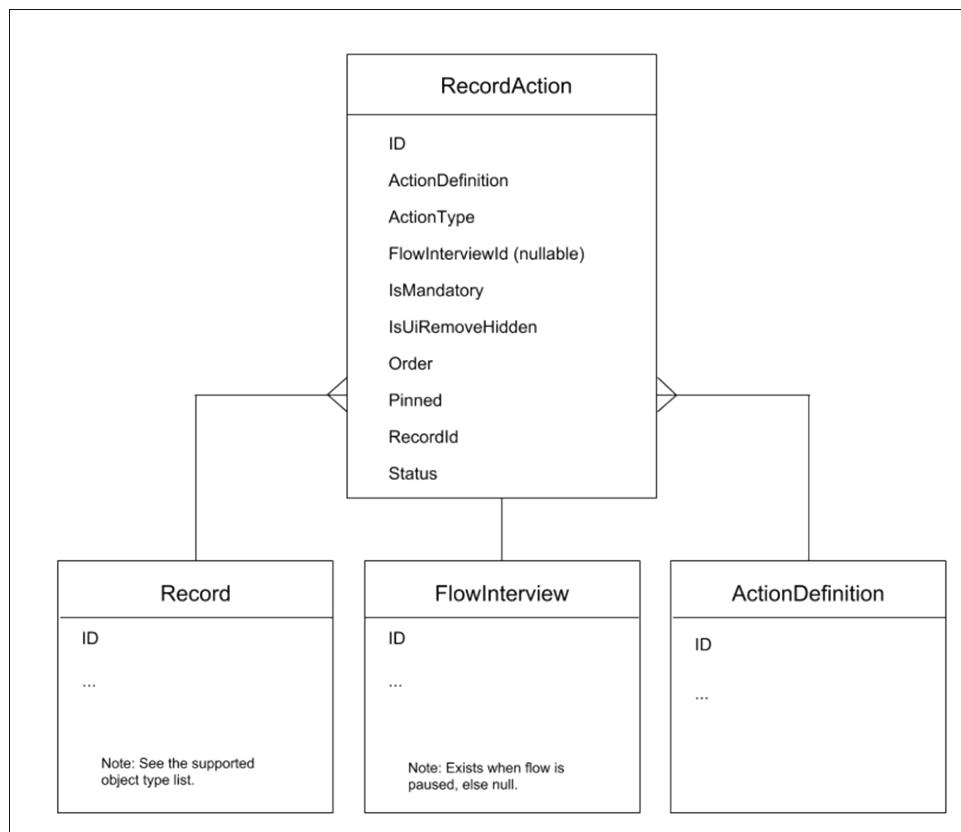
Java Example

Here's an example of how to associate flows to a record using the RecordAction object.

```
public void associateNewCustomerFlowWithAccount(Account a) {
    try {
        RecordAction newRecordAction = new RecordAction();
        newRecordAction.setRecordId(a.getId());
        newRecordAction.setActionDefinition("New_Customer_Flow");
        newRecordAction.setOrder(1);

        SaveResult[] results = connection
            .create(new SObject[] { newRecordAction });
    } catch (ConnectionException ce) {
        ce.printStackTrace();
    }
}
```

Data Model



Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

RecordActionHistory

History is available for tracked fields of the object.

SerializedProduct

Records serial numbers for each individual product in an inventory. This object is available in API version 50.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Special Access Rules

To use this object, you need the Manage Industries Visit permission and the Industries Visit permission set license. This rule doesn't apply to using serialized products in Field Service.

Fields

Field	Details
AssetId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Reference to an asset record.
ExpirationDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date the product expires.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The last date and time this record was referenced.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	<p>Description The last date and time this record was viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the serialized product record. This is auto-generated.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Reference to the owner of the record.</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product that is serialized.</p>
ProductItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reference to the inventory, a product item record, this serialized product belongs to.</p>
SerialNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The serial number of the product.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The status of the product. Possible values include:</p> <ul style="list-style-type: none"> • Available • Consumed • Damaged • Lost • Sent <p>The default value is Available.</p>

Visit

Track information related to a field rep's visit to a health care provider.

Special Access Rules

In Life Sciences Cloud, Visit is used for Customer Engagement.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account that is associated with a visit.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
Channel	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description The channel of the visit.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Email • In-Person • Phone • Remote • SMS • WeChat • WhatsApp <p>The default value is <code>In-Person</code>. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
ParentVisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description If this visit is the child of a larger group visit, this field is used to provide a link to that visit.</p> <p>This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p> <p>Relationship Name ParentVisit</p> <p>Refers To Visit</p>
PlaceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the location that sales reps visit.</p> <p>Relationship Name Place</p> <p>Refers To Address, ContactPointAddress, Location, RetailStore</p>
PlannedVisitStartTime	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Sort, Update</p>
	<p>Description The date and time when the visit is expected to start.</p>
SignatureType	<p>Type picklist</p>
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>
	<p>Description The type of the signature.</p>
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Digital • Physical
	<p>This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
Status	<p>Type picklist</p>
	<p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p>
	<p>Description The status of a visit.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Completed • Planned <p>The default value is Planned.</p>
TerritoryId	<p>Type reference</p>
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The ID of the territory for this visit.</p> <p>This field is a relationship field. This field is available with the Life Sciences Cloud for Customer Engagement Add-on license in API version 65.0 and later.</p>
	<p>Relationship Name Territory</p>
	<p>Refers To Territory2</p>

VisitedParty

Represents the contact person at the account that's being visited. This object is available in API version 49.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Lookup to the person assigned as the contact at an account. This field references the Contact object.</p>
IsPrimaryContact	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the person is the primary visited party.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the visited party.</p>
VisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Lookup to the Visit record this person is associated with.</p>

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

VisitedPartyHistory

History is available for the object.

VisitedPartyFeed

Feed tracking is available for the object.

Visitor

Represents the sales reps performing visits.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
AssigneeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Lookup to the person assigned as the visitor. Such as the employee attending the visit with the field user. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Assignee</p> <p>Relationship Type Master-detail</p> <p>Refers To</p> <ul style="list-style-type: none"> • Contact • User
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the visitor.</p>
VisitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Lookup to the <code>Visit</code> record this visitor is associated with. This field is a relationship field.</p> <p>Relationship Name Visit</p> <p>Refers To Visit</p>

Life Sciences Cloud Associated Objects

This section provides a list of objects associated to Life Sciences Cloud standard objects with their standard fields.

Some fields may not be listed for some objects. To see the system fields for each object, see [System Fields](#) in the *Object Reference for Salesforce and Lightning Platform*.

To verify the complete list of fields for an object, use a describe call from the API or inspect with an appropriate tool. For example, inspect the WSDL or use a schema viewer.

*StandardObjectName*ChangeEvent

A ChangeEvent object is available for each object that supports Change Data Capture. You can subscribe to a stream of change events using Change Data Capture to receive data tied to record changes in Salesforce. Changes include record creation, updates to an existing record, deletion of a record, and undeletion of a record. A change event isn't a Salesforce object—it doesn't support CRUD operations or queries. It's included in the object reference so you can discover which Salesforce objects support change events.

Supported Calls

```
describeSObjects()
```

Special Access Rules

- Not all objects may be available in your org. Some objects require specific feature settings and permissions to be enabled.
- For more special access rules, if any, see the documentation for the standard object. For example, for AccountChangeEvent, see the special access rules for Account.

Change Event Name

Change events are available for all custom objects and a subset of standard objects. The name of a change event is based on the name of the corresponding object for which it captures the changes.

Standard Object Change Event Name

```
<Standard_Object_Name>ChangeEvent
```

Example: AccountChangeEvent

Custom Object Change Event Name

```
<Custom_Object_Name>__ChangeEvent
```

Example: MyCustomObject__ChangeEvent

Change Event Fields

The fields that a change event can include correspond to the fields on the associated parent Salesforce object, with a few exceptions. For example, AccountChangeEvent fields correspond to the fields on Account.

The fields that a change event doesn't include are:

- The IsDeleted system field.
- The SystemModStamp system field.

- Any field whose value isn't on the record and is derived from another record or from a formula, except roll-up summary fields, which are included. Examples are formula fields. Examples of fields with derived values include `LastActivityDate` and `PhotoUrl`.

Each change event also contains header fields. The header fields are included inside the `ChangeEventHeader` field. They contain information about the event, such as whether the change was an update or delete and the name of the object, like `Account`.

In addition to the event payload, the event schema ID is included in the `schema` field. Also included is the event-specific field, `replayId`, which is used for retrieving past events.

Event Message Example

The following example is an event message in JSON format for a new account record creation.

```
{  
  "schema": "IeRuaY6cbI_HsV8Rv1Mc5g",  
  "payload": {  
    "ChangeEventHeader": {  
      "entityName": "Account",  
      "recordIds": [  
        "<record_ID>"  
      ],  
      "changeType": "CREATE",  
      "changeOrigin": "com/salesforce/api/soap/51.0;client=SfdcInternalAPI/",  
      "transactionKey": "0002343d-9d90-e395-ed20-cf416ba652ad",  
      "sequenceNumber": 1,  
      "commitTimestamp": 1612912679000,  
      "commitNumber": 10716283339728,  
      "commitUser": "<User_ID>"  
    },  
    "Name": "Acme",  
    "Description": "Everyone is talking about the cloud. But what does it mean?",  
    "OwnerId": "<Owner_ID>",  
    "CreatedDate": "2021-02-09T23:17:59Z",  
    "CreatedBy": "<User_ID>",  
    "LastModifiedDate": "2021-02-09T23:17:59Z",  
    "LastModifiedBy": "<User_ID>"  
  },  
  "event": {  
    "replayId": 6  
  }  
}
```

API Version and Schema

When you subscribe to change events, the subscription uses the latest API version and the event messages received reflect the latest field definitions. For more information, see [API Version and Event Schema](#) in the *Change Data Capture Developer Guide*.

Usage

For more information about Change Data Capture, see [Change Data Capture Developer Guide](#).

Objects That Support Change Events

The following objects have associated ChangeEvent objects.

- AccountPlanParticipant
- AccountPlanProduct
- AccountPlanRelationship
- AccountPlanRelaObjAnalysis
- AccountPlanStakeholder
- AccountPlanStkhldrAction
- AccountPlanStkhldrProduct
- AcctPlanPtcpStakeholder
- ActionableList
- ActionableListFilterCriteria
- ActionPlanStatusPeriod
- AppAlert
- AppAlertTerritory
- AppAlertUserResponse
- BusinessLicenseProduct
- CareProgram
- CommSubConsentCmplSnpsh
- CommSubscription
- ContactPointAddress
- ContactPointBestContactTime
- ContactPointSocial
- GoalDefinitionProduct
- HealthcareProvider
- Inquiry
- InquiryQuestion
- InquiryQuestionAnswer
- LifeSciAcctGrpAssignment
- LifeSciEmailTemplate
- LifeSciEmailTmplFragment
- LifeSciEmailTmplRelaFrgmt
- LifeSciEmailTmplSnapshot
- LifeSciMarketableProduct
- LifeSciProductAcctRstrc
- LifeScienceEmail
- MergeRequest
- PartyPublication
- ProductGuidance
- ProductTerritoryAvailability

- ProviderAcctProductInfo
- ProviderAcctTerritoryInfo
- ProviderAffiliation
- ProviderAffiliationProduct
- PrvdEngmtComplianceCycle
- PrvdAccountTerritorySummary
- Sprint
- TerritoryAccountScore
- TerritoryAcctProdMsgScore
- TerritoryAcctRcmdAction
- TerritoryBusinessPlan
- TerrGeoAssignmentRule
- TerrProvAffilAssignRule
- VideoCall
- VideoCallParticipant
- VideoCallPtcpRequest
- VideoCallPtcpSession
- VideoCallRecording

StandardObjectNameFeed

StandardObjectNameFeed is the model for all feed objects associated with standard objects. These objects represent the posts and feed-tracked changes of a standard object.

The object name is variable and uses *StandardObjectNameFeed* syntax. For example, AccountFeed represents the posts and feed-tracked changes on an account record. We list the available associated feed objects at the end of this topic. For specific version information, see the documentation for the standard object.

Supported Calls

`delete(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve()`

Special Access Rules

In the internal org, users can delete all feed items they created. This rule varies in communities where threaded discussions and delete-blocking are enabled. Community members can delete all feed items they created, provided the feed items don't have content nested under them—like a comment, answer, or reply. Where the feed item has nested content, only feed moderators and users with the Modify All Data permission can delete threads.

To delete feed items they didn't create, users must have one of these permissions:

- Modify All Data
- Modify All Records on the parent object, like Account for AccountFeed
- Moderate Chatter



Note: Users with the Moderate Chatter permission can delete only the feed items and comments they can see.

Only users with this permission can delete items in unlisted groups.

For more special access rules, if any, see the documentation for the standard object. For example, for AccountFeed, see the special access rules for Account.

Fields

Field	Details
BestCommentId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the comment marked as best answer on a question post.</p>
Body	<p>Type textarea</p> <p>Properties Nillable, Sort</p> <p>Description The body of the post. Required when Type is TextPost. Optional when Type is ContentPost or LinkPost.</p>
CommentCount	<p>Type int</p> <p>Properties Filter, Group, Sort</p> <p>Description The number of comments associated with this feed item.</p>
ConnectionId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description When a PartnerNetworkConnection modifies a record that is tracked, the CreatedBy field contains the ID of the system administrator. The ConnectionId contains the ID of the PartnerNetworkConnection. Available if Salesforce to Salesforce is enabled for your organization.</p>
InsertedById	<p>Type reference</p> <p>Properties Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>ID of the user who added this item to the feed. For example, if an application migrates posts and comments from another application into a feed, the <code>InsertedBy</code> value is set to the ID of the context user.</p>
isRichText	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Defaulted on create, Filter, Group, Sort</p> <p>Description</p> <p>Indicates whether the feed item <code>Body</code> contains rich text. If you post a rich text feed comment using SOAP API, set <code>IsRichText</code> to <code>true</code> and escape HTML entities from the body. Otherwise, the post is rendered as plain text.</p> <p>Rich text supports the following HTML tags:</p> <ul style="list-style-type: none"> • <code><p></code> <p> Tip: Though the <code>
</code> tag isn't supported, you can use <code><p>&nbsp;</p></code> to create lines.</p> <ul style="list-style-type: none"> • <code><a></code> • <code></code> • <code><code></code> • <code><i></code> • <code><u></code> • <code><s></code> • <code></code> • <code></code> • <code></code> • <code></code> <p>The <code></code> tag is accessible only through the API and must reference files in Salesforce similar to this example: <code></code></p> <p> Note: In API version 35.0 and later, the system replaces special characters in rich text with escaped HTML. In API version 34.0 and prior, all rich text appears as a plain-text representation.</p>
LikeCount	<p>Type</p> <p>int</p> <p>Properties</p> <p>Filter, Group, Sort</p> <p>Description</p> <p>The number of likes associated with this feed item.</p>

Field	Details
LinkUrl	<p>Type url</p> <p>Properties Nillable, Sort</p> <p>Description The URL of a <code>LinkPost</code>.</p>
NetworkScope	<p>Type picklist</p> <p>Properties Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether this feed item is available in the default Experience Cloud site, a specific Experience Cloud site, or all sites. This field is available in API version 26.0 and later, if digital experiences is enabled for your org.</p> <p><code>NetworkScope</code> can have the following values:</p> <ul style="list-style-type: none"> • <code>NetworkId</code>—The ID of the Experience Cloud site in which the <code>FeedItem</code> is available. If left empty, the feed item is only available in the default Experience Cloud site. • <code>AllNetworks</code>—The feed item is available in all Experience Cloud sites. <p>Note the following exceptions for <code>NetworkScope</code>:</p> <ul style="list-style-type: none"> • Only feed items with a Group or User parent can set a <code>NetworkId</code> or a null value for <code>NetworkScope</code>. • For feed items with a record parent, users can set <code>NetworkScope</code> only to <code>AllNetworks</code>. • You can't filter a feed item on the <code>NetworkScope</code> field.
ParentId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the record that is tracked in the feed. The detail page for the record displays the feed.</p>
RelatedRecordId	<p>Type reference</p> <p>Properties Group, Nillable, Sort</p> <p>Description ID of the <code>ContentVersion</code> record associated with a <code>ContentPost</code>. This field is null for all posts except <code>ContentPost</code>.</p>

Field	Details
Title	<p>Type string</p> <p>Properties Group, Nillable, Sort</p> <p>Description The title of the feed item. When the Type is LinkPost, the LinkUrl is the URL and this field is the link name.</p>
Type	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of feed item. Values are:</p> <ul style="list-style-type: none"> • ActivityEvent—indirectly generated event when a user or the API adds a Task associated with a feed-enabled parent record (excluding email tasks on cases). Also occurs when a user or the API adds or updates a Task or Event associated with a case record (excluding email and call logging). <p>For a recurring Task with CaseFeed disabled, one event is generated for the series only. For a recurring Task with CaseFeed enabled, events are generated for the series and each occurrence.</p> <ul style="list-style-type: none"> • AdvancedTextPost—created when a user posts a group announcement and, in Lightning Experience as of API version 39.0 and later, when a user shares a post. • AnnouncementPost—Not used. • ApprovalPost—generated when a user submits an approval. • BasicTemplateFeedItem—Not used. • CanvasPost—a post made by a canvas app posted on a feed. • CollaborationGroupCreated—generated when a user creates a public group. • CollaborationGroupUnarchived—Not used. • ContentPost—a post with an attached file. • CreatedRecordEvent—generated when a user creates a record from the publisher. • DashboardComponentAlert—generated when a dashboard metric or gauge exceeds a user-defined threshold. • DashboardComponentSnapshot—created when a user posts a dashboard snapshot on a feed. • LinkPost—a post with an attached URL. • PollPost—a poll posted on a feed. • ProfileSkillPost—generated when a skill is added to a user's Chatter profile. • QuestionPost—generated when a user posts a question. • ReplyPost—generated when Chatter Answers posts a reply.

Field	Details
	<ul style="list-style-type: none"> RipplePost—generated when a user creates a Thanks badge in WDC. TextPost—a direct text entry on a feed. TrackedChange—a change or group of changes to a tracked field. UserStatus—automatically generated when a user adds a post. Deprecated.
Visibility	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether this feed item is available to all users or internal users only. This field is available if Salesforce Communities are enabled for your organization.</p> <p>Visibility can have the following values:</p> <ul style="list-style-type: none"> AllUsers—The feed item is available to all users who have permission to see the feed item. InternalUsers—The feed item is available to internal users only. <p>Note the following exceptions for Visibility:</p> <ul style="list-style-type: none"> For record posts, Visibility is set to InternalUsers for all internal users by default. External users can set Visibility only to AllUsers. On user and group posts, only internal users can set Visibility to InternalUsers.

Usage

A feed for an object is automatically created when a user enables feed tracking for the object. Use feeds to track changes to records. For example, AccountFeed tracks changes to an account record. Use feed objects to retrieve the content of feed fields, such as type of feed or feed ID.

Note the following SOQL restrictions. No SOQL limit if logged-in user has View All Data permission. If not, specify a `LIMIT` clause of 1,000 records or fewer. SOQL `ORDER BY` on fields using relationships is not available. Use `ORDER BY` on fields on the root object in the SOQL query.

StandardObjectNameHistory

StandardObjectNameHistory is the model for all history objects associated with standard objects. These objects represent the history of changes to the values in the fields of a standard object.

The object name is variable and uses *StandardObjectNameHistory* syntax. For example, AccountHistory represents the history of changes to the values of an account record's fields. We list the available associated history objects at the end of this topic. For specific version information, see the documentation for the standard object.

Supported Calls

`describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for AccountHistory, see the special access rules for Account.

Fields

Field Name	Details
<i>StandardObjectNameId</i>	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the standard object.</p>
<i>DataType</i>	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Data type of the field that was changed.</p>
<i>Field</i>	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Name of the field that was changed.</p>
<i>NewValue</i>	<p>Type anyType</p> <p>Properties Nillable, Sort</p> <p>Description New value of the field that was changed.</p>
<i>OldValue</i>	<p>Type anyType</p>

Field Name	Details
	<p>Properties Nillable, Sort</p>
	<p>Description Old value of the field that was changed.</p>

StandardObjectNameOwnerSharingRule

StandardObjectNameOwnerSharingRule is the model for all owner sharing rule objects associated with standard objects. These objects represent a rule for sharing a standard object with users other than the owner.

The object name is variable and uses *StandardObjectNameOwnerSharingRule* syntax. For example, *ChannelProgramOwnerSharingRule* is a rule for sharing a channel program with users other than the channel program owner. We list the available associated owner sharing rule objects at the end of this topic. For specific version information, see the standard object documentation.

 **Note:** To enable access to this object for your org, contact Salesforce customer support. However, we recommend that you instead use Metadata API to programmatically update owner sharing rules because it triggers automatic sharing rule recalculation. The [SharingRules](#) Metadata API type is enabled for all orgs.

Supported Calls

`create(), delete(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), update(), upsert()`

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for *ChannelProgramOwnerSharingRule*, see the special access rules for *ChannelProgram*.

Fields

Field Name	Details
AccessLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Determines the level of access users have to records. Values are:</p> <ul style="list-style-type: none"> • Read (read only) • Edit (read/write)
Description	<p>Type textarea</p>

Field Name	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Description of the sharing rule. Maximum length is 1000 characters.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization.</p> <p> Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance slows down while Salesforce generates one for each record.</p>
GroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the source group. Records that are owned by users in the source group trigger the rule to give access.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.</p>
UserOrGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field Name	Details
Description	
ID of the user or group that you are granting access to.	

StandardObjectNameShare

StandardObjectNameShare is the model for all share objects associated with standard objects. These objects represent a sharing entry on the standard object.

The object name is variable and uses *StandardObjectNameShare* syntax. For example, AccountBrandShare is a sharing entry on an account brand. We list the available associated share objects at the end of this topic. For specific version information, see the standard object documentation.

Supported Calls

`create()`, `delete()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for AccountBrandShare, see the special access rules for AccountBrand.

Fields

Field Name	Details
AccessLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The level of access allowed. Values are:</p> <ul style="list-style-type: none"> • All (owner) • Edit (read/write) • Read (read only)
ParentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the parent record.</p>

Field Name	Details
RowCause	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Reason that the sharing entry exists.</p>
UserOrGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the user or group that has been given access to the object.</p>

VisitedPartyFeed

This object represents the posts and feed-tracked changes of the `VisitedParty` object. This object is available in API version 49.0 and later.

Supported Calls

`delete()`, `describesObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`

Fields

Field	Details
BestCommentId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the comment marked as best answer on a question post.</p>
Body	<p>Type textarea</p> <p>Properties Nillable, Sort</p> <p>Description The body of the post. Required when Type is TextPost. Optional when Type is ContentPost or LinkPost.</p>

Field	Details
CommentCount	<p>Type int</p> <p>Properties Filter, Group, Sort</p> <p>Description The number of comments associated with this feed item.</p>
InsertedById	<p>Type reference</p> <p>Properties Group, Nillable, Sort</p> <p>Description ID of the user who added this item to the feed. For example, if an application migrates posts and comments from another application into a feed, the InsertedBy value is set to the ID of the context user.</p>
IsRichText	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the feed item Body contains rich text. Set IsRichText to true if you post a rich text feed item via SOAP API. Otherwise, the post is rendered as plain text. Rich text supports the following HTML tags:</p> <ul style="list-style-type: none"> • <p> <p> Tip: Though the
 tag isn't supported, you can use <p>&nbsp;</p> to create lines.</p> <ul style="list-style-type: none"> • <a> • • <code> • <i> • <u> • <s> • • • • <p>The tag is accessible only via the API and must reference files in Salesforce similar to this example: </p>

Field	Details
LikeCount	<p>Type int</p> <p>Properties Filter, Group, Sort</p> <p>Description The number of likes associated with this feed item.</p>
LinkUrl	<p>Type url</p> <p>Properties Nillable, Sort</p> <p>Description The URL of a LinkPost.</p>
NetworkScope	<p>Type picklist</p> <p>Properties Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether this feed item is available in the default Experience Cloud site, a specific Experience Cloud site, or all sites. This field is available in API version 26.0 and later, if digital experiences is enabled for your org.</p> <p>NetworkScope can have the following values:</p> <ul style="list-style-type: none"> • NetworkId—The ID of the Experience Cloud site in which the FeedItem is available. If left empty, the feed item is only available in the default Experience Cloud site. • AllNetworks—The feed item is available in all Experience Cloud sites. <p>Note the following exceptions for NetworkScope:</p> <ul style="list-style-type: none"> • Only feed items with a Group or User parent can set a NetworkId or a null value for NetworkScope. • For feed items with a record parent, users can set NetworkScope only to AllNetworks. • You can't filter a feed item on the NetworkScope field.
ParentId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the record that is tracked in the feed. The detail page for the record displays the feed.</p>

Field	Details
RelatedRecordId	<p>Type reference</p> <p>Properties Group, Nillable, Sort</p> <p>Description ID of the ContentVersion record associated with a ContentPost. This field is null for all posts except ContentPost.</p>
Title	<p>Type string</p> <p>Properties Group, Nillable, Sort</p> <p>Description The title of the feed item. When the Type is LinkPost, the LinkUrl is the URL and this field is the link name.</p>
Type	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Possible values are:</p> <ul style="list-style-type: none"> • ActivityEvent • AdvancedTextPost—created when a user posts a group announcement and when a user shares a post. • AnnouncementPost • ApprovalPost • AttachArticleEvent • BasicTemplateFeedItem—Basic Template Post • CallLogPost • CanvasPost—a post made by a canvas app posted on a feed. • CaseCommentPost • ChangeStatusPost • ChatTranscriptPost • CollaborationGroupCreated • CollaborationGroupUnarchived • ContentPost • CreateRecordEvent • DashboardComponentSnapshot • EmailMessageEvent

Field	Details
	<ul style="list-style-type: none"> • FacebookPost • LinkPost • MilestoneEvent • PollPost • ProfileSkillPost • QuestionPost • ReplyPost • RypplePost—generated when a user creates a Thanks badge in WDC. • SocialPost • TextPost • TrackedChange • UserStatus
Visibility	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether this feed item is available to all users or internal users only. This field is available if Salesforce Communities are enabled for your organization.</p> <p>Visibility can have the following values:</p> <ul style="list-style-type: none"> • AllUsers—The feed item is available to all users who have permission to see the feed item. • InternalUsers—The feed item is available to internal users only. <p>Note the following exceptions for Visibility:</p> <ul style="list-style-type: none"> • For record posts, Visibility is set to InternalUsers for all internal users by default. • External users can set Visibility only to AllUsers. • On user and group posts, only internal users can set Visibility to InternalUsers.

Usage

A feed for an object is automatically created when a user enables feed tracking for the object. Use feeds to track changes to records. For example, AccountFeed tracks changes to an account record. Use feed objects to retrieve the content of feed fields, such as type of feed or feed ID.

Note the following SOQL restrictions. No SOQL limit if logged-in user has View All Data permission. If not, specify a `LIMIT` clause of 1,000 records or fewer. SOQL `ORDER BY` on fields using relationships is not available. Use `ORDER BY` on fields on the root object in the SOQL query.

VisitorFeed

This object represents the posts and feed-tracked changes of the `Visitor` object. This object is available in API version 49.0 and later.

Supported Calls

`delete()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`

Fields

Field	Details
BestCommentId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the comment marked as best answer on a question post.</p>
Body	<p>Type textarea</p> <p>Properties Nillable, Sort</p> <p>Description The body of the post. Required when Type is TextPost. Optional when Type is ContentPost or LinkPost.</p>
CommentCount	<p>Type int</p> <p>Properties Filter, Group, Sort</p> <p>Description The number of comments associated with this feed item.</p>
InsertedById	<p>Type reference</p> <p>Properties Group, Nillable, Sort</p> <p>Description ID of the user who added this item to the feed. For example, if an application migrates posts and comments from another application into a feed, the InsertedBy value is set to the ID of the context user.</p>
IsRichText	<p>Type boolean</p>

Field	Details
	<p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the feed item <code>Body</code> contains rich text. Set <code>IsRichText</code> to <code>true</code> if you post a rich text feed item via SOAP API. Otherwise, the post is rendered as plain text.</p> <p>Rich text supports the following HTML tags:</p> <ul style="list-style-type: none"> • <code><p></code> <p> Tip: Though the <code>
</code> tag isn't supported, you can use <code><p>&nbsp;</p></code> to create lines.</p> <ul style="list-style-type: none"> • <code><a></code> • <code></code> • <code><code></code> • <code><i></code> • <code><u></code> • <code><s></code> • <code></code> • <code></code> • <code></code> • <code></code> <p>The <code></code> tag is accessible only via the API and must reference files in Salesforce similar to this example: <code></code></p>
LikeCount	<p>Type int</p> <p>Properties Filter, Group, Sort</p> <p>Description The number of likes associated with this feed item.</p>
LinkUrl	<p>Type url</p> <p>Properties Nillable, Sort</p> <p>Description The URL of a <code>LinkPost</code>.</p>
NetworkScope	<p>Type picklist</p>

Field	Details
	<p>Properties Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether this feed item is available in the default Experience Cloud site, a specific Experience Cloud site, or all sites. This field is available in API version 26.0 and later, if digital experiences is enabled for your org.</p> <p>NetworkScope can have the following values:</p> <ul style="list-style-type: none"> • NetworkId—The ID of the Experience Cloud site in which the FeedItem is available. If left empty, the feed item is only available in the default Experience Cloud site. • AllNetworks—The feed item is available in all Experience Cloud sites. <p>Note the following exceptions for NetworkScope:</p> <ul style="list-style-type: none"> • Only feed items with a Group or User parent can set a NetworkId or a null value for NetworkScope. • For feed items with a record parent, users can set NetworkScope only to AllNetworks. • You can't filter a feed item on the NetworkScope field.
ParentId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the record that is tracked in the feed. The detail page for the record displays the feed.</p>
RelatedRecordId	<p>Type reference</p> <p>Properties Group, Nillable, Sort</p> <p>Description ID of the ContentVersion record associated with a ContentPost. This field is null for all posts except ContentPost.</p>
Title	<p>Type string</p> <p>Properties Group, Nillable, Sort</p> <p>Description The title of the feed item. When the Type is LinkPost, the LinkUrl is the URL and this field is the link name.</p>

Field	Details
Type	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Possible values are:</p> <ul style="list-style-type: none"> • ActivityEvent • AdvancedTextPost—created when a user posts a group announcement and when a user shares a post. • AnnouncementPost • ApprovalPost • AttachArticleEvent • BasicTemplateFeedItem—Basic Template Post • CallLogPost • CanvasPost—a post made by a canvas app posted on a feed. • CaseCommentPost • ChangeStatusPost • ChatTranscriptPost • CollaborationGroupCreated • CollaborationGroupUnarchived • ContentPost • CreateRecordEvent • DashboardComponentSnapshot • EmailMessageEvent • FacebookPost • LinkPost • MilestoneEvent • PollPost • ProfileSkillPost • QuestionPost • ReplyPost • RypplePost—generated when a user creates a Thanks badge in WDC. • SocialPost • TextPost • TrackedChange • UserStatus

Field	Details
Visibility	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether this feed item is available to all users or internal users only. This field is available if Salesforce Communities are enabled for your organization.</p> <p>Visibility can have the following values:</p> <ul style="list-style-type: none"> • AllUsers—The feed item is available to all users who have permission to see the feed item. • InternalUsers—The feed item is available to internal users only. <p>Note the following exceptions for Visibility:</p> <ul style="list-style-type: none"> • For record posts, Visibility is set to InternalUsers for all internal users by default. • External users can set Visibility only to AllUsers. • On user and group posts, only internal users can set Visibility to InternalUsers.

Usage

A feed for an object is automatically created when a user enables feed tracking for the object. Use feeds to track changes to records. For example, AccountFeed tracks changes to an account record. Use feed objects to retrieve the content of feed fields, such as type of feed or feed ID.

Note the following SOQL restrictions. No SOQL limit if logged-in user has View All Data permission. If not, specify a LIMIT clause of 1,000 records or fewer. SOQL ORDER BY on fields using relationships is not available. Use ORDER BY on fields on the root object in the SOQL query.

Life Sciences Cloud Fields on Standard Objects

Life Sciences Cloud adds fields to some standard Salesforce objects to represent information about individuals. These fields are available only in orgs where Life Sciences Cloud is enabled.

Fields on Account

Life Sciences Cloud fields extend the standard Account object to represent information about patients and providers.

AccountPlan

Life Sciences Cloud fields extend the standard Account Plan object to represent information about customers with measurable objectives and executable steps to proactively manage and grow customer relationships.

AccountPlanObjective

Life Sciences Cloud fields extend the standard Account Plan Objective object to represent information about strategic objectives or initiatives pursued by a relationship team with a customer to enhance customer engagement and satisfaction.

[ActionPlan](#)

Life Sciences Cloud fields extend the standard ActionPlan object to represent the instance of an action plan.

[ActionPlanItem](#)

Life Sciences Cloud fields extend the standard ActionPlanItem object to represent the instance of an action plan item.

[ActionPlanTemplateItemValue](#)

Life Sciences Cloud fields extend the standard ActionPlanTemplateItemValue object to represent the value associated with an action plan template item.

[Fields on ActionPlanTemplate](#)

Life Sciences Cloud fields extend the standard ActionPlanTemplate object for integration with external systems.

[Fields on ActionPlanTemplateItem](#)

Life Sciences Cloud fields extend the standard ActionPlanTemplateItem object to support integration with external systems, commonly used for Key Account Management.

[ActionPlanTemplateVersion](#)

Life Sciences Cloud fields extend the standard ActionPlanTemplateVersion object to represent a version of an action plan template.

[Fields on Contact](#)

Life Sciences Cloud fields extend the standard Contact object to represent information about an individual.

[Fields on ContactPointAddress](#)

Life Sciences Cloud fields extend the standard Contact Point Address object to represent a contact's billing or shipping address associated with an individual or account. This object is available in API version 65.0 and later.

[Fields on Event](#)

Life Sciences Cloud fields extend the standard Event object to represent an event in the calendar. In the user interface, event and task records are collectively referred to as activities.

[Fields on Event Relation](#)

Life Sciences Cloud fields extend the standard Event Relation object to represent a person (a user, lead, or contact) or a resource (such as a conference room) invited to an event.

[Fields on ProductRequest](#)

Life Sciences Cloud fields extend the standard ProductRequest object for sample order information, including destination user and urgency level.

[Fields on ProductRequestLineitem](#)

Life Sciences Cloud fields extend the Product Request Line Item object to represent information about sample order details.

[Fields on ProductTransfer](#)

Life Sciences Cloud fields extend the standard ProductTransfer object to capture specific inventory and batch information.

Fields on Account

Life Sciences Cloud fields extend the standard Account object to represent information about patients and providers.

Fields

Field	Details
Effective Date	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date from when the person account is active.</p>
End Date	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date from when the person account is no longer active.</p>
Source System ID	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in its source system. This field can't be encrypted.</p>

AccountPlan

Life Sciences Cloud fields extend the standard Account Plan object to represent information about customers with measurable objectives and executable steps to proactively manage and grow customer relationships.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), update(), upsert()
```

Fields

Field	Details
ActionPlanCompletedPct	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	Description
	The completed percentage of action plans associated with the account plan.
EconomicalAnalysisInfo	Type textarea
	Properties
	Create, Nillable, Update
	Description
	The evaluation of economic factors that can affect the account, including market trends, economic indicators, and financial health of the customer and their industry.
EnvironmentalAnalysisInfo	Type textarea
	Properties
	Create, Nillable, Update
	Description
	The assessment of environmental factors that can impact the account, such as sustainability considerations, climate change-related risks, and regulatory compliance with environmental standards.
LegalAnalysisInfo	Type textarea
	Properties
	Create, Nillable, Update
	Description
	The detailed analysis of the legal landscape relevant to the account, including regulations, compliance requirements, and potential legal risks or opportunities.
PoliticalAnalysisInfo	Type textarea
	Properties
	Create, Nillable, Update
	Description
	The detailed assessment of political factors that can influence the account, such as government policies, regulatory changes, and political stability in the relevant regions.
SocialAnalysisInfo	Type textarea
	Properties
	Create, Nillable, Update

Field	Details
	<p>Description The examination of social factors that can impact the account, including demographic trends, cultural considerations, and social responsibility initiatives.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>
TechnologicalAnalysisInfo	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The evaluation of technological factors that can affect the account, including emerging technologies, industry-specific innovations, and the customer's technological capabilities and infrastructure.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AccountPlanChangeEvent on page 1426](#)

Change events are available for the object.

[AccountPlanFeed on page 1429](#)

Feed tracking is available for the object.

[AccountPlanHistory on page 1434](#)

History is available for tracked fields of the object.

AccountPlanShare on page 1438

Sharing is available for the object.

SEE ALSO:

[Object Reference for the Salesforce Platform: AccountPlan](#)

[Object Reference for the Salesforce Platform: AccountPlan](#)

AccountPlanObjective

Life Sciences Cloud fields extend the standard Account Plan Objective object to represent information about strategic objectives or initiatives pursued by a relationship team with a customer to enhance customer engagement and satisfaction.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
ActionPlanCompletedPct	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The completed percentage of action plans associated with the account plan objective.</p>
DueDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the objective is due to be completed.</p>
GoalDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The goal definition associated with the account plan objective. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name GoalDefinition</p> <p>Refers To GoalDefinition</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into the object.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AccountPlanObjectiveChangeEvent](#)

Change events are available for the object.

[AccountPlanObjectiveFeed](#)

Feed tracking is available for the object.

[AccountPlanObjectiveHistory](#)

History is available for tracked fields of the object.

[AccountPlanObjectiveShare on page 1438](#)

Sharing is available for the object.

SEE ALSO:

[Object Reference for the Salesforce Platform: AccountPlanObjective](#)

[Object Reference for the Salesforce Platform: AccountPlanObjective](#)

ActionPlan

Life Sciences Cloud fields extend the standard ActionPlan object to represent the instance of an action plan.

The ActionPlan object and its fields are used by the Key Account Management and the Provider Engagement Compliance feature areas. This topic only lists the fields used in Key Account Management. To learn about the fields that are used in Provider Engagement Compliance, see the ActionPlan object documentation in the Provider Engagement Compliance section.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
CompletedPercentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of the action plan that has been completed.</p>
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>
SprintId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The sprint which tracks the action plan. This field is a relationship field.</p> <p>Relationship Name Sprint</p>

Field	Details
	<p>Refers To Sprint</p>
StatusCode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the current status of the action plan. Possible values are:</p> <ul style="list-style-type: none"> • Canceled • Completed • In Progress • Not Started • Restarted
TargetReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reference record associated with the action plan. This field is a polymorphic relationship field.</p> <p>Relationship Name TargetReferenceRecord</p> <p>Refers To CareProgram, Visit</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ActionPlanChangeEvent](#)

Change events are available for the object.

[ActionPlanFeed](#)

Feed tracking is available for the object.

ActionPlanShare

Sharing is available for the object.

SEE ALSO:

[Object Reference for the Salesforce Platform: ActionPlan](#)

ActionPlanItem

Life Sciences Cloud fields extend the standard ActionPlanItem object to represent the instance of an action plan item.

The ActionPlanItem object and its fields are used by the Key Account Management and the Provider Engagement Compliance feature areas. This topic only lists the fields used in Key Account Management. To learn about the fields that are used in Provider Engagement Compliance, see the ActionPlanItem object documentation in the Provider Engagement Compliance section.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
SourceSystemIdentifier	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The identifier of the record in the source system.
SourceSystemName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the system from which data is loaded into this object.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ActionPlanItemChangeEvent

Change events are available for the object.

SEE ALSO:

[Object Reference for the Salesforce Platform: ActionPlanItem](#)

ActionPlanTemplateItemValue

Life Sciences Cloud fields extend the standard ActionPlanTemplateItemValue object to represent the value associated with an action plan template item.

The ActionPlanTemplateItemValue object and its fields are used by the Key Account Management and the Provider Engagement Compliance feature areas. This topic only lists the fields used in Key Account Management. To learn about the fields that are used in Provider Engagement Compliance, see the ActionPlanTemplateItemValue object documentation in the Provider Engagement Compliance section.

Supported Calls

`create(), delete(), describeLayout(), describesObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ActionPlanTemplateItemValueChangeEvent

Change events are available for the object.

SEE ALSO:

[Object Reference for the Salesforce Platform: ActionPlanTemplateItemValue](#)

Fields on ActionPlanTemplate

Life Sciences Cloud fields extend the standard ActionPlanTemplate object for integration with external systems.

Fields

Field	Details
ParentTemplateId	<p>Type Reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the parent template associated with the action plan template. This field is a relationship field.</p> <p>Relationship Name ParentTemplate</p> <p>Refers To ActionPlanTemplate</p>
SourceSystemIdentifier	<p>Type String</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type String</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>

Fields on ActionPlanTemplateItem

Life Sciences Cloud fields extend the standard ActionPlanTemplateItem object to support integration with external systems, commonly used for Key Account Management.

Fields

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nullable, Sort, Update</p> <p>Description The identifier of the record in the source system.</p>
SourceSystemName	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The name of the system from which data is loaded into this object.</p>

ActionPlanTemplateVersion

Life Sciences Cloud fields extend the standard ActionPlanTemplateVersion object to represent a version of an action plan template.

The ActionPlanTemplateVersion object and its fields are used by the Key Account Management and the Provider Engagement Compliance feature areas. This topic only lists the fields used in Key Account Management. To learn about the fields that are used in Provider Engagement Compliance, see the ActionPlanTemplateVersion object documentation in the Provider Engagement Compliance section.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
ActionPlanTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description The ID of the action plan template this version represents. This field is a relationship field.</p>
	<p>Relationship Name ActionPlanTemplate</p>
	<p>Relationship Type Master-detail</p>
	<p>Refers To ActionPlanTemplate (the master object)</p>
ActivationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort</p> <p>Description The date and time when this version becomes active.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the action plan template version.</p>

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the action plan template version. Possible values are:</p> <ul style="list-style-type: none"> • Draft • Final—Published • Obsolete • ReadOnly
Version	<p>Type int</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort</p> <p>Description The index number of this action plan template version.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ActionPlanTemplateVersionChangeEvent

Change events are available for the object.

SEE ALSO:

[Object Reference for the Salesforce Platform: ActionPlanTemplateVersion](#)

Fields on Contact

Life Sciences Cloud fields extend the standard Contact object to represent information about an individual.

Fields

Field	Details
MaritalStatus	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The individual's marital status.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Divorced • Married • Separated • Single • Widowed

Fields on ContactPointAddress

Life Sciences Cloud fields extend the standard Contact Point Address object to represent a contact's billing or shipping address associated with an individual or account. This object is available in API version 65.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
BrickName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the geography brick associated with the contact point address record.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the contact point address record.</p>
FullAddress	<p>Type string</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p>
	<p>Description The concatenated address of the contact point address. This field is a calculated field.</p>
GeoGroup1Code	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The first geography group code associated with the contact point address.</p>
GeoGroup2Code	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The second geography group code associated with the contact point address.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether a contact's address is active for the account (true) or not (false). The default value is <code>false</code>.</p>
IsStateDstrLicenseExempt	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the contact point address is exempt from the requirement for a State Distributor License (SDL). The default value is <code>false</code>.</p>
IsTerrAssignmentExcluded	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
Description	Indicates whether a contact's address is excluded from territory alignment (true) or not (false). The default value is <code>false</code> .
IsValidated	Type boolean
Properties	Create, Defaulted on create, Filter, Group, Sort, Update
Description	Indicates whether a contact's address is validated (true) or not (false). The default value is <code>false</code> .
RelatedContactPointAddressId	Type reference
Properties	Create, Filter, Group, Nillable, Sort
Description	The source of this contact point address record. This field is a relationship field.
Relationship Name	RelatedContactPointAddress
Refers To	ContactPointAddress
SourceSystemIdentifier	Type string
Properties	Create, Filter, Group, idLookup, Nillable, Sort, Update
Description	The ID of the record in the external system.
SourceSystemName	Type string
Properties	Create, Filter, Group, Nillable, Sort, Update
Description	The name of the external system that generated the record.
WebsiteUrl	Type url

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p>
	<p>Description The URL of the website associated with the contact.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ContactPointAddressChangeEvent on page 1426](#)

Change events are available for the object.

[ContactPointAddressHistory on page 1434](#)

History is available for tracked fields of the object.

[ContactPointAddressShare on page 1438](#)

Sharing is available for the object.

SEE ALSO:

[Object Reference for the Salesforce Platform: ContactPointAddress](#)

Fields on Event

Life Sciences Cloud fields extend the standard Event object to represent an event in the calendar. In the user interface, event and task records are collectively referred to as activities.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Contains a text description of the event. Limit: 32,000 characters.</p>
EndDateTime	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Available in API versions 13.0 and later. The time portion of this field is always transferred in the Coordinated Universal Time (UTC) time zone. Translate the time portion to or from a local time zone for the user or the application, as appropriate.</p> <p>This field is optional, depending on the following:</p> <ul style="list-style-type: none"> • If <code>IsAllDayEvent</code> is true, you can supply a value for either <code>DurationInMinutes</code> or <code>EndDateTime</code>. Supplying values in both fields is allowed if the values add up to the same amount of time. If both fields are <code>null</code>, the duration defaults to one day. • If <code>IsAllDayEvent</code> is false, a value must be supplied for either <code>DurationInMinutes</code> or <code>EndDateTime</code>. Supplying values in both fields is allowed if the values add up to the same amount of time. <p>Depending on your API version, errors with the <code>DurationInMinutes</code> and <code>EndDateTime</code> fields may appear in different places.</p> <ul style="list-style-type: none"> • Versions 38.0 and before—Errors always appear in the <code>DurationInMinutes</code> field. • Versions 39.0 and later—if there's no value for the <code>DurationInMinutes</code> field, errors appear in the <code>EndDateTime</code> field. Otherwise, they appear in the <code>DurationInMinutes</code> field.
<code>IsAllDayEvent</code>	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the <code>ActivityDate</code> field (<code>true</code>) or the <code>ActivityDateTime</code> field (<code>false</code>) is used to define the date or time of the event. Label is All-Day Event. See also <code>DurationInMinutes</code> and <code>EndDateTime</code>.</p> <p>The default value is <code>false</code>.</p>
<code>OwnerId</code>	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Contains the ID of the user or public calendar who owns the event. Label is Assigned to ID. This is a polymorphic relationship field. By default, the event is assigned to the user who created it. If the event is created by the Automated Process user, add a different value for <code>OwnerId</code>. The Automated Process user isn't a valid value for the <code>OwnerId</code> field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Calendar, User</p>
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description Indicates the start date and time of the event. Available in versions 13.0 and later. If the Event <code>IsAllDayEvent</code> flag is set to true (indicating that it's an all-day Event), then the event start date information is contained in the <code>StartTime</code> field. The time portion of this field is always transferred in the Coordinated Universal Time (UTC) time zone. Translate the time portion to or from a local time zone for the user or the application, as appropriate. If the Event <code>IsAllDayEvent</code> flag is set to false (indicating that it isn't an all-day event), then the event start date information is contained in the <code>StartTime</code> field. The time portion is always transferred in the Coordinated Universal Time (UTC) time zone. You need to translate the time portion to or from a local time zone for the user or the application, as appropriate. If this field has a value, then <code>ActivityDate</code> and <code>ActivityDateTime</code> must either be <code>null</code> or match the value of this field.</p>
Subject	<p>Type combobox</p> <p>Properties Create, Filter, Nullable, Sort, Update</p> <p>Description The subject line of the event, such as Call, Email, or Meeting. Limit: 255 characters.</p>

SEE ALSO:

[Object Reference for the Salesforce Platform: Event](#)

Fields on Event Relation

Life Sciences Cloud fields extend the standard Event Relation object to represent a person (a user, lead, or contact) or a resource (such as a conference room) invited to an event.

Supported Calls

`create(), delete(), describeObjects(), getDeleted(), getUpdated(), query(), retrieve(), update(), upsert()`

Fields

Field	Details
EventId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Contains the ID of the event. This value can't be changed after it's been specified. This is a relationship field.</p> <p>Relationship Name Event</p> <p>Relationship Type Lookup</p> <p>Refers To Event</p>
RelationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Contains the ID of the person (User, Contact, or Lead) or the resource invited to an event. When Shared Activities is enabled, <code>RelationId</code> can also contain the ID of an account, opportunity, or other object related to an event. This value can't be changed after it's been specified. This is a polymorphic relationship field.</p> <p>Relationship Name Relation</p> <p>Relationship Type Lookup</p> <p>Refers To Calendar, Contact, Lead, User</p>

SEE ALSO:

[Object Reference for the Salesforce Platform: EventRelation](#)

Fields on ProductRequest

Life Sciences Cloud fields extend the standard ProductRequest object for sample order information, including destination user and urgency level.

Fields

Field	Details
DestinationLocationUserId	<p>Type Reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The primary user of the destination location associated with the product request. This field is a relationship field.</p> <p>Relationship Name DestinationLocationUser</p> <p>Refers To User</p>
UrgencyLevel	<p>Type Picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the level of urgency associated with the product request.</p>

Fields on ProductRequestLineItem

Life Sciences Cloud fields extend the Product Request Line Item object to represent information about sample order details.

Fields

Field	Details
ExceptionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the type of exception while placing a product request.</p>

Fields on ProductTransfer

Life Sciences Cloud fields extend the standard ProductTransfer object to capture specific inventory and batch information.

Fields

Field	Details
InventoryCountReferenceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The inventory count record where the product transfer is recorded. This field is a relationship field.</p> <p>Relationship Name InventoryCountReference</p> <p>Refers To InventoryCntProdtBatchItem</p>
InventoryOperationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The inventory operation associated with the product transfer. This field is a relationship field.</p> <p>Relationship Name InventoryOperation</p> <p>Refers To InventoryOperation</p>
ProductionBatchId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The production batch associated with the transferred products. This field is a relationship field.</p> <p>Relationship Name ProductionBatch</p> <p>Refers To ProductionBatch</p>

Field	Details
ReceivedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the transferred product is received at the destination location.</p>
TransferCause	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the cause of the product transfer.</p>
WarningMessage	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The warning message displayed to the end user during product transfer.</p>

StandardValueSet Names and Standard Picklist Fields

This table lists the names of standard picklists as standard value sets and their corresponding field names.

 **Note:** The names of standard value sets and picklist fields are case-sensitive.

Standard Value Set Name	Field Name
AccPlanObjectivePriority	AccountPlanObjective.Priority
AccPlanObjectiveStatus	AccountPlanObjective.Status
AccountPlanStatus	AccountPlan.Status
ActionPlanState	ActionPlan.ActionPlanState
ActionableListListStatus	ActionableList.ListStatus
ActualContactPointType	PrvdEngmtComplianceCycle.ActualContactPointType
Advocacy	PrvdAccountUserGroupInfo.Advocacy
ApAdjustmentReason	ProviderActvtyPlanAdjusment.AdjustmentReason
APTCategoriesEnum	ActionPlanTemplate.Category

Standard Value Set Name	Field Name
APTSourceTypeEnum	ActionPlanTemplate.SourceType
APTSubcategoryEnum	ActionPlanTemplate.Subcategory
ApStatusChangeReason	ProviderActvtyPlanAdjusment.StatusChangeReason
AppAlertSeverity	AppAlert.Severity
AppAlertSource	AppAlert.Source
AssessmentTaskCategory	AssessmentTask.Category
AssigneeChangeReasons	ProviderActivityGoal.AssigneeChangeReason
BLicenseJurisdictionType	BusinessLicense.JurisdictionType
BLicenseVerificationStatus	BusinessLicense.VerificationStatus
BusinessLicenseStatus	BusinessLicense.Status
CareProgramProductStatus	CareProgramProduct.Status
CareProgramStatus	CareProgram.Status
CaseStatus	Inquiry.Status
CategorySeverityType	RecordAlert.Severity
CPBestContactTimeType	ContactPointBestContactTime.Type
CProgramProductAvailability	CareProgramProduct.Availability
ContactPointAddressType	ContactPointAddress.AddressType
ContactPointUsageType	ContactPointAddress.UsageType
CPSSocialPlatformProvider	ContactPointSocial.SocialPlatformProvider
DigitalSignatureType	DigitalSignature.SignatureType
ExpenseType	Expense.ExpenseType
FormularyStatusType	Formulary.Status
FormularyTypes	Formulary.FormularyType
FormularyItemAuthorizationRequiredType	FormularyItem.PriorAuthorizationRequiredType
FormularyItemStepTherapyLimitType	FormularyItem.StepTherapyLimitType
FormularyItemStatusType	FormularyItem.Status
GoalAssignmentProgressionStatus	GoalAssignment.ProgressionStatus
GoalAssignmentStatus	GoalAssignment.Status
GoalDefinitionCategory	GoalDefinition.Category
GoalDefinitionUsageType	GoalDefinition.UsageType

Standard Value Set Name	Field Name
GrossFloorAreaUom	Location.GrossFloorAreaUom
HCFAvgRsrchEthicalReviewDrtn	HealthcareFacility.AvgRsrchEthicalReviewDrtn
HCFacilityLocationType	HealthcareFacility.LocationType
HCFClassification	HealthcareFacility.Classification
HealthcareProviderStatus	HealthcareProvider.Status
HProviderOperatingCC	HealthcareProvider.OperatingCountryCode
HProviderProTitle	HealthcareProvider.ProfessionalTitle
HProviderProviderClass	HealthcareProvider.ProviderClass
HProviderProviderType	HealthcareProvider.ProviderType
HPClassifications	HealthcareProvider.Classification
HProviderNpiNpiType	HealthcareProviderNpi.NpiType
ICAPurposeType	InventoryCountAssessment.Purpose
ICPBIDiscrepancyType	InventoryCntProdtBatchltem.DiscrepancyReasonType
InquiryChannelTypeEnum	Inquiry.InquiryChannelType
InquiryPriorityEnum	Inquiry.Priority
InquiryTypeEnum	Inquiry.Type
IntegrationJobRunStatus	IntegrationJobRun.Status
InternalRiskRating	AccountPlan.AccountInternalRiskRating
InventoryOperationStatus	InventoryOperation.Status
LifeSciMrkPrdTherapeuticClass	LifeSciMarketableProduct.TherapeuticClass
LifeSciMrkPrdTherapeuticArea	LifeSciMarketableProduct.TherapeuticArea
LifeScienceDocumentType	LifeScienceDocument.Type
LicenseClassType	BusinessLicense.LicenseClass
LineOfAuthorityType	BusinessLicense.LineOfAuthority
LocationOwnershipStatus	Location.OwnershipStatus
LocationPrimaryProperty	Location.PrimaryPropertyFunction
LocationPriority	Location.Priority
LocationStatus	Location.Status
LocationType	Location.LocationType
MergeRequestOriginType	MergeRequest.OriginType

Standard Value Set Name	Field Name
OperationShipmentStatus	InventoryOperation.ShipmentStatus
OpportunityScore	PrvdAccountUserGroupInfo.OpportunityScore
PAAffiliationRole	ProviderAffiliation.Role
PAAffiliationTitle	ProviderAffiliation.AffiliationTitle
PDStatusType	ProductDisbursement.Status
PDUnitMeasureType	ProductDisbursement.QuantityUnitOfMeasure
PDWarningType	ProductDisbursement.WarningType
PPPartyRoleType	PartyPublication.PartyRoleType
PPStatus	PartyPublication.Status
PPublicationCategory	PartyPublication.PublicationCategory
PreferredContactPointType	CareProgram.PreferredContactPointType
ProdRequestLineItemStatus	ProductRequestLineItem.Status
ProductRequestExceptionType	ProductRequestLineItem.ExceptionType
ProductRequestShipmentType	ProductRequest.ShipmentType
ProductRequestStatus	ProductRequest.Status
ProductRequestUrgencyLevel	ProductRequest.UrgencyLevel
ProductTransferCause	ProductTransfer.TransferCause
ProductTransferStatus	ProductTransfer.Status
ProvVisBookingStatusReas	ProviderVisit.BookingStatusReason
ProvVisSubDelayReasType	ProviderVisit.SubmitDelayReasonType
PVRSDeliveryStatus	ProviderVisitRqstSample.DeliveryStatus
QuantityUnitOfMeasure	ProductTransfer.QuantityUnitOfMeasure
QuantityUnitOfMeasure	ProductRequestLineItem.QuantityUnitOfMeasure
QuantityUnitOfMeasure	ProductBatchItem.QuantityUnitOfMeasure
ReasonType	MedicalInsightAccount.ReasonType
ResidenceStatusType	BusinessLicense.ResidenceStatus
RetailStoreDeliveryMethod	RetailStore.DeliveryMethod
RetailStorePaymentMode	RetailStore.PaymentMethod
RetailStoreType	RetailStore.StoreType
ReviewerChangeReasons	ProviderActivityGoal.ReviewerChangeReason

Standard Value Set Name	Field Name
ShipmentStatus	ProductTransfer.ShipmentStatus
SprintStatus	Sprint.Status
StakeholderInfluenceLevel	AccountPlanStakeholder.InfluenceLevel
StakeholderRoleType	AccountPlanStakeholder.RoleType
StakeholderStrength	AccountPlanStakeholder.Strength
StartedByType	ActionPlan.StartedByType
TaraSkipReasonEnum	TerritoryAcctRcmdAction.SkipReason
TerritoryBusinessPlanStatus	TerritoryBusinessPlan.Status
TierTypes	FormularyItem.TierType
TPAAffiliationRole	TerrProvAffilAssignRule.AffiliationRole
UserAdInfoPrefCntry	UserAdditionalInfo.PreferredCountry
VisitChannel	ProviderVisit.Channel
VisitChannel	ProviderVisitProdDetailing.ProviderVisitChannel
VisitChannel	Visit.Channel
VisitPriority	Visit.VisitPriority

Life Sciences Cloud Platform Events

Use the `ApplnFormAppealStsChgEvt` platform event to notify subscribers when the status of the Financial Assistance Program's appeal changes. Use the `CareBnftVrfyRqstStsChgEvent` platform event to notify subscribers when the status of care benefit verify request changes. This platform event object is available within the Life Sciences Cloud platform.

[ApplnFormAppealStsChgEvt](#)

Notifies subscribers of changes to the status of an appeal filed against a Financial Assistance Program. This object is available in API version 63.0 and later.

[CareBnftVrfyRqstStsChgEvent](#)

Notifies subscribers of changes to the status of a care benefit verify request. This object is available in API version 65.0 and later.

ApplnFormAppealStsChgEvt

Notifies subscribers of changes to the status of an appeal filed against a Financial Assistance Program. This object is available in API version 63.0 and later.

Supported Calls

`create()`, `describeSObjects()`

Special Access Rules

This object is available to users with Health Cloud Starter and Manage Financial Assistance Program permission set.

Fields

Field	Details
AppealIdentifier	<p>Type string</p> <p>Properties Create, Nillable</p> <p>Description The identifier of an appeal that has a status change.</p>
AppealStatus	<p>Type picklist</p> <p>Properties Create, Nillable, Restricted picklist</p> <p>Description Specifies the status of an appeal. Possible values are:<ul style="list-style-type: none"> • Accepted • Rejected </p>
ApplicationFormIdentifier	<p>Type string</p> <p>Properties Create, Nillable</p> <p>Description The identifier of the application associated with an appeal.</p>
EventCreationDateTime	<p>Type dateTime</p> <p>Properties Create, Nillable</p> <p>Description The date and time when the event was created.</p>

CareBnftVrfyRqstStsChgEvent

Notifies subscribers of changes to the status of a care benefit verify request. This object is available in API version 65.0 and later.

Supported Calls

`create()`, `describeSObjects()`

Special Access Rules

This object is available to users with Manage Pharmacy Benefits Verification and Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission set.

Fields

Field	Details
EventCreationDateTime	<p>Type dateTime</p> <p>Properties Create, Nillable</p> <p>Description The date and time when the event was created.</p>
RecordIdentifier	<p>Type string</p> <p>Properties Create</p> <p>Description The identifier of the associated care benefit verify request record.</p>
Status	<p>Type string</p> <p>Properties Create</p> <p>Description Specifies the status of a care benefit verify request.</p>

Working With Electronic Health Records

HL7 (Health Level Seven) is a standard for exchanging electronic health records (EHR). You can parse EHR data transmitted via HL7 data messages and store it in Salesforce.

Salesforce is committed to interoperability and the use of standards to facilitate the exchange of health data. As a voting member of HL7.org, Salesforce can share excerpts of HL7 standards, post the standards on Salesforce digital assets, and use HL7 organizational and "Care Connected" logos. Here we reference some of the key data elements in the HL7 standards to facilitate mapping to the Salesforce data model.

 **Note:** Elements that aren't mapped here are not yet supported. We are continuing to map additional elements.

[Mapping FHIR v4.0 to Salesforce Standard Objects](#)

The Fast Health Interoperability Resources (FHIR) standard defined by Health Level Seven (HL7) enables healthcare systems to work seamlessly together enhancing their interoperability. The Clinical Data Model is built to align with HL7's FHIR R4. However, because of the way the Salesforce platform works, the Salesforce implementation of FHIR R4 isn't identical to how it's defined by HL7. Here's how various FHIR resources map to fields in different standard objects in Salesforce.

[Store HL7 v2.3 Messages in Salesforce Standard Objects](#)

Like the Fast Health Interoperability Resources (FHIR) standard defined by Health Level Seven (HL7), HL7 v2.3 is also a database framework defined by HL7 to facilitate interoperability between electronic healthcare systems. Because the Clinical Data Model was built to align with FHIR v4.0, it is also compatible with its predecessor HL7 v2.3. However, because of the way the Salesforce platform works, the Salesforce implementation varies from the HL7 recommendations in certain cases such as the data types that are used.

Mapping FHIR v4.0 to Salesforce Standard Objects

The Fast Health Interoperability Resources (FHIR) standard defined by Health Level Seven (HL7) enables healthcare systems to work seamlessly together enhancing their interoperability. The Clinical Data Model is built to align with HL7's FHIR R4. However, because of the way the Salesforce platform works, the Salesforce implementation of FHIR R4 isn't identical to how it's defined by HL7. Here's how various FHIR resources map to fields in different standard objects in Salesforce.

[Considerations for Integration](#)

The Salesforce implementation of FHIR resources differs from the FHIR specification. Built on the core Salesforce platform, the FHIR-aligned clinical data model comes with field mappings that help you integrate with the FHIR R4 specification.

[Address](#)

The `Address` FHIR resource maps to the `ContactPointAddress` object in Salesforce.

[AdverseEvent](#)

The `AdverseEvent` FHIR resource maps to the `AdverseEvent` objects in Salesforce.

[AllergyIntolerance](#)

The `allergyIntolerance` FHIR resource maps to the `AllergyIntolerance` and `PatientHealthReaction` objects in Salesforce.

[Annotation](#)

The `Annotation` FHIR resource maps to the `AuthorNote` object in Salesforce.

[Attachment](#)

The `Attachment` FHIR resource maps to the `Attachment` object in Salesforce.

[CarePlan](#)

The `CarePlan` FHIR resource maps to the `CarePlan`, `CarePlanDetail`, `CarePlanActivity`, and `CarePlanActivityDetail` objects in Salesforce.

[CodeableConcept](#)

The `CodeableConcept` FHIR resource maps to the `CodeSetBundle` object in Salesforce.

[Coding](#)

The `Coding` FHIR resource maps to the `CodeSet` object in Salesforce.

[CommunicationRequest](#)

The `CommunicationRequest` FHIR resource maps to the `TrackedCommunication` and `TrackedCommunicationDetail` objects in Salesforce.

Condition

The Condition FHIR resource maps to the HealthCondition object in Salesforce.

ContactPoint

The ContactPoint FHIR resource maps to the ContactPointPhone object in Salesforce.

Device

The Device FHIR resource maps to the Asset and CareRegisteredDevice objects in Salesforce.

DiagnosticReport

The diagnosticReport FHIR resource maps to the DiagnosticSummary object in Salesforce.

DocumentReference

The DocumentReference FHIR resource maps to the DiagnosticSummary and DiagnosticSummaryDetail objects in Salesforce.

Dosage

The Dosage FHIR resource maps to the PatientMedicationDosage object in Salesforce.

Encounter

The Encounter FHIR resource maps to the ClinicalEncounter, ClinicalEncounterDiagnosis, ClinicalEncounterFacility, ClinicalEncounterIdentifier, ClinicalEncounterProvider, ClinicalEncounterReason, and ClinicalEncounterSvcRequest objects in Salesforce.

EpisodeOfCare

The episodeOfCare FHIR resource maps to the CareEpisode and CareEpisodeDetail objects in Salesforce.

Flag

The Flag FHIR resource maps to the ClinicalAlert object in Salesforce.

Goal

The Goal FHIR resource maps to the GoalAssignment and GoalAssignmentDetail objects in Salesforce.

HumanName

The HumanName FHIR resource maps to the PersonName object in Salesforce.

Identifier

The Identifier FHIR resource maps to the Identifier object in Salesforce.

Immunization

The Immunization FHIR resource maps to the PatientImmunization and PatientHealthReaction objects in Salesforce.

InformationOrigin

The CRDMetricData FHIR resource maps to the AssessmentQuestionResponse object.

Location

The Location FHIR resource maps to the HealthcareFacility and Location objects in Salesforce.

Medication

The medication FHIR resource maps to the Medication object in Salesforce.

MedicationRequest

The MedicationRequest FHIR resource maps to the MedicationRequest object in Salesforce.

MedicationStatement

The medicationStatement FHIR resource maps to the MedicationStatement object in Salesforce.

Observation

The observation FHIR resource maps to the CareObservation and CareObservationComponent objects in Salesforce.

Organization

The Organization FHIR resource maps primarily to the Account object in Salesforce.

Patient

The Patient FHIR resource maps to the Account and Contact objects in Salesforce. Patients are modeled using Person Accounts.

Practitioner

The Practitioner FHIR resource maps to the HealthcareProvider object and person accounts in Salesforce.

PractitionerRole

The practitionerRole FHIR resource maps to the HealthcarePractitionerFacility and CareProviderFacilitySpecialty objects in Salesforce.

Procedure

The procedure FHIR resource maps to the PatientMedicalProcedure and PatientMedicalProcedureDetail objects in Salesforce.

RelatedPerson

The relatedPerson FHIR resource maps to the Account and Contact objects in Salesforce, and is connected to the person that person's related to using the ContactContactRelation__c object.

ResearchStudy

The ResearchStudy FHIR resource maps to the ResearchStudy objects in Salesforce.

ServiceRequest

The serviceRequest FHIR resource maps to the ClinicalServiceRequest and ClinicalServiceRequest Detail objects in Salesforce.

Timing

The Timing FHIR resource maps to the ActivityTiming object in Salesforce.

SEE ALSO:

[Clinical Data Model](#)

Considerations for Integration

The Salesforce implementation of FHIR resources differs from the FHIR specification. Built on the core Salesforce platform, the FHIR-aligned clinical data model comes with field mappings that help you integrate with the FHIR R4 specification.

A middleware integration solution is required to convert messages from HL7 and FHIR-based systems to the fields and objects in Salesforce. But before you integrate, here are a few things to remember:

- The HumanName FHIR resource maps to the PersonName field in Salesforce. The FHIR resource stores names in the FirstName, MiddleName, and LastName fields, while Salesforce's clinical data model stores information in the FirstName, LastName, and FullName fields. LastName can store the family name and any middle name, or any consequent names after the first name. FullName stores the combination of the patient's first and last name. The ParentRecordId field relates this name to the person by referencing the Account or Contact record of the person's Person Account.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions.

- If a coding or codeable concept in FHIR has a value set with conceptually simple values, then Salesforce uses a picklist. For example, the FHIR `identifier.use` resource, which is a code data type, maps to the `Identifier.IdUsageType` field of the Identifier object, which is a picklist in Salesforce.
- For resources that FHIR defines as code data types, Salesforce uses a string. For example, the FHIR `coding.code` resource, which is code data type, maps to the `CodeSet.Code` field of the CodeSet object, which is a string in Salesforce.
- For two resources that FHIR defines as URI, Salesforce uses a string. These two resources are the `Identifier.SourceSystem` field and the `CodeSet.SourceSystem` field. The FHIR `identifier.system` resource, which is a URI, maps to the `Identifier.SourceSystem` field of the Identifier object, which is a string in Salesforce. Similarly, the FHIR `coding.system` resource, which is a URI, maps to the `CodeSet.SourceSystem` field of the CodeSet object, which is also a string in Salesforce.
- According to FHIR, CodeableConcept has a zero-to-many coding resource. Because Salesforce doesn't support zero-to-many references, Code Set Bundle flattens this zero-to-many reference to 15 zero-to-one Code Set references. The Code Set references are `CodeSet1Id`, `CodeSet2Id`, `CodeSet3Id`, and so on, until `CodeSet15Id`.

Salesforce doesn't have data types for periods, quantities, ranges, and ratios. Instead, resources that need these data types are flattened to sets of two or three fields in their implementation.

- Period fields are flattened into a set of start date and end date fields. For example, `allergyIntolerance.onset.onsetPeriod` in the FHIR specification maps to the `AllergyIntolerance.OnsetStartTime` and `AllergyIntolerance.OnsetEndTime` fields in Salesforce.
- Quantity fields are flattened into a combination of a numeric quantity and unit fields. The unit field indicates the unit of measure. The quantity field, which is a double field, represents the numeric value. For example, `medicationRequest.dispenseRequest.initialFill.quantity` is flattened into a set of quantity and unit fields.
- Range fields are flattened into a set of upper and lower limits and unit fields. To reference the unit, we have a Lookup to the `UnitofMeasure` object. For example, `procedure.performed.performedRange` in the FHIR specification maps to the `PatientMedicalProcedure.PerformedAtAgeLowerLimit`, `PatientMedicalProcedure.PerformedAtAgeUpperLimit`, and `PatientMedicalProcedure.PerformedAgeRangeUnit` fields in Salesforce.
- Ratio fields are flattened into a set of numerator and denominator fields. If the ratio refers to a quantity, then a unit field is added. To reference the unit, we have a Lookup to the `UnitofMeasure` object. For example, `serviceRequest.quantity.quantityRatio` in the FHIR specification maps to the `ClinicalServiceRequest.QuantityNumerator`, `ClinicalServiceRequest.QuantityDenominator`, and `ClinicalServiceRequest.QuantityNumeratorUnitId` fields in Salesforce.

Address

The `Address` FHIR resource maps to the `ContactPointAddress` object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for `Address` map to the fields in Salesforce.

Table 1: Address - Salesforce

Address Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
use	<code>ContactPointAddress.UsageType</code>	Picklist	0..1	FHIR defines <code>ContactPointAddress.use</code> as a code set. However, the Salesforce implementation of <code>ContactPointAddress.ContentType</code> is a picklist.
type	N/A	N/A	N/A	Not supported

Address Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
text	N/A	N/A	N/A	Not supported
line	ContactPointAddress .Street	String	0..1	While FHIR defines address.line as zero-many, Salesforce supports only one string for each record. If you have multiple lines, it's recommended to merge them into a single string before passing it to Salesforce.
city	ContactPointAddress .City	String	0..1	N/A
district	N/A	N/A	N/A	Not supported
state	ContactPointAddress .State	String	0..1	N/A
postal Code	ContactPointAddress .PostalCode	String	0..1	N/A
country	ContactPointAddress .Country	String	0..1	N/A
period	ContactPointAddress .ActiveFromDate	Date	0..1	Because Salesforce doesn't support a native period data type, the Salesforce implementation flattens address.period to a set of from and to dates.
	ContactPointAddress .ActiveToDate	Date	0..1	

AdverseEvent

The AdverseEvent FHIR resource maps to the AdverseEvent objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [adverseEvent](#) map to the fields in Salesforce.

Table 2: adverseEvent - Salesforce

Adverse Event Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
status	AdverseEventEntry .Status	DynamicEnum	1..1	While FHIR defines adverseEventEntry .status as a code set, the Salesforce implementation of AdverseEventEntry .Status is text.
actuality	AdverseEventEntry .Type	DynamicEnum	1..1	While FHIR defines adverseEventEntry .actuality as a code set, the Salesforce implementation of AdverseEventEntry .type is dynamic enum.

Adverse Event Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
category	AdverseEventEntry .Category	Picklist (Multi-Select)	0..M	While FHIR defines <code>adverseEventEntry .category</code> as a code set bundle, the Salesforce implementation of <code>AdverseEventEntry.Category</code> is picklist (Multi-Select).
code	AdverseEventEntry .EventCode	Lookup: Code Set, Code Set Bundle	0..1	While FHIR defines <code>adverseEventEntry .eventCode</code> as a code set bundle, the Salesforce implementation of <code>AdverseEventEntry.EventCode</code> is a lookup.
subject	AdverseEventEntry .Subject	Polymorphic Lookup: Care Program Enrollee, Account, Team Member, Care ProgramGroup, Team, Health CareProvider	1..1	N/A
encounter	AdverseEventEntry .ClinicalEncounter	Lookup: Clinical Encounter	0..1	N/A
cause	AdverseEventEntry .CauseStartTime	Date/Time	0..1	Since Salesforce doesn't natively support the period data type, <code>adverseEvent .cause</code> is flattened into a set of cause start date time and cause end date time fields.
	AdverseEventEntry .CauseEndTime	Date/Time	0..1	
effect	AdverseEventEntry .EventStartTime	Date/Time	0..1	Since Salesforce doesn't natively support the period data type, <code>adverseEvent .effect</code> is flattened into a set of event start date time and event end date time fields.
	AdverseEventEntry .EventEndTime	Date/Time	0..1	
detected	AdverseEventEntry .DetectedDate	Date/Time	0..1	N/A
recordedDate	AdverseEventEntry.Recorded Date	Date/Time	0..1	N/A
resultingEffect	AdverseEventResultingEffect .Effect	Lookup: Health Condition, Care Observation	1..1	While FHIR defines <code>adverseEvent ResultingEffect.resultingEffect</code> as a zero-to-many resource, the Salesforce implementation of <code>AdverseEvent ResultingEffect.Effect</code> is one-to-many.

Adverse Event Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
location	AdverseEventEntry.Location	Lookup: Healthcare Facility, Care Program Site	0.1	N/A
seriousness	AdverseEventEntry.Severity	Picklist	0.1	While FHIR defines <code>adverseEventEntry .Severity</code> as a code set bundle, the Salesforce implementation of <code>AdverseEventEntry.Severity</code> is picklist.
outcome	AdverseEventOutcome .OutcomeCode	Lookup: Code Set, Code Set Bundle	1.1	While FHIR defines <code>adverseEvent Outcome.outcome</code> as a CodeSetBundle, the Salesforce implementation of <code>AdverseEvent Outcome.OutcomeCode</code> is a lookup.
recorder	AdverseEventEntry.RecordedBy	Lookup: Account Care Program Enrollee	1.1	While FHIR defines <code>adverseEventOutcome .recorder</code> as a zero-to-many resource, the Salesforce implementation of <code>AdverseEvent Outcome.RecordedBy</code> is one-to-one.
participant.function	AdverseEventParty.Role	Dynamic Enum	0.1	N/A
participant.actor	AdverseEventParty.Party	Lookup: Account, Contact, Care Program Enrollee, Healthcare Facility, Care Registered Device, Healthcare Practitioner Facility	1.1	N/A
expectedIn ResearchStudy	AdverseEventEntry.Expected	Boolean	0.1	N/A
suspect Entity .instance	AdverseEventCause .Cause	Lookup: Patient Immunization, Medication, Medication Statement, Research Study, Patient Medical	1.1	While FHIR defines <code>adverseEventCause .suspectEntity.instance</code> as a Code SetBundle, the Salesforce implementation of <code>AdverseEventCause.Cause</code> is a lookup.

Adverse Event Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
		Procedure, Care Registered Device		
suspectEntity.causality.assessmentMethod	AdverseEventCause.AssessmentMethodCode	Lookup: Code Set, CodeSet Bundle	0.1	N/A
suspectEntity.causality.entityRelatedness	AdverseEventCause.Probability	Dynamic Enum	0.1	N/A
suspectEntity.causality.author	AdverseEventCause.AuthoredBy	Polymorphic Lookup: Account, Contact, User, Healthcare Facility, Healthcare Practitioner Facility, ResearchStudy Participant	0.1	N/A
contributingFactor.item	AdverseEventContributingFactor.ContributingFactor	Polymorphic Lookup: Health Condition, Care Observation, Allergy Intolerance, Patient Immunization, CareRegistered Device, Medication, Medication Statement, Diagnostic Summary, PatientMedical Procedure, Medication Administration	1.M	While FHIR defines <code>adverseEvent ContributingFactor.contributingFactor.item</code> as a zero-to-many resource, the Salesforce implementation of <code>AdverseEventContributingFactor.ContributingFactor</code> is one-to-many.

Adverse Event Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
preventive Action.item	AdverseEventAction.ActionCode	Polymorphic Lookup: Code Set, CodeSet Bundle	0.1	While FHIR defines <code>adverseEventAction.preventiveAction.item</code> as a one-to-one resource, the Salesforce implementation of <code>AdverseEventAction.ActionCode</code> is zero-to-one.
mitigating Action.item	AdverseEventAction.ActionCode	Polymorphic Lookup: Code Set, CodeSet Bundle	0.1	While FHIR defines <code>adverseEventAction.mitigatingAction.item</code> as a one-to-one resource, the Salesforce implementation of <code>AdverseEventAction.ActionCode</code> is zero-to-one.
supportingInfo.item	AdverseEventSupportingInformation.SupportingInformation	Polymorphic Lookup: Health Condition, Care Observation, Allergy Intolerance, Patient Immunization, Diagnostic Summary, Medication, Medication Statement	1.1	N/A

AllergyIntolerance

The `allergyIntolerance` FHIR resource maps to the `AllergyIntolerance` and `PatientHealthReaction` objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for `allergyIntolerance` map to the fields in Salesforce.

Table 3: `allergyIntolerance` - Salesforce

Allergy Intolerance Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0.M	The identifier information for an allergy intolerance is represented as <code>Identifier</code> records that reference the <code>AllergyIntolerance</code> record using their <code>Identifier.ParentRecordId</code> field.

Allergy Intolerance Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
clinicalStatus	AllergyIntolerance.Status	Picklist	0..1	While FHIR defines <code>allergyIntolerance.clinicalStatus</code> as a code set bundle, the Salesforce implementation of <code>AllergyIntolerance.Status</code> is picklist.
verificationStatus	AllergyIntolerance.VerificationStatus	Picklist	0..1	While FHIR defines <code>allergyIntolerance.verificationStatus</code> as a code set bundle, the Salesforce implementation of <code>AllergyIntolerance.VerificationStatus</code> is picklist.
type	AllergyIntolerance.Type	Picklist	0..1	While FHIR defines <code>allergyIntolerance.category</code> as a code set bundle, the Salesforce implementation of <code>AllergyIntolerance.Categories</code> is a picklist.
category	AllergyIntolerance.Category	Multi-Select Picklist	0..M	While FHIR defines <code>allergyIntolerance.category</code> as a code set bundle, the Salesforce implementation of <code>AllergyIntolerance.Category</code> is a picklist.
criticality	AllergyIntolerance.Severity	Picklist	0..1	While FHIR defines <code>allergyIntolerance.criticality</code> as a code set bundle, the Salesforce implementation of <code>AllergyIntolerance.Severity</code> is picklist.
code	AllergyIntolerance.CodeId	Lookup: CodeSetBundle	1..1	N/A
patient	AllergyIntolerance.PatientId	Master-Detail Reference: Account	1..1	N/A
encounter	AllergyIntolerance.ClinicalEncounterId	Lookup: Clinical Encounter	0..1	N/A
onset.onsetDateTime	AllergyIntolerance.OnsetStartTime	DateTime	0..1	<code>AllergyIntolerance.OnsetStartDateTime</code> is used as both the equivalent of <code>allergyIntolerance.onset.onsetDateTime</code> and the start date of <code>allergyIntolerance.onset.onsetPeriod</code>
onset.onsetAge	N/A	N/A	N/A	Not supported
onset.onsetPeriod	AllergyIntolerance.OnsetStartTime	DateTime	0..1	Since Salesforce doesn't natively support the period data type, <code>allergyIntolerance.onset.onsetPeriod</code> is flattened into a

Allergy Intolerance Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
	AllergyIntolerance .OnsetEndDateTime	DateTime	0.1	set of start date and end date fields. The start date field is also used as the equivalent of <code>allergyIntolerance.onset.onsetDateTime</code>
onset .onset Range	N/A	N/A	N/A	Not supported
onset .onset String	N/A	N/A	N/A	Not supported
recorded Date	AllergyIntolerance .RecordCreationDateTime	DateTime	0.1	N/A
recorder	AllergyIntolerance .RecordCreatorId	Polymorphic Lookup: Account, Healthcare .Provider	0.1	N/A
asserter	AllergyIntolerance .AssertionSourceId	Polymorphic Lookup: Account, Healthcare .Provider	0.1	N/A
last Occurrence	AllergyIntolerance .LastOccurrenceDateTime	DateTime	0.1	N/A
note	N/A	N/A	N/A	Not supported
reaction	PatientHealthReaction	Object	0.M	The reaction information for an allergy intolerance is represented as <code>PatientHealthReaction</code> records that reference the Allergy Intolerance record using their <code>PatientHealthReaction.ParentId</code> field.
reaction .substance	PatientHealthReaction .CausativeSubstanceId	Lookup: CodeSet Bundle	0.1	N/A
reaction .manifestation	PatientHealthReaction .ManifestedSymptomId	Lookup: CodeSet Bundle	0.1	While FHIR defines <code>allergyIntolerance.reaction.manifestation</code> as a one-to-many resource, the Salesforce implementation of <code>PatientHealth</code>

Allergy Intolerance Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				Reaction.ManifestedSymptomId is zero-to-one.
reaction .description	PatientHealthReaction .Details	String	0.1	N/A
reaction .onset	PatientHealthReaction .ReactionDateTime	DateTime	0.1	N/A
reaction .severity	PatientHealthReaction .Severity	Picklist	0.1	While FHIR defines <code>allergyIntolerance .reaction.severity</code> as a code set bundle, the Salesforce implementation of <code>Patient HealthReaction.Severity</code> is a picklist.
reaction .exposure Route	PatientHealthReaction .ExposureRouteId	Lookup: CodeSet Bundle	0.1	N/A
reaction .note	N/A	N/A	N/A	Not supported

SEE ALSO:

[AllergyIntolerance](#)

Annotation

The Annotation FHIR resource maps to the AuthorNote object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Annotation](#) map to the fields in Salesforce.

Table 4: Annotation - Salesforce

Annotation Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
author .author Reference	AuthorNote.AuthorId	Lookup: Account, Contact, Healthcare Provider	0.1	N/A
author .author String	AuthorNote.AuthorName	String	0.1	N/A

Annotation Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
time	AuthorNote.AuthoredDateTime	DateTime	0..1	N/A
text	ActivityTiming.NoteText	Double	0..1	N/A

Attachment

The Attachment FHIR resource maps to the Attachment object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Attachment](#) map to the fields in Salesforce.

Table 5: Attachment - Salesforce

Attachment Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
content Type	Attachment.Content Type	String	0..1	FHIR defines Attachment.use as a code set. However, the Salesforce implementation of Attachment.ContentType is a string.
language	DiagnosticSummary.AttachmentLanguage	String	0..1	FHIR defines Attachment.use as a code set. However, the Salesforce implementation of DiagnosticSummary.Attachment Language is a string.
data	Attachment.Body	Base64	0..1	N/A
url	N/A	N/A	N/A	Not supported
size	Attachment.BodyLength	Double	0..1	N/A
hash	N/A	N/A	N/A	Not supported
title	Attachment.Name	String	0..1	N/A
Creation	Attachment.Created Date	DateTime	0..1	N/A

CarePlan

The CarePlan FHIR resource maps to the CarePlan, CarePlanDetail, CarePlanActivity, and CarePlanActivityDetail objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [CarePlan](#) map to the fields in Salesforce.

Table 6: CarePlan - Salesforce

CarePlan Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0.M	The identifier information for a care plan is represented as Identifier records that reference the CarePlan record using their Identifier.ParentRecordId field.
instantiates Canonical	N/A	N/A	N/A	Not supported
instantiates Uri	N/A	N/A	N/A	Not supported
basedOn	CarePlanDetail.Detail Type	Picklist	0.M	Select Based On as the picklist value in detailType..
	CarePlanDetail.Detail RecordId	Lookup: CarePlan		Select Care Plan as the domain set in DetailRecordId.
replaces	CarePlanDetail.Detail Type	Picklist	0.M	Select Replaced Care Plan as the picklist value in detailType..
	CarePlanDetail.Detail RecordId	Lookup: CarePlan		Select Care Plan as the domain set in DetailRecordId.
partof	CarePlanDetail.Detail Type	Picklist	0.M	Select Part Of as the picklist value in detailType..
	CarePlanDetail.Detail RecordId	Lookup: CarePlan		Select Care Plan as the domain set in DetailRecordId.
status	CarePlan.Status	Picklist	1.1	While FHIR defines this field as a code, the Salesforce implementation is a picklist.
intent	CarePlan.AuthorizationType	Picklist	0.1	While FHIR defines this field as a one-to-one code, the salesforce implementation is a zero-to-one picklist.
category	CarePlanDetail.Detail Type	Picklist	0.M	Select Category as the picklist value in detailType..
	CarePlanDetail.Detail CodeId	Lookup: CodeSet Bundle, CodeSet		
title	CarePlan.Name	Text	1.1	While FHIR defines this as a zero-to-one value, the Salesforce implementation is one-to-one..
description	CarePlan.Description	Text Area	0.1	N/A
subject	CarePlan .ParticipantId	Lookup: Account	1.1	The Salesforce implementation doesn't support Groups.

CarePlan Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
encounter	CarePlan.ClinicalEncounterId	Lookup: Clinical Encounter	0..1	N/A
period	CarePlan.CreatedDate	DateTime	0..1	While FHIR defines this field as a Period field, the Salesforce implementation uses a pair of DateTime fields.
	CarePlan.EndDate	DateTime	0..1	
created	CarePlan.StartDate	Date	0..1	N/A
author	CarePlan.AuthorId	Lookup: Account, Healthcare Provider, Healthcare Practitioner Facility, Care Registered Device	0..1	The Salesforce implementation doesn't support careTeam values for this field.
contributor	CarePlanDetail.DetailType	Picklist	0..M	Select Part Of as the picklist value in detailType. .
	CarePlanDetail.DetailRecordId	Lookup: Account, Healthcare Provider, Healthcare Practitioner Facility, Care Registered Device		Select an appropriate domain set for DetailRecordId.
careTeam	CaseTeam	Object	0..M	Create case teams for the Case record that's the parent record of the CarePlan record.
status Reason	CarePlan.statusReason	Text	0..1	N/A
addresses	CarePlanDetail.DetailType	Picklist	0..M	Select Addressed Item as the picklist value in detailType.
	CarePlanDetail.DetailRecordId	Lookup: Health Condition		Select HealthCondition as the domain set for DetailRecordId.
supporting Info	CarePlanDetail.DetailType	Picklist	0..M	Select Supporting Information as the picklist value in detailType.

CarePlan Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
	CarePlanDetail.Detail RecordId	Lookup: Care Plan, Healthcare Provider, Healthcare Practitioner, Facility, Care Registered Device, Health Condition		Select an appropriate domain set for DetailRecordId.
goal	GoalAssignment	Object	0..M	Associate the GoalAssignment record to its parent care plan using the ParentRecordId field.
activity	CarePlanActivity	Object	0..M	The activity subset of a carePlan FHIR resource is represented in Salesforce as CarePlanActivity records that reference the care plan as its parent.
activity .outcome Codeable Concept	CarePlanActivity Detail.DetailType	Picklist	0..M	Select Outcome Code as the picklist value in detailType..
	CarePlanActivity Detail.DetailCodeId	Lookup: CodeSet Bundle, CodeSet		N/A
activity.				
activity .outcome Reference	CarePlanActivity Detail.DetailType	Picklist	0..M	Select Outcome Code as the picklist value in detail Type..
	CarePlanActivity Detail.DetailRecordId	Lookup: Clinical Encounter, Patient Medical Procedure, Health Condition, Care Observation, Diagnostic Imaging, Appointment, Healthcare Provider, Healthcare Practitioner, Facility, Care Registered Device		Select an appropriate domain set for Detail RecordId.
activity .progress	AuthorNote	Object	0..1	Represented as AuthorNote records that reference CarePlanActivity records as their parent.
activity .reference	CarePlanActivity .ReferenceRecordId	Lookup: Medication Statement, Medication Request, Clinical Request, Clinical	0..1	The Salesforce implementation of this field doesn't support Appointment, CommunicationRequest, DeviceRequest, NutritionOrder, VisionPrescription, and RequestGroup.

CarePlan Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
		Service Request		
	CarePlanActivity .ReferenceTaskId	Lookup: Task	0.1	The Salesforce implementation implements the Task data type for this field as a separate field on the object.
activity .detail .kind	CarePlanActivity .ActivityType	Picklist	0.1	While FHIR defines this field as a code, the Salesforce implementation is a code.
activity .detail .instantiates Canonical	N/A	N/A	N/A	Not supported
activity .detail .instantiates Uri	N/A	N/A	N/A	Not supported
activity .detail .code	CarePlanActivity .ActivityCodeId	Lookup: CodeSet Bundle, CodeSet	0.1	N/A
activity .detail .reason Code	CarePlanActivity Detail.DetailType	Picklist	0.M	Select Reason Code as the picklist value in detailType..
	CarePlanActivity Detail.DetailCodeId	Lookup: CodeSet Bundle, CodeSet		N/A
activity .detail .reason Reference	CarePlanActivity Detail.DetailType	Picklist	0.M	Select Reason Code as the picklist value in detail Type..
	CarePlanActivity Detail.DetailRecordId	Lookup: Health Condition, Care Record, Diagnostic Summary		Select an appropriate domain set for Detail RecordId.
activity .detail .goal	GoalAssignment	Object	0.M	Associate the GoalAssignment record to its parent care plan activity using the ParentRecordId field.
activity .detail .status	CarePlanActivity .Status	Picklist	0.1	While FHIR defines this field as a one-to-one code, the Salesforce implementation is a zero-to-one picklist.

CarePlan Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
activity.detail.statusReason	CarePlanActivity.StatusReasonCodeId	Lookup: CodeSet Bundle, CodeSet	0.1	N/A
activity.detail.doNotPerform	CarePlanActivity.ProhibitedActivity	Picklist	0.1	The Salesforce implementation is a picklist with the values Default, True, and False.
activity.detail.scheduledTiming	CarePlanActivity.ActivityTimingId	Lookup: Activity Timing	0.1	N/A
activity.detail.scheduledPeriod	CarePlanActivity.ScheduledPeriodStart	DateTime	0.1	The Salesforce implementation uses a pair of DateTime fields instead of a period field.
	CarePlanActivity.ScheduledPeriodEnd	DateTime	0.1	
activity.detail.scheduledString	CarePlanActivity.ScheduleDescription	Text	0.1	N/A
activity.detail.location	CarePlanActivity.LocationId	Lookup: Location, Healthcare Facility	0.1	N/A
activity.detail.performer	CarePlanActivity.Detail.DetailType	Picklist	0.M	Select Reason Code as the picklist value in detail Type..
	CarePlanActivity.Detail.DetailRecordId	Lookup: Account, Healthcare Provider, Healthcare Practitioner, Care Facility, Care Registered Device		Select an appropriate domain set for Detail RecordId. The Salesforce implementation doesn't support careTeam and healthService values for this field.
activity.detail.productCodeableConcept	CarePlanActivity.AdministeredProductCodeId	Lookup: CodeSet Bundle, CodeSet	0.1	N/A

CarePlan Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
activity.detail.productReference	CarePlanActivity.AdministeredProductId	Lookup: Medication	0.1	N/A
activity.detail.dailyAmount	CarePlanActivity.DailyDoseQuantity	Number	0.1	Salesforce implements the quantity data type as a pair of number and unit fields.
	CarePlanActivity.DailyDoseUnitId	Lookup: Unit OfMeasure	0.1	
activity.detail.quantity	CarePlanActivity.SuppliedQuantity	Number	0.1	Salesforce implements the quantity data type as a pair of number and unit fields.
	CarePlanActivity.SuppliedQuantityUnitId	Lookup: Unit OfMeasure	0.1	
activity.detail.description	CarePlanActivity.Description	Text	0.1	N/A
note	AuthorNote	Object	0.	Represented as AuthorNote records that reference CarePlan records as their parent.

CodeableConcept

The CodeableConcept FHIR resource maps to the CodeSetBundleBundle object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [CodeableConcept](#) map to the fields in Salesforce.

Table 7: CodeableConcept - Salesforce

Codeable Concept Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
coding	CodeSet Bundle.CodeSet1Id, CodeSet Bundle.CodeSet2Id, CodeSet Bundle.CodeSet3Id,... and CodeSet Bundle.CodeSet15Id	Lookup: CodeSet	0.1	FHIR defines CodeableConcept.coding as a zero-to-many reference. However, the Salesforce implementation has flattened this into fifteen zero-to-one references to CodeSet

Codeable Concept Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
text	CodeSetBundle.Name	String	0.1	N/A

SEE ALSO:

[CodeSetBundle](#)

Coding

The Coding FHIR resource maps to the CodeSet object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Coding](#) map to the fields in Salesforce.

Table 8: Coding - Salesforce

Coding Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
system	CodeSet.SourceSystem	String	0.1	FHIR defines coding.system as a URI. However, the Salesforce implementation of CodeSet.SourceSystem is a string because Salesforce doesn't support the URI data type.
version	CodeSet.SystemVersion	String	0.1	N/A
code	CodeSet.Code	String	0.1	FHIR defines coding.code as a code data type. However, the Salesforce implementation of CodeSet.Code is a string because Salesforce doesn't support the Code data type.
display	CodeSet.Name	String	0.1	N/A
user Selected	CodeSet.IsPrimary	Boolean	0.1	N/A

SEE ALSO:

[CodeSet](#)

CommunicationRequest

The CommunicationRequest FHIR resource maps to the TrackedCommunication and TrackedCommunicationDetail objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [CommunicationRequest](#) map to the fields in Salesforce.

Table 9: CommunicationRequest - Salesforce

communicationrequest Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0..M	The identifier information for a communication request is represented as <code>Identifier</code> records that reference the <code>TrackedCommunication</code> record using their <code>Identifier.ParentRecordId</code> field.
basedOn	N/A	N/A	N/A	Not supported
status	<code>TrackedCommunication.Status</code>	Picklist	1..1	While FHIR defines <code>CommunicationRequest.status</code> as a code set, the Salesforce implementation of <code>TrackedCommunication.Status</code> is a picklist.
statusReason	<code>TrackedCommunication.StatusReason</code>	Picklist	0..1	While FHIR defines <code>CommunicationRequest.statusReason</code> as a code set bundle, the Salesforce implementation of <code>TrackedCommunication.StatusReason</code> is a picklist.
groupIdentifier	N/A	N/A	N/A	Not supported
intent	N/A	N/A	N/A	Not supported
priority	<code>TrackedCommunication.Priority</code>	Picklist	0..1	While FHIR defines <code>CommunicationRequest.priority</code> as a code set, the Salesforce implementation of <code>TrackedCommunication.Priority</code> is a picklist.
subject	<code>TrackedCommunication.Subject</code>	Lookup: Account, Contact, User	0..1	N/A
occurrence	<code>TrackedCommunication.OccurrenceStartTime</code>	Date/Time	0..1	Since Salesforce doesn't natively support the period data type, <code>CommunicationRequest.occurrence</code> is flattened into a set of occurrence start date time and occurrence end date time fields.
	<code>TrackedCommunication.OccurrenceEndTime</code>	Date/Time	0..1	
authoredOn	<code>TrackedCommunication.CreatedDate</code>	Date/Time	0..1	N/A
doNotPerform	N/A	N/A	N/A	Not supported
encounter	N/A	N/A	N/A	Not supported

Communication Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
requester	TrackedCommunication.RequesterReferenceId	Lookup: Account, Contact, User	0..1	N/A
informationProvider	TrackedCommunication.CommunicatorReferenceId	Lookup: Account, Contact, User	0..M	N/A
replaces	TrackedCommunication.Detail.DetailType	Picklist	0..M	Select Replaced Item as the picklist value in DetailType.
category	TrackedCommunication.Detail.DetailType	Picklist	0..M	Select Category as the picklist value in DetailType.
medium	TrackedCommunication.Detail.DetailType	Picklist	0..M	Select Medium as the picklist value in DetailType.
about	TrackedCommunication.Detail.DetailType	Picklist	0..M	Select About as the picklist value in DetailType.
recipient	TrackedCommunication.Detail.DetailType	Picklist	0..M	Select Recipient as the picklist value in DetailType.
reason	TrackedCommunication.Detail.DetailType	Picklist	0..M	Select Reason Code as the picklist value in DetailType.
note	TrackedCommunication.Detail.DetailType	Picklist	0..M	Select Note as the picklist value in DetailType.
payload.content	TrackedCommunication.Detail.DetailType	Picklist	1..1	Select Payload as the picklist value in DetailType.

Condition

The Condition FHIR resource maps to the `HealthCondition` object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Condition](#) map to the fields in Salesforce.

Table 10: Condition - Salesforce

Condition Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0..M	The identifier information for a health condition is represented as <code>Identifier</code> records that reference the health condition record using their <code>Identifier.ParentRecordId</code> field.

Condition Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
clinical Status	HealthCondition .ConditionStatus	Picklist	0..1	While FHIR defines Condition.clinical Status as a code set bundle, the Salesforce implementation of HealthCondition .ConditionStatus is picklist.
verification Status	HealthCondition .DiagnosticStatus	Picklist	0..1	While FHIR defines condition .verificationStatus as a code set bundle, the Salesforce implementation of HealthCondition.Diagnostic Status is picklist.
category	HealthCondition.Type	Picklist	0..1	While FHIR defines Condition.category as a zero-to-many code set bundle, the Salesforce implementation of HealthCondition .Categories is a zero-to-one picklist.
severity	HealthCondition .Severity	Picklist	0..1	While FHIR defines condition.severity as a code set bundle, the Salesforce implementation of HealthCondition .Severity is picklist.
code	HealthCondition .ConditionCodeId	Lookup: CodeSet Bundle	1..1	While FHIR defines condition.code as a zero-to-one resource, the Salesforce implementation is a one-to-one field.
bodySite	HealthCondition .SiteId	Lookup: CodeSet Bundle	0..1	Use this field if only one bodySite value is required for the condition.
	HealthConditionDetail	Object	0..M	Use the child object to specify BodySite values for a condition if multiple bodySite values are required.
subject	HealthCondition .PatientId	Master-Detail Reference: Account	1..1	The Salesforce implementation of Condition .subject doesn't support groups.
encounter	HealthCondition .ClinicalEncounterId	Lookup: Encounter	0..1	N/A
onset .onset DateTime	HealthCondition.Onset StartDateTime	DateTime	0..1	HealthCondition.OnsetStartDate Time is used as both the equivalent of condition.onset.onsetDateTime and the start date of condition.onset .onsetPeriod
onset .onsetAge	N/A	N/A	N/A	Not supported

Condition Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
onset .onset Period	HealthCondition.Onset StartDateTime	DateTime	0..1	Since Salesforce doesn't natively support the period data type, condition.onset.onsetPeriod is flattened into a set of start date and end date fields. The start date field is also used as the equivalent of condition.onset.onsetDateTime
	HealthCondition.Onset EndDateTime	DateTime	0..1	
onset .onset Range	N/A	N/A	N/A	Not supported
onset .onset String	N/A	N/A	N/A	Not supported
abatement .abatement DateTime	HealthCondition .AbatementStartTime	DateTime	0..1	HealthCondition.AbatementStartTime is used as both the equivalent of condition.abatement.abatementDateTime and the start date of condition.abatement.abatementPeriod
abatement .abatement Age	N/A	N/A	N/A	Not supported
abatement .abatement Period	HealthCondition .AbatementStartDate	DateTime	0..1	Since Salesforce doesn't natively support the period data type, condition.abatement.abatementPeriod is flattened into a set of start date and end date fields. The start date field is also used as the equivalent of condition.abatement.abatementDateTime
	HealthCondition .AbatementEndDateTime	DateTime	0..1	
abatement .abatement Range	N/A	N/A	N/A	Not supported
abatement .abatement String	N/A	N/A	N/A	Not supported
recorded Date	HealthCondition .RecordCreationDateTime	DateTime	0..1	N/A
recorder	HealthCondition .RecordCreatorId	Polymorphic Lookup: Account, Healthcare Provider	0..1	N/A

Condition Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
asserter	HealthCondition .AssertionSourceId	Polymorphic Lookup: Account, Healthcare Provider	0.1	N/A
stage	HealthCondition .StageId	Lookup: CodeSet Bundle	0.1	The child resources of condition.stage is combined into a single code set bundle reference field. While FHIR defines condition.stage as a zero-to-many resource, the Salesforce implementation is a zero-to-one field.
evidence	N/A	N/A	N/A	Not supported
note	AuthorNote	Object	0.M	The notes for a health condition is represented as AuthorNote records that reference the health condition record using their AuthorNote .ParentRecordId field.

SEE ALSO:

[HealthCondition](#)

ContactPoint

The ContactPoint FHIR resource maps to the ContactPointPhone object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [ContactPoint](#) map to the fields in Salesforce.

Table 11: ContactPoint - Salesforce

Contact Point Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
system	ContactPointPhone .PhoneType	Picklist	0.1	While FHIR defines contactPoint.system as a reference to a code set bundle, the Salesforce implementation is a picklist.
value	ContactPointPhone .TelephoneNumber	Phone	0.1	While FHIR defines contactPoint.value as a string, ContactPointPhone .TelephoneNumber is a phone data type.
	ContactPointPhone .AreaCode	String	0.1	N/A
	ContactPointPhone .ExtensionNumber	String	0.1	N/A

Contact Point Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
	Contact.Email	Email	0.1	While FHIR defines contactPoint.value as a string, Contact.Email is an email data type.
use	ContactPointPhone.UsageType	Picklist	0.1	While FHIR defines contactPoint.use as a code, the Salesforce implementation is a picklist.
	ContactPointEmail.UsageType	Picklist	0.1	
rank	ContactPointPhone.PreferenceRank	Double	0.1	N/A
	ContactPointEmail.PreferenceRank	Double	0.1	N/A
period	ContactPointPhone.ActiveFromDate	Date	0.1	Because Salesforce doesn't support a native period data type, the Salesforce implementation of contactPoint.period is flattened to a set of from and to dates.
	ContactPointPhone.ActiveToDate	Date	0.1	
	ContactPointEmail.ActiveFromDate	Date	0.1	Because Salesforce doesn't support a native period data type, the Salesforce implementation of contactPoint.period is flattened to a set of from and to dates.
	ContactPointEmail.ActiveToDate	Date	0.1	

Device

The Device FHIR resource maps to the Asset and CareRegisteredDevice objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Device](#) map to the fields in Salesforce.

Table 12: Patient - Salesforce

Device Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0.M	The identifier information for a device is represented as Identifier records that reference the CareRegisteredDevice record using their Identifier.ParentRecordId field.
uidCarrier.DeviceIdentifier	CareRegisteredDevice.UniqueDeviceId1	External Lookup	0.3	While FHIR defines uidCarrier.DeviceIdentifier as a zero-to-many value, the

Device Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
	CareRegisteredDevice.UniqueDeviceId2	External Lookup		Salesforce implementation supports a maximum of three values using three fields.
	CareRegisteredDevice.UniqueDeviceId3	External Lookup		
uidCarrier.Issuer	CareRegisteredDevice.UniqueDeviceId1Issuer	URL	0.3	While FHIR defines uidCarrier.Issuer as a zero-to-many value, the Salesforce implementation supports a maximum of three values using three fields.
	CareRegisteredDevice.UniqueDeviceId2Issuer	URL		
	CareRegisteredDevice.UniqueDeviceId3Issuer	URL		
uidCarrier.jurisdiction	N/A	N/A	N/A	Not supported
uidCarrier.carrierAIDC	N/A	N/A	N/A	Not supported
uidCarrier.carrierHRF	N/A	N/A	N/A	Not supported
uidCarrier.entryType	N/A	N/A	N/A	Not supported
status	Asset.Status	Picklist	0.1	While FHIR defines device.status as code, the Salesforce implementation is a picklist.
status Reason	Asset.StatusReason	Picklist	0.1	While FHIR defines device.statusReason as a zero-to-many codeable concept, the Salesforce implementation is a zero-to-one picklist.
distinct Identifier	Asset.Uuid	String	0.1	N/A
manufacturer	Asset.AssetProviderBy	Lookup: Account	0.1	While FHIR defines device.manufacturer as string, the Salesforce implementation is a lookup to Account (Organization).
manufacture Date	Asset.ManufactureDate	Date	0.1	While FHIR defines device.manufactureDate as DateTime, the Salesforce implementation is a of the data type Date.
expiration Date	Asset.UsageEndDate	Date	0.1	While FHIR defines device.expirationDate as DateTime,

Device Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				the Salesforce implementation is a of the data type Date.
lotNumber	N/A	N/A	N/A	Not supported
serial Number	Asset.SerialNumber	String	0..1	N/A
device Name.name	CareRegisteredDevice .Name	String	0..1	While FHIR defines device.deviceName as a zero-to-many resource, the Salesforce implementation is zero-to-one.
device Name.type	Lookup: CareRegistered Device.NameType	Multi-Select Picklist	0..M	
model Number	Asset.ProductCode	String	0..1	N/A
part Number	N/A	N/A	N/A	Not supported
type	CareRegisteredDevice .DeviceTypeId	Lookup: Code Set	0..1	While FHIR defines device.type as a codeable concept value, the Salesforce implementation is a code set.
specialization	N/A	N/A	N/A	Not supported
version	N/A	N/A	N/A	Not supported
property	N/A	N/A	N/A	Not supported
patient	CareRegisteredDevice .PatientId	Lookup: Account	0..1	N/A
owner	Asset.AssetServicedBy	Lookup: Account	0..1	N/A
contact	CareRegisteredDevice .SupportContactDetail	String	0..1	While FHIR defines device.contact as a contact point value, the Salesforce implementation is a string.
location	N/A	N/A	N/A	N/A
url	Asset.Product2Id .DisplayUrl	URL	0..1	N/A
account	N/A	N/A	N/A	Not supported
note.	AuthorNote	Object	0..M	The notes for a device are represented as AuthorNote records that reference the CareRegisteredDevice record using their AuthorNote.ParentRecordId field.

Device Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
safety	CareRegisteredDevice .SafetyInformation	String	0..1	While FHIR defines <code>device.safety</code> as a codeable concept, the Salesforce implementation is a string field.
parent	Asset.ParentId	Lookup Asset	0..1	N/A

DiagnosticReport

The `diagnosticReport` FHIR resource maps to the `DiagnosticSummary` object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [diagnosticReport](#) map to the fields in Salesforce.

Table 13: `diagnosticReport` - Salesforce

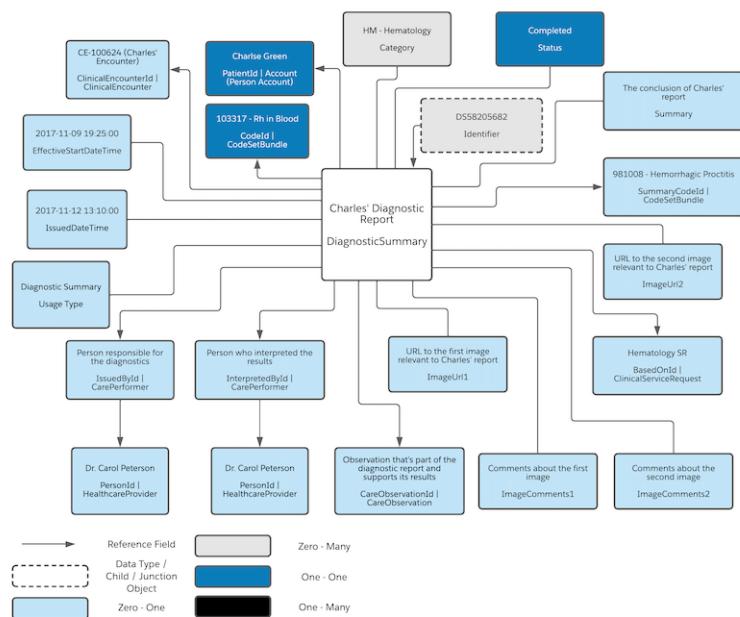
Diagnostic Report Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0..M	The identifier information for a diagnostic summary is represented as <code>Identifier</code> records that reference the <code>DiagnosticSummary</code> record using their <code>Identifier.ParentRecordId</code> field.
basedOn	DiagnosticSummary .BasedOnId	Polymorphic Lookup: Medication Statement, Clinical Service Request	0..1	While FHIR defines <code>diagnosticReport .basedOn</code> as a zero-to-many reference, the Salesforce implementation is a zero-to-one text field. Only references to medication statement and clinical service request records are supported.
status	DiagnosticSummary .Status	Picklist	1..1	While FHIR defines <code>diagnosticReport .status</code> as a reference to code set bundle, the Salesforce implementation is a picklist.
category	DiagnosticSummary .Category	Multi-Select Picklist	0..M	While FHIR defines <code>diagnosticReport .category</code> as a reference to code set bundle, the Salesforce implementation is a multi-select picklist.
code	DiagnosticSummary .CodeId	Lookup: CodeSet Bundle	1..1	N/A

Diagnostic Report Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
subject	DiagnosticSummary .PatientId	Master-Detail: Account	1..1	The Salesforce implementation of diagnosticReport.subject supports references to only patients.
encounter	DiagnosticSummary .ClinicalEncounterId	Lookup: Clinical Encounter	0..1	N/A
effective .effective DateTime	DiagnosticSummary .EffectiveStartDate Time	DateTime	0..1	N/A
effective .effective Period	DiagnosticSummary .EffectiveStartDate Time	DateTime	0..1	Because Salesforce doesn't support a native period data type, the diagnosticReport.effective.effectivePeriod field is flattened into a set of start date and end date fields.
	DiagnosticSummary .EffectiveEndDate Time	DateTime	0..1	
issued	DiagnosticSummary .IssuedDateTime	DateTime	0..1	Because Salesforce doesn't support a native instant data type, the diagnosticReport.issued FHIR resource is implemented as a date time field in Salesforce.
performer	DiagnosticSummary .IssuedById	Lookup: Care Performer	0..1	While FHIR defines diagnosticReport.performer as a zero-to-many resource, the Salesforce implementation is a zero-to-one reference to CarePerformer.
resultsInterpreter	DiagnosticSummary .InterpretedById	Lookup: Care Performer	0..1	While FHIR defines diagnosticReport.resultsInterpreter as a zero-to-many resource, the Salesforce implementation is a zero-to-one reference to CarePerformer.
specimen	N/A	N/A	N/A	Not supported
result	DiagnosticSummary .CareObservationId	Lookup: Care Observation	0..1	While FHIR defines diagnosticReport.result as a zero-to-many resource, the Salesforce implementation is a zero-to-one reference to CareObservation.
imaging Study	N/A	N/A	N/A	Not supported
media .comment	DiagnosticSummary .ImageComments1	String	0..1	The zero-to-many diagnosticReport.media resource is flattened to five separate zero-to-one text fields and five separate zero-to-one URL fields in the Salesforce implementation.
	DiagnosticSummary .ImageComments2	String		

Diagnostic Report Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
	DiagnosticSummary.ImageComments3	String	0..1	
	DiagnosticSummary.ImageComments4	String	0..1	
	DiagnosticSummary.ImageComments5	String	0..1	
media.link	DiagnosticSummary.ImageUrl1	URL	0..1	
	DiagnosticSummary.ImageUrl2	URL	0..1	
	DiagnosticSummary.ImageUrl3	URL	0..1	
	DiagnosticSummary.ImageUrl4	URL	0..1	
	DiagnosticSummary.ImageUrl5	URL	0..1	
conclusion	DiagnosticSummary.Summary	String	0..1	N/A
conclusion Code	DiagnosticSummary.SummaryCodeId	Lookup: CodeSet Bundle	0..1	While FHIR defines diagnosticReport.conclusionCode as a zero-to-many resource, the Salesforce implementation is a zero-to-one reference.
presented Form	N/A	N/A	N/A	Not supported

Sample Record Diagram

Here's a diagram that shows an example of how this resource is represented in Salesforce.



SEE ALSO:

[DiagnosticSummary](#)

DocumentReference

The DocumentReference FHIR resource maps to the DiagnosticSummary and DiagnosticSummaryDetail objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [DocumentReference](#) map to the fields in Salesforce.

Table 14: Patient - Salesforce

DocumentReference Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
MasterIdentifier	N/A	N/A	N/A	Not supported
identifier	Identifier	Object	0.M	The identifier information for a documentReference is represented as Identifier records that reference the DiagnosticSummary record using their Identifier. ParentRecordId field.
status	DiagnosticSummary.Status	Picklist	1.1	While FHIR defines document Reference.status as

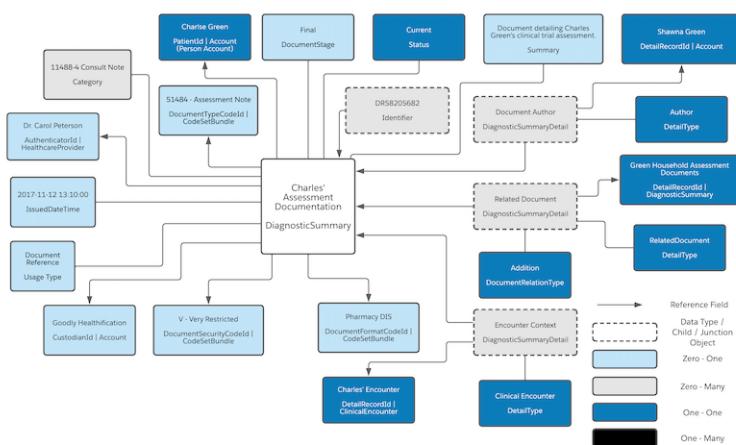
DocumentReference Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				a code, the Salesforce implementation is a picklist.
docStatus	DiagnosticSummary.Document Stage	Picklist	0.1	While FHIR defines document Reference.docStatus as a code, the Salesforce implementation is a picklist.
type	DiagnosticSummary.Document TypeCodeId	Lookup: CodeSet Bundle	0.1	N/A
category	DiagnosticSummary.Category	Multi-Select Picklist	0.M	While FHIR defines documentReference.category as a codeable concept, the Salesforce implementation is a picklist.
subject	DiagnosticSummary.PatientId	Master-Detail: Account	1.1	The Salesforce implementation supports only patients as subjects of a document reference.
date	DiagnosticSummary.Issued DateTime	DateTime	0.1	N/A
author	DiagnosticSummaryDetail	Object	0.M	The author information of a document reference is represented using the DiagnosticSummaryDetail child object. The DetailRecordId field references the author, the DetailTypefield specifies the child record type as Author, and the DiagnosticSummaryId field references the parent DiagnosticSummary record that represents the document reference.
authenticator	DiagnosticSummary .AuthenticatorId	Lookup: Healthcare Provider, Account, Contact, User	0.1	The Salesforce implementation doesn't directly support practitionerRole or HealthcarePractitionerFacility records as authenticators.

DocumentReference Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
custodian	DiagnosticSummary.Custodian.Id	Lookup: Account	0.1	N/A
relatesTo.code	DiagnosticSummaryDetail.DocumentRelationType	Picklist	0.M	The related document information of a document reference is represented using the DiagnosticSummaryDetail child object. The DetailRecordId field references the related document, the DocumentRelationType field specifies the type of relation, the DetailTypefield specifies the child record type as Related Document, and the DiagnosticSummaryId field references the parent DiagnosticSummary record that represents the document reference.
relatesTo.target	DiagnosticSummaryDetail.DetailRecord	Lookup: Diagnostic Summary	0.M	
description	DiagnosticSummary.Summary	String	0.1	While FHIR defines document Reference.status Reason as a zero-to-many codeable concept, the Salesforce implementation is a zero-to-one picklist.
securityLabel	DiagnosticSummary.DocumentSecurityCode	Lookup: CodeSet Bundle	0.1	N/A
content.attachment	DiagnosticSummary.ReportAttachmentId	Lookup: Attachment	0.1	While FHIR defines documentReference.Content as a one-to-many resource, the Salesforce implementation is zero-to-one.
content.format	DiagnosticSummary.DocumentFormatCode	Lookup: CodeSet	0.1	N/A
context.encounter	DiagnosticSummaryDetail	Object	0.M	The encounter context information of a document reference is represented using the DiagnosticSummaryDetail

DocumentReference Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				child object. The DetailRecordId field references the clinical encounter record, the DetailType field specifies the child record type as Clinical Encounter, and the DiagnosticSummaryId field references the parent DiagnosticSummary record that represents the document reference.
context.event	N/A	N/A	N/A	Not supported
context.period	N/A	N/A	N/A	Not supported
context.facilityType	N/A	N/A	N/A	Not supported
context.practiceSetting	N/A	N/A	N/A	Not supported
context.sourcePatientInfo	N/A	N/A	N/A	Not supported
context.related	N/A	N/A	N/A	Not supported

Sample Record Diagram

Here's a diagram that shows an example of how this resource is represented in Salesforce.



Dosage

The Dosage FHIR resource maps to the PatientMedicationDosage object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Dosage](#) map to the fields in Salesforce.

Table 15: Dosage - Salesforce

Dosage Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
sequence	PatientMedicationDosage.Sequence	Double	0..1	N/A
text	PatientMedicationDosage.Comments	String	0..1	Both dosage.text and dosage.timing are mapped to the PatientMedicationDosage.Comments field in Salesforce.
additionalInstruction	PatientMedicationDosage.AdditionalInstruction	String	0..1	While FHIR defines Dosage.additionalInstruction as a zero-to-many reference to code set bundle, the Salesforce implementation is a zero-to-one text field.
patientInstruction	PatientMedicationDosage.PatientInstruction	String	0..1	N/A
timing	PatientMedicationDosage.TimingId	String	0..1	N/A
asNeeded.asNeededBoolean	PatientMedicationDosage.IsAsNeeded	Boolean	0..1	N/A
asNeeded.asNeededCodeableConcept	N/A	N/A	N/A	Not supported
site	PatientMedicationDosage.SiteId	Lookup: CodeSet Bundle	0..1	N/A
route	PatientMedicationDosage.RouteId	Lookup: CodeSet Bundle	0..1	N/A
method	PatientMedicationDosage.MethodId	Lookup: CodeSet Bundle	0..1	N/A
doseAndRate	N/A	N/A	0..1	While FHIR defines dosage.doseAndRate as a zero-to-many block of child resources, the

Dosage Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				Salesforce implementation supports only a zero-to-one set of information per record.
doseAnd Rate.type	PatientMedication Dosage.Dosage DefinitionType	Picklist	0.1	While FHIR defines dosage.doseAndRate.type as a code set bundle, the Salesforce implementation is a picklist.
doseAnd Rate.dose	PatientMedication Dosage.DosageQuantity Type	Picklist	0.1	A Salesforce-original field that determines whether the dosage.doseAndRate.dose value in the record is a dose range or a dose quantity.
	PatientMedication Dosage.DosageQuantity Numerator	Double	0.1	Because Salesforce doesn't support native quantity or range data types, the dosage.doseAndRate.dose FHIR resource is flattened to a set of numerator, denominator, and unit fields.
	PatientMedication Dosage.DosageQuantity Denominator	Double	0.1	
	PatientMedication Dosage.DosageUnitId	Lookup: UnitOf Measure	0.1	
doseAnd Rate.rate	PatientMedication Dosage.DosageRateType	Picklist	0.1	A Salesforce-original field that determines whether the dosage.doseAndRate.rate value in the record is a simple frequency, frequency range, or frequency ratio.
	PatientMedication Dosage.DosageRate Numerator	Double	0.1	Because Salesforce doesn't support native quantity, range, or ratio data types, the dosage.doseAndRate.dose FHIR resource is flattened to a set of numerator, denominator, and unit fields.
	PatientMedication Dosage.DosageRate Denominator	Double	0.1	
	PatientMedication Dosage.DosageRate UnitId	Lookup: UnitOf Measure	0.1	
doseAnd Rate .maxDose PerPeriod	N/A	N/A	N/A	Not supported
doseAnd Rate.max DosePer Administration	N/A	N/A	N/A	Not supported

Dosage Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
doseAnd Rate.max DosePer Lifetime	N/A	N/A	N/A	Not supported

SEE ALSO:

[PatientMedicationDosage](#)

Encounter

The `Encounter` FHIR resource maps to the `ClinicalEncounter`, `ClinicalEncounterDiagnosis`, `ClinicalEncounterFacility`, `ClinicalEncounterIdentifier`, `ClinicalEncounterProvider`, `ClinicalEncounterReason`, and `ClinicalEncounterSvcRequest` objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for `Encounter` map to the fields in Salesforce.

Table 16: Patient - Salesforce

Encounter Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	<code>ClinicalEncounter Identifier</code>	Object	0.M	The identifier information for an encounter is represented as <code>ClinicalEncounter Identifier</code> records that reference the encounter record using their <code>Clinical EncounterIdentifier.Parent RecordId</code> field.
status	<code>ClinicalEncounter .Status</code>	Picklist	1.1	While FHIR defines <code>encounter.status</code> as a code, its Salesforce implementation is a picklist.
status History	N/A	N/A	N/A	Not supported
class	<code>ClinicalEncounter. Category</code>	Picklist	1.1	While FHIR defines <code>encounter.class</code> as a code set, its Salesforce implementation is a picklist.
class History	N/A	N/A	N/A	Not supported
type	<code>ClinicalEncounter. TypeId</code>	Lookup: <code>CodeSet</code> <code>Bundle</code>	0.1	While FHIR defines <code>encounter.type</code> as a zero-to-many resource, the Salesforce implementation is zero-to-one.

Encounter Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
serviceType	ClinicalEncounter.ServiceType	Picklist	0..1	While FHIR defines <code>encounter.serviceType</code> as a code set bundle, its Salesforce implementation is a picklist.
priority	ClinicalEncounter.PriorityId	Lookup: CodeSet Bundle	0..1	N/A
subject	ClinicalEncounter.PatientId	Lookup: Account	1..1	While FHIR defines <code>encounter.subject</code> as a zero-to-one resource, the Salesforce implementation is one-to-one.
episodeOfCare	N/A	N/A	N/A	Not supported
basedOn	ClinicalEncounterSvcRequest	Object	0..M	The service request information that an encounter is based on is represented as <code>ClinicalEncounterSvcRequest</code> records that reference the encounter record using their <code>ClinicalEncounterSvcRequest.ClinicalEncounterId</code> field.
participant	ClinicalEncounter.Provider	Object	0..M	The participant information for an encounter is represented as <code>ClinicalEncounter.Provider</code> records that reference the encounter record using their <code>ClinicalEncounter.Provider.ClinicalEncounterId</code> field.
participant.type	ClinicalEncounter.Provider.Practitioner.TypeId	Lookup: CodeSet Bundle	0..1	While FHIR defines <code>encounter.participant.type</code> as a zero-to-many resource, the Salesforce implementation is zero-to-one.
participant.period	ClinicalEncounter.Provider.StartDate	DateTime	0..1	Because Salesforce doesn't have a native period data type, the <code>encounter.participant.period</code> resource is flattened into a set of start date and end date fields, and set of duration and duration unit fields.
	ClinicalEncounter.Provider.EndDate	DateTime	0..1	
	ClinicalEncounter.Provider.Duration	Double	0..1	
	ClinicalEncounter.Provider.Duration.UnitId	Lookup: UnitOfMeasure	0..1	
participant.individual	ClinicalEncounter.Provider.Practitioner.Id	Lookup: HealthcareProvider	0..1	N/A

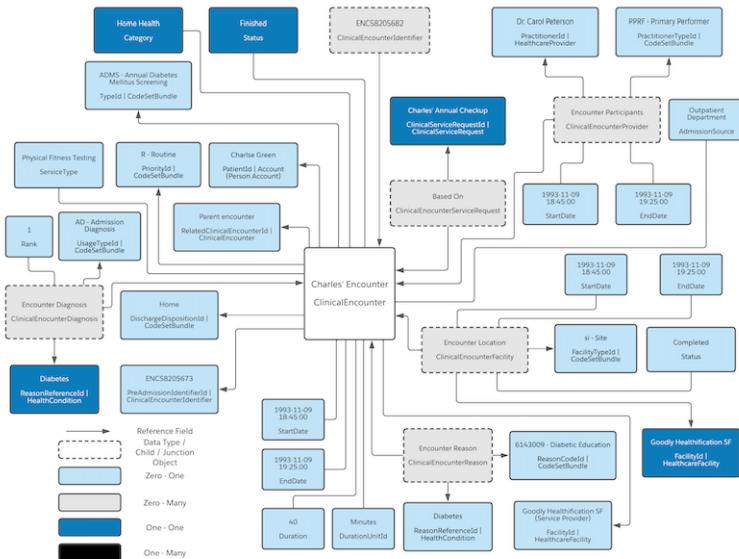
Encounter Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
appointment	N/A	N/A	N/A	Not supported
period	ClinicalEncounter .StartDate	DateTime	0.1	Because Salesforce doesn't have a native period data type, the encounter.period resource is flattened into a set of start date and end date fields.
	ClinicalEncounter.End Date	DateTime	0.1	
length	ClinicalEncounter .Duration	Double	0.1	Because Salesforce doesn't have a native duration data type, the encounter.length resource is flattened into a set of duration and duration unit fields.
	ClinicalEncounter .DurationUnitId	Lookup: UnitOf Measure	0.1	
reason Code	ClinicalEncounter Reason.ReasonCodeId	Lookup: CodeSet Bundle	0.M	The reason for an encounter is represented as ClinicalEncounterReason records that reference the encounter record using their ClinicalEncounterReason.ClinicalEncounterId field.
reason Reference	ClinicalEncounter Reason.Reason ReferenceId	Polymorphic Lookup: Health Condition, Care Observation, and Patient Medical Procedure	0.M	The reason for an encounter is represented as ClinicalEncounterReason records that reference the encounter record using their ClinicalEncounterReason.ClinicalEncounterId field.
diagnosis	ClinicalEncounter Diagnosis	Object	0.M	The diagnosis information for an encounter is represented as ClinicalEncounter Diagnosis records that reference the encounter record using their ClinicalEncounterDiagnosis.ClinicalEncounterId field.
diagnosis .condition	ClinicalEncounter Diagnosis.DiagnosisId	Polymorphic Lookup: Health Condition, and Patient Medical Procedure	0.1	N/A

Encounter Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
diagnosis.use	ClinicalEncounter.Diagnosis.UsageTypeId	Lookup: CodeSet Bundle	0..1	N/A
diagnosis.rank	ClinicalEncounter.Diagnosis.Rank	Double	0..1	N/A
account	N/A	N/A	N/A	Not supported
hospitalization.pre Admission Identifier .	ClinicalEncounter.Pre AdmissionIdentifierId	Lookup: Clinical Encounter Identifier	0..1	N/A
hospitalization.origin	ClinicalEncounter.PreviousFacilityId	Lookup: Healthcare Facility	0..1	While FHIR defines <code>encounter.hospitalization.origin</code> as a single resource, the Salesforce implementation flattens it into two fields.
	ClinicalEncounter.PreviousOrganizationId	Lookup: Account	0..1	
hospitalization.admitSource	ClinicalEncounter.AdmissionSource	Picklist	0..1	While FHIR defines <code>encounter.hospitalization.admitSource</code> as a code set bundle, its Salesforce implementation is a picklist.
hospitalization.re Admission	ClinicalEncounter.ReadmissionCodeId	Lookup: CodeSet Bundle	0..1	N/A
hospitalization.diet Preference	ClinicalEncounter.DietPreference	Multi-Select Picklist	0..M	While FHIR defines <code>encounter.hospitalization.dietPreference</code> as a code set bundle, its Salesforce implementation is a picklist.
hospitalization.special Courtesy	ClinicalEncounter.SpecialCourtesy	Picklist	0..1	While FHIR defines <code>encounter.hospitalization.specialCourtesy</code> as a zero-to-many code set bundle, its Salesforce implementation is a zero-to-one picklist.
hospitalization.special Arrangement	N/A	N/A	N/A	Not supported
hospitalization.destination	ClinicalEncounter.DestinationFacilityId	Lookup: Healthcare Facility	0..1	While FHIR defines <code>encounter.hospitalization.destination</code> as

Encounter Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
	ClinicalEncounter.DestinationOrganizationId	Lookup: Account	0..1	a single resource, the Salesforce implementation flattens it into two fields.
hospitalization.dischargeDisposition	ClinicalEncounter.DischargeDispositionId	Lookup: CodeSet Bundle	0..1	N/A
location	ClinicalEncounter.Facility	Object	0..M	The facility information for an encounter is represented as ClinicalEncounter Facility records that reference the encounter record using their ClinicalEncounter Facility.ClinicalEncounterId field.
location.location	ClinicalEncounter.Facility.FacilityId	Lookup: Healthcare Facility	0..1	N/A
location.status	ClinicalEncounter.Facility.Status	Picklist	0..1	While FHIR defines encounter.location.status as a code, its Salesforce implementation is a picklist.
location.physicalType	ClinicalEncounter.Facility.FacilityTypeId	Lookup: CodeSet Bundle	0..1	N/A
location.period	ClinicalEncounter.Facility.StartDate	DateTime	0..1	Because Salesforce doesn't have a native period data type, the encounter.location.period resource is flattened into a set of start date and end date fields, and set of duration and duration unit fields.
	ClinicalEncounter.Facility.EndDate	DateTime	0..1	
	ClinicalEncounter.Facility.Duration	Double	0..1	
	ClinicalEncounter.Facility.DurationUnitId	Lookup: UnitOfMeasure	0..1	
serviceProvider	ClinicalEncounter.FacilityId	Lookup: Healthcare Facility	0..1	While FHIR defines encounter.serviceProvider as referencing an organization, the Salesforce implementation references a facility.
partOf	ClinicalEncounter.RelatedClinicalEncounterId	Lookup: Clinical Encounter	0..1	N/A

Sample Record Diagram

Here's a diagram that shows an example of how this resource is represented in Salesforce.



SEE ALSO:

- [ClinicalEncounter](#)
- [ClinicalEncounterDiagnosis](#)
- [ClinicalEncounterFacility](#)
- [ClinicalEncounterIdentifier](#)
- [ClinicalEncounterProvider](#)
- [ClinicalEncounterReason](#)
- [ClinicalEncounterSvcRequest](#)

EpisodeOfCare

The `episodeOfCare` FHIR resource maps to the `CareEpisode` and `CareEpisodeDetail` objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for `episodeOfCare` map to the fields in Salesforce.

Table 17: episodeOfCare - Salesforce

Goal Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0..M	The identifier information for an episode of care is represented as <code>Identifier</code> records that reference the <code>CareEpisode</code> record using their <code>Identifier.ParentRecordId</code> field.

Goal Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
status	CareEpisode.Status	Picklist	1..1	While FHIR defines this field as a code value, the Salesforce implementation is a picklist.
status History	N/A	N/A	N/A	Not supported
type	CareEpisode.Type	Multi-Select Picklist	0..M	While FHIR defines this field as a codeable concept, the Salesforce implementation is a multi-select picklist.
diagnosis .condition	CareEpisodeDetail .DetailType	Picklist	0..M	Select Diagnosis as the picklist value in detailType.
	CareEpisodeDetail .DetailRecordId	Lookup: Health Condition		
diagnosis .role	CareEpisodeDetail .RoleCodeId	Lookup: CodeSet Bundle, CodeSet	0..1	N/A
diagnosis .rank	CareEpisodeDetail .Rank	Number	0..1	N/A
patient	CareEpisode.PatientId	Master-Detail: Account	1..1	N/A
managing Organization	CareEpisode .Responsible OrganizationId	Lookup: Account, Healthcare Provider	0..1	N/A
period	CareEpisode.StartDate Time	DateTime	0..1	The Salesforce implementation implements the Period data type as a pair of DateTime fields.
	CareEpisode.EndEnd DateTime	DateTime	0..1	
referral Request	CareEpisodeDetail .DetailType	Picklist	0..1	Select Referral Request as the picklist value in detailType.
	CareEpisodeDetail .DetailRecordId	Lookup: Clinical Service Request		Select ClinicalServiceRequest as the domain set for ReferenceRecordId.
care Manager	CareEpisode.Care CoordinatorId	Lookup: Healthcare Provider, Healthcare	0..1	N/A

Goal Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
		Practitioner Facility		
team	N/A	N/A	N/A	Not supported
account	N/A	N/A	N/A	Not supported

Flag

The `Flag` FHIR resource maps to the `ClinicalAlert` object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for `Flag` map to the fields in Salesforce.

Table 18: Flag - Salesforce

Flag Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0..M	The identifier information for a clinical alert is represented as <code>Identifier</code> records that reference the clinical alert record using their <code>Identifier.ParentRecordId</code> field.
status	<code>ClinicalAlert.Status</code>	Picklist	0..1	While FHIR defines <code>Flag.status</code> as a code, the Salesforce implementation of <code>Clinical Alert.Status</code> is picklist.
category	<code>ClinicalAlert.Categories</code>	Multi-Select Picklist	0..M	While FHIR defines <code>Flag.category</code> as a code set bundle, the Salesforce implementation of <code>ClinicalAlert.Categories</code> is a multi-select picklist.
code	<code>ClinicalAlert.CodeId</code>	Lookup: CodeSet Bundle	1..1	While FHIR defines <code>Flag.code</code> as a code set bundle only, the Salesforce implementation flattens it into <code>ClinicalAlert.Code</code> and <code>ClinicalAlert.CodeDescription</code> . The latter is meant to display non-coded information to users as required.
	<code>ClinicalAlert.Code Description</code>	String	0..1	
subject	<code>ClinicalAlert.Subject</code>	Polymorphic Lookup: Location, Account Healthcare Provider, Medication, and	1..1	The Salesforce implementation of <code>flag.subject</code> doesn't support plan definitions.

Flag Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
		Patient Medical Procedure		
period	ClinicalAlert.Start Date	Date Time	0..1	In Salesforce's implementation, <code>Flag.period</code> is split into two fields, <code>ClinicalAlert.StartDate</code> and <code>ClinicalAlert.EndDate</code> .
	ClinicalAlert.EndDate	Date Time	0..1	
encounter	ClinicalAlert.Related EncounterId	Lookup: Clinical Encounter	0..1	N/A
author	ClinicalAlert.RaisedById	Polymorphic Lookup: Healthcare Provider, Care Registered Device, and Healthcare Practitioner Facility	0..1	The Salesforce implementation of <code>flag.author</code> doesn't support patients, and organizations.

SEE ALSO:

[ClinicalAlert](#)

Goal

The Goal FHIR resource maps to the `GoalAssignment` and `GoalAssignmentDetail` objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Goal](#) map to the fields in Salesforce.

Table 19: Goal - Salesforce

Goal Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
Identifier	N/A	N/A	N/A	Not supported
lifecycle Status	GoalAssignment.Status	Picklist	0..1	While FHIR defines this field as a one-to-one code value, the Salesforce implementation is a zero-to-one picklist.

Goal Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
achievementStatus	GoalAssignment .ProgressionStatus	Picklist	0..1	While FHIR defines this value as a codeable concept, the Salesforce implementation is a picklist.
category	N/A	N/A	N/A	Not supported
continuous	GoalAssignment .IsContinuousGoal	Boolean	0..1	N/A
priority	GoalAssignment .Priority	Picklist	0..1	While FHIR defines this field as a codeable concept, the Salesforce implementation is a picklist.
description	GoalAssignment.Description	Text Area	0..1	While FHIR defines this field as a one-to-one codeable concept, the salesforce implementation supports both zero-to-one text values and zero-to-one codeable concept and codeset values.
	GoalAssignment.Description.Codeld	Lookup: CodeSet, Bundle, CodeSet	0..1	
subject	GoalAssignment.ParentRecordId	Lookup: Account, CarePlan. GoalAssignment, CarePlan Activity	1..1	The Salesforce implementation additionally supports goal and carePlan as valid subject values for goal.
start	GoalAssignment.StartDate	Date	0..1	N/A
	GoalAssignment.StartEventCodeId	Lookup: CodeSet, Bundle, CodeSet	0..1	N/A
target	N/A	N/A	N/A	Not Supported
status Date	GoalAssignment.StatusDate	DateTime	0..1	The Salesforce Implementation uses the DateTime data type instead of Date.
status Reason	GoalAssignment.statusReason	Text	0..1	N/A
expressedBy	GoalAssignment.AssignedById	Lookup: Account, Contact, Healthcare Provider, Healthcare	0..1	The Salesforce implementation doesn't support careTeam values for this field.

Goal Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
		Practitioner Facility		
addresses	GoalAssignmentDetail .DetailType	Picklist	0..M	Select Addressed Item as the picklist value in detailType and select one of the supported domain sets in detailRecord.
	GoalAssignmentDetail .DetailRecordId	Lookup: Health Condition, Care Observation, Medication Statement, Medication Request, Clinical Service Request		The Salesforce implementation doesn't support procedure, nutritionOrder, and RiskAssessment values.
outcome Code	GoalAssignmentDetail .DetailType	Picklist	0..M	Select Outcome Code as the picklist value in detailType.
	GoalAssignmentDetail .DetailCodeId	Lookup: CodeSet Bundle, CodeSet		N/A
outcome Reference	GoalAssignmentDetail .DetailType	Picklist	0..M	Select Outcome Reference as the picklist value in detailType.
	GoalAssignmentDetail .DetailRecordId	Lookup: Care Observation		Select Care Observation as the domain set in DetailRecordId.
note	N/A	N/A	N/A	Not supported

HumanName

The HumanName FHIR resource maps to the PersonName object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [HumanName](#) map to the fields in Salesforce.

Table 20: HumanName - Salesforce

Human Name Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
family	PersonName.LastName	String	0..1	In cases where a person has a middle name, PersonName.LastName is supposed to store a combination of the middle name and the last name.
Given	PersonName.FirstName	String	0..1	While the cardinality defined by FHIR for HumanName.Given is zero-to-many, the Salesforce implementation in PersonName.FirstName is zero-to-one.
text	PersonName.FullName	String	0..1	N/A
use	PersonName.NameUsageType	Dynamic picklist	0..1	While FHIR defines HumanName.use as a code, Salesforce implements PersonName.NameUsageType as a dynamic picklist.
prefix	PersonName.Prefix	String	0..1	While the cardinality defined by FHIR for HumanName.prefix is zero-to-many, the Salesforce implementation in PersonName.Prefix is zero-to-one.
suffix	PersonName.Suffix	String	0..1	While the cardinality defined by FHIR for HumanName.suffix is zero-to-many, the Salesforce implementation in PersonName.Suffix is zero-to-one.
period	PersonName.EffectiveDate	Date Time	0..1	In Salesforce's implementation, HumanName.period is split into two fields, PersonName.EffectiveDate and PersonName.EndDate.
	PersonName.EndDate	Date Time	0..1	

Identifier

The Identifier FHIR resource maps to the Identifier object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Identifier](#) map to the fields in Salesforce.

Table 21: Identifier - Salesforce

Identifier Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
use	Identifier.IdUsageType	Picklist	0..1	FHIR defines identifier.use as a code set. However, the Salesforce implementation of Identifier.IdUsageType is a dynamic

Identifier Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				picklist because of the limited list of possible values.
type	Identifier.IdTypeId	Polymorphic Lookup: CodeSet, CodeSet Bundle	0.1	N/A
system	Identifier.SourceSystem	String	0.1	FHIR defines identifier.system as a URI. However, the Salesforce implementation of Identifier.SourceSystem is a string because Salesforce doesn't support the URI data type.
value	Identifier.IdValue	String	0.1	N/A
period	Identifier.EffectiveDate	DateTime	0.1	In Salesforce's implementation, identifier.period is split into two fields, Identifier.EffectiveDate and Identifier.EndDate.
	Identifier.EndDate	DateTime	0.1	
assigner	Identifier.IssuingAuthorityId	Lookup: Account	0.1	N/A

SEE ALSO:

[Identifier](#)

Immunization

The Immunization FHIR resource maps to the PatientImmunization and PatientHealthReaction objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Immunization](#) map to the fields in Salesforce.

Table 22: Immunization - Salesforce

Immunization Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0..M	The identifier information for an immunization is represented as Identifier records that reference the PatientImmunization record using their Identifier.ParentRecordId field.

Immunization Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
status	PatientImmunization .Status	Picklist	0.1	While FHIR defines immunization.status as a code set bundle, the Salesforce implementation of PatientImmunization .Status is picklist.
status Reason	PatientImmunization .StatusReasonCodeId	Lookup: CodeSet Bundle	0.1	N/A
vaccine Code	PatientImmunization .VaccineCodeId	Lookup: CodeSet Bundle	0.1	N/A
patient	PatientImmunization .PatientId	Master-Detail Reference: Account	1.1	N/A
encounter	PatientImmunization .ClinicalEncounterId	Lookup: Clinical Encounter	0.1	N/A
occurrence .occurrence DateTime	PatientImmunization .VaccinationDate	DateTime	0.1	N/A
occurrence .occurrence String	PatientImmunization .VaccinationPeriod	String	0.1	N/A
recorded	PatientImmunization .RecordCreationDateTime	DateTime	0.1	N/A
primary Source	PatientImmunization .IsRecordedBy Vaccinator	Boolean	0.1	N/A
report Origin	PatientImmunization .InformationSourceId	Lookup: CodeSet Bundle	0.1	N/A
location	PatientImmunization .FacilityId	Lookup: Healthcare .Facility	0.1	N/A
manufacturer	PatientImmunization .Manufacturer	String	0.1	Use this field if only the name of the organization is required.
	PatientImmunization .Manufacturer AccountId	Lookup: Account		N/A

Immunization Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
lotNumber	PatientImmunization .LotNumber	String	0..1	N/A
expiration Date	PatientImmunization .ExpirationDate	DateTime	0..1	N/A
site	PatientImmunization .SiteId	Lookup: CodeSet Bundle	0..1	N/A
route	PatientImmunization .RouteId	Lookup: CodeSet Bundle	0..1	N/A
dose	PatientImmunization .Dose	Double	0..1	The Salesforce equivalent of immunization .dose is represented using the fields Patient Immunization.Dose for the quantity and PatientImmunization.DoseUnitId for the unit.
dose	PatientImmunization .DoseUnitId	Lookup: UnitOf Measure	0..1	
performer	CarePerformer	Object	0..M	The performer information for an immunization is represented as CarePerformer records that reference the PatientImmunization record using their CarePerformer.Parent RecordId field.
performer .function	CarePerformer.RoleId	Lookup: CodeSet Bundle	0..1	N/A
performer .actor	CarePerformer .PersonId	Polymorphic Lookup: Account and Healthcare Provider	1..1	N/A
note	N/A	N/A	N/A	Not supported
reason Code	PatientImmunization .ReasonCodeId	Lookup: CodeSet Bundle	0..1	N/A
reason Reference	PatientImmunization .HealthConditionId	Lookup: Health Condition	0..1	The FHIR resource immunization.reason Reference is flattened into three separate zero-to-one references to HealthCondition, CareObservation, and DiagnosticSummary in the Salesforce implementation.
reason Reference	PatientImmunization .CareObservationId	Lookup: Care Observation	0..1	

Immunization Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
	PatientImmunization .DiagnosticSummaryId	Lookup: Diagnostic Summary	0.1	
isSubpotent	PatientImmunization .IsSubpotent	Boolean	0.1	N/A
subpotent Reason	PatientImmunization .SubpotencyReason CodeId	Lookup: CodeSet Bundle	0.1	While FHIR defines immunization .subpotentReason as a zero-to-many resource, the Salesforce implementation of PatientImmunization.SubpotencyReasonCodeId is a zero-to-one reference.
education	N/A	N/A	N/A	Not supported
program Eligibility	N/A	N/A	N/A	Not supported
fundingSource	N/A	N/A	N/A	Not supported
reaction	PatientHealthReaction	Object	0.M	The reaction information for an immunization is represented as PatientHealthReaction records that reference the PatientImmunization record using their PatientHealthReaction.ParentId field.
reaction .date	PatientHealthReaction .ReactionDateTime	DateTime	0.1	N/A
reaction .detail	PatientHealthReaction .ObservationId	Lookup: Care Observation	0.1	N/A
reaction .reported	PatientHealthReaction .IsSelfReported	Boolean	0.1	N/A
protocol Applied	N/A	N/A	0.1	While FHIR defines immunization .protocolApplied as a zero-to-many reference, the Salesforce implementation of its child resources is zero-to-one.
protocol Applied .series	PatientImmunization .Immunization Recommendation	String	0.1	N/A
protocol Applied .authority	PatientImmunization .Recommending Authority	String	0.1	While FHIR defines immunization .protocolApplied.authority as a reference to organization, the Salesforce implementation of PatientImmunization .RecommendingAuthority is a text field .

Immunization Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
protocol Applied .target Disease	PatientImmunization .TargetDiseaseCodeId	Lookup: CodeSet Bundle	0.1	N/A
protocol Applied .dose Number Positive Int	PatientImmunization .CurrentDose	Double	0.1	N/A
protocol Applied .dose Number String	N/A	N/A	N/A	The Salesforce implementation of immunization.protocolApplied .doseNumber supports only integer values.
protocol Applied .series Doses Positive Int	PatientImmunization .RecommendedDoses	Double	0.1	N/A
protocol Applied .series Doses String	N/A	N/A	N/A	The Salesforce implementation of immunization.protocolApplied .seriesDoses supports only integer values

SEE ALSO:

[PatientImmunization](#)

InformationOrigin

The CRDMetricData FHIR resource maps to the AssessmentQuestionResponse object.

FHIR V4.0 - Discovery Framework Data Model Mapping

Here's how the fields defined by FHIR for [InformationOrigin](#) map to the fields in Salesforce.

Table 23: InformationOrigin - Salesforce

informationorigin element	Salesforce Field	Type	Salesforce Cardinality	Notes
extensionLevel	AssessmentQuestionResponse.OriginType	Picklist	0.1	N/A

informationorigin element	Salesforce Field	Type	Salesforce Cardinality	Notes
extension:author	AssessmentQuestionResponse.ReviewerId	Reference: Account, Contact, Healthcare Provider, User	0..1	N/A
extension:code	AssessmentQuestionResponse.ReviewedId	Reference: Code Set, Code Set Bundle	0..M	N/A

Location

The Location FHIR resource maps to the `HealthcareFacility` and `Location` objects in Salesforce.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for `Location` map to the fields in the Salesforce.

Table 24: Location - Salesforce

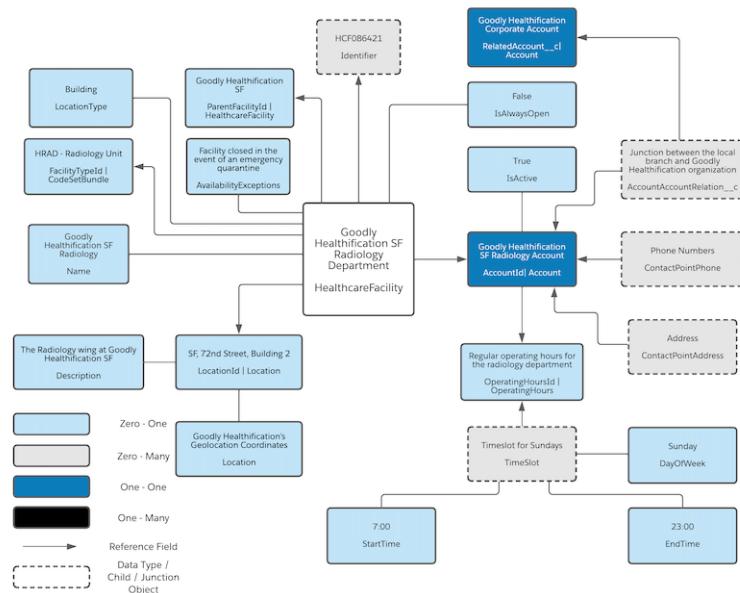
Location Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0..M	The identifier information for a facility is represented as <code>Identifier</code> records that reference the facility record using their <code>Identifier.ParentRecordId</code> field.
status	Account.IsActive	Boolean	0..1	While FHIR defines <code>location.status</code> as a code, the salesforce implementation is a boolean field in the referenced account record.
operationalStatus	N/A	N/A	N/A	Not supported
name	HealthcareFacility.Name	String	0..1	N/A
alias	N/A	N/A	N/A	Not supported
description	Location.Description	String	0..1	N/A
mode	N/A	N/A	N/A	Not supported
type	HealthcareFacility.FacilityTypeId	Lookup: CodeSet Bundle	0..1	While FHIR defines <code>location.type</code> as a zero-to-many resource, Salesforce implements <code>HealthcareFacility.FacilityTypeId</code> as a zero-to-one field.

Location Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
telecom	ContactPointPhone	Object	0..M	The telecom information of the facility is stored as ContactPointPhone records that reference the account referenced by the facility record.
address	ContactPointAddress	Object	0..M	The address information of the facility is stored as ContactPointAddress records that reference the account referenced by the facility record.
physical Type	HealthcareFacility .LocationType	Picklist	0..1	While FHIR defines location.physical Type as a code set bundle, Salesforce implements HealthcareFacility .LocationType as a picklist.
position	Location.Location	Geolocation	0..1	The location.position FHIR resource is mapped to the Location.Location salesforce field. This location (Salesforce object) record is referenced by the healthcare facility record using its HealthcareFacility .LocationId lookup field. position.altitude is not supported in Location.Location.
managing Organization	AccountAccount Relation__c	Junction Object	0..1	The junction object that connects the facility account with the parent organization's business account.
partOf	HealthcareFacility .ParentFacilityId	Lookup: Healthcare Facility	0..1	N/A
hoursOf Operation .daysOfWeek	TimeSlot.DayOfWeek	Picklist	0..1	While FHIR defines location.hoursOf Operation.daysOfWeek as a code set bundle, Salesforce implementation is a picklist. While the TimeSlot.DayOfWeek field is a zero-to-one field, multiple time slot records can reference the same operating hours record, thereby supporting a zero-to-many reference for location.hoursOfOperation .daysOfWeek in the Salesforce implementation. The time slot record references the operating hours record using its TimeSlot .OperatingHoursId master-detail reference field. This operating hours record is referenced by the facility's account record using

Location Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				its Account.OperatingHoursId lookup field. And finally, this account record is referenced by the facility record using its Healthcare Facility.AccountId master-detail reference field.
hoursOf Operation.allDay	N/A	N/A	N/A	Not supported
hoursOf Operation.openingTime	TimeSlot.StartTime	Time	0.1	The time slot record references the operating hours record using its TimeSlot.OperatingHoursId master-detail reference field. This operating hours record is referenced by the facility's account record using its Account.OperatingHoursId lookup field. And finally, this account record is referenced by the facility record using its Healthcare Facility.AccountId master-detail reference field.
hoursOf Operation.closingTime	TimeSlot.EndTime	Time	0.1	The time slot record references the operating hours record using its TimeSlot.OperatingHoursId master-detail reference field. This operating hours record is referenced by the facility's account record using its Account.OperatingHoursId lookup field. And finally, this account record is referenced by the facility record using its Healthcare Facility.AccountId master-detail reference field.
availabilityExceptions	HealthcareFacility.AvailabilityExceptions	String	0.1	N/A
endPoint	N/A	N/A	N/A	Not supported

Sample Record Diagram

Here's a diagram that shows an example of how this resource is represented in Salesforce.



SEE ALSO:

[HealthcareFacility](#)

Medication

The `medication` FHIR resource maps to the `Medication` object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for `medication` map to the fields in Salesforce.

Table 25: medication - Salesforce

Medication Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0.M	The identifier information for a medication is represented as <code>Identifier</code> records that reference the <code>medication</code> record using their <code>Identifier.ParentRecordId</code> field.
code	Medication.Medication.CodeId	Lookup: CodeSet Bundle	0.1	N/A
status	Medication.Status	Picklist	1.1	While FHIR defines <code>medication.status</code> as a code set bundle, the Salesforce implementation of <code>Medication.Status</code> is picklist.
manufacturer	Medication.ManufacturerId	Lookup: Account	0.1	N/A

Medication Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
form	Medication.MedicationFormId	Lookup: CodeSet Bundle	0.1	N/A
amount	Medication.Quantity.Numerator	Double	0.1	Because Salesforce doesn't support a native quantity data type, the medication.amount field is flattened into a set of numerator, denominator, and unit fields.
	Medication.Quantity.Denominator	Double	0.1	
	Medication.Quantity.UnitId	Lookup: UnitOfMeasure	0.1	
ingredient.item	MedicinalIngredient.IngredientId	Lookup: CodeSet Bundle, Medication	0.1	Zero-to-many value for medication.ingredient is implemented using the child object MedicinalIngredient. Each ingredient record references the parent Medication record using the ParentRecordId field.
ingredient.isActive	MedicinalIngredient.IsActive	Boolean	0.1	
ingredient.strength	MedicinalIngredient.StrengthNumerator	Double	0.1	
	MedicinalIngredient.StrengthNumerator.UnitId	Lookup: UnitOfMeasure	0.1	
	MedicinalIngredient.StrengthDenominator	Double	0.1	
	MedicinalIngredient.StrengthDenominator.UnitId	Lookup: UnitOfMeasure	0.1	
batch.lotNumber	Medication.BatchNumber	Int	0.1	N/A
batch.expirationDate	Medication.ExpirationDate	DateTime	0.1	N/A

SEE ALSO:

[Medication](#)

MedicationRequest

The MedicationRequest FHIR resource maps to the MedicationRequest object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [MedicationRequest](#) map to the fields in Salesforce.

Table 26: MedicationRequest - Salesforce

Medication Request Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0.M	The identifier information for a medication request is represented as Identifier records that reference the MedicationRequest record using their Identifier.ParentRecord.Id field.
status	MedicationRequest.Status	Picklist	1.1	While FHIR defines MedicationRequest.Status as a code set bundle, the Salesforce implementation of MedicationRequest.Status is picklist.
statusReason	MedicationRequest.StatusReasonCodeId	Lookup: CodeSet Bundle	0.1	N/A
intent	MedicationRequest.Type	Picklist	1.1	While FHIR defines MedicationRequest.intent as a code set bundle, the Salesforce implementation of MedicationRequest.Type is picklist.
category	MedicationRequest.MedicationAdministrationContext.Id	Lookup: CodeSet Bundle	0.1	While FHIR defines MedicationRequest.category as a zero-to-many resource, the Salesforce implementation is zero-to-one.
priority	MedicationRequest.Priority	Picklist	0.1	While FHIR defines MedicationRequest.priority as a code set bundle, the Salesforce implementation of MedicationRequest.Priority is picklist.
doNotPerform	MedicationRequest.IsIgnored	Boolean	0.1	N/A
reported	MedicationRequest.IsSecondaryInformation	Boolean	0.1	N/A
reportedReference	MedicationRequest.SecondarySourceId	Polymorphic Lookup: Account, Healthcare Provider	0.1	N/A

Medication Request Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
medication.medication.CodeableConcept	MedicationRequest.MedicationCodeId	Lookup: CodeSet Bundle	0..1	While the individual fields MedicationRequest.MedicationCodeId and MedicationRequest.MedicationId are zero-to-one references, the set {MedicationRequest.MedicationCodeId, MedicationRequest.MedicationId} is a one-to-one resource.
medication.medicationReference	MedicationRequest.MedicationId	Lookup: Medication	0..1	
subject	MedicationRequest.PatientId	Master-Detail Reference: Account	1..1	Only references to patients are supported.
encounter	MedicationRequest.ClinicalEncounterId	Lookup: Clinical Encounter	0..1	N/A
supportingInformation	N/A	N/A	N/A	Not Supported
authoredOn	MedicationRequest.PrescribedDate	DateTime	0..1	N/A
requester	MedicationRequest.RequesterId	Polymorphic Lookup: Account, Healthcare Provider, Care Registered Device	0..1	N/A
performer	MedicationRequest.PerformerId	Polymorphic Lookup: Account, Care Registered Device, and Healthcare Provider	0..1	Doesn't support references to care teams.
performerType	MedicationRequest.PerformerTypeId	Lookup: CodeSet Bundle	0..1	N/A
recorder	N/A	N/A	N/A	Not Supported

Medication Request Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
reasonCode	MedicationRequest.ReasonCodeId	Lookup: CodeSet Bundle	0..1	While FHIR defines MedicationRequest.reasonCode as a zero-to-many resource, the Salesforce implementation is zero-to-one.
reasonReference	MedicationRequest.ReasonReferenceId	Polymorphic Lookup: Health Condition, Care Observation	0..1	While FHIR defines MedicationRequest.reasonReference as a zero-to-many resource, the Salesforce implementation is zero-to-one.
instantiatesCanonical	N/A	N/A	N/A	Not Supported
instantiatesCanonical	N/A	N/A	N/A	Not Supported
basedOn	MedicationRequest.RelatedRequestId	Lookup: Medication Request	0..1	The medicationRequest.basedOn FHIR resource is flattened to a set of medication request and service request fields in the Salesforce implementation.
	MedicationRequest.Detail.Clinical.ServiceRequestId	Lookup: Clinical Service Request	0..1	
groupIdentifier	MedicationRequest.MedicationRequest.GroupId	Lookup: Identifier	0..1	N/A
courseOfTherapyType	MedicationRequest.TherapyDuration	Picklist	0..1	While FHIR defines MedicationRequest.courseOfTherapyType as a code set bundle, the Salesforce implementation of MedicationRequest.TherapyDuration is picklist.
insurance	N/A	N/A	N/A	Not supported
note	N/A	N/A	N/A	Not supported
dosageInstruction	PatientMedicationDosage	Object	0..M	The dosage information for a medication request is represented as PatientMedicationDosage records that reference the MedicationRequest record using their PatientMedicationDosage.ParentRecordId field.
dispenseRequest.initial	MedicationRequest.InitialFillQuantity	Double	0..1	Because Salesforce doesn't support a native quantity data type, the implementation of medicationRequest.dispense

Medication Request Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
Fill .quantity	MedicationRequest .FillQuantityUnitId	Lookup: UnitOf Measure	0.1	Request.initialFill.quantity is flattened into a set of quantity and unit fields.
dispense Request .initial Fill .duration	MedicationRequest .InitialFillDuration	Double	0.1	Because Salesforce doesn't support a native duration data type, the implementation of medicationRequest.dispenseRequest.initialFill.duration is flattened into a set of duration and unit fields.
	MedicationRequest .FillDurationUnitId	Lookup: UnitOf Measure	0.1	
dispense Request .dispense Interval	MedicationRequest .DispenseInterval	Double	0.1	Because Salesforce doesn't support a native duration data type, the implementation of medicationRequest.dispenseRequest.dispenseInterval is flattened into a set of interval and unit fields.
	MedicationRequest .DispenseIntervalUnitId	Lookup: UnitOf Measure	0.1	
dispense Request .validity Period	MedicationRequest .PrescriptionPeriod Start	DateTime	0.1	Because Salesforce doesn't support a native period data type, the implementation of medicationRequest.dispenseRequest.validityPeriod is flattened into a set of start and end dates.
	MedicationRequest .PrescriptionPeriodEnd	DateTime	0.1	
dispense Request .numberOf Repeats Allowed	MedicationRequest .RefillsAllowed	Double	0.1	N/A
dispense Request .quantity	MedicationRequest .RefillQuantity	Double	0.1	Because Salesforce doesn't support a native quantity data type, the medicationRequest.dispenseRequest.quantity is flattened into a set of quantity and unit fields.
	MedicationRequest .FillQuantityUnitId	Lookup: UnitOf Measure	0.1	
dispense Request .expected Supply Duration	MedicationRequest .RefillDuration	Double	0.1	Because Salesforce doesn't support a native duration data type, the medicationRequest.dispenseRequest.expectedSupplyDuration is flattened into a set of duration and unit fields.
	MedicationRequest .FillDurationUnitId	Lookup: UnitOf Measure	0.1	
dispense Request .performer	MedicationRequest .DispenserId	Lookup: Account	0.1	N/A

Medication Request Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
substitution.allowed.allowed Boolean	MedicationRequest.CanSubstitute	Boolean	0..1	N/A
substitution.allowed.allowed CodeableConcept	MedicationRequest.AllowedSubstitutionTypeCodeId	Lookup: CodeSet Bundle	0..1	0..1
substitution.reason	MedicationRequest.SubstitutionReasonCodeId	Lookup: CodeSet Bundle	0..1	N/A
priorPrescription	MedicationRequest.PreviousPrescriptionId	Lookup: MedicationRequest	0..1	N/A
detectedIssue	N/A	N/A	N/A	Not supported
eventHistory	N/A	N/A	N/A	Not supported

SEE ALSO:

[MedicationRequest](#)

MedicationStatement

The medicationStatement FHIR resource maps to the `MedicationStatement` object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [medicationStatement](#) map to the fields in Salesforce.

Table 27: MedicationStatement - Salesforce

Medication Statement Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0..M	The identifier information for a medication statement is represented as <code>Identifier</code> records that reference the <code>MedicationStatement</code> record using their <code>Identifier.ParentRecordId</code> field.

Medication Statement Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
basedOn	MedicationStatement .MedicationRequestId	Lookup: Medication Request	0.1	While FHIR defines <code>medicationStatement .basedOn</code> as a zero-to-many resource, the Salesforce implementation of <code>MedicationStatement.MedicationRequestId</code> is zero-to-one. The Salesforce implementation doesn't support references to care plan or service request records.
partOf	MedicationStatement .ParentMedicationStatementId	Lookup: Medication Statement	0.1	The Salesforce implementation of <code>medicationRequest.partOf</code> is flattened into three separate references.
	MedicationStatement .ProcedureId	Lookup: Patient Medical Procedure	0.1	References to medication administration and medication dispense records are not supported. While FHIR defines <code>medicationStatement .partOf</code> as a zero-to-many resource, the Salesforce implementation is zero-to-one for each of the flattened fields.
	MedicationStatement .CareObservationId	Lookup: Care Observation	0.1	
status	MedicationStatement .Status	Picklist	1.1	While FHIR defines <code>MedicationStatement .status</code> as a code set bundle, the Salesforce implementation of <code>MedicationStatement .Status</code> is picklist.
status Reason	MedicationStatement .StatusReasonCodeId	Lookup: CodeSet Bundle	0.1	N/A
category	MedicationStatement .DeliverySetting	Picklist	0.1	While FHIR defines <code>MedicationStatement .category</code> as a code set bundle, the Salesforce implementation is a picklist.
medication .medication Codeable Concept	MedicationStatement .MedicationCodeId	Lookup: CodeSet Bundle	0.1	While the individual fields <code>MedicationStatement.MedicationCodeId</code> and <code>MedicationStatement .MedicationId</code> are zero-to-one references, the set <code>{MedicationStatement .MedicationCodeId, MedicationStatement.MedicationId}</code> is a one-to-one resource.
medication .medication Reference	MedicationStatement .MedicationId	Lookup: Medication	0.1	
subject	MedicationStatement .PatientId	Master-Detail Reference: Account	1.1	Only references to patients are supported.

Medication Statement Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
context	MedicationStatement .ClinicalEncounterId	Lookup: Clinical Encounter	0.1	Only references to encounters are supported.
effective .effective DateTime	MedicationStatement .StartTime	DateTime	0.1	The MedicationStatement.StartDate Time field is used as both the Salesforce counterpart for medicationStatement .effective.effectiveDateTime and the start date field for medication Statement.effective.effective Period.
effective .effective Period	MedicationStatement .StartTime	DateTime	0.1	Because Salesforce doesn't support a native period data type, the implementation of medication Statement.effective.effective Period is flattened into a set of start and end dates.
	MedicationStatement .EndDateTime	DateTime	0.1	
date Asserted	MedicationStatement .AssertionDateTime	DateTime	0.1	N/A
information Source	MedicationStatement .StatementSourceId	Polymorphic Lookup: Account, Healthcare Provider	0.1	N/A
derived From	N/A	N/A	N/A	Not supported
reason Code	MedicationStatement .MedicationReason CodeId	Lookup: CodeSet Bundle	0.1	While FHIR defines MedicationStatement .reasonCode as a zero-to-many resource, the Salesforce implementation is zero-to-one.
reason Reference	MedicationStatement .MedicationReasonId	Polymorphic Lookup: Health Condition, Care Observation	0.1	While FHIR defines MedicationStatement .reasonReference as a zero-to-many resource, the Salesforce implementation is zero-to-one. Only references to condition and observation records are supported.
note	N/A	N/A	N/A	Not supported
dosage	PatientMedication Dosage	Object	0.M	The dosage information for a medication statement is represented as Patient MedicationDosage records that reference the MedicationStatement record using

Medication Statement Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				their PatientMedicationDosage .ParentRecordId field.

SEE ALSO:

[MedicationStatement](#)

Observation

The observation FHIR resource maps to the CareObservation and CareObservationComponent objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [observation](#) map to the fields in Salesforce.

Table 28: observation - Salesforce

Observation Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	N/A	N/A	N/A	Not supported
basedOn	CareObservation.BasedOnId	Polymorphic Lookup: Medication Request, Clinical Service Request	0.1	While FHIR defines observation.basedOn as a zero-to-many reference, the Salesforce implementation is a zero-to-one text field. Only references to medication request and clinical service request records are supported.
partof	CareObservation.PartOfId	Polymorphic Lookup: Medication Statement, Patient Immunization, Patient Medical Procedure	0.1	While FHIR defines observation.partOf as a zero-to-many reference, the Salesforce implementation is a zero-to-one text field. Only references to medication statement, patient immunization, and patient medical procedure records are supported.
status	CareObservation.ObservationStatus	Picklist	1.1	While FHIR defines observation.status as a reference to code set bundle, the Salesforce implementation is a picklist.
category	CareObservation.Category	Picklist	0.1	While FHIR defines observation.category as a zero-to-many reference to

Observation Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				code set bundle, the Salesforce implementation is a zero-to-one picklist.
code	CareObservation .CodeId	Lookup: CodeSet	1..1	While FHIR defines <code>observation.code</code> as a one-to-one reference to code set bundle, Salesforce implements this as three separate <code>CodeSet</code> reference fields. The first one is a one-to-one field, while the other two are zero-to-one fields.
	CareObservation .AdditionalCode1Id	Lookup: CodeSet	0..1	
	CareObservation .AdditionalCode2Id	Lookup: CodeSet	0..1	
subject	CareObservation .ObservedSubjectId	Master-Detail: Account	1..1	The Salesforce implementation of <code>observation.subject</code> supports references to only patients.
focus	N/A	N/A	N/A	Not supported
encounter	CareObservation .EncounterId	Lookup: Clinical Encounter	0..1	N/A
effective .effective DateTime	CareObservation .EffectiveDateTime	DateTime	0..1	N/A
effective .effective Period	CareObservation .EffectiveDateTime	DateTime	0..1	Because Salesforce doesn't support a native period data type, the <code>observation.effective .effectivePeriod</code> field is flattened into a set of effective date and end date fields.
	CareObservation.End DateTime	DateTime	0..1	
effective .effective Timing	N/A	N/A	N/A	Not supported
effective .effective Instant	N/A	N/A	N/A	Not supported
issued	CareObservation .IssuedDateTime	DateTime	0..1	Because Salesforce doesn't support a native instant data type, the <code>observation .issued</code> FHIR resource is implemented as a date time field in Salesforce.
performer	CareObservation .ObserverId	Polymorphic Lookup: Account, Healthcare Provider	0..1	While FHIR defines <code>observation .performer</code> as a zero-to-many resource, the Salesforce implementation is a zero-to-one reference to <code>Account</code> and <code>Healthcare Provider</code> . References to care teams are not supported.

Observation Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
results Interpreter	CareObservation .InterpretedById	Lookup: Care Performer	0.1	While FHIR defines <code>observation.results Interpreter</code> as a zero-to-many resource, the Salesforce implementation is a zero-to-one reference to <code>CarePerformer</code> .
value	CareObservation .ObservedValueType	Static Picklist	0.1	A Salesforce-original field that determines whether the value stored in <code>CareObservation.ObservedValue Numerator</code> and <code>CareObservation.ObservedValueDenominator</code> is a range, ratio, or quantity. This field is used only when the data entered for <code>observation.value</code> is one these data types.
	CareObservation .ObservedValue Numerator	Double	0.1	Because Salesforce doesn't support native range, ratio, and quantity data types, the <code>observation.value</code> FHIR resource is flattened to a set of numerator, denominator, and unit fields for this type of data.
	CareObservation .ObservedValue Denominator	Double	0.1	The Salesforce implementation of <code>observation.value</code> doesn't support <code>observation.value.valueSample Data</code> and <code>observation.value.value Time</code> .
	CareObservation .ObservedValueUnitId	Lookup: UnitOf Measure	0.1	<code>CareObservation.ObservedValue UnitId</code> is a duplicate field that stores the same information as <code>CareObservation.UnitOf MeasureId</code> . Use only one of these two fields to specify the unit of a quantity value.
	CareObservation .ObservedValue Denominator	Lookup: CodeSet Bundle	0.1	N/A
	CareObservation .NumericValue	Double	0.1	N/A
	CareObservation .ObservedValueText	String	0.1	N/A
	CareObservation .IsOutcomePositive	Boolean	0.1	<code>CareObservation.IsObserved</code> is a duplicate field that can store the same information. Use only one of these two fields.
	CareObservation .ObservationStartTime	DateTime	0.1	<code>CareObservation.ObservationStartTime</code> is used for both <code>observation</code>

Observation Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
	CareObservation.ObservationEndTime	DateTime	0.1	.component.value.valueDateTime and observation.component.value.valuePeriod. Because Salesforce doesn't support a native period data type, the observation.value.valuePeriod FHIR resource is flattened to a set of start and end dates.
data Absent Reason	N/A	N/A	N/A	Not supported
interpretation	CareObservation.ValueInterpretation	Picklist	0.1	While FHIR defines observation.interpretation as a zero-to-many code set bundle, the Salesforce implementation is a zero-to-one picklist.
note	N/A	N/A	N/A	Not supported
bodySite	CareObservation.BodySiteId	Lookup: CodeSet Bundle	0.1	N/A
method	CareObservation.MethodId	Lookup: CodeSet Bundle	0.1	N/A
specimen	N/A	N/A	N/A	Not supported
device	CareObservation.DeviceId	Lookup: Asset	0.1	References to device metrics records aren't supported.
reference Range.low	CareObservation.LowerBaselineValue	Double	0.1	Because Salesforce doesn't support a native quantity data type, the observation.referenceRange.low FHIR resource is flattened to a set of value and unit fields for this type of data.
	CareObservation.BaselineUnitId	Lookup: UnitOfMeasure	0.1	
reference Range .high	CareObservation.UpperBaselineValue	Double	0.1	Because Salesforce doesn't support a native quantity data type, the observation.referenceRange.high FHIR resource is flattened to a set of value and unit fields for this type of data.
	CareObservation.BaselineUnitId	Lookup: UnitOfMeasure	0.1	
reference Range.type	N/A	N/A	N/A	Not supported

Observation Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
reference Range.appliesTo	N/A	N/A	N/A	Not supported
reference Range.age	N/A	N/A	N/A	Not supported
reference Range.text	CareObservation.BaselineValueText	String	0.1	N/A
hasMember	CareObservation.RelatedObservationId	Lookup: Care Observation	0.1	While FHIR defines <code>observation.hasMember</code> as a zero-to-many resource, the Salesforce implementation is zero-to-one. Only references to observation records are supported.
derivedFrom	CareObservation.DerivationSourceId	Lookup: Care Observation, Diagnostic Summary	0.1	While FHIR defines <code>observation.derivedFrom</code> as a zero-to-many resource, the Salesforce implementation is zero-to-one.
component	CareObservation.Component	Object	0.M	The component information for a care observation is represented as <code>CareObservation.Component</code> records that reference the <code>CareObservation</code> record using their <code>Identifier.CareObservationId</code> field.
component.code	CareObservation.Component.ComponentTypeCodeId	Lookup: CodeSet Bundle	1.1	N/A
component.value	CareObservation.Component.ValueType	Static Picklist	0.1	A Salesforce-original field that determines whether the value stored in <code>CareObservationComponent.ObservedValueNumerator</code> and <code>CareObservationComponent.ObservedValueDenominator</code> is a range, ratio, or quantity. This field is used only when the data entered for <code>observation.component.value</code> is one of these data types.
	CareObservation.Component.ObservedValueNumerator	Double	0.1	Because Salesforce doesn't support native range, ratio, and quantity data types, the <code>observation.component.value</code> FHIR

Observation Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
	CareObservation Component.Observed ValueDenominator	Double	0..1	resource is flattened to a set of numerator, denominator, and unit fields for this type of data.
	CareObservation Component.Observed ValueUnitId	Lookup: UnitOf Measure	0..1	The Salesforce implementation of observation.component.value doesn't support observation.component.value.valueSampleData and observation.component.value.valueTime.
	CareObservation Component.Observed ValueCodeId	Lookup: CodeSet Bundle	0..1	N/A
	CareObservation Component.Numeric Value	Double	0..1	N/A
	CareObservation Component.Observed ValueText	String	0..1	N/A
	CareObservation Component.IsObserved	Boolean	0..1	N/A
	CareObservation Component.Observation StartTime	DateTime	0..1	CareObservationComponent.ObservationStartTime is used for both observation.component.value.valueDateTime and observation.component.value.valuePeriod.
	CareObservation Component.Observation EndTime	DateTime	0..1	Because Salesforce doesn't support a native period data type, the observation.component.value.valuePeriod FHIR resource is flattened to a set of start and end dates.
component .data Absent Reason	CareObservation Component.MissingData Reason	String	0..1	While FHIR defines observation.component.dataAbsentReason as a code set bundle reference, the Salesforce implementation is a text field.
component .interpretation	CareObservation Component.Value Interpretation	Lookup: CodeSet Bundle	0..1	While FHIR defines observation.component.interpretation as a code set bundle reference, the Salesforce implementation is a picklist.

Observation Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
component.referenceRange.low	CareObservation.Component.LowerBaselineValue	Double	0..1	Because Salesforce doesn't support a native quantity data type, the <code>observation.component.referenceRange.low</code> FHIR resource is flattened to a set of value and unit fields for this type of data.
	CareObservation.Component.BaselineUnitId	Lookup: UnitOfMeasure	0..1	
component.referenceRange.high	CareObservation.Component.UpperBaselineValue	Double	0..1	Because Salesforce doesn't support a native quantity data type, the <code>observation.component.referenceRange.high</code> FHIR resource is flattened to a set of value and unit fields for this type of data.
	CareObservation.Component.BaselineUnitId	Lookup: UnitOfMeasure	0..1	
component.referenceRange.type	N/A	N/A	N/A	Not supported
component.referenceRange.appliesTo	N/A	N/A	N/A	Not supported
component.referenceRange.age	N/A	N/A	N/A	Not supported
component.referenceRange.text	CareObservation.Component.BaselineValueText	String	0..1	N/A



Note: The fields `CareObservation.IsOutcomePositive` and `CareObservation.UnitOfMeasureId` don't have FHIR-defined validation rules built into them because these fields are used in other features and data models. You can define your own custom validation rules on them based on your business requirements.

Organization

The Organization FHIR resource maps primarily to the `Account` object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Organization](#) map to the fields in Salesforce.

Table 29: Organization - Salesforce

Organization Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0.M	The identifier information for an organization is represented as <code>Identifier</code> records that reference the organization record using their <code>Identifier.ParentRecordId</code> field.
active	Account.IsActive	Boolean	0.1	N/A
type	Account.Type	Picklist	0.1	While FHIR defines <code>account.type</code> as a zero-to-many code set bundle reference, its Salesforce implementation is a zero-to-one picklist.
name	Account.Name	String	0.1	N/A
alias	N/A	N/A	N/A	Not supported
telecom	ContactPointPhone	Object	0.M	The telecom information for an organization is represented as <code>ContactPointPhone</code> records that reference the organization record using their <code>ContactPointPhone.ParentId</code> field.
address	ContactPointAddress	Object	0.M	The address information for an organization is represented as <code>ContactPointAddress</code> records that reference the organization record using their <code>ContactPointAddress.ParentId</code> field.
contact	AccountContactRelation.ContactId	Lookup: Contact	0.M	Contacts are connected to organizations using the <code>AccountContactRelation</code> junction object. The <code>AccountContactRelation.AccountId</code> field references the organization's account record, and the <code>AccountContactRelation.ContactId</code> field references the contact record of the contact's person account.
contact.relationship	AccountContactRelation.Roles	Multi-Select picklist	0.M	While FHIR defines <code>organization.contact.purpose</code> as a code set bundle, its Salesforce implementation is a picklist.
contact.name	PersonName	Object	0.M	The name information for a contact is represented as <code>PersonName</code> records that reference the contact's person account using their <code>PersonName.ParentRecordId</code> field. While FHIR defines <code>patient.contact.name</code> as a zero-to-one resource, the Salesforce implementation can support zero-to-many references.

Organization Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
contact .telecom	ContactPointPhone	Object	0..M	The telecom information for a contact is represented as ContactPointPhone records that reference the contact's person account record using their ContactPointPhone .ParentId field.
contact .address	ContactPointAddress	Object	0..M	The address information for a contact is represented as ContactPointAddress records that reference the contact's person account record using their ContactPointAddress .ParentId field. While FHIR defines patient.contact .address as a zero-to-one resource, the Salesforce implementation can support zero-to-many references.
contact .endPoint	N/A	N/A	N/A	Not supported

Patient

The Patient FHIR resource maps to the Account and Contact objects in Salesforce. Patients are modeled using Person Accounts.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Patient](#) map to the fields in Salesforce.

Table 30: Patient - Salesforce

Patient Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0..M	The identifier information for a patient is represented as Identifier records that reference the patient record using their Identifier .ParentRecordId field.
active	Account.IsActive	Boolean	0..1	N/A
name	PersonName	Object	0..M	The name information for a patient is represented as PersonName records that reference the patient record using their PersonName .ParentRecordId field.
telecom	ContactPointPhone	Object	0..M	The telecom information for a patient is represented as ContactPointPhone records that reference the patient record using their ContactPointPhone .ParentId field.

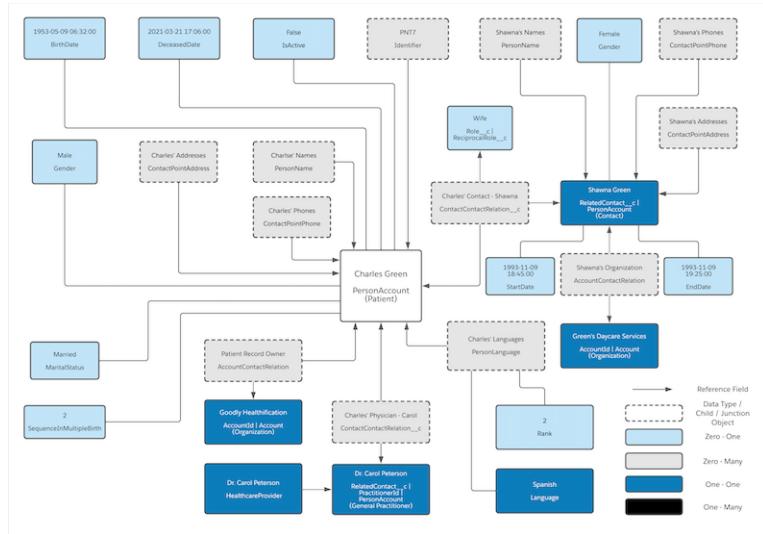
Patient Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
gender	Contact.Gender	Picklist	0..1	While FHIR defines <code>patient.gender</code> as a code set, its Salesforce implementation is a picklist.
birthDate	Contact.Birthdate	Date	0..1	N/A
deceased .deceased Boolean	N/A	N/A	N/A	Not supported
deceased .deceased DateTime	Contact.DeceasedDate	DateTime	0..1	While FHIR defines <code>patient.deceased</code> as either a boolean or a date, Salesforce supports only a date.
address	ContactPointAddress	Object	0..M	The address information for a patient is represented as <code>ContactPointAddress</code> records that reference the patient record using their <code>ContactPointAddress.ParentId</code> field.
marital Status	Contact.MaritalStatus	Picklist	0..1	While FHIR defines <code>patient.maritalStatus</code> as a code set bundle, its Salesforce implementation is a picklist.
multiple Birth .multiple Birth Boolean	N/A	N/A	N/A	Not supported
multiple Birth .multiple Birth Integer	Contact.SequenceIn MultipleBirth	Double	0..1	While FHIR defines <code>patient.multipleBirth</code> as either a boolean or an integer, Salesforce supports only an integer.
photo	N/A	N/A	N/A	Not supported
contact	ContactContact Relation__c .RelatedContact__c	Lookup: Contact	0..M	Contacts are connected to patients using the <code>ContactContactRelation__c</code> junction object. The <code>ContactContact Relation__c.Contact__c</code> field references the contact record of the patient's person account, and the <code>ContactContact Relation__c.RelatedContact__c</code> field references the contact record of the contact's person account.
contact .relationship	ContactContact Relation__c.Role__c	Lookup: ReciprocalRole__c	0..M	While FHIR defines <code>patient.contact.relationship</code> as a code set bundle, its

Patient Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				Salesforce implementation is a reference to ReciprocalRole__c.
contact.name	PersonName	Object	0..M	<p>The name information for a contact is represented as PersonName records that reference the contact record of the contact's person account using their PersonName.ParentRecordId field.</p> <p>While FHIR defines patient.contact.name as a zero-to-one resource, the Salesforce implementation can support zero-to-many references.</p>
contact.telecom	ContactPointPhone	Object	0..M	<p>The telecom information for a contact is represented as ContactPointPhone records that reference the contact's person account record using their ContactPointPhone.ParentId field.</p>
contact.address	ContactPointAddress	Object	0..M	<p>The address information for a contact is represented as ContactPointAddress records that reference the contact's person account record using their ContactPointAddress.ParentId field.</p> <p>While FHIR defines patient.contact.address as a zero-to-one resource, the Salesforce implementation can support zero-to-many references.</p>
contact.gender	Contact.Gender	Picklist	0..1	While FHIR defines patient.contact.gender as a code set, its Salesforce implementation is a picklist.
contact.organization	N/A	N/A	N/A	Not supported
contact.period	ContactContactRelation__c.StartDate__c	Date	0..1	Because Salesforce doesn't support a native period datatype, the patient.contact.period FHIR resource is flattened to a set of from and to dates.
	ContactContactRelation__c.EndDate__c	Date	0..1	
communication	PersonLanguage	Object	0..M	The language information for a patient is represented as PersonLanguage records

Patient Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				that reference the patient record using their PersonLanguage.IndividualId field.
communication.language	PersonLanguage.Language	Picklist	0.1	While FHIR defines patient.communication.language as a code set bundle, its Salesforce implementation is a picklist.
communication.preferred	PersonLanguage.Rank	Double	0.1	While FHIR defines patient.communication.preferred as a boolean, its Salesforce implementation is an integer field that ranks the degree of preference.
general Practitioner	ContactContactRelation__c.RelatedContact__c	Lookup: Contact	0.M	<p>Practitioners are connected to patients using the ContactContactRelation__c junction object. The ContactContactRelation__c.Contact__c field references the contact record of the patient's person account, and the ContactContactRelation__c.RelatedContact__c field references the contact record of the practitioner's person account.</p> <p>Salesforce doesn't support PractitionerRole type values for patient.generalPractitioner</p>
managing Organization	AccountContactRelation.AccountId	Lookup: Account	0.M	<p>Managing organizations are connected to patients using the AccountContactRelation junction object. The AccountContactRelation.AccountId field references the account record of the patient's organization, and the AccountContactRelation.ContactId field references the contact record of the patient's person account.</p>
link	N/A	N/A	N/A	Not supported

Sample Record Diagram

Here's a diagram that shows an example of how this resource is represented in Salesforce.



Practitioner

The Practitioner FHIR resource maps to the HealthcareProvider object and person accounts in Salesforce.

The Practitioner resource in FHIR is represented as a combination of HealthcareProvider records and person accounts in Salesforce, where the HealthcareProvider record is the base. The person account is associated to the HealthcareProvider record by referencing the person account record using the `AccountId` field on HealthcareProvider.

 **Note:** If your implementation models providers as contacts instead of person accounts, you can't associate the fields mapped to Account to your providers. You can instead associate your HealthcareProvider record to the Contact record using the `PractitionerId` field on HealthcareProvider.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for Practitioner map to the fields in Salesforce.

Table 31: Practitioner - Salesforce

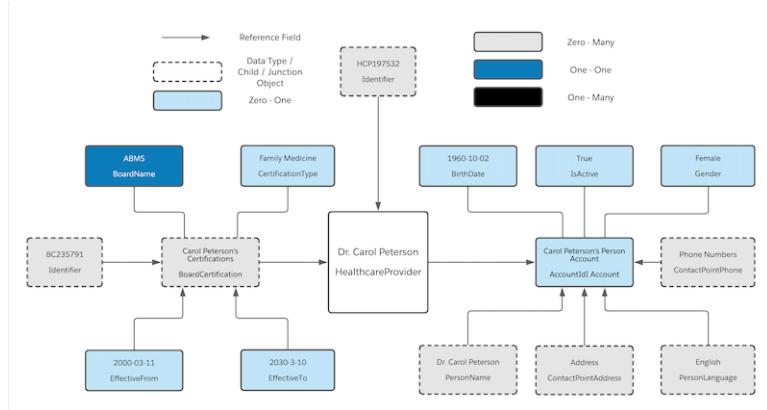
Practitioner Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0.M	The identifier information for a documentReference is represented as Identifier records that reference the HealthcareProvider record using their Identifier.ParentRecordId field.
active	Account.IsActive	Boolean	0.1	<p>The practitioner.active field is mapped to the account record of the provider's person account. This account record is referenced using the HealthcareProvider.AccountId field.</p> <p>If your implementation models providers as Contacts instead of Person Accounts, then you</p>

Practitioner Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				can't map <code>practitioner.active</code> to your providers.
name	PersonName	Object	0..M	The name information for a practitioner is represented as <code>PersonName</code> records that reference the practitioner's person account record using their <code>PersonName.ParentRecordId</code> field.
telecom	ContactPointPhone	Object	0..M	The telecom information for a practitioner is represented as <code>ContactPointPhone</code> records that reference the account record of the practitioner's person account using the <code>ContactPointPhone.ParentId</code> field. If your Implementation models providers as Contacts instead of Person Accounts, then you can't map <code>practitioner.telecom</code> to your providers.
address	ContactPointAddress	Object	0..M	The address information for a practitioner is represented as <code>ContactPointAddress</code> records that reference the account record of the practitioner's person account using the <code>ContactPointAddress.ParentId</code> field. If your Implementation models providers as Contacts instead of Person Accounts, then you can't map <code>practitioner.address</code> to your providers.
gender	Contact.Gender	Picklist	0..1	While FHIR defines <code>practitioner.gender</code> as a code set, its Salesforce implementation is a picklist. The practitioner's gender is mapped to the contact record of their person account. This contact record is referenced using the <code>HealthcareProvider.PractitionerId</code> field on <code>HealthcareProvider</code> .
birthDate	Contact.Birthdate	Date	0..1	N/A
photo	N/A	N/A	N/A	Not supported
qualification	BoardCertification	Object	0..M	The qualification information for a practitioner is represented as <code>BoardCertification</code>

Practitioner Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				records that reference the practitioner's HealthcareProvider record using their BoardCertification.HealthcareProviderId field.
qualification.identifier	Identifier	Object	0..M	The identifier information for a qualification is represented as Identifier records that reference the BoardCertification record using their Identifier.ParentRecordId field.
qualification.code	BoardCertification.CertificationType	Picklist	0..1	While FHIR defines practitioner.qualification.code as a code set bundle, its Salesforce implementation is a picklist.
qualification.period	BoardCertification.EffectiveFrom	Date	0..1	Because Salesforce doesn't support a native period data type, the practitioner.qualification.period FHIR resource is flattened to a set of from and to dates.
	BoardCertification.EffectiveTo	Date	0..1	
qualification.issuer	BoardCertification.BoardName	String	0..1	N/A
communication	PersonLanguage	Object	0..M	The language information for a practitioner is represented as PersonLanguage records that reference the practitioner's person account using their PersonLanguage.IndividualId field. While FHIR defines practitioner.communication as a code set bundle, the Salesforce implementation is a reference to PersonLanguage.

Sample Record Diagram

Here's a diagram that shows an example of how this resource is represented in Salesforce.



PractitionerRole

The `practitionerRole` FHIR resource maps to the `HealthcarePractitionerFacility` and `CareProviderFacilitySpecialty` objects in Salesforce.

The `practitionerRole` resource in FHIR is represented as a combination of `HealthcarePractitionerFacility` and `CareProviderFacilitySpecialty` records, where the `HealthcarePractitionerFacility` record is the base. The `CareProviderFacilitySpecialty` record is associated to the `HealthcarePractitionerFacility` record by referencing the `HealthcarePractitionerFacility` record using the `PractitionerFacilityId` field on `CareProviderFacilitySpecialty`.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [PractitionerRole](#) map to the fields in Salesforce.

Table 32: PractitionerRole - Salesforce

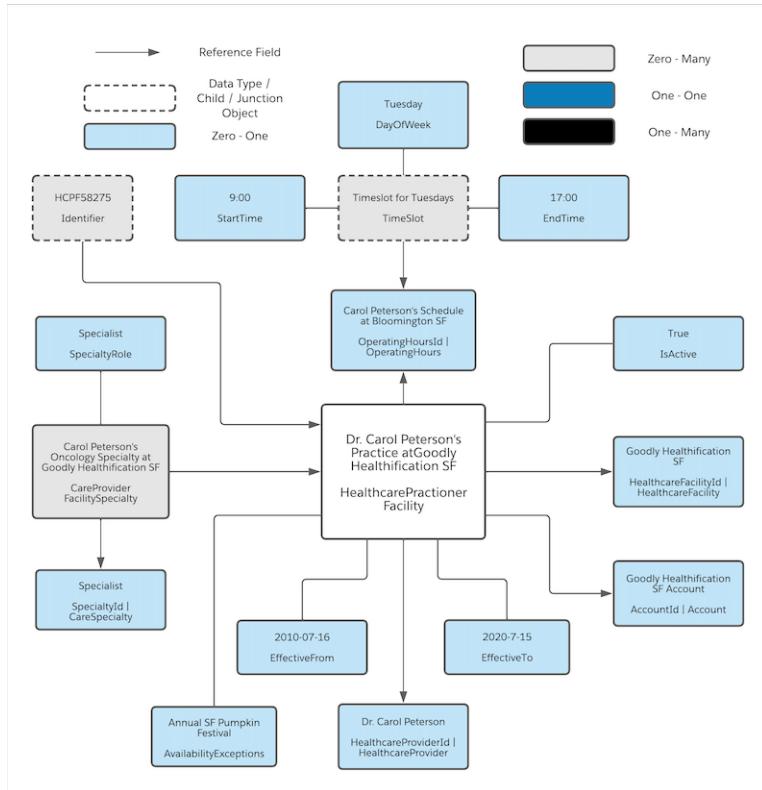
Practitioner Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
<code>identifier</code>	<code>Identifier</code>	Object	0.M	The identifier information for a <code>practitionerRole</code> is represented as <code>Identifier</code> records that reference the <code>HealthcarePractitionerFacility</code> record using their <code>Identifier.ParentRecordId</code> field.
<code>active</code>	<code>HealthcarePractitionerFacility.IsActive</code>	Boolean	0.1	N/A
<code>period</code>	<code>HealthcarePractitionerFacility.EffectiveFrom</code>	Date	0.1	Because Salesforce doesn't support a native period data type, the <code>practitionerRole.period</code> FHIR resource is flattened to a set of from and to dates.
	<code>HealthcarePractitionerFacility.EffectiveTo</code>	Date	0.1	

Practitioner Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
practitioner	HealthcarePractitioner Facility.Healthcare ProviderId	Lookup: Healthcare Provider	0.1	N/A
organization	HealthcarePractitioner Facility.AccountId	Lookup: Account	0.1	N/A
code	CareProviderFacility Specialty.SpecialtyRole	Picklist	0.M	<p>While FHIR defines <code>practitionerRole.code</code> as a code set bundle, its Salesforce implementation is a picklist.</p> <p>Zero-to-many values can be associated by creating multiple <code>CareProviderFacility Specialty</code> records that reference a <code>Healthcare PractitionerFacility</code> record. However, a single <code>CareProviderFacility Specialty</code> record can have only one combination of role and specialty.</p>
specialty	CareProviderFacility Specialty.SpecialtyId	Lookup: CareSpecialty	0.M	<p>While FHIR defines <code>practitionerRole.code</code> as a code set bundle, its Salesforce implementation is a <code>CareSpecialty</code> reference.</p> <p>Zero-to-many values can be associated by creating multiple <code>CareProviderFacility Specialty</code> records that reference a <code>Healthcare PractitionerFacility</code> record. However, a single <code>CareProviderFacility Specialty</code> record can have only one combination of role and specialty.</p>
location	HealthcarePractitioner Facility.Healthcare FacilityId	Lookup: Healthcare Facility	0.1	The Salesforce implementation supports only one <code>practitionerRole.location</code> reference for each practitioner role.

Practitioner Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
healthcareService	N/A	N/A	N/A	Not supported
telecom	N/A	N/A	N/A	Not supported
availableTime	HealthcarePractitioner Facility.OperatingHoursId	Operating Hours	0..M	Even though only one OperatingHours record can be referenced from a HealthcarePractitioner Facility record, multiple time slots can be added to that OperatingHours record. As such, zero-to-many available time values can be added to a single HealthcarePractitioner Facility record through a single OperatingHours reference.
notAvailable	N/A	N/A	N/A	Not supported
availabilityExceptions	HealthcarePractitioner Facility.AvailabilityExceptions	String	0..1	N/A
endPoint	N/A	N/A	N/A	Not supported

Sample Record Diagram

Here's a diagram that shows an example of how this resource is represented in Salesforce.



Procedure

The procedure FHIR resource maps to the `PatientMedicalProcedure` and `PatientMedicalProcedureDetail` objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for `Procedure` map to the fields in Salesforce.

Table 33: Procedure - Salesforce

Procedure Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0.M	The identifier information for a Procedure is represented as <code>Identifier</code> records that reference the <code>PatientMedicalProcedure</code> record using their <code>Identifier.ParentRecordId</code> field.
instantiates Canonical	N/A	N/A	N/A	Not Supported
instantiates Canonical	N/A	N/A	N/A	Not Supported

Procedure Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
basedOn	PatientMedicalProcedureDetail	Object	0..M	<p>The information about the service request that a procedure is based on is represented as PatientMedicalProcedureDetail records that reference the PatientMedicalProcedure record using their PatientMedicalProcedureDetail.PatientMedicalProcedureId field.</p> <p>The Salesforce implementation of procedure .basedOn doesn't support references to care plans.</p>
	PatientMedicalProcedureDetail.DetailRecordId	Lookup: ClinicalServiceRequest	0..1	For procedure.basedOn information, PatientMedicalProcedureDetail.DetailRecordId must reference a ClinicalServiceRequest record.
	PatientMedicalProcedureDetail.DetailType	Picklist Value: Based On	0..1	For procedure.basedOn information, PatientMedicalProcedureDetail.DetailType must use the value <i>Based On</i> .
partOf	PatientMedicalProcedureDetail	Object	0..M	<p>The information about the procedure or observation that a procedure is a part of is represented as PatientMedicalProcedureDetail records that reference the PatientMedicalProcedure record using their PatientMedicalProcedureDetail.PatientMedicalProcedureId field.</p> <p>The Salesforce implementation of procedure .partOf doesn't support references to medication administration.</p>
	PatientMedicalProcedureDetail.DetailRecordId	Polymorphic Lookup: PatientMedicalProcedure, CareObservation	0..1	For procedure.partOf information, PatientMedicalProcedureDetail.DetailRecordId must reference either a PatientMedicalProcedure record or a CareObservation.
	PatientMedicalProcedureDetail.DetailType	Picklist Value: Part Of	0..1	For procedure.partOf information, PatientMedicalProcedureDetail.DetailType must use the value <i>Part Of</i> .

Procedure Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
status	PatientMedicalProcedure.Status	Picklist	0..1	While FHIR defines <code>procedure.status</code> as a code set bundle, the Salesforce implementation of <code>PatientMedicalProcedure.Status</code> is picklist.
statusReason	PatientMedicalProcedure.StatusReasonCodeId	Lookup: CodeSet Bundle	0..1	N/A
category	PatientMedicalProcedure.TypeId	Lookup: CodeSet Bundle	0..1	N/A
code	PatientMedicalProcedure.CodeId	Lookup: CodeSet Bundle	0..1	N/A
subject	PatientMedicalProcedure.PatientId	MasterDetail: Account	1..1	The Salesforce implementation of <code>procedure.subject</code> doesn't support references to groups.
encounter	PatientMedicalProcedure.ClinicalEncounterId	Lookup: Clinical Encounter	0..1	N/A
performed.performedDateTime	PatientMedicalProcedure.StartDate	DateTime	0..1	<code>PatientMedicalProcedure.StartDate</code> is used for both <code>procedure.performed.performedDateTime</code> and <code>procedure.performed.performedPeriod</code> . For the latter, the field is used to represent the start date of the period.
performed.performedPeriod	PatientMedicalProcedure.StartDate	DateTime	0..1	Because Salesforce doesn't support a native period data type, the <code>procedure.performed.performedPeriod</code> field is flattened into a set of start date and end date fields.
	PatientMedicalProcedure.EndDate	DateTime	0..1	
performed.performedString	PatientMedicalProcedure.DurationTimeString	String	0..1	N/A
performed.performedAge	PatientMedicalProcedure.PerformedAtAge	Double	0..1	Because Salesforce doesn't support a native age data type, the <code>procedure.performed.performedAge</code> FHIR resource is flattened into a set of age and unit fields.
	PatientMedicalProcedure.PerformedAtAgeUnitId	Lookup: UnitOfMeasure	0..1	

Procedure Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
performed .performedRange	PatientMedicalProcedure.PerformedAtAgeLowerLimit	Double	0..1	Because Salesforce doesn't support a native range data type, the procedure.performed .performedRange FHIR resource is flattened into a set of lower limit, upper limit, and unit fields.
	PatientMedicalProcedure.PerformedAtAgeUpperLimit	Double	0..1	
	PatientMedicalProcedure.PerformedAgeRangeUnit	Lookup: UnitOfMeasure	0..1	
recorder	PatientMedicalProcedure.RecordCreatorId	Lookup: Account, HealthcareProvider	0..1	N/A
asserter	PatientMedicalProcedure.AssertionSourceId	Lookup: Account, HealthcareProvider	0..1	N/A
performer	CarePerformer	Object	0..M	The performer information for a Procedure is represented as CarePerformer records that reference the PatientMedicalProcedure record using their CarePerformer.ParentRecordId field.
performer.function	CarePerformer.RoleId	Polymorphic Lookup: CodeSet, CodeSet Bundle	0..1	N/A
performer.actor	CarePerformer.PersonId	Polymorphic Lookup: Account, HealthcareProvider	0..1	The Salesforce implementation doesn't support references to devices.
performer.actoronBehalfOf	CarePerformer.AffiliatedOrganizationId	Lookup: Account	0..1	0..1
location	PatientMedicalProcedure.FacilityId	Lookup: HealthcareFacility	0..1	N/A
reasonCode	PatientMedicalProcedure.ReasonCodeId	Lookup: CodeSet Bundle	0..1	While FHIR defines procedure.reasonCode as a zero-to-many resource, the Salesforce implementation is zero-to-one.

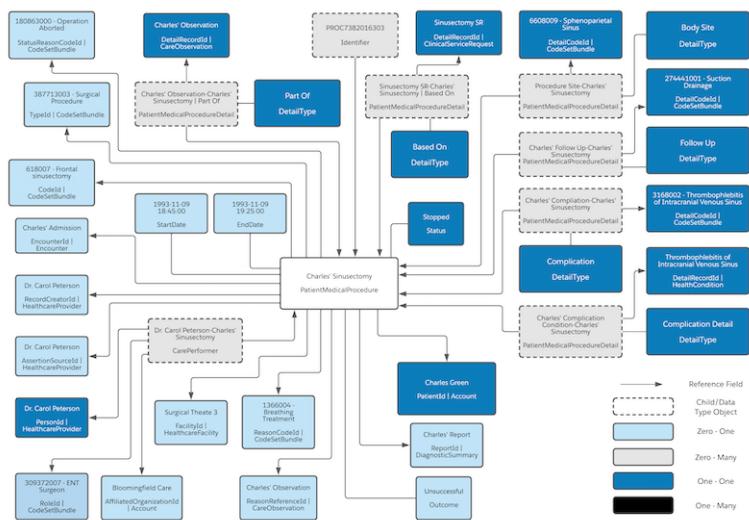
Procedure Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
reason Reference	PatientMedical Procedure.Reason ReferenceId	Polymorphic Lookup: Health Condition, Care Observation, Patient Medical Procedure, and Diagnostic Summary	0.1	While FHIR defines <code>procedure.reason</code> Code as a zero-to-many resource, the Salesforce implementation is zero-to-one. The Salesforce implementation doesn't support document reference records.
bodySite	PatientMedical ProcedureDetail	Object	0.M	The body site information of a procedure is represented as <code>PatientMedical ProcedureDetail</code> records that reference the <code>PatientMedicalProcedure</code> record using their <code>PatientMedicalProcedure Detail.PatientMedicalProcedureId</code> field.
	PatientMedical ProcedureDetail. DetailCodeId	Polymorphic Lookup: CodeSet, CodeSet Bundle	0.1	For <code>procedure.bodySite</code> information, <code>PatientMedicalProcedureDetail. DetailCodeId</code> must reference a <code>CodeSet</code> or <code>CodeSetBundle</code> record.
	PatientMedical ProcedureDetail. DetailType	Picklist Value: Body Site	0.1	For <code>procedure.bodySite</code> information, <code>PatientMedicalProcedureDetail. DetailType</code> must use the value <code>Body Site</code> .
outcome	PatientMedical Procedure.Outcome	Picklist	0.1	While FHIR defines <code>procedure.outcome</code> as a code, the Salesforce implementation of <code>PatientMedicalProcedure.Outcome</code> is a picklist.
report	PatientMedical Procedure.ReportId	Lookup: Diagnostic Summary	0.1	While FHIR defines <code>procedure.report</code> as a zero-to-many resource, the Salesforce implementation is zero-to-one. The Salesforce implementation of <code>procedure .report</code> doesn't support references to composition or document reference records.
complication	PatientMedical ProcedureDetail	Object	0.M	The complication information of a procedure is represented as <code>PatientMedical</code>

Procedure Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				ProcedureDetail records that reference the PatientMedicalProcedure record using their PatientMedicalProcedure Detail.PatientMedicalProcedureId field.
	PatientMedicalProcedureDetail.DetailCodeId	Polymorphic Lookup: CodeSet, CodeSet Bundle	0..1	For procedure.complication information, PatientMedicalProcedureDetail.DetailCodeId must reference a CodeSet or CodeSetBundle record.
	PatientMedicalProcedureDetail.DetailType	Picklist Value: Complication	0..1	For procedure.complication information, PatientMedicalProcedureDetail.DetailType must use the value <i>Complication</i> .
complicationDetail	PatientMedicalProcedureDetail	Object	0..M	The complication detail information of a procedure is represented as PatientMedicalProcedureDetail records that reference the PatientMedicalProcedure record using their PatientMedicalProcedureDetail.PatientMedicalProcedureId field.
	PatientMedicalProcedureDetail.DetailRecordId	Lookup: HealthCondition	0..1	For procedure.complicationDetail information, PatientMedicalProcedureDetail.DetailRecordId must reference a HealthCondition record.
	PatientMedicalProcedureDetail.DetailType	Picklist Value: Complication Detail	0..1	For procedure.complicationDetail information, PatientMedicalProcedureDetail.DetailType must use the value <i>Complication Detail</i> .
followUp	PatientMedicalProcedureDetail	Object	0..M	The follow up information of a procedure is represented as PatientMedicalProcedureDetail records that reference the PatientMedicalProcedure record using their PatientMedicalProcedureDetail.PatientMedicalProcedureId field.
	PatientMedicalProcedureDetail.DetailCodeId	Polymorphic Lookup: CodeSet,	0..1	For procedure.followUp information, PatientMedicalProcedureDetail.

Procedure Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
		CodeSet Bundle		DetailCodeId must reference a CodeSet or CodeSetBundle record.
	PatientMedical ProcedureDetail.DetailType	Picklist Value: Follow Up	0..1	For procedure.complicationDetail information, PatientMedicalProcedure Detail.DetailType must use the value <i>Follow Up</i> .
Note	AuthorNote	Object	0..M	Use the AuthorNote object to add notes to a procedure, and use the ParentRecordId field to reference the parent procedure the note belongs to.
focal Device	PatientMedical ProcedureDetail.DetailrecordId	Lookup: Care Registered Device	0..M	Use the PatientMedicalProcedure Detail child object to add multiple focalDevice values that reference the parent procedure record.
used Reference	PatientMedical ProcedureDetail.DetailRecordId	Lookup: Care Registered Device	0..M	Use the PatientMedicalProcedure Detail child object to specify devices used in a procedure, and reference the parent procedure record.
usedCode	PatientMedical ProcedureDetail.DetailCodeId	N/A	0..M	Use the PatientMedicalProcedure Detail child object to specify codes for items used in a procedure, and reference the parent procedure record.

Sample Record Diagram

Here's a diagram that shows an example of how this resource is represented in Salesforce.



SEE ALSO:

[CarePerformer](#)

[PatientMedicalProcedure](#)

[PatientMedicalProcedureDetail](#)

RelatedPerson

The `relatedPerson` FHIR resource maps to the `Account` and `Contact` objects in Salesforce, and is connected to the person that person's related to using the `ContactContactRelation__c` object.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for `RelatedPerson` map to the fields in Salesforce.

Table 34: RelatedPerson - Salesforce

RelatedPerson Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0.M	The identifier information for a related person is represented as <code>Identifier</code> records that reference the related person's person account using their <code>Identifier.ParentRecordId</code> field.
active	Account.IsActive	Boolean	0.1	N/A
patient	ContactContactRelation__c.Contact__c	Lookup: Contact	1.1	Though Salesforce can technically accommodate patient as a zero-to-many association, it is recommended to align with the FHIR defined one-to-one association.
relationship	ContactContactRelation__c.Role__c	Lookup: ReciprocalRole__c	0.M	While FHIR defines <code>relatedPerson.relationship</code> as a code set bundle, its

RelatedPerson Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				Salesforce implementation is a reference to <code>ReiciprocalRole__c</code> .
name	PersonName	Object	0.M	The name information for a related person is represented as <code>PersonName</code> records that reference the related person's person account using their <code>PersonName.ParentRecordId</code> field.
telecom	ContactPointPhone	Object	0.M	The telecom information for a related person is represented as <code>ContactPointPhone</code> records that reference the related person's person account using their <code>ContactPointPhone.ParentId</code> field.
gender	Contact.Gender	Picklist	0.1	While FHIR defines <code>relatedPerson.gender</code> as a code set, its Salesforce implementation is a picklist.
birthDate	Contact.Birthdate	Date	0.1	N/A
address	ContactPointAddress	Object	0.M	The address information for a related person is represented as <code>ContactPointAddress</code> records that reference the related person's person account using their <code>ContactPointAddress.ParentId</code> field.
photo	N/A	N/A	N/A	Not supported
period	ContactContact Relation__c .StartDate__c	Date	0.1	Because Salesforce doesn't support a native period data type, the <code>relatedPerson.period</code> FHIR resource is flattened to a set of start and end dates.
	ContactContact Relation__c .EndDate__c	Date	0.1	
communication	PersonLanguage	Object	0.M	The language information for a related person is represented as <code>PersonLanguage</code> records that reference the related person's person account using their <code>PersonLanguage.IndividualId</code> field.
communication.language	PersonLanguage.Language	Picklist	0.1	While FHIR defines <code>relatedPerson.communication.language</code> as a code set bundle, its Salesforce implementation is a picklist.
communication.preferred	PersonLanguage.Rank	Double	0.1	While FHIR defines <code>relatedPerson.communication.preferred</code> as a

RelatedPerson Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				boolean, its Salesforce implementation is an integer field that ranks the degree of preference.

ResearchStudy

The ResearchStudy FHIR resource maps to the ResearchStudy objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [researchStudy](#) map to the fields in Salesforce.

Table 35: researchStudy - Salesforce

Research Study Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
url	ResearchStudy.UniformResourceIdentifier	URL	0..1	N/A
identifier	ResearchStudy.Identifier	Object	0..M	The identifier information for a research study is represented as Identifier records that reference the ResearchStudy record using their Identifier.ParentRecordId field.
name	ResearchStudy.Name	Text	1..1	While FHIR defines researchStudy.name as a zero-to-one resource, the Salesforce implementation of ResearchStudy.Name is one-to-one.
title	ResearchStudy.Title	Long Text Area	0..1	While FHIR defines researchStudy.type as a text, the Salesforce implementation of ResearchStudy.Title is a long text area.
date	ResearchStudy.SourceSystemModified	Date/Time	1..1	N/A
status	ResearchStudy.PublicationStatus	Picklist	1..1	N/A
primary Purpose Type	ResearchStudy.IntentType	Picklist	0..1	N/A
phase	ResearchStudy.Phase	Picklist	0..1	N/A
studyDesign	CareProgramDetail.DetailRecord	Lookup: CodeSet, CodeSetBundle,	1..M	While FHIR defines researchStudy.studyDesign as a zero-to-many resource, the Salesforce implementation of

Research Study Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
		OmniProcess, CarePlanTemplate		CareProgramDetail.DetailRecord is one-to-many.
focus	CareProgramDetail.DetailRecord	Lookup: CodeSet, CodeSetBundle, OmniProcess, CarePlanTemplate	1.M	While FHIR defines <code>researchStudy.focus</code> as a zero-to-many resource, the Salesforce implementation of <code>CareProgramDetail.DetailRecord</code> is one-to-many.
condition	CareProgramDetail.DetailRecord	Lookup: CodeSet, CodeSetBundle, OmniProcess, CarePlanTemplate	1.M	While FHIR defines <code>researchStudy.condition</code> as a zero-to-many resource, the Salesforce implementation of <code>CareProgramDetail.DetailRecord</code> is one-to-many.
keyword	CareProgramDetail.DetailRecord	Lookup: CodeSet, CodeSetBundle, OmniProcess, CarePlanTemplate	1.M	While FHIR defines <code>researchStudy.keyword</code> as a zero-to-many resource, the Salesforce implementation of <code>CareProgramDetail.DetailRecord</code> is one-to-many.
region	CareProgramDetail.DetailRecord	Lookup: CodeSet, CodeSetBundle, OmniProcess, CarePlanTemplate		While FHIR defines <code>researchStudy.region</code> as a zero-to-many resource, the Salesforce implementation of <code>CareProgramDetail.DetailRecord</code> is one-to-many.
description .Summary	ResearchStudy.Summary	Long Text Area	0.1	N/A
description	ResearchStudy.Description	Long Text Area	0.1	N/A
period	ResearchStudy.Start Date	Date/Time	0.1	Since Salesforce doesn't natively support the period data type, <code>researchStudy.Period</code> is flattened into a set of start date and end date fields. The start date field is also used as the equivalent of <code>researchStudy.period DateTime</code> .
	ResearchStudy.EndDate	Date/Time	0.1	
site	CareProgramSite.HealthCare Facility	Lookup: HealthCareFacility	0.M	N/A
classifier	CareProgramSite.DetailRecord	Lookup: CodeSet, CodeSetBundle, OmniProcess, CarePlanTemplate	1.M	While FHIR defines <code>researchStudy.classifier</code> as a zero-to-many resource, the Salesforce implementation of <code>CareProgramSite.DetailRecord</code> is one-to-many.

Research Study Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
associatedParty.name	CareProgramTeamMember.Member	Polymorphic Lookup	0..1	While FHIR defines <code>researchStudy.associatedParty.name</code> as a text, the Salesforce implementation of <code>CareProgramTeamMember.Member</code> is a polymorphic lookup.
associatedParty.role	CareProgramTeamMemberRole Period.Role	DynamicEnum	1..1	N/A
associatedParty.period	CareProgramTeamMemberRole Period.EffectiveStartDate	Date/Time	0..1	Since Salesforce doesn't natively support the period data type, <code>researchStudy.associatedParty.period</code> is flattened into a set of start date and end date fields. The start date field is also used as the equivalent of <code>researchStudy.periodDateTime</code> .
associatedParty.period	CareProgramTeamMemberRole Period.EffectiveEndDate	Date/Time	0..1	Since Salesforce doesn't natively support the period data type, <code>researchStudy.associatedParty.period</code> is flattened into a set of start date and end date fields. The start date field is also used as the equivalent of <code>researchStudy.periodDateTime</code> .
associatedParty.classifier	CareProgramTeamMember.Category	Multi-Select	0..M	While FHIR defines <code>researchStudy.associatedParty.name</code> as a CodeSetBundle, the Salesforce implementation of <code>CareProgramTeamMember.Category</code> is Multi-Select.
progressStatus.state	CareProgramStatusPeriod.Status	DynamicEnum	1..M	While FHIR defines <code>researchStudy.state</code> as a zero-to-many resource, the Salesforce implementation of <code>CareProgramDetail.DetailRecord</code> is one-to-many.
progressStatus.actual	CareProgramStatusPeriod.AreDatesTentative	Boolean	0..1	N/A
progressStatus.period	CareProgramStatusPeriod.EffectiveStartTime	Date/Time	0..1	Since Salesforce doesn't natively support the period data type, <code>researchStudy.progressStatus.period</code> is flattened into effective start date time field.
progressStatus.period	CareProgramStatusPeriod.EffectiveEndTime	Date/Time	0..1	Since Salesforce doesn't natively support the period data type, <code>researchStudy.progressStatus.period</code> is flattened into an effective end date time field.

Research Study Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
whyStopped	ResearchStudy.DiscontinuationReason	Picklist	0.1	While FHIR defines <code>researchStudy.whyStopped</code> as a code set bundle, the Salesforce implementation of <code>ResearchStudy.DiscontinuationReason</code> is a picklist.
recruitment.targetnumber	CareProgram.TargetEnrolleeCount	Number	0.1	N/A
recruitment.actualnumber	CareProgram.CurrentEnrolleeCount	Number	0.1	N/A
recruitment.eligibility	ResearchStudy.InclusionExclusionCriteria	Rich Text Area	0.1	N/A
comparisonGroup.name	ResearchStudyComparisonGroup.Name	Text	1.1	N/A
comparisonGroup.type	ResearchStudyComparisonGroup.TypeCode	Lookup: CodeSet	1.1	While FHIR defines <code>researchStudy.comparisonGroup.type</code> as a zero-to-one resource, the Salesforce implementation of <code>CareProgramDetail.TypeCode</code> is one-to-one.
comparisonGroup.description	ResearchStudyComparisonGroup.Description	Text	0.1	N/A
objective.name	CareProgramGoal.Name	Long Text Area	1.1	While FHIR defines <code>researchStudy.objective.name</code> as a zero-to-one resource, the Salesforce implementation of <code>CareProgramGoal.Name</code> is one-to-one.
objective.type	CareProgramGoal.Type	Picklist	0.1	N/A
objective.description	CareProgramGoal.Description	Long Text Area	0.1	N/A
result	DiagnosticSummary.BasedOn	Lookup: Medication Statement, Clinical Service Request	0.1	N/A

ServiceRequest

The `serviceRequest` FHIR resource maps to the `ClinicalServiceRequest` and `ClinicalServiceRequestDetail` objects in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [serviceRequest](#) map to the fields in Salesforce.

Table 36: serviceRequest - Salesforce

Service Request Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
identifier	Identifier	Object	0.M	The identifier information for a service request is represented as <code>Identifier</code> records that reference the <code>ClinicalServiceRequest</code> record using their <code>Identifier.ParentRecordId</code> field.
instantiates Canonical	N/A	N/A	N/A	Not Supported
instantiates Canonical	N/A	N/A	N/A	Not Supported
basedOn	ClinicalServiceRequestDetail	Object	0.M	The information about the service request or medication request that a service request is based on is represented as <code>ClinicalServiceRequestDetail</code> records that reference the <code>ClinicalServiceRequest</code> record using their <code>ClinicalServiceRequestDetail.ClinicalServiceRequestId</code> field. The Salesforce implementation of <code>serviceRequest.basedOn</code> doesn't support references to care plans.
	ClinicalServiceRequestDetail.DetailRecordId	Polymorphic Lookup: Clinical Service Request, Medication Request	0.1	For <code>serviceRequest.basedOn</code> information, <code>ClinicalServiceRequestDetail.DetailRecordId</code> must reference a <code>ClinicalServiceRequest</code> or <code>MedicationRequest</code> record.
	ClinicalServiceRequestDetail.DetailType	Picklist Value: Based On	0.1	For <code>serviceRequest.basedOn</code> information, <code>ClinicalServiceRequestDetail.DetailType</code> must use the value <code>Based On</code> .
replaces	ClinicalServiceRequest.OriginalRequestId	Lookup: Clinical Service Request	0.1	While FHIR defines <code>serviceRequest.replaces</code> as a zero-to-many resource, the Salesforce implementation is zero-to-one.

Service Request Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
requisition	ClinicalServiceRequest.ServiceRequestGroupIdentifierId	Lookup: Identifier	0..1	N/A
status	ClinicalServiceRequest.Status	Picklist	1..1	While FHIR defines <code>serviceRequest.status</code> as a code set bundle, the Salesforce implementation of <code>ClinicalServiceRequest.Status</code> is picklist.
intent	ClinicalServiceRequest.Type	Picklist	1..1	While FHIR defines <code>serviceRequest.intent</code> as a code set bundle, the Salesforce implementation of <code>ClinicalServiceRequest.Type</code> is picklist.
category	ClinicalServiceRequest.CategoryId	Lookup: CodeSet Bundle	0..1	N/A
priority	ClinicalServiceRequest.Priority	Picklist	0..1	While FHIR defines <code>serviceRequest.priority</code> as a code set bundle, the Salesforce implementation of <code>ClinicalServiceRequest.Priority</code> is picklist.
doNotPerform	ClinicalServiceRequest.IsIgnored	Boolean	0..1	N/A
code	ClinicalServiceRequest.RequestCodeId	Lookup: CodeSet Bundle	0..1	N/A
orderDetail	N/A	N/A	N/A	Not Supported
quantity.Quantity	ClinicalServiceRequest.Quantity.Numerator	Double	0..1	Because Salesforce doesn't support a native quantity data type, the implementation of <code>serviceRequest.quantity.quantityQuantity</code> is flattened into a set of quantity and unit fields.
	ClinicalServiceRequest.Quantity.NumeratorUnitId	Lookup: UnitOfMeasure	0..1	
quantity.Ratio	ClinicalServiceRequest.Quantity.Numerator	Double	0..1	Because Salesforce doesn't support a native ratio data type, the implementation of <code>serviceRequest.quantity.quantityRatio</code> is flattened into a set of numerator, denominator and unit fields.
	ClinicalServiceRequest.Quantity.Denominator	Double	0..1	

Service Request Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
	ClinicalServiceRequest.Quantity.NumeratorUnitId	Lookup: UnitOfMeasure	0.1	
	ClinicalServiceRequest.QuantityType	Picklist Value: Ratio	0.1	For <code>serviceRequest.quantity.quantityRatio</code> information, ClinicalServiceRequest.QuantityType must use the value <code>Ratio</code> .
quantity.quantityRange	ClinicalServiceRequest.Quantity.Numerator	Double	0.1	Because Salesforce doesn't support a native range data type, the implementation of <code>serviceRequest.quantity.quantityRange</code> is flattened into a set of numerator, denominator and unit fields.
	ClinicalServiceRequest.Quantity.Denominator	Double	0.1	
	ClinicalServiceRequest.Quantity.NumeratorUnitId	Lookup: UnitOfMeasure	0.1	
	ClinicalServiceRequest.QuantityType	Picklist Value: Range	0.1	For <code>serviceRequest.quantity.quantityRange</code> information, ClinicalServiceRequest.QuantityType must use the value <code>Range</code> .
subject	ClinicalServiceRequest.PatientId	Master-Detail Reference: Account	1.1	Only references to patients are supported.
encounter	ClinicalServiceRequest.ClinicalEncounterId	Lookup: Clinical Encounter	0.1	N/A
occurrence.occurrenceDateTime	ClinicalServiceRequest.StartDate	DateTime	0.1	<code>ClinicalServiceRequest.StartDate</code> is used for both <code>serviceRequest.occurrence.occurrenceDateTime</code> and <code>serviceRequest.occurrence.occurrencePeriod</code> . For the latter, the field is used to represent the start date of the period.
occurrence.occurrencePeriod	ClinicalServiceRequest.StartDate	DateTime	0.1	Because Salesforce doesn't support a native period data type, the <code>serviceRequest.occurrence.occurrencePeriod</code> is flattened into a set of start date and end date fields.
	ClinicalServiceRequest.EndDate	DateTime	0.1	

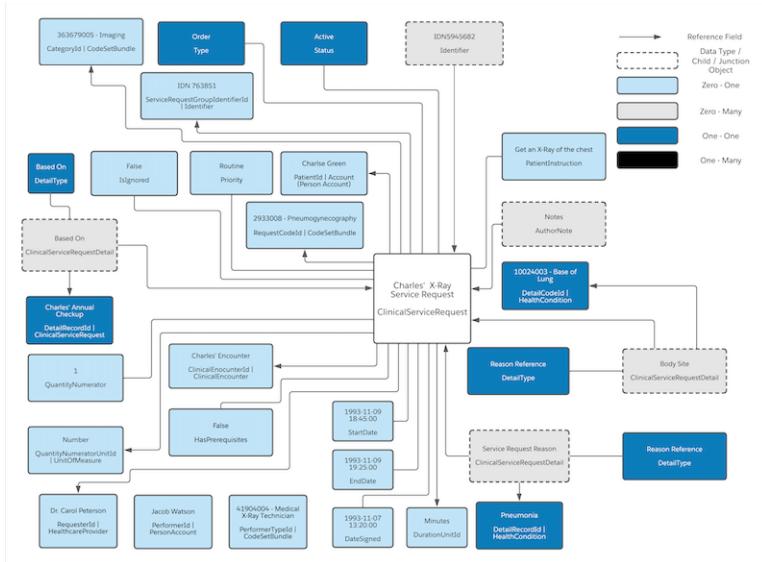
Service Request Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
occurrence .occurrence Timing	N/A	N/A	N/A	Not supported
asNeeded .asNeeded Boolean	ClinicalService Request.Has Prerequisites	Boolean	0..1	N/A
asNeeded .asNeeded Codeable Concept	ClinicalService Request.Prerequisite CodeId	Lookup: CodeSet Bundle	0..1	0..1
authored On	ClinicalService Request.DateSigned	DateTime	0..1	N/A
requester	ClinicalService Request.RequesterId	Polymorphic Lookup: Account, Asset, Care Registered Device, and Healthcare Provider	0..1	N/A
performer Type	ClinicalService Request.PerformerType Id	Lookup: CodeSet Bundle	0..1	N/A
performer	ClinicalService Request.PerformerId	Polymorphic Lookup: Account, Asset, Care Registered Device, and Healthcare Provider	0..1	References to care teams and healthcare services are not supported. While FHIR defines serviceRequest .performer as a zero-to-many resource, the Salesforce implementation is zero-to-one.
location Code	ClinicalService Request.Facility CodeId	Lookup: CodeSet Bundle	0..1	While FHIR defines serviceRequest .locationCode as a zero-to-many resource, the Salesforce implementation is zero-to-one.
location Reference	ClinicalService Request.FacilityId	Lookup: Healthcare Facility	0..1	While FHIR defines serviceRequest .locationReference as a zero-to-many resource, the Salesforce implementation is zero-to-one.

Service Request Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
reasonCode	ClinicalServiceRequest.ReasonCodeId	Lookup: CodeSet Bundle	0.1	While FHIR defines <code>serviceRequest.reasonCode</code> as a zero-to-many resource, the Salesforce implementation is zero-to-one.
reasonReference	ClinicalServiceRequest.DiagnosticReportId	Lookup: DiagnosticSummary	0.1	N/A
	ClinicalServiceRequest.ConditionId	Lookup: HealthCondition	0.1	To support zero-to-many values, use the child object instead.
	ClinicalServiceRequest.ObservationId	Lookup: CareObservation	0.1	To support zero-to-many values, use the child object instead.
	ClinicalServiceRequestDetail	Object	0.M	The records referencing the reasons for a service request are represented as <code>ClinicalServiceRequestDetail</code> records that reference the <code>ClinicalServiceRequest</code> record using their <code>ClinicalServiceRequestDetail.ClinicalServiceRequestId</code> field.
ClinicalServiceRequestDetail	DetailRecordId	Polymorphic Lookup: HealthCondition, CareObservation, DiagnosticSummary	0.1	For <code>serviceRequest.reasonReference</code> information, <code>ClinicalServiceRequestDetail.DetailRecordId</code> must reference a <code>HealthCondition</code> or <code>CareObservation</code> record.
	DetailType	Picklist Value: ReasonReference	0.1	For <code>serviceRequest.reasonReference</code> information, <code>ClinicalServiceRequestDetail.DetailType</code> must use the value <code>Reason Reference</code> .
insurance	N/A	N/A	N/A	Not supported
supportingInfo	N/A	N/A	N/A	Not supported
specimen	N/A	N/A	N/A	Not supported
bodySite	ClinicalServiceRequestDetail	Object	0.M	The body site information of a <code>serviceRequest</code> is represented as <code>ClinicalServiceRequestDetail</code> records that reference the <code>ClinicalServiceRequest</code> record using their

Service Request Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
				ClinicalServiceRequestDetail .ClinicalServiceRequestId field.
	ClinicalServiceRequestDetail.Detail.CodeId	Polymorphic Lookup: CodeSet, CodeSet Bundle	0.1	For serviceRequest.bodySite information, ClinicalServiceRequest Detail.DetailCodeId must reference a CodeSet or CodeSetBundle record.
	ClinicalServiceRequestDetail.Detail.Type	Picklist Value: Body Site	0.1	For serviceRequest.bodySite information, ClinicalServiceRequest Detail.DetailType must use the value <i>Body Site</i> .
Note	N/A	N/A	N/A	Not supported
patient Instruction	ClinicalServiceRequest.PatientInstruction	Text	0.1	N/A
relevant History	N/A	N/A	N/A	Not supported

Sample Record Diagram

Here's a diagram that shows an example of how this resource is represented in Salesforce.



SEE ALSO:

ClinicalServiceRequest

ClinicalServiceRequestDetail

Timing

The Timing FHIR resource maps to the ActivityTiming object in Salesforce.

FHIR V4.0 - Clinical Data Model Mapping

Here's how the fields defined by FHIR for [Timing](#) map to the fields in Salesforce.

Table 37: Timing - Salesforce

Timing Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
event	Event.ActivityDate	Object	0.M	timing.event is stored in Event.ActivityDate. This event record then references the ActivityTiming record using its WhatId field.
repeat.boundsDuration	ActivityTiming.PeriodLength	Int	0.1	Because Salesforce doesn't support a native duration data type, repeat.boundsDuration is flattened to a set of length and unit fields.
	ActivityTiming.PeriodLengthUnitId	Lookup:UnitOfMeasure	0.1	
repeat.boundsRange	ActivityTiming.PeriodLengthLowerLimit	Double	0.1	Because Salesforce doesn't support a native duration data type, repeat.boundsRange is flattened to a set of lower limit, upper limit, and unit fields.
	ActivityTiming.PeriodLengthUpperLimit	Double	0.1	

Timing Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
	ActivityTiming.PeriodLengthUnitId	Lookup: UnitOfMeasure	0.1	
repeat.bounds.boundsPeriod	ActivityTiming.PeriodStartTime	DateTime	0.1	Because Salesforce doesn't support a native period data type, <code>repeat.bounds.boundsPeriod</code> is flattened to a set of start and end date fields.
	ActivityTiming.PeriodEndTime	DateTime	0.1	
repeat.count	ActivityTiming.CountInPeriod	Int	0.1	N/A
repeat.countMax	ActivityTiming.MaxCountInPeriod	Int	0.1	N/A
repeat.duration	ActivityTiming.ActivityDuration	Double	0.1	N/A
repeat.durationMax	ActivityTiming.MaxActivityDuration	Double	0.1	N/A
repeat.durationUnit	ActivityTiming.ActivityDurationUnitId	Lookup: UnitOfMeasure	0.1	N/A
repeat.frequency	ActivityTiming.ActivityCountPerRepetition	Double	0.1	N/A
repeat.frequencyMax	ActivityTiming.MaxActivityCountPerRepetition	Int	0.1	N/A
repeat.period	ActivityTiming.RepetitionCycleLength	Double	0.1	N/A
repeat.periodMax	ActivityTiming.MaxRepetitionCycleLength	Double	0.1	N/A
repeat.periodUnit	ActivityTiming.RepetitionCycleUnitId	Lookup: UnitOfMeasure	0.1	N/A
repeat.dayOfWeek	ActivityTiming.WeeklyActivityTimeId	Lookup: Operating Hours	0.M	While FHIR defines <code>repeat.dayOfWeek</code> as a code value, the Salesforce implementation uses a reference to OperatingHours. A record in OperatingHours can have multiple values for days in a week and time.

Timing Resource	Salesforce Field	Type	Salesforce Cardinality	Notes
repeat.timeOfDay	ActivityTiming.WeeklyActivityTimeId	Lookup: Operating Hours	0..M	N/A
repeat.when	ActivityTiming.ActivityTime	Picklist	0..1	While FHIR defines repeat.when as a zero-to-many code, the Salesforce implementation is a zero-to-one picklist.
repeat.offset	ActivityTiming.ActivityTimeOffset	Int	0..1	N/A
code	ActivityTiming.TimingCodeId	Lookup: CodeSet Bundle	0..1	

Store HL7 v2.3 Messages in Salesforce Standard Objects

Like the Fast Health Interoperability Resources (FHIR) standard defined by Health Level Seven (HL7), HL7 v2.3 is also a database framework defined by HL7 to facilitate interoperability between electronic healthcare systems. Because the Clinical Data Model was built to align with FHIR v4.0, it is also compatible with its predecessor HL7 v2.3. However, because of the way the Salesforce platform works, the Salesforce implementation varies from the HL7 recommendations in certain cases such as the data types that are used.

Here are some HL7 messages and their segments that are supported in Salesforce standard objects.

[HL7 v2.3 Messages Supported in Salesforce Standard Objects](#)

Salesforce Standard objects support ADT, ORM, ORU, MDM, VXU, and RDE messages from HL7 v2.3 based systems.

[HL7 v2.3 Segments Supported in Salesforce Standard Objects](#)

Salesforce Standard objects support the following segments in HL7 v2.3.

[HL7 v2.3 Data Types Supported in Salesforce Standard Objects](#)

Salesforce Standard objects support the following data types defined in HL7 v2.3.

HL7 v2.3 Messages Supported in Salesforce Standard Objects

Salesforce Standard objects support ADT, ORM, ORU, MDM, VXU, and RDE messages from HL7 v2.3 based systems.

These messages can be stored in Salesforce by mapping their constituent segments to fields in Salesforce standard objects.

- **Admission, Discharge, and Transfer (ADT)**
 - [Patient Identification \(PID\)](#) on page 1592
 - [Patient Visit \(PV1\)](#) on page 1594
 - [Patient Visit - Additional Information \(PV2\)](#) on page 1596
 - [Observation Segment \(OBX\)](#) on page 1588
 - [Patient Allergy Information \(AL1\)](#) on page 1586
- **Order Message (ORM_O01)**
 - [Patient Identification \(PID\)](#) on page 1592

- [Patient Visit \(PV1\) on page 1594](#)
- [Patient Visit - Additional Information \(PV2\) on page 1596](#)
- [Patient Allergy Information \(AL1\) on page 1586](#)
- [Common Order Segment \(ORC\) on page 1591](#)
- **Unsolicited Transmission of an Observation Message (ORU_R01)**
 - [Patient Identification \(PID\) on page 1592](#)
 - [Patient Visit \(PV1\) on page 1594](#)
 - [Patient Visit - Additional Information \(PV2\) on page 1596](#)
 - [Common Order Segment \(ORC\) on page 1591](#)
 - [Observation Request Segment \(OBR\) on page 1587](#)
 - [Observation Segment \(OBX\) on page 1588](#)
- **Unsolicited Vaccination Record Update (VXU_V04)**
 - [Patient Identification \(PID\) on page 1592](#)
 - [Patient Visit \(PV1\) on page 1594](#)
 - [Patient Visit - Additional Information \(PV2\) on page 1596](#)
 - [Common Order Segment \(ORC\) on page 1591](#)
 - [Pharmacy Administration Segment \(RXA\) on page 1597](#)
 - [Pharmacy Route Segment \(RXR\) on page 1599](#)
 - [Observation Segment \(OBX\) on page 1588](#)
- **Pharmacy/Treatment Encoded Order Message (RDE_O01)**
 - [Patient Identification \(PID\) on page 1592](#)
 - [Patient Visit \(PV1\) on page 1594](#)
 - [Patient Visit - Additional Information \(PV2\) on page 1596](#)
 - [Patient Allergy Information \(AL1\) on page 1586](#)
 - [Common Order Segment \(ORC\) on page 1591](#)
 - [Pharmacy Encoded Order Segment \(RXE\) on page 1598](#)
 - [Pharmacy Route Segment \(RXR\) on page 1599](#)
 - [Pharmacy Component Order Segment \(RXC\) on page 1598](#)
 - [Observation Segment \(OBX\) on page 1588](#)

HL7 v2.3 Segments Supported in Salesforce Standard Objects

Salesforce Standard objects support the following segments in HL7 v2.3.

[AL1 - Patient Allergy Information](#)

The Patient Allergy Information (AL1) HL7 segment maps to the `AllergyIntolerance` object in Salesforce.

[OBR - Observation Request Segment](#)

The Observation Request Segment (OBR) HL7 segment maps primarily to the `ClinicalServiceRequest`, `DiagnosticSummary`, and `PatientMedicalProcedure` objects in Salesforce.

[OBX - Observation Segment](#)

The Observation Segment (OBX) HL7 segment maps to the `CareObservation` object in Salesforce.

[ORC - Common Order Segment](#)

The Common Order Segment (ORC) HL7 segment maps primarily to the `ClinicalServiceRequest` and `MedicationRequest` objects in Salesforce.

[PID - Patient Identification](#)

The Patient Identification (PID) HL7 segment maps to the `ContactPointPhone` object in Salesforce.

[PV1 - Patient Visit](#)

The Patient Visit (PV1) HL7 segment maps to the `Encounter` object, among other objects in Salesforce.

[PV2 - Patient Visit - Additional Information](#)

The Patient Visit - Additional Information (PV2) HL7 segment maps primarily to the `ClinicalEncounter` object in Salesforce.

[RXA - Pharmacy Administration Segment](#)

The Pharmacy Administration Segment (RXA) HL7 segment maps primarily to the `PatientImmunization` and `Medication` objects in Salesforce.

[RXC - Pharmacy Component Order Segment](#)

The Pharmacy Component Order Segment (RXC) HL7 segment maps to the `Medication` and `MedicationRequest` objects in Salesforce.

[RXE - Pharmacy Encoded Order Segment](#)

The Pharmacy Encoded Order Segment (RXE) HL7 segment maps primarily to the `Medication` object in Salesforce.

[RXR - Pharmacy Route Segment](#)

The Pharmacy Route Segment (RXR) HL7 segment maps primarily to the `PatientImmunization` and `PatientMedicationDosage` objects in Salesforce.

AL1 - Patient Allergy Information

The Patient Allergy Information (AL1) HL7 segment maps to the `AllergyIntolerance` object in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for AL1 map to fields in Salesforce standard objects.



Note: Only the segments supported by Salesforce are mentioned below.

Table 38: AL1 - Salesforce

AL1	Salesforce Field	Type	Notes
AL1.2 - Allergy Type	<code>AllergyIntolerance.Category</code>	Picklist	N/A
AL1.3 - Allergy Code/Mnemonic/Description	<code>AllergyIntolerance.CodeId</code>	Lookup: CodeSetBundle	N/A
AL1.4 - Allergy Severity	<code>PatientHealthReaction.Severity</code>	Picklist	N/A
AL1.5 - Allergy Reaction	<code>PatientHealthReaction.ManifestedSymptomId</code>	Lookup: CodeSetBundle	N/A

AL1	Salesforce Field	Type	Notes
AL1.6 - Identification Date	onset.onsetDateTime	DateTime	N/A

OBR - Observation Request Segment

The Observation Request Segment (OBR) HL7 segment maps primarily to the `ClinicalServiceRequest`, `DiagnosticSummary`, and `PatientMedicalProcedure` objects in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for OBR map to fields in Salesforce standard objects.

 **Note:** Only the segments supported by Salesforce are mentioned below.

Table 39: OBR - Salesforce

OBR	Salesforce Field	Type	Notes
OBR.2 - Place Order Number	Identifier	Object	Place Order Number is created as an identifier record. This record will then reference the entity it belongs to using the ParentRecordId field.
OBR.3 - Fill Order Number	Identifier	Object	Fill Order Number is created as an identifier record. This record will then reference the entity it belongs to using the ParentRecordId field.
OBR.4 - Universal Service Id	<ul style="list-style-type: none"> • <code>ClinicalService.Request.RequestCodeId</code> • <code>PatientMedicalProcedure.CodeId</code> • <code>DiagnosticSummary.CodeId</code> 	Lookup: CodeSetBundle	N/A
OBR.5 - Order Status	<ul style="list-style-type: none"> • <code>ClinicalService.Request.Status</code> • <code>MedicationRequest.Status</code> 	Picklists	N/A
OBR.7 - Observation Date/Time	<code>PatientMedicalProcedure.StartDate</code>	Double	N/A
OBR.16 - Ordering Provider	<code>ClinicalService.Request.RequesterId</code>	Lookup: HealthcareProvider, Account, Asset	N/A

OBX	Salesforce Field	Type	Notes
OBR.22 - Results Rpt/Status Chng - Date/Time	DiagnosticSummary.IssuedDateTime	DateTime	N/a
OBR.24 - Diagnostic Service Section ID	<ul style="list-style-type: none"> • ClinicalServiceRequest.CategoryId • DiagnosticSummary.CategoryId 	<ul style="list-style-type: none"> • Lookup: CodeSetBundle • Picklist 	N/A
OBR.25 - Result Status	<ul style="list-style-type: none"> • PatientMedicalProcedure.Status • DiagnosticSummary.Status 	Picklist	N/A
OBR.27 - Quantity/Timing	ClinicalServiceRequest.Quantity.Numerator	Double	N/A
	ClinicalServiceRequest.Quantity.Denominator	Double	N/A
	ClinicalServiceRequest.Quantity.NumeratorUnitId	Lookup: UnitOfMeasure	N/A
OBR.31 - Reason For Study	PatientMedicalProcedure.ReasonCodeId	Lookup: CodeSetBundle	N/A
OBR.32 - Principal Result Interpreter	DiagnosticSummary.InterpretedById	Lookup: CarePerformer	N/A

OBX - Observation Segment

The Observation Segment (OBX) HL7 segment maps to the `CareObservation` object in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for OBX map to fields in Salesforce standard objects.



Note: Only the Segments supported by Salesforce are mentioned below.

Table 40: OBX - Salesforce

OBX	Salesforce Field	Type	Notes
OBX.2 - Value Type	<code>CareObservation.ObservedValueType</code>	Picklist	N/A

OBX	Salesforce Field	Type	Notes
OBX.3 - Observation Identifier	CareObservation .CodeId	Lookup: CodeSetBundle	N/A
	CareObservation Component.Component TypeCodeId	Lookup: CodeSetBundle	N/A
OBX.5 - Observation Value	<ul style="list-style-type: none"> • CareObservation. ObservedValue Numerator • CareObservation. ObservedValue Denominator • CareObservation. ObservedValue CodeId • CareObservation. ObservedValueText • CareObservation.Is Observed • CareObservation. ObservationStartTime • CareObservation. ObservationEndTime • Care ObservationComponent .ObservedValue Numerator • CareObservation Component.Observed ValueDenominator • Care ObservationComponent .ObservedValue CodeId • Care ObservationComponent .ObservedValueText • Care ObservationComponent .IsObserved • CareObservation Component. 	Multiple Data types; Refer Object reference documentation	N/A

OBX	Salesforce Field	Type	Notes
	ObservationStartTime <ul style="list-style-type: none"> • CareObservationComponent.ObservationEndTime • Attachment.ContentType • Attachment.Body • PatientMedicalProcedure.ReportId 		
OBX.6 - Units	<ul style="list-style-type: none"> • CareObservation.ObservedValueUnitId • CareObservation.Component.ObservedValueUnitId 	Lookup: UnitOfMeasure	N/A
OBX.7 - Reference Range	<ul style="list-style-type: none"> • CareObservation.LowerBaselineValue • CareObservation.UpperBaselineValue • CareObservation.Component.LowerBaselineValue • CareObservation.Component.UpperBaselineValue 	Double	N/A
OBX.8 - Abnormal Flags	<ul style="list-style-type: none"> • CareObservation.ValueInterpretation • CareObservation.Component.ValueInterpretation 	Lookup: CodeSetBundle	N/A
OBX.11 - Observation Result Status	CareObservation.ObservationStatus	Picklist	N/A
OBX.14 - Date/Time of the Observation	CareObservation.IssuedDateTime	DateTime	N/A

OBX	Salesforce Field	Type	Notes
OBX.16 - Responsible Observer	CareObservation.ObserverId	Lookup: HealthcareProvider, Account	N/A
	CarePerformer	Object	The performer information for a Procedure is represented as Care Performer records that reference the PatientMedicalProcedure record using their Care Performer.Parent RecordId field.
OBX.17 - Observation Method	CareObservation.MethodId	Lookup: CodeSetBundle	N/A

ORC - Common Order Segment

The Common Order Segment (ORC) HL7 segment maps primarily to the `ClinicalServiceRequest` and `MedicationRequest` objects in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for ORC map to fields in Salesforce standard objects.

 **Note:** Only the segments supported by Salesforce are mentioned below.

Table 41: ORC - Salesforce

ORC	Salesforce Field	Type	Notes
ORC.1 - Order Control	<ul style="list-style-type: none"> • <code>ClinicalServiceRequest.Status</code> • <code>MedicationRequest.Status</code> 	Picklists	N/A
ORC.2 - Place Order Number	<code>Identifier</code>	Object	Place Order Number is created as an identifier record. This record will then reference the entity it belongs to using the ParentRecordId field.
ORC.3 - Fill Order Number	<code>Identifier</code>	Object	Fill Order Number is created as an identifier record. This record will then reference the entity it belongs to using the ParentRecordId field.
ORC.4 - Placer Group Number	<code>ClinicalServiceRequest.ServiceRequestGroupIdentifierId</code>	Lookup: Identifier	N/A

ORC	Salesforce Field	Type	Notes
ORC.5 - Order Status	<ul style="list-style-type: none"> • ClinicalService Request.Status • MedicationRequest .Status 	Picklists	N/A
ORC.7 - Quantity/Timing	ClinicalService Request.Quantity Numerator	Double	N/A
	ClinicalService Request.Quantity Denominator	Double	N/A
	ClinicalService Request.Quantity NumeratorUnitId	Lookup: UnitOfMeasure	N/A
ORC.9 - Date and Time of Transaction	ClinicalService Request.DateSigned	DateTime	N/A
ORC.12 - Ordering Provider	ClinicalService Request.RequesterId	Lookup: HealthcareProvider, Account, Asset	N/A
ORC.12 - Order Control Code Reason	<ul style="list-style-type: none"> • ClinicalService Request .ReasonCodeId • MedicationRequest . StatusReasonCodeId 	Lookup: CodeSetBundle	N/a

PID - Patient Identification

The Patient Identification (PID) HL7 segment maps to the `ContactPointPhone` object in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for PID map to fields in Salesforce standard objects.

 **Note:** Only the Segments supported by Salesforce are mentioned below.

Table 42: PID - Salesforce

PID	Salesforce Field	Type	Notes
PID.2 - Patient ID (External ID)	Identifier	Object	The identifier record for the patient is associated to the patient by referencing the patient's account record using

PID	Salesforce Field	Type	Notes
			the ParentRecordId field in Identifier.
PID.3 - Patient ID (Internal ID)	Identifier	Object	The identifier record for the patient is associated to the patient by referencing the patient's account record using the ParentRecordId field in Identifier.
PID.4 - Alternate Patient ID	Identifier	Object	The identifier record for the patient is associated to the patient by referencing the patient's account record using the ParentRecordId field in Identifier.
PID.5 - Patient Name	PersonName	Object	The name information for a patient is represented as Person Name records that reference the patient record using their Person Name.ParentRecordId field.
PID.7 - Date/Time of Birth	Contact.BirthDate	Date	Salesforce supports only the date of birth. The time of birth isn't supported.
PID.8 - Sex	Contact.Gender	Picklist	N/A
PID.9 - Patient Alias	PersonName	Object	The name information for a patient is represented as Person Name records that reference the patient record using their Person Name.ParentRecordId field.
PID.11 - Patient Address	ContactPointAddress	Object	The address information for a patient is represented as Contact PointAddress records that reference the patient record using their ContactPointAddress .ParentId field.
PID.13 - Home Phone	ContactPointPhone	Object	The telecom information for a patient is represented as Contact PointPhone records that reference the patient record using their ContactPointPhone .ParentId field.
PID.14 - Work Phone	ContactPointPhone	Object	The telecom information for a patient is represented as Contact

PID	Salesforce Field	Type	Notes
			PointPhone records that reference the patient record using their ContactPointPhone.ParentId field.
PID.15 - Primary Language	PersonLanguage	Object	The name information for a patient is represented as Person Name records that reference the patient record using their PersonLanguage.IndividualId field.
PID.16 - Marital Status	Contact.MaritalStatus	Picklist	N/A
PID.25 - Multiple Birth Indicator	Contact.SequenceInMultipleBirth	Double	N/A
PID.29 - Patient Death Date and Time	Contact.DeceasedDate	DateTime	N/A

PV1 - Patient Visit

The Patient Visit (PV1) HL7 segment maps to the `Encounter` object, among other objects in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for PV1 map to fields in Salesforce standard objects.



Note: Only the Segments supported by Salesforce are mentioned below.

Table 43: PV1 - Salesforce

PV1	Salesforce Field	Type	Notes
PV1.2 - Patient Class	ClinicalEncounter.Category	Picklist	N/A
PV1.3 - Assigned Patient Location	ClinicalEncounter.Facility	Object	The facility information for a patient visit is represented as <code>ClinicalEncounter.Facility</code> records that reference the encounter record using their <code>ClinicalEncounterFacility.ClinicalEncounterId</code> field.
PV1.4 - Admission Type	ClinicalEncounter.TypeId	Lookup: CodeSetBundle	N/A
PV1.5 - Preadmit Number	ClinicalEncounter.PreAdmissionIdentifierId	Lookup: Identifier	N/A

PV1	Salesforce Field	Type	Notes
PV1.7 - Attending Doctor	ClinicalEncounter.Provider	Object	The participant information for an encounter is represented as ClinicalEncounterProvider records that reference the encounter record using their ClinicalEncounterProvider. ClinicalEncounterId field.
PV1.8 - Referring Doctor	ClinicalEncounter.Provider	Object	The participant information for an encounter is represented as ClinicalEncounterProvider records that reference the encounter record using their ClinicalEncounterProvider. ClinicalEncounterId field.
PV1.9 - Consulting Doctor	ClinicalEncounter.Provider	Object	The participant information for an encounter is represented as ClinicalEncounterProvider records that reference the encounter record using their ClinicalEncounterProvider. ClinicalEncounterId field.
PV1.10 - Hospital Service	ClinicalEncounter.ServiceType	Picklist	N/A
PV1.13 - Readmission Indicator	ClinicalEncounter.ReadmissionCodeId	Lookup: CodeSetBundle	N/A
PV1.14 - Admit Source	ClinicalEncounter.AdmissionSource	Picklist	N/A
PV1.16 - VIP Indicator	ClinicalEncounter.SpecialCourtesy	Picklist	N/A
PV1.17 - Admitting Doctor	ClinicalEncounter.Provider	Object	The participant information for an encounter is represented as ClinicalEncounterProvider records that reference the encounter record using their ClinicalEncounterProvider. ClinicalEncounterId field.
PV1.18 - Patient Type	ClinicalEncounter.TypeId	Lookup: CodeSetBundle	N/A
PV1.19 - Visit Identifier	ClinicalEncounter.Identifier	Object	The identifier information for an encounter is represented as ClinicalEncounterIdentifier records that reference the

PV1	Salesforce Field	Type	Notes
			encounter record using their ClinicalEncounterIdentifier. ParentRecordId field.
PV1.22 - Courtesy Code	ClinicalEncounter.SpecialCourtesy	Picklist	N/A
PV1.36 - Discharge Disposition	ClinicalEncounter.DischargeDispositionId	Lookup: CodeSetBundle	N/A
PV1.37 - Discharged to Location	ClinicalEncounter.DestinationFacilityId	Lookup: HealthcareFacility	N/A
	ClinicalEncounter.DestinationOrganizationId	Lookup: Account	N/A
PV1.38 - Diet Type	ClinicalEncounter.DietPreference	Picklist	N/A
PV1.44 - Admit Date/Time	ClinicalEncounter.StartDate	DateTime	N/A
PV1.45 - Discharge Date/Time	ClinicalEncounter.EndDate	DateTime	N/A
PV1.50 - Alternate Visit ID	ClinicalEncounter.Identifier	Object	The identifier information for an encounter is represented as ClinicalEncounterIdentifier records that reference the encounter record using their ClinicalEncounterIdentifier. ParentRecordId field.

PV2 - Patient Visit - Additional Information

The Patient Visit - Additional Information (PV2) HL7 segment maps primarily to the `ClinicalEncounter` object in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for PV2 map to fields in Salesforce standard objects.

 **Note:** Only the segments supported by Salesforce are mentioned below.

Table 44: PV2 - Salesforce

PV2	Salesforce Field	Type	Notes
PV2.3 - Admit Reason	ClinicalEncounterReason.ReasonCodeId	Lookup: CodeSetBundle	N/A

PV2	Salesforce Field	Type	Notes
PV2.7 - Visit User Code	ClinicalAlert.CodeId	Lookup: CodeSetBundle	N/A
PV2.11 - Actual Length of Inpatient Stay	ClinicalEncounter.Duration	Double	N/A
	ClinicalEncounter.DurationUnitId	Lookup: UnitOfMeasure	N/A
PV2.25 - Patient Status Code	ClinicalEncounter.PriorityId	Lookup: CodeSetBundle	N/A

RXA - Pharmacy Administration Segment

The Pharmacy Administration Segment (RXA) HL7 segment maps primarily to the `PatientImmunization` and `Medication` objects in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for RXA map to fields in Salesforce standard objects.



Note: Only the segments supported by Salesforce are mentioned below.

Table 45: RXA - Salesforce

RXA	Salesforce Field	Type	Notes
RXA.3 - Date/Time Start of Administration	PatientImmunization.VaccinationDate	DateTime	N/A
RXA.5 - Administered Code	<ul style="list-style-type: none"> • Patient Immunization .VaccineCodeId • Medication .MedicationCodeId 	Lookup: CodeSetBundle	N/A
RXA.6 - Administered Amount	PatientImmunization.Dose	Double	N/A
RXA.7 - Administered Unit	PatientImmunization.DoseUnitId	Lookup:UnitOfMeasure	N/A
RXA.8 - Administered Dosage Form	Medication.MedicationFormId	Lookup: CodeSetBundle	N/A
RXA.10 - Administering Provider	CarePerformer	Object	The performer information for an immunization is represented as CarePerformer records that reference the Patient Immunization record using their

RXA	Salesforce Field	Type	Notes
			CarePerformer.ParentRecordId field.
RXA.11 - Administered-at Location	PatientImmunization.FacilityId	Lookup: Healthcare Facility	N/A
RXA.15 - Substance Lot Number	PatientImmunization.LotNumber	String	N/A
RXA.16 - Substance Expiration Date	PatientImmunization.ExpirationDate	DateTime	N/A
RXA.17 - Substance Manufacturer Name	<ul style="list-style-type: none"> • PatientImmunization.Manufacturer • Medication.ManufacturerId 	<ul style="list-style-type: none"> • String • Lookup: Account 	N/A
RXA.18 - Substance Refusal Reason	PatientImmunization.StatusReasonCodeId	<ul style="list-style-type: none"> • Lookup: CodeSetBundle 	N/A
RXA.20 - Completion Status	PatientImmunization.Status	Picklist	N/A

RXC - Pharmacy Component Order Segment

The Pharmacy Component Order Segment (RXC) HL7 segment maps to the `Medication` and `MedicationRequest` objects in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for RXC map to fields in Salesforce standard objects.



Note: Only the segments supported by Salesforce are mentioned below.

Table 46: RXC - Salesforce

RXC	Salesforce Field	Type	Notes
RXC.2 - Component Code	<ul style="list-style-type: none"> • Medication.MedicationCodeId • MedicationRequest.MedicationCodeId 	Lookup: CodeSetBundle	N/A

RXE - Pharmacy Encoded Order Segment

The Pharmacy Encoded Order Segment (RXE) HL7 segment maps primarily to the `Medication` object in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for RXE map to fields in Salesforce standard objects.

 **Note:** Only the segments supported by Salesforce are mentioned below.

Table 47: RXE - Salesforce

RXE	Salesforce Field	Type	Notes
RXE.2 - Give Code	Medication.Medication.CodeId	Lookup: CodeSetBundle	N/A
RXE.2 - Give Dosage Form	Medication.Medication.FormId	Lookup: CodeSetBundle	N/A

RXR - Pharmacy Route Segment

The Pharmacy Route Segment (RXR) HL7 segment maps primarily to the `PatientImmunization` and `PatientMedicationDosage` objects in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for RXR map to fields in Salesforce standard objects.

 **Note:** Only the segments supported by Salesforce are mentioned below.

Table 48: RXR - Salesforce

RXR	Salesforce Field	Type	Notes
RXR.1 - Route	<ul style="list-style-type: none"> • Patient.Immunization.RouteId • PatientMedicationDosage.RouteId 	Lookup: CodeSetBundle	N/A
RXR.2 - Site	<ul style="list-style-type: none"> • Patient.Immunization.SiteId • PatientMedicationDosage.SiteId 	Lookup: CodeSetBundle	N/A
RXR.4 - Administration Method	PatientMedicationDosage.MethodId	Lookup: CodeSetBundle	N/A

HL7 v2.3 Data Types Supported in Salesforce Standard Objects

Salesforce Standard objects support the following data types defined in HL7 v2.3.

CE - Coded Element

The Coded Element (CE) HL7 segment maps to the `CodeSet` object in Salesforce.

CX - Extended Composite ID With Check Digit

The Extended Composite ID With Check Digit (CX) HL7 segment maps to the `Identifier` object in Salesforce.

XPN - Extended Person Name

The Extended Person Name (XPN) HL7 segment maps to the `PersonName` object in Salesforce.

XTN - Extended Telecommunication Number

The Extended Telecommunication Number (XTN) HL7 segment maps to the `ContactPointPhone` object in Salesforce.

CE - Coded Element

The Coded Element (CE) HL7 segment maps to the `CodeSet` object in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for CE map to fields in Salesforce standard objects.



Note: Only the segments supported by Salesforce are mentioned below.

Table 49: CE - Salesforce

CE	Salesforce Field	Type	Notes
CE.1 - Identifier	<code>CodeSet.Code</code>	String	N/A
CE.2 - Text	<code>CodeSet.Name</code>	String	N/A
	<code>CodeSetBundle.Name</code>	String	N/A
CE.3 - Name of Coding System	<code>CodeSet.SourceSystem</code>	String	N/A

CX - Extended Composite ID With Check Digit

The Extended Composite ID With Check Digit (CX) HL7 segment maps to the `Identifier` object in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for CX map to fields in Salesforce standard objects.



Note: Only the segments supported by Salesforce are mentioned below.

Table 50: CX - Salesforce

CX	Salesforce Field	Type	Notes
CX.1 - ID	<code>Identifier.IdValue</code>	String	N/A
CX.4 - Assigning Authority	<code>Identifier.IssuingAuthority</code>	Lookup: Account	N/A
CX.5 - Identifier Type Code	<code>Identifier.IdType</code>	Lookup: CodeSet, CodeSet Bundle	N/A

XPN - Extended Person Name

The Extended Person Name (XPN) HL7 segment maps to the `PersonName` object in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for XPN map to fields in Salesforce standard objects.



Note: Only the segments supported by Salesforce are mentioned below.

Table 51: XPN - Salesforce

XPN	Salesforce Field	Type	Notes
XPN.1 - Family Name	<code>PersonName.LastName</code>	String	In cases where a person has a middle name, <code>PersonName.LastName</code> is supposed to store a combination of the middle name and the last name.
XPN.2 - Given Name	<code>PersonName.FirstName</code>	String	N/A
XPN.3 - Middle Initial or Name	N/A	N/A	This attribute isn't implemented in <code>PersonName</code> . In cases where a person has a middle name, <code>PersonName.LastName</code> is supposed to store a combination of the middle name and the last name.
XPN.4 - Suffix	<code>PersonName.Suffix</code>	String	N/A
XPN.5 - Prefix	<code>PersonName.Prefix</code>	String	N/A
XPN.6 - Degree	N/A	N/A	This attribute isn't implemented in <code>PersonName</code> .
XPN.7 - Name Type Code	<code>PersonName.NameUsageType</code>	Dynamic Picklist	While HL7 defines XPN.7 as a code, Salesforce implements <code>PersonName.NameUsageType</code> as a dynamic picklist.

XTN - Extended Telecommunication Number

The Extended Telecommunication Number (XTN) HL7 segment maps to the `ContactPointPhone` object in Salesforce.

HL7 V2.3 - Clinical Data Model Mapping

Here's how the segments defined by HL7 V2.3 for XTN map to fields in Salesforce standard objects.



Note: Only the segments supported by Salesforce are mentioned below.

Table 52: XTN - Salesforce

XTN	Salesforce Field	Type	Notes
XTN.1 - Telephone Number	ContactPointPhone.PhoneNumber	Phone	N/A
XTN.2 - Telecommunication Use Code	ContactPointPhone.UsageType	Picklist	N/A
	ContactPointEmail.UsageType	Picklist	N/A
XTN.3 - Telecommunication Equipment Type	ContactPointPhone.PhoneType	Picklist	N/A
XTN.4 - Email Address	ContactPointEmail.EmailAddress	Email	N/A
XTN.6 - Area/City Code	ContactPointPhone.AreaCode	String	Some systems may break down the phone number into multiple components, such as country code, area code, local number, extension, and so on. In such cases, the full number may have to be assembled.
XTN.8 - Extension	ContactPointPhone.ExtensionNumber	String	N/A

Life Sciences Cloud Business APIs

You can access Life Sciences Cloud Business APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

To understand the architecture, authentication, rate limits, and how the requests and responses work, see [Connect REST API Developer Guide](#)

Resources

Use these resources of Life Sciences Cloud Business APIs to enhance your Salesforce implementation or integrate with other applications.

Request Bodies

This section lists the request bodies for Life Sciences Cloud Business APIs. The query parameters for an endpoint are listed along with each resource.

Response Bodies

A resource can return a response body in either JSON or XML format.

SEE ALSO:

[Connect REST API Developer Guide: Introduction](#)

Resources

Use these resources of Life Sciences Cloud Business APIs to enhance your Salesforce implementation or integrate with other applications.

[Account Management](#)

Use these resources to manage customer accounts.

[Account Manual Alignment](#)

Manually align an account to a territory in the Life Sciences package to create a Provider Account Territory Info record.

[Account User Territory Information \(POST\)](#)

Get user details, including territories and additional user information.

[Advanced Provider Search](#)

Facilitate three distinct types of account searches: Healthcare Provider (HCP), Healthcare Organization (HCO), and license-based searches. For HCP and HCO searches, the API processes fields from the account, healthcare provider, and contact point address entities. The license-based searches use fields from the business license entity.

[Book Slot Chain \(POST\)](#)

Create service appointments for a care program enrollee in advanced therapy management based on the provided appointment slots.

[Contact Encounter \(POST\)](#)

Load details of contact encounters into the system.

[Content Management](#)

Use these resources to manage customer content.

[Care Program Enrollments \(POST\)](#)

Use this API to enroll multiple patients in a care program.

[Digital Verification \(POST\)](#)

Perform verification for the digital verification records within advanced therapy management.

[Download Provider \(POST\)](#)

Download Health Care provider data from an external system to a Salesforce org after a search is performed.

[Benefit Verification](#)

Use these resources to verify the health benefits covered by the patient's insurer. The call center agent can view the coverages in the patient's record page.

[Intelligent Document Management](#)

Use the Intelligent Document Management resources to create or update records in Salesforce objects based on the content document records or received document records.

[Patients \(GET, POST, PUT\)](#)

Retrieve the FHIR patient resource record details. Create or update a patient record rather than making multiple separate calls to the objects in Salesforce.

[Provider Search](#)

Search for Healthcare providers and accounts based on a free-text input, either from internal Salesforce data or an external system. This API returns account information, including healthcare providers and matching contact point addresses.

[Providers](#)

Use these resources to create practitioner or facility records, or update existing fields in provider records and insert new fields.

[Sample Limits Validation \(POST\)](#)

Validate the samples requested during a visit against the sample limits for that account, product, and sample limit template.

[Visits \(POST\)](#)

Create visits for sales representatives. For example, for a medical device visit, a sales representative visits the surgeon or a hospital location.

[Work Type Lead Time \(POST\)](#)

Get a list of work types and their associated lead times that are optimized across regions for a specific advanced therapy.

Account Management

Use these resources to manage customer accounts.

[Merge Customer Account \(POST\)](#)

Merges a list of customer accounts. If any one account merge in the request fails, the entire operation is cancelled.

[Merge Customer Account with Status \(POST\)](#)

Merges a list of customer accounts and provides a status for each request. This API processes all valid requests and does not fail the entire operation if one request is invalid.

Merge Customer Account (POST)

Merges a list of customer accounts. If any one account merge in the request fails, the entire operation is cancelled.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Resource

```
/connect/life-sciences/commercial/customers/actions/merge
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/life-sciences/commercial/customers/actions/merge
```

Available version

65.0

HTTP methods

POST

Request body for POST

```
{
  "customersToMerge": [
    {
      "winningId": "001x0000002k18VFFV",
      "winningExternalId": "001x0000004op0XHHX",
      "losingId": "001x0000009gh6TDDT",
      "losingExternalId": "001x0000001ij7UEEU"
    },
    {
      "winningId": "001x0000003mn9WGGW",
      "winningExternalId": "001x0000007uv3AKKA",
      "losingId": "001x0000004op0XHHX",
      "losingExternalId": "001x0000005ij7UEEU"
    }
  ]
}
```

```

        "losingId": "001x0000006st2ZJJZ",
        "losingExternalId": "001x0000005qr1YIIY"
    }
],
"overrideBlankValues": true
}

```

Name	Type	Description	Required
customersToMerge	MergeCustomersInput Representation on page 1766	A list of customer merge requests. A maximum of 100 requests can be included in a single call.	Required
overrideBlankValues	Boolean	<p>Specifies whether to override blank values in the Consolidated Account record with values from the Merged Account record. The default value is <code>false</code>.</p> <p>If set to <code>true</code>, it looks for null values in the fields of the winning account and fills them with non null values from the losing account</p>	Optional

Response body for POST

[Customer Accounts Merged Output](#) on page 1820

Merge Customer Account with Status (POST)

Merges a list of customer accounts and provides a status for each request. This API processes all valid requests and does not fail the entire operation if one request is invalid.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Resource

```
/connect/life-sciences/commercial/customers/actions/merge-with-status
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/life-sciences/commercial/customers/actions/merge-with-status
```

Available version

65.0

HTTP methods

POST

Request body for POST

```
{
  "customersToMerge": [
    {
      "winningId": "a3Lxx00000MbzxAC",
      "winningExternalId": "a3Lxx00000MbzxBC",
      ...
    }
  ]
}
```

```

        "losingId": "001xx00001STZUxxTR",
        "losingExternalId": "001x000007uv3AKKA"
    },
    {
        "winningId": "001x000007cd4RBRR",
        "winningExternalId": "001x000008ef5SCCS",
        "losingId": "001xx00001SYtgxxUI",
        "losingExternalId": "001x000001ij7UEEU"
    }
],
"overrideBlankValues": true
}

```

Name	Type	Description	Required
customersToMerge	MergeCustomerRepresentation on page 1766	A list of customer merge requests. A maximum of 100 requests can be included in a single call.	Required
overrideBlankValues	Boolean	<p>Specifies whether to override blank values in the Consolidated Account record with values from the Merged Account record. The default value is <code>false</code>.</p> <p>If set to <code>true</code>, it looks for null values in the fields of the winning account and fills them with non null values from the losing account.</p>	Optional

Response body for POST

[Merge Customer Accounts with Status Output](#) on page 1834

Account Manual Alignment

Manually align an account to a territory in the Life Sciences package to create a Provider Account Territory Info record.

Resource

/connect/life-sciences/commercial/customer-manual-alignment

Available version

65.0

HTTP methods

POST

Request body for POST

```

{
    "territoryId": "territoryId",
    "accountId": "accountId"
}

```

Name	Type	Description	Required
accountId	String	Account to be aligned to the territory.	Required
territoryId	String	ID of the territory to which account is aligned.	Required

Response body for POST[Account Manual Alignment Output](#) on page 1786

Account User Territory Information (POST)

Get user details, including territories and additional user information.

Resource`/connect/life-sciences/commercial/account-user-territory-info`**Available version**

64.0

HTTP methods

POST

Request body for POST**JSON Example**

```
{
  "accountId": "00xxG00000n6bbxxAA",
  "fieldNames": ["City", "IsActive", "LanguageLocaleKey"]
}
```

Properties

Parameter Name	Type	Description	Required or Optional	Available Version
accountId	String	The ID of the user. Using this ID, this API fetches users associated with territories linked to this account.	Required	64.0
fieldNames	<list>String	The additional user fields that you want to retrieve. The user ID and name is fetched by default.	Optional	64.0

Response body for POST[AccountUserTerritoryInfoOutputRepresentation](#) on page 1785

Advanced Provider Search

Facilitate three distinct types of account searches: Healthcare Provider (HCP), Healthcare Organization (HCO), and license-based searches. For HCP and HCO searches, the API processes fields from the account, healthcare provider, and contact point address entities. The license-based searches use fields from the business license entity.

Resource

```
/connect/life-sciences/commercial/advanced-provider-search
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/life-sciences/commercial/advanced-provider-search?externalSearch=true
```

Available version

65.0

HTTP methods

POST

Query parameters for POST

Parameter Name	Type	Description	Required or Optional
externalSearch	Boolean	Indicates whether to perform the search on an external system (<code>true</code>) or not (<code>false</code>). By default, this value is set to <code>false</code> and an internal search is performed. This is a URL parameter, not part of the input representation.	Optional

Request body for POST

```
{
  "account": [
    {
      "field": "Name",
      "value": "Robert"
    },
    {
      "field": "AccountNumber",
      "value": "123456"
    }
  ],
  "healthcareProvider": [
    {
      "field": "Specialties",
      "value": "Robert"
    },
    {
      "field": "PhoneticName",
      "value": "Robrt"
    }
  ],
  "contactPointAddress": [
    {
      "field": "IsPrimary",
      "value": "false"
    }
  ]
}
```

```
{
  "field": "CountryCode",
  "value": "US"
},
"businessLicense": [
  {
    "field": "ComplianceScope",
    "value": "Address"
  },
  {
    "field": "LicenseNumber",
    "value": "123456"
  }
]
}
```

Property Name	Type	Description	Required or Optional
account	List<String>	List of account fields and their corresponding search values. At least one field from either account or healthcare provider must be populated.	Optional
businessLicense	List<String>	List of business license fields and their corresponding search values.	Optional
contactPoint Address	List<String>	List of contact point address fields and their corresponding search values.	Optional
healthcare Provider	List<String>	List of healthcare provider fields and their corresponding search values. At least one field from either account or healthcare provider must be populated.	Optional

Response body for POST

[Provider Search Output](#) on page 1845

Book Slot Chain (POST)

Create service appointments for a care program enrollee in advanced therapy management based on the provided appointment slots. This API takes both the published and unpublished slots as inputs. If the provided slots are published, the API calls the Salesforce Scheduler API to book the slots.

Resource

```
/connect/health/advanced-therapy-management/book-slot-chain
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/health/advanced-therapy-management/book-slot-chain
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{  
    "careProgramEnrolleeId": "08pxx0000004C92AAE",  
    "workProcedureId": "08pxx0000004C92AAE",  
    "slots": [  
        {  
            "schedStartTime": "2022-03-26T16:30:00.000+0000",  
            "schedEndTime": "2022-03-26T16:30:00.000+0000",  
            "workTypeId": "08pxx0000004C92AAE",  
            "serviceTerritoryId": "08pxx0000004C92AAE",  
            "serviceResourceId": "08pxx0000004C92AAE",  
            "contactId": "08pxx0000004C92AAE",  
            "appointmentType": "08pxx0000004C92AAE",  
            "subject": "Apheresis",  
            "additionalInformation": "Needs Cab Assistance",  
            "street": "1 Market Street",  
            "city": "San Francisco",  
            "state": "CA",  
            "postalCode": "94105",  
            "country": "USA",  
            "comments": "",  
            "status": "Scheduled"  
        },  
        {  
            "schedStartTime": "2022-03-26T16:30:00.000+0000",  
            "schedEndTime": "2022-03-26T16:30:00.000+0000",  
            "workTypeId": "08pxx0000004C92AAE",  
            "serviceTerritoryId": "08pxx0000004C92AAE",  
            "serviceResourceId": "08pxx0000004C92AAE",  
            "contactId": "08pxx0000004C92AAE",  
            "appointmentType": "08pxx0000004C92AAE",  
            "subject": "Apheresis",  
            "additionalInformation": "Needs Cab Assistance",  
            "street": "1 Market Street",  
            "city": "San Francisco",  
            "state": "CA",  
            "postalCode": "94105",  
            "country": "USA",  
            "comments": "",  
            "status": "Scheduled"  
        },  
        {  
            "schedStartTime": "2022-03-26T16:30:00.000+0000",  
            "schedEndTime": "2022-03-26T16:30:00.000+0000",  
            "workTypeId": "08pxx0000004C92AAE",  
            "serviceTerritoryId": "08pxx0000004C92AAE",  
            "serviceResourceId": "08pxx0000004C92AAE",  
            "contactId": "08pxx0000004C92AAE",  
            "appointmentType": "08pxx0000004C92AAE",  
            "subject": "Apheresis",  
            "additionalInformation": "Needs Cab Assistance",  
            "street": "1 Market Street",  
            "city": "San Francisco",  
            "state": "CA",  
            "postalCode": "94105",  
            "country": "USA",  
            "comments": "",  
            "status": "Scheduled"  
        }  
    ]  
}
```

```

        "subject": "Apheresis",
        "additionalInformation": "Needs Cab Assistance",
        "street": "1 Market Street",
        "city": "San Francisco",
        "state": "CA",
        "postalCode": "94105",
        "country": "USA",
        "comments": "",
        "status": "Scheduled"
    }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
careProgramEnrolleeId	String	ID of the care program enrollee for whom the service appointments must be created.	Required	60.0
slots	Slots []	Appointment slots to be booked.	Required	60.0
workProcedureId	String	ID of the work procedure for which the service appointments are to be created.	Required	60.0

Response body for POST

[Book Slot Chain Output](#)

Contact Encounter (POST)

Load details of contact encounters into the system.

Prerequisites

- This API must be used only for person account-enabled orgs.
- Ensure that you have access to the Contact Encounter fields and the Contact Encounter Participants fields in your org.

Contact Tracing Encounters and Participants

- To create a new encounter, set the `referenceID` field to `null`.
- To update an existing encounter with details of new encounter participants, pass the `referenceID` of the encounter in the payload.
- A single payload can have a maximum of 5 encounters.
- A single payload can have a maximum of 50 participants per encounter.
- Encounter participants are not mandatory. If a participant is specified, the participant type is mandatory. If the participant type is set to `lead`, the participant's first name and last name are mandatory.

Resource

/services/data/vXX.X/contact-tracing

Available version

49.0 and later

AuthenticationAuthorization: Bearer **token**

Note: The Lightning Platform REST API supports OAuth 2.0 (an open protocol to allow secure API authorization). See [Authorize Apps with OAuth](#) in *Salesforce Help* for more details.

HTTP methods

POST

Request body**JSON example**

```
{  
    contactTracingEncounters: [  
        {  
            "referenceId": "0haRM000000000BYAQ",  
            "name": "SF All Hands Q2",  
            "estimatedParticipantCount": 10,  
            "startDateTime": "2020-06-20T00:00:00Z",  
            "duration": 12,  
            "description": "held in SF tower",  
            "participants": [  
                {  
                    "participantType": "lead",  
                    "recordTypeName": "triage",  
                    "startTime": "2020-06-20T00:00:00Z",  
                    "duration": 12,  
                    "firstName": "Leo",  
                    "lastName": "Machado",  
                    "age": 24,  
                    "phoneNumber": "24323322",  
                    "emailAddress": "lee.lo@mail.com",  
                    "address": {  
                        "city": "Seattle",  
                        "state": "Washington",  
                        "country": "US",  
                        "postalCode": "11404",  
                        "street": "Richmond St"  
                    }  
                },  
                {  
                    "participantType": "patient",  
                    "referenceId": "001RM000004iUi8YAE",  
                    "sourceSystemId": "211453",  
                    "startTime": "2020-06-20T00:00:00Z",  
                    "duration": 10,  
                    "age": 34  
                }  
            ],  
            "location": {  
                "name": "Seattle County",  
                "description": "Gala event",  
            }  
        }  
    ]  
}
```

```

        "latitude" : "47.6" ,
        "longitude": "122.3",
        "encounterAddress":{
            "city":"Seattle",
            "state":"Washington",
            "country":"US",
            "postalCode":"11404",
            "street":"Dutch St"
        }
    }
]
}

```

Properties

Name	Type	Description
contactTracingEncounters. referenceId	String	The ID of an existing contact encounter record in the Salesforce system.
contactTracingEncounters.name	String	Required. The name for the encounter.
contactTracingEncounters. estimatedParticipantCount	Integer	The estimated number of participants in the encounter.
contactTracingEncounters. startDateTime	DateTime	Required. The start date and time of the encounter. Must be in YYYY-MM-DDT HH:MM:SS format. For example, 2020-05-18T09:15:00.
contactTracingEncounters. duration	Integer	Required. The duration of the encounter in minutes.
contactTracingEncounters. description	String	The description for the encounter.
contactTracingEncounters. participants	List	The list of participants for the contact encounter. Each element in the list represents ContactEncounterParticipant. Valid values are: <ul style="list-style-type: none"> • lead • employee • patient
 ⓘ Note: Only one value is allowed.		
contactTracingEncounters. participants.participantType	String	Required. The encounter participant type. Valid values are: <ul style="list-style-type: none"> • Lead— A new lead is created with the specified participant record type. If the record type does not exist in the org, an error message is returned. If the record

Name	Type	Description
contactTracingEncounters.participants.referenceId	String	<p>type is not provided in the payload, the default record type (triage) is used.</p> <ul style="list-style-type: none"> Employee—The system performs a lookup to the person account and the record type is ignored. This lookup can be done in the following ways: <ul style="list-style-type: none"> Using the <code>referenceId</code> that corresponds to the Salesforce record ID. Using <code>sourceSystemId</code>. For an employee, this ID is typically the employee ID or employee number. If a match is found, the contact encounter participant record is created with the <code>contact</code> field lookup pointing to the matched person account. If a match is not found, this record is rejected and an error message is provided in the response. Patient—The system performs a lookup to the person account and the record type is ignored. This lookup can be done in the following ways: <ul style="list-style-type: none"> Using the <code>referenceId</code> that corresponds to the Salesforce record ID. Using <code>sourceSystemId</code>. For a patient, this ID is the patient ID from an external source system. If a match is found, the contact encounter participant record is created with the <code>contact_id</code> lookup pointing to the matched person account. If a match is not found, this record is rejected and an error message is provided in the response.
		 Note: Only one value is allowed.
contactTracingEncounters.participants.sourceSystemId	String	The ID of an existing patient or employee record in the Salesforce system. If a payload has both the <code>referenceID</code> and the <code>sourceSystemID</code> , the <code>referenceID</code> is used for the patient or the employee lookup.
contactTracingEncounters.participants.recordTypeName	String	For a patient, the patient ID from an external source system at participant level. For an employee, the employee number representing the employee record in the Salesforce or the external system. If a payload has both the <code>referenceID</code> and the <code>sourceSystemID</code> , the <code>referenceID</code> is used for the patient or employee lookup.
		The name for the record type. The value for this field must be exactly the same as the label of the record type in the user interface. This field is used only when

Name	Type	Description
contactTracingEncounters.participants.referenceId	String	contactTracingEncounters.participants.referenceId is set to lead.
contactTracingEncounters.participants.startTime	DateTime	The time when the encounter started.
contactTracingEncounters.participants.duration	Integer	Required. The duration of the encounter in minutes.
contactTracingEncounters.participants.firstName	String	Required. The first name of the participant. This field is used only when contactTracingEncounters.participants.participantType is set to lead.
		 Note: If participants.referenceId is provided, this field is optional.
contactTracingEncounters.participants.lastName	String	Required. The last name of the encounter participant. This field is used only when contactTracingEncounters.participants.participantType is set to lead.
		 Note: If participants.referenceId is provided, this field is optional.
contactTracingEncounters.participants.age	Integer	The age of the encounter participant.
contactTracingEncounters.participants.phoneNumber	String	The phone number of the encounter participant. This field is used only when contactTracingEncounters.participants.participantType is set to lead.
contactTracingEncounters.participants.emailAddress	String	The email address of the encounter participant. This field is used only when contactTracingEncounters.participants.participantType is set to lead.
contactTracingEncounters.participants.address	String	The address of the encounter participant. This field is used only when contactTracingEncounters.participants.participantType is set to lead.
contactTracingEncounters.participants.address.city	String	The city of the encounter participant. This field is used only when contactTracingEncounters.participants.participantType is set to lead.
contactTracingEncounters.participants.address.state	String	The state of the encounter participant. This field is used only when contactTracingEncounters.participants.participantType is set to lead.
contactTracingEncounters.participants.address.country	String	The country of the encounter participant. This field is used only when contactTracingEncounters.participants.participantType is set to lead.

Name	Type	Description
contactTracingEncounters.participants.address.postalCode	String	The postal code of the encounter participant. This field is used only when contactTracingEncounters.participants.participantType is set to lead.
contactTracingEncounters.participants.address.street	String	The street of the encounter participant. This field is used only when contactTracingEncounters.participants.participantType is set to lead.
contactTracingEncounters.location	Object (reference to location)	Identifies the location of the encounter.
contactTracingEncounters.location.name	String	<p>Required. The name of the location where the encounter took place. If the encounter location name already exists in the system, the existing location record is used and the following location fields are ignored:</p> <ul style="list-style-type: none"> • contactTracingEncounters.location.description • contactTracingEncounters.location.latitude • contactTracingEncounters.location.longitude • contactTracingEncounters.location.encounteraddress.city • contactTracingEncounters.location.encounteraddress.state • contactTracingEncounters.location.encounteraddress.country • contactTracingEncounters.location.encounteraddress.postalCode • contactTracingEncounters.location.encounteraddress.street
contactTracingEncounters.location.description	String	The description of the location where the encounter took place.
contactTracingEncounters.location.latitude	String	The latitude coordinate of the location where the encounter took place.
contactTracingEncounters.location.longitude	String	The longitude coordinate of the location where the encounter took place.
contactTracingEncounters.location.encounteraddress.city	String	The city where the encounter took place.
contactTracingEncounters.location.encounteraddress.state	String	The state where the encounter took place.

Name	Type	Description
contactTracingEncounters.location.encounteraddress.country	String	The country where the encounter took place.
contactTracingEncounters.location.encounteraddress.postalCode	String	The postal code of the location where the encounter took place.
contactTracingEncounters.location.encounteraddress.street	String	The street where the encounter took place.

Response body

JSON example

```
{
  "encounters" : [ {
    "created" : false,
    "id" : "0haxx00000000rFAQQ",
    "location" : null,
    "participants" : [ {
      "created" : true,
      "employee" : null,
      "errors" : null,
      "id" : "0hbxx00000000G9AAI",
      "lead" : {
        "created" : true,
        "id" : "00Qxx000002TST8EAO"
      },
      "patient" : null
    }, {
      "created" : true,
      "employee" : null,
      "errors" : null,
      "id" : "0hbxx00000000GAAAY",
      "lead" : {
        "created" : true,
        "id" : "00Qxx000002TST9EAO"
      },
      "patient" : null
    }, {
      "created" : true,
      "employee" : null,
      "errors" : null,
      "id" : "0hbxx00000000GBAAY",
      "lead" : null,
      "patient" : {
        "created" : false,
        "id" : "001xx000003GZ6tAAG"
      }
    } ]
  },
  "errors" : null,
  "status" : null,
}
```

```
        "success" : true  
    }
```

Content Management

Use these resources to manage customer content.

[Bulk Presentation \(POST\)](#)

Create a presentation and its associated content in bulk. You can upload presentation files as PDF or ZIP and associated metadata. The *Health Cloud Starter* and *Life Sciences Commercial Admin* Permission Sets are required for accessing this API. To know more, see [Email Template](#) and [Intelligent Content](#).

[Bulk Presentation \(PATCH\)](#)

Update a presentation and its associated content in bulk. You can upload presentation files as PDF or ZIP and associating metadata. The *Health Cloud Starter* and *Life Sciences Commercial Admin* Permission Sets are required for accessing this API. To know more, see [Email Template](#) and [Intelligent Content](#).

[Email Template \(POST\)](#)

Create an email template. The *Health Cloud Starter* and *Life Sciences Commercial Admin* Permission Sets are required for accessing this API. To know more, see [Email Template](#) and [Intelligent Content](#).

[Email Template \(PATCH\)](#)

Update an email template. The *Health Cloud Starter* and *Life Sciences Commercial Admin* Permission Sets are required for accessing this API. To know more, see [Email Template](#) and [Intelligent Content](#).

[Presentation Page Product \(POST, PATCH\)](#)

Create or update (delete) product and guidance associations for a presentation page. The *Health Cloud Starter* and *Life Sciences Commercial Admin* Permission Sets are required for accessing this API. To know more, see [Email Template](#) and [Intelligent Content](#).

Bulk Presentation (POST)

Create a presentation and its associated content in bulk. You can upload presentation files as PDF or ZIP and associated metadata. The *Health Cloud Starter* and *Life Sciences Commercial Admin* Permission Sets are required for accessing this API. To know more, see [Email Template](#) and [Intelligent Content](#).

Resource

```
/connect/life-sciences/commercial/bulk-presentation
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/life-sciences/commercial/bulk-presentation
```

Available version

65.0

HTTP methods

POST

 **Note:** For all Bulk APIs, provide the file input either as `contentDocumentId` or `fileId`. Do not include both parameters.

Request body for POST

```
{
  "contentType": "PRESENTATION_ZIP", // Valid values: PRESENTATION_PDF, PRESENTATION_ZIP, or PRESENTATION_PAGE.
  "presentation": {
    // Required for PRESENTATION_PDF or PRESENTATION_ZIP. Not needed for PRESENTATION_PAGE.

    "name": "demo-presentation-name",
    "id": "demo-presentation-external-id",
    "enableDoubleTapZoom": true,
    "enablePinchZoom": false,
    "playerGesture": "Swipeup",
    "activationDate": "2019-06-03T15:00:00.000Z",
    "deactivationDate": "2019-06-03T15:00:00.000Z",

    // These fields are only valid for PRESENTATION_ZIP.
    "topics": [
      "topic_id_1",
      "topic_id_2"
    ],
    "sendByEmail": false,
    "publicContentName": "public_content_name",
    "publicContentUrl": "public_content_url",

    "customFields": [
      {
        "fieldName": "Custom_Text_Field_c",
        "fieldValue": "custom_field_value_1_string"
      }
    ]
  },
  "pages": [
    {
      // Required only for PRESENTATION_PDF. Must be 1 for the file page, and incremented for subsequent PDF pages. Not needed for ZIP/PAGE.
      "pageNumber": 1,
      "name": "demo-presentation-page1",
      "mandatory": false,
      "activationDate": "2019-06-03T15:00:00.000Z",
      "deactivationDate": "2019-06-03T15:00:00.000Z",

      /* Provide EITHER contentDocumentId OR fileId, but not both.
       - For PDF: File input is ONLY provided on the page where pageNumber is 1.
       - For ZIP/PAGE: File input is required for ALL pages.
      */
      "contentDocumentId": "069xx0000004gbkAAA",
      //fileId": "file1-key",
      "id": "demo-page-id-1", // Required for ZIP/PAGE. Not required for PRESENTATION_PDF.

      "isAdditionalContent": false, // Required for ZIP/PAGE. Not required for
    }
  ]
}
```

```
PRESENTATION_PDF.

"customFields": [
  {
    "fieldName": "custom_field_name_1",
    "fieldValue": 45
  }
],
"products": [
  {
    "productId": "1Kexx0000004C92CAE",
    "guidanceIds": [
      "1Kgxx0000004C92CAE"
    ]
  }
]
},
{
  // "pageNumber": 2, /* Must be included for a second page if contentType is
PRESENTATION_PDF. */
  "name": "demo-presentation-page2",
  "mandatory": false,
  "activationDate": "2019-06-03T15:00:00.000Z",
  "deactivationDate": "2019-06-03T15:00:00.000Z",

  // File input is required here for ZIP/PAGE. Must be omitted for PDF.
  "contentDocumentId": "069xx0000004gbcAAB",

  "id": "demo-page-id-2", // Required for ZIP/PAGE.
  "isAdditionalContent": false, // Required for ZIP/PAGE.

  "customFields": [
    {
      "fieldName": "custom_field_name_1",
      "fieldValue": "custom_field_value_1"
    }
  ],
  "products": [
    {
      "productId": "1Kexx0000004C92CAE",
      "guidanceIds": [
        "1Kgxx0000004C92CAE"
      ]
    }
  ]
}
}
```

Properties

Name	Type	Description	Required
contentType	String	The type of content. Valid values are PRESENTATION_PDF, PRESENTATION_ZIP, or PRESENTATION_PAGE.	Required
presentation	Object on page 1699	JSON payload containing presentation metadata.	Required only if the contentType is PRESENTATION_PDF or PRESENTATION_ZIP
pages	List<Object> on page 1698	List of presentation pages, each containing its own metadata and file association. Only one page can be provided in the pages input for PRESENTATION_PAGE content type.	Required

Response body for POST

[Create Bulk Presentation Output](#) on page 1819

Bulk Presentation (PATCH)

Update a presentation and its associated content in bulk. You can upload presentation files as PDF or ZIP and associating metadata. The *Health Cloud Starter* and *Life Sciences Commercial Admin* Permission Sets are required for accessing this API. To know more, see [Email Template](#) and [Intelligent Content](#).

Resource

```
/connect/life-sciences/commercial/bulk-presentation
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/life-sciences/commercial/bulk-presentation
```

Available version

65.0

HTTP methods

PATCH

Request body for PATCH

```
{
  "contentType": "PRESENTATION_ZIP", // Valid values: PRESENTATION_PDF, PRESENTATION_ZIP, or PRESENTATION_PAGE.

  // Required for PDF or ZIP content types. Not required for PRESENTATION_PAGE.
  "presentation": {
    "name": "demo-presentation-name",
    "id": "demo-presentation-id",
    "enableDoubleTapZoom": true,
    "enablePinchZoom": false,
```

```

"playerGesture": "Swipeup",
"activationDate": "2019-06-03T15:00:00.000Z",
"deactivationDate": "2019-06-03T15:00:00.000Z",

// These fields are only valid for PRESENTATION_ZIP.
"topics": [
    "topic_id_1",
    "topic_id_2"
],
"sendByEmail": false,
"publicContentName": "public_content_name",
"publicContentUrl": "public_content_url",

"customFields": [
    {
        "fieldName": "Custom_Text_Field_c",
        "fieldValue": "custom_field_value_1_string"
    }
]
),

// Only one page can be provided for PRESENTATION_PAGE.
"pages": [
    {
        // Required only for PRESENTATION_PDF. Must be 1 for the file page, and incremented
        // for subsequent PDF pages. Not required for ZIP/PAGE.
        "pageNumber": 1,
        "name": "demo-presentation-page1",
        "mandatory": false,
        "activationDate": "2019-06-03T15:00:00.000Z",
        "deactivationDate": "2019-06-03T15:00:00.000Z",

        /* File input (contentDocumentId or fileId) is ONLY required if you are UPDATING
        the content of the presentation.
        - For PDF: File input is ONLY provided on the page where pageNumber is 1. Omit
        fileId/contentDocumentId if only updating metadata.
        - For ZIP/PAGE: File input is required for ALL pages if their content is
        changing.
        */
        "contentDocumentId": "069xx0000004gbkAAA",
        //fileId": "file1-key", /* Use contentDocumentId OR fileId, but not both. */

        "id": "demo-page-id-1", // Required for ZIP/PAGE. Omit for PRESENTATION_PDF.
        "isAdditionalContent": false, // Required for ZIP/PAGE. Omit for PRESENTATION_PDF.

        "customFields": [
            {
                "fieldName": "custom_field_name_1",
                "fieldValue": 45
            }
        ],
        "products": [
            {

```

```

        "productId": "1Kexx0000004C92CAE",
        "guidanceIds": [
            "1Kgxx0000004C92CAE"
        ]
    }
],
{
    /* Second page example. */
    // "pageNumber": 2, /* Must be included for a second page if contentType is PRESENTATION_PDF. */
    "name": "demo-presentation-page2",
    "mandatory": false,
    "activationDate": "2019-06-03T15:00:00.000Z",
    "deactivationDate": "2019-06-03T15:00:00.000Z",

    // File input is required here for ZIP/PAGE if content is being updated. Not required for PDF.
    "contentDocumentId": "069xx0000004gbcAAB",

    "id": "demo-page-id-2", // Required for ZIP/PAGE.
    "isAdditionalContent": false, // Required for ZIP/PAGE.

    "customFields": [
        {
            "fieldName": "custom_field_name_1",
            "fieldValue": "custom_field_value_1"
        }
    ],
    "products": [
        {
            "productId": "1Kexx0000004C92CAE",
            "guidanceIds": [
                "1Kgxx0000004C92CAE"
            ]
        }
    ]
}
}

```

Properties

Name	Type	Description	Required
contentType	String	The type of content. Possible values are: <ul style="list-style-type: none">• PRESENTATION_PDF• PRESENTATION_ZIP• PRESENTATION_PAGE.	Required
presentation	Object on page 1700	JSON payload containing presentation metadata.	Required only if the contentType is

Name	Type	Description	Required
			PRESENTATION_PDF or PRESENTATION_ZIP
pages	List<Object> on page 1701	List of presentation pages, each containing its own metadata and file association. Only one page can be provided in the pages input for PRESENTATION_PAGE content type.	Optional

Response body for PATCH[Update Bulk Presentation Output](#) on page 1819**Email Template (POST)**

Create an email template. The *Health Cloud Starter* and *Life Sciences Commercial Admin* Permission Sets are required for accessing this API. To know more, see [Email Template](#) and [Intelligent Content](#).

Resource

```
/connect/life-sciences/commercial/bulk-email-template
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/life-sciences/commercial/bulk-email-template
```

Available version

65.0

HTTP methods

POST

Request body for POST

```
{
    "emailSubject": "Welcome",
    "contentDocumentId": "069xx0000004CAeAAM",
    "name": "Welcome Email",
    "activatedDate": "2025-06-03T15:00:00.000Z",
    "senderType": "SYSTEM",
    "senderEmailFieldAPIName": "noreply@company.com",
    "replyToType": "USER",
    "replyToEmailAddress": "support@company.com",
    "id": "external-id",
    "deactivatedDate": "2025-01-01T00:00:00.000Z",
    "description": "This is a welcome email template used for onboarding new users.",
    "attachmentObjectTypes": [
        "PDF",
        "DOCX"
    ],
    "customFields": [
        {
            "fieldName": "user",
            "fieldValue": "admin"
        }
    ]
}
```

```

        },
        {
            "fieldName": "standard",
            "fieldValue": "user"
        }
    ],
    "languages": [
        "en",
        "es"
    ],
    "isActive": true,
    "surveyId": "sample-survey-id",
    "productId": "sample-product-id",
    "communicationSubscriptionId": "sample-comm-subscription-id",
    "topics": [
        "Onboarding",
        "User Engagement"
    ],
    "shouldIgnoreEmailConsent": false,
    "isSubjectLineEditable": true,
    "bccEmailIdList": "bcc@example.com",
    "automatedEmailContextType": "ProviderVisit",
    "automatedEmailActionType": "Create",
    "isDefaultAutoEmailTemplate": false
}

```

Properties

Property Name	Type	Description	Required
activatedDate	Date	Date when the email template becomes active.	Optional
attachmentObjectTypes	List<String>	List of object types for attachments.	Optional
automatedEmailActionType	String	Action type for automated emails. Possible values are: <ul style="list-style-type: none">• Create• Update• Cancel	Optional
automatedEmailContextType	String	Context type for automated emails. Possible values are: <ul style="list-style-type: none">• ProviderVisit• Meeting	Optional
bccEmailIdList	String	Email ID for BCC.	Optional
communicationSubscriptionId	String	ID of the communication subscription associated with the email temaplate.	Optional
contentDocumentId	String	ID of the content document ZIP containing the email files. You can pass this parameter if you wish to process the existing document record. This	Required

Property Name	Type	Description	Required
		parameter cannot be provided when you pass the <code>fileId</code> .	
customFields	Object	Map of custom field names and their values for the email template.	Optional
deactivatedDate	Datetime	Date when the email template becomes inactive.	Optional
description	String	Description of the email template.	Optional
emailSubject	String	Subject line of the email template.	Required, only if the file input is provided either as <code>contentDocumentId</code> or <code>fileId</code>
fileId	String	The multipart form field key that references the uploaded file for this presentation page. You can pass this parameter if you wish to process a new file that you will include in the request. You cannot provide this parameter when you pass the <code>contentDocumentId</code> as only one of the two are allowed.	Required
id	String	ID of the email template. Either the <code>SourceSystemIdentifier</code> or <code>Salesforce Id</code> of the <code>LifeSciEmailTemplate</code> record.	Optional
isActive	Boolean	Indicates if the email template is active (<code>true</code>) or not (<code>false</code>).	Optional
isDefaultAutomatedTemplate	Boolean	Indicates if this is a default automated email template (<code>true</code>) or not (<code>false</code>).	Optional
isSubjectLineEditable	Boolean	Indicates if the email subject line is editable (<code>true</code>) or not (<code>false</code>).	Optional
languages	List<String>	List of languages associated with the email template as per the ISO codes such as <code>en_US</code> , <code>fr</code> , <code>es</code> .	Optional
name	String	Name of the email template.	Required
productId	String	ID of the associated product.	Optional
replyToEmailAddress	String	Reply-to email address.	Optional
replyToType	String	Type of reply-to address. Possible values are: <ul style="list-style-type: none"> • <code>SalesRep</code> • <code>PredefinedEmail</code> 	Optional
senderEmailFieldAPIName	String	API name of the sender's email field.	Optional

Property Name	Type	Description	Required
senderType	String	Type of sender for the email. Possible values are: <ul style="list-style-type: none">• SalesRep• PredefinedEmail	Optional
shouldIgnoreEmailConsent	Boolean	Indicates whether email consent should be ignored (true) or not (false).	Optional
surveyId	String	ID of the associated survey.	Optional
topics	List<String>	List of topics associated with the email template. TopicAssignment for Life Science EmailTemplate must be enabled before using this field.	Optional

Response body for POST

[Create Email Template Output](#) on page 1819

Email Template (PATCH)

Update an email template. The *Health Cloud Starter* and *Life Sciences Commercial Admin* Permission Sets are required for accessing this API. To know more, see [Email Template](#) and [Intelligent Content](#).

Resource

```
/connect/life-sciences/commercial/bulk-email-template
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/life-sciences/commercial/bulk-email-template
```

Available version

65.0

HTTP methods

PATCH

Request body for PATCH

```
{
  "emailSubject": "Welcome",
  "contentDocumentId": "069xx0000004CAeAAM",
  "name": "Welcome Email",
  "activatedDate": "2025-06-03T15:00:00.000Z",
  "senderType": "SYSTEM",
  "senderEmailFieldAPIName": "noreply@company.com",
  "replyToType": "USER",
  "replyToEmailAddress": "support@company.com",
  "id": "email-template-id",
  "deactivatedDate": "2025-01-01T00:00:00.000Z",
  "description": "This is a welcome email template used for onboarding new users.",
  "attachmentObjectTypes": [
```

```

        "PDF",
        "DOCX"
    ],
    "customFields": [
        {
            "fieldName": "user",
            "fieldValue": "admin"
        },
        {
            "fieldName": "standard",
            "fieldValue": "user"
        }
    ],
    "languages": [
        "en",
        "es"
    ],
    "isActive": true,
    "surveyId": "sample-survey-id",
    "productId": "sample-product-id",
    "communicationSubscriptionId": "sample-comm-subscription-id",
    "topics": [
        "Onboarding",
        "User Engagement"
    ],
    "shouldIgnoreEmailConsent": false,
    "isSubjectLineEditable": true,
    "bccEmailIdList": "bcc@example.com",
    "automatedEmailContextType": "ProviderVisit",
    "automatedEmailActionType": "Create",
    "isDefaultAutoEmailTemplate": false
}

```

Properties

Property Name	Type	Description	Required
activatedDate	Date	Date when the email template becomes active.	Optional
attachmentObjectTypes	List<String>	List of object types for attachments.	Optional
automatedEmailActionType	String	Action type for automated emails. Possible values are: <ul style="list-style-type: none">• Create• Update• Cancel	Optional
automatedEmailContextType	String	Context type for automated emails. Possible values are: <ul style="list-style-type: none">• ProviderVisit• Meeting	Optional

Property Name	Type	Description	Required
bccEmailIdList	String	Email ID for BCC.	Optional
communicationsSubscriptionId	String	ID of the communication subscription associated with the email template.	Optional
contentDocumentId	String	ID of the content document ZIP containing the email files. You can pass this parameter if you wish to process the existing document record. You cannot provide this parameter when you pass the <code>fileId</code> .	Optional
customFields	Object	Map of custom field names and their values for the email template.	Optional
deactivatedDate	Datetime	Date when the email template becomes inactive.	Optional
description	String	Description of the email template.	Optional
emailSubject	String	Subject line of the email template.	Required, only if the file input is provided either as <code>contentDocumentId</code> or <code>fileId</code> .
fileId	String	The multipart form field key that references the uploaded file for this presentation page. You can pass this parameter if you wish to process a new file that you will include in the request. You cannot provide this parameter when you pass the <code>contentDocumentId</code> as only one of the two are allowed.	Optional
id	String	ID of the email template. Either the <code>SourceSystemIdentifier</code> or Salesforce ID of the <code>LifeSciEmailTemplate</code> record.	Required
isActive	Boolean	Indicates if the email template is active (<code>true</code>) or not (<code>false</code>).	Optional
isDefaultAutomatedEmailTemplate	Boolean	Indicates if this is a default automated email template (<code>true</code>) or not (<code>false</code>).	Optional
isSubjectLineEditable	Boolean	Indicates if the email subject line is editable (<code>true</code>) or not (<code>false</code>).	Optional
languages	List<String>	List of languages associated with the email template as per the ISO codes such as <code>en_US</code> , <code>fr</code> , <code>es</code> .	Optional
name	String	Name of the email template.	Optional
productId	String	ID of the associated product.	Optional
replyToEmailAddress	String	Reply-to email address.	Optional

Property Name	Type	Description	Required
replyToType	String	Type of reply-to address. Possible values are: <ul style="list-style-type: none">• SalesRep• PredefinedEmail	Optional
senderEmailFieldAPIName	String	API name of the sender's email field.	Optional
senderType	String	Type of sender for the email. Possible values are: <ul style="list-style-type: none">• SalesRep• PredefinedEmail	Optional
shouldIgnoreEmailConsent	Boolean	Indicates whether email consent should be ignored (true) or not (false).	Optional
surveyId	String	ID of the associated survey.	Optional
topics	List<String>	List of topics associated with the email template. TopicAssignment for Life Science EmailTemplate must be enabled before using this field.	Optional

Response body for PATCH[Update Email Template Output](#) on page 1819**Presentation Page Product (POST, PATCH)**

Create or update (delete) product and guidance associations for a presentation page. The *Health Cloud Starter* and *Life Sciences Commercial Admin* Permission Sets are required for accessing this API. To know more, see [Email Template](#) and [Intelligent Content](#).

Resource

```
/connect/life-sciences/commercial/page/products
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/life-sciences/commercial/page/products
```

Available version

65.0

HTTP methods

POST, PATCH

Request body for POST or PATCH
 **Note:** The PATCH request will delete the records.

```
{
  "id": "string",
  "products": [
```

```
{
  "productId": "1Kexx000000409xxAE",
  "guidanceIds": [
    "a0Fc0000007I516EAC", "Guidance_2_ext_id"
  ]
}
```

Name	Type	Description	Required
id	String	ID of the presentation page.	Required, if an existing page record needs to be updated for PRESENTATION_ZIP and PRESENTATION_PAGE content types.
pageNumber	Integer	Page number for the presentation page. This value must be unique and within the range of 1 to 200.	Required for PRESENTATION_PDF content type.
products	List<Object> on page 1769	Array of objects containing the product ID and guidance ID mapping.	Required

Response body for POST

[Presentation Page Product Output](#) on page 1842

Care Program Enrollments (POST)

Use this API to enroll multiple patients in a care program.

A single API call creates both patient enrollment cards, and enrollee products for all the patients. You can enroll up to 200 patients in a single request.

! **Important:** Ensure that you have configured required care system field-mapping records for provider, patient, care program, and the product in **Setup > Care System Field Mappings**. For more information, see [CareSystemFieldMapping](#).

Enrollments

Enroll multiple patients into a care program.

Enrollments

Enroll multiple patients into a care program.

Resource

```
/services/data/vXX.X/connect/health/care-programs/enrollments
```

Available version

46.0

Authentication

Use OAuth to connect to Salesforce and get an access token. Pass the access token in your requests. For more information, see [Connect to Connect REST API Using OAuth](#).

HTTP methods

POST

Request body

Root XML tag

```
<careProgramEnrollmentData>
```

JSON example

```
{
  "programId": "programId1",
  "sourceSystem": "source-system-name",
  "patientData": [
    {
      "patientId": "patient1",
      "careProgramProductData": [
        {
          "providerId": "provider1",
          "productId": "product1"
        },
        {
          "providerId": "provider1",
          "productId": "product2"
        }
      ]
    },
    {
      "patientId": "patient2",
      "careProgramProductData": [
        {
          "providerId": "provider3",
          "productId": "product4"
        }
      ]
    }
  ]
}
```

Properties

Name	Type	Description	Required	Available Version
patientData	Patient Input []	List of all objects that contain patients data. You can have up to 200 items in this list.	Yes	46.0
programId	String	ID of the care program as configured in the care system field mappings.	Yes	46.0

Name	Type	Description	Required	Available Version
sourceSystem	String	Name of the source system as configured in the care system field mappings.	Yes	46.0

Response body

[Program Enrollment Result](#)

Prerequisites

Ensure that you have configured the following care system field mapping configured in **Setup > Care System Field Mappings**:

Name	Role	Target Object
Care_Program	Not Applicable	CareProgram
Patient	Patient	Account
Product	Not Applicable	Product2
Provider	Service Provider	Account

 **Note:** Ensure that you have configured appropriate external ID field and source system for each of these mappings.

For more information, see [CareSystemFieldMapping](#).

Digital Verification (POST)

Perform verification for the digital verification records within advanced therapy management.

Resource

`/connect/health/advanced-therapy-management/digital-verification`

Resource example

`https://yourInstance.salesforce.com/services/data/v60.0/connect/health/advanced-therapy-management/digital-verification`

Available version

60.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "digitalVerificationInputFieldsMap": {
    "VerificationStatusCategory": "Completed",
    "Comment": "done successfully",
    "VerificationSite": "USA"
  },
  "userCredentials": {
    ...
  }
}
```

```

    "loginId": "sanampreet.singh@salesforce.com",
    "password": "123456"
},
"digitalVerificationId": "15Exx0000004CAeEAM",
sessionId:12Exz0022004CAFABM
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
digital Verification Id	String	ID of the digital verification record for which the digital verification is to be performed.	Required	60.0
sessionId	String	ID that tracks the session established through a connected app or remote system in Salesforce.	Optional	60.0
user Credentials	User Credentials Input	Authentication credentials of the user performing the digital verification.	Required	60.0
digital Verification InputFields Map	Digital Verification Input Fields Map	Map structure holding key-value pairs of digital verification input fields.	Required	60.0

Response body for POST[Digital Verification](#)**Download Provider (POST)**

Download Health Care provider data from an external system to a Salesforce org after a search is performed.

Resource

```
/connect/life-sciences/commercial/download-provider
```

Available version

66.0

HTTP methods

POST

Request body for POST**Properties**

Property Name	Type	Description	Required	Available Version
country Code	String	The country code where the search was performed.	Required	66.0

Property Name	Type	Description	Required	Available Version
data source	String	The external data source, such as One Key.	Optional	66.0
entity Type	String	The type of entity, such as individual or workplace.	Required	66.0
external Id	String	The unique external ID from the search response.	Required	66.0
in Contract	Boolean	Indicates whether the record is currently in contract.	Optional	66.0

Response body for POST

[Download Provider Output](#) on page 1822

Benefit Verification

Use these resources to verify the health benefits covered by the patient's insurer. The call center agent can view the coverages in the patient's record page.

Benefits Verification (POST)

The Verify Benefits API call is the main resource for checking which health benefits are available to a patient.

Benefits Verification Input

This is the input structure of a Verify Benefits API call.

Benefits Verification Request

This is what a Verify Benefits request looks like.

Benefits Verification Output

This is the content of the output from running the Verify Benefits API call.

Benefits Verification Response

This is the content of the response from a Verify Benefits API call.

Benefits Verification (POST)

The Verify Benefits API call is the main resource for checking which health benefits are available to a patient.

Resource

```
/connect/health/benefitsverification/verifyBenefits
```

Available version

53.0

Requires Chatter

No

HTTP methods

POST

Response body for POST

[Benefits Verification Output](#) on page 1636

Benefits Verification Input

This is the input structure of a Verify Benefits API call.

Root XML tag

inputData

JSON example

Properties

Name	Type	Description	Required or Optional	Available Version
benefitsVerificationRequests	Benefits Verification Request	List of Benefits Verification Requests Request on page 1636[]		53.0

Benefits Verification Request

This is what a Verify Benefits request looks like.

Properties

Name	Type	Description	Required or Optional	Available Version
encounterDate	String	Encounter Date		53.0
memberAccountId	String	Member Account Id		53.0
memberPlanId	String	Member Plan Id		53.0
providerNpi	String	Provider Npi		53.0
providerOrganizationName	String	Provider Organization Name		53.0
providerType	String	Provider Type		53.0
serviceTypeCodes	String[]	Service Type Codes		53.0

Benefits Verification Output

This is the content of the output from running the Verify Benefits API call.

Property Name	Type	Description	Filter Group and Version	Available Version
benefitsVerificationResponses	Benefits Verification Response	Benefits Verification Responses on page 1637	Small, 53.0	53.0
code	String	Benefits Verification api returned code	Small, 53.0	53.0
isSuccess	Boolean	Benefits Verification api success flag	Small, 53.0	53.0
message	String	Benefits Verification api message	Small, 53.0	53.0

Benefits Verification Response

This is the content of the response from a Verify Benefits API call.

Property Name	Type	Description	Filter Group and Version	Available Version
careBenefitVerifyRequestId	String	Care Benefit Verify Request Id	Small, 53.0	53.0
code	String	Benefits Verification api returned code	Small, 53.0	53.0
coverageBenefitId	String	Coverage Benefit Id	Small, 53.0	53.0
isSuccess	Boolean	Benefits Verification api success flag	Small, 53.0	53.0
message	String	Benefits Verification api message	Small, 53.0	53.0

Intelligent Document Management

Use the Intelligent Document Management resources to create or update records in Salesforce objects based on the content document records or received document records.

Currently, a user can use the manual flow from the user interface to create records in the target Salesforce objects. A user can create target records based on the content document records or received document records using:

- Transform Document—Transform the received document to create a record in the target Salesforce object.
- Review Document—When the transformed document is used to create the target record, users can review the document for any conflicts, choose to resolve the conflicts, and update the document.

With the Intelligent Document Automation APIs, you can automate the process of getting the mappings between the values of the keys extracted from the content document and the Salesforce object fields, and create a record in the target Salesforce object.

Before using the APIs, perform AWS text extraction from the content document record or received document record by using the POST request on the OCR Text Extraction resource.

Supported Salesforce Objects

Account, BusinessMilestone, Case, Contact, CareDiagnosis, CareRequest, CareRequestDrug, CareRequestExtension, CareRequestItem, CareProgramEnrollee, Lead, Opportunity, Visit, and custom objects.

Special Access Rules

To use these resources, you must have the HealthCloud, DocumentChecklist, and AWSTextract1000LimitAddOn licenses.

Available Resources

Resource	Description
/connect/form-reader/contentDocuments/\${contentDocumentId}/record	Create records in Salesforce objects using a document based on a content document record.
/connect/form-reader/contentDocuments/\${contentDocumentId}/record/\${targetRecordId}	Update an existing record in a Salesforce object using a document based on a content document record.
/connect/form-reader/receivedDocuments/\${receivedDocumentId}/record	Create records in Salesforce objects using a document based on a received document record.
/connect/form-reader/receivedDocuments/\${receivedDocumentId}/record/\${targetRecordId}	Update an existing record in a Salesforce object using a document based on a received document record.
/connect/document-automation/contentDocuments/\${contentDocumentId}/linkedObjects/\${linkedObjectId}	Split a document and attach one or more pages from the transformed document to Salesforce records.

Record Creation with Content Documents (POST)

Create records in Salesforce objects using a document based on a content document record.

Record Creation with Received Documents (POST)

Create records in Salesforce objects using a document based on a received document record.

Record Update with Content Documents (PATCH)

Update an existing record in a Salesforce object using a document based on a content document record.

Record Update with Received Documents (PATCH)

Update an existing record in a Salesforce object using a document based on a received document record.

Split Documents

Split a document and attach one or more pages from the transformed document to Salesforce records.

Record Creation with Content Documents (POST)

Create records in Salesforce objects using a document based on a content document record.

Resource

```
/connect/form-reader/contentDocuments/${contentDocumentId}/record
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect  
/form-reader/contentDocuments/069xx0000004D1sAAE/record
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**Root XML tag**

<DocumentProcessInput>

JSON example for POST

```
{
  "objectApiName": "Account",
  "documentTypeId": "0dexx0000000001",
  "overrideConfidenceScoreThreshold": 50,
  "ignoreFieldValueConflict": false,
  "fieldsWithoutConflictList": [
    "noConflictFields": [
      {
        "field": "name"
      },
      {
        "field": "accountnumber"
      }
    ]
  },
  "additionalFields": {
    "additionalFieldMap": {
      "AccountNumber": "9090909"
    }
  }
  "templateApiName": "sample_template"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalFields	Map<String, Object>	List of additional fields that you want to create or update in the target object and which are not present in the Intelligent Form Reader field mappings.	Optional	55.0
attachDocument	Boolean	Indicates whether to automatically create the DocumentChecklistItem (DCI) and ContentDocumentLink records to link the document to the target object (<code>true</code>) or not (<code>false</code>). Default value is <code>false</code> .	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
fieldsWithoutConflictList	Fields Without Conflict Input[]	List of fields that must not have any conflicts for the record creation or update process.	Optional	55.0
ignoreFieldValueConflict	Boolean	Indicates whether to ignore conflicts in OCR (<code>true</code>) or not (<code>false</code>). Default value is <code>false</code> .	Optional	55.0
linkedObjectId	String	ID of the linked object record.	Optional	55.0
objectApiName	String	API name of the target object in which you want to create or update a record.	Optional	55.0
overrideConfidenceScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.	Optional	55.0
		 Note: The value of this field overrides the confidence score threshold value set on the user interface.		
recordTypeId	String	ID of the record type of the target object.	Optional	55.0
templateApiName	String	API name of the document template to retrieve.	Optional	59.0

Response body for POST[Document Process Output](#)**Record Creation with Received Documents (POST)**

Create records in Salesforce objects using a document based on a received document record.

Resource`/connect/form-reader/receivedDocuments/${receivedDocumentId}/record`**Resource Example**`https://yourInstance.salesforce.com/services/data/vXX.X/connect/form-reader/receivedDocuments/0iox000000001AAA/record`**Available version**

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**Root XML tag**

```
<DocumentProcessInput>
```

JSON example for POST

```
{
  "objectApiName": "Account",
  "documentTypeId": "0dexx0000000001",
  "overrideConfidenceScoreThreshold": 50,
  "ignoreFieldValueConflict": false,
  "fieldsWithoutConflictList": {
    "noConflictFields": [
      {
        "field": "name"
      },
      {
        "field": "accountnumber"
      }
    ],
    "additionalFields": {
      "additionalFieldMap": {
        "AccountNumber": "9090909"
      }
    }
  },
  "templateApiName": "sample_template"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalFields	Map<String, Object>	List of additional fields that you want to create or update in the target object and which are not present in the Intelligent Form Reader field mappings.	Optional	55.0
attachDocument	Boolean	Indicates whether to automatically create the DocumentChecklistItem (DCI) and ContentDocumentLink records to link the document to the target object (<code>true</code>) or not (<code>false</code>). Default value is <code>false</code> .	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0
fieldsWithoutConflictList	Fields Without Conflict Input	List of fields that must not have any conflicts for the record creation or update process.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
ignoreFieldValueConflict	Boolean	Indicates whether to ignore conflicts in OCR (<code>true</code>) or not (<code>false</code>). Default value is <code>false</code> .	Optional	55.0
linkedObjectId	String	ID of the linked object record.	Optional	55.0
objectApiName	String	API name of the target object in which you want to create or update a record.	Optional	55.0
overrideConfidenceScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.	Optional	55.0
		 Note: The value of this field overrides the confidence score threshold value set on the user interface.		
recordTypeId	String	ID of the record type of the target object.	Optional	55.0
templateApiName	String	API name of the document template to retrieve.	Optional	59.0

Response body for POST[Document Process Output](#)**Record Update with Content Documents (PATCH)**

Update an existing record in a Salesforce object using a document based on a content document record.

Resource`/connect/form-reader/contentDocuments/${contentDocumentId}/record/${targetRecordId}`**Resource Example**`https://yourInstance.salesforce.com/services/data/vXX.X/connect/form-reader/contentDocuments/${contentDocumentId}/record/${targetRecordId}`**Available version**

55.0

Requires Chatter

No

HTTP methods

PATCH

Request body for PATCH**Root XML tag**`<DocumentProcessInput>`

JSON example for PATCH

```
{
  "documentTypeId": "0dexx0000000001",
  "overrideConfidenceScoreThreshold": 100,
  "ignoreFieldValueConflict": false,
  "attachDocument": true,
  "fieldsWithoutConflictList": [
    "noConflictFields": [
      {
        "field": "name"
      },
      {
        "field": "accountnumber"
      }
    ]
  },
  "templateApiName": "sample_template"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalFields	Map<String, Object>	List of additional fields that you want to create or update in the target object and which are not present in the Intelligent Form Reader field mappings.	Optional	55.0
attachDocument	Boolean	Indicates whether to automatically create the DocumentChecklistItem (DCI) and ContentDocumentLink records to link the document to the target object (<code>true</code>) or not (<code>false</code>). Default value is <code>false</code> .	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0
fieldsWithoutConflictList	Fields Without Conflict Input[]	List of fields that must not have any conflicts for the record creation or update process.	Optional	55.0
ignoreFieldValueConflict	Boolean	Indicates whether to ignore conflicts in OCR (<code>true</code>) or not (<code>false</code>). Default value is <code>false</code> .	Optional	55.0
linkedObjectId	String	ID of the linked object record.	Optional	55.0
objectApiName	String	API name of the target object in which you want to create or update a record.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
overrideConfidenceScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.	Optional	55.0
		 Note: The value of this field overrides the confidence score threshold value set on the user interface.		
recordTypeId	String	ID of the record type of the target object.	Optional	55.0
templateApiName	String	API name of the document template to retrieve.	Optional	59.0

Response body for PATCH[Document Process Output](#)**Record Update with Received Documents (PATCH)**

Update an existing record in a Salesforce object using a document based on a received document record.

Resource

```
/connect/form-reader/receivedDocuments/${receivedDocumentId}/record/${targetRecordId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/receivedDocuments/0iox0000000001AAA/record/001xx000003GavnAAC
```

Available version

55.0

Requires Chatter

No

HTTP methods

PATCH

Request body for PATCH**Root XML tag**

```
<DocumentProcessInput>
```

JSON example for POST

```
{
  "documentTypeId": "0dex000000000001",
  "overrideConfidenceScoreThreshold": 100,
  "ignoreFieldValueConflict": false,
  "attachDocument": true,
  "fieldsWithoutConflictList": {
    "noConflictFields": [
      {
        "field": "Name"
      }
    ]
  }
}
```

```

        "field": "name"
    },
    {
        "field": "accountnumber"
    }
]
}
"templateApiName": "sample_template"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalFields	Map<String, Object>	List of additional fields that you want to create or update in the target object and which are not present in the Intelligent Form Reader field mappings.	Optional	55.0
attachDocument	Boolean	Indicates whether to automatically create the DocumentChecklistItem (DCI) and ContentDocumentLink records to link the document to the target object (<code>true</code>) or not (<code>false</code>). Default value is <code>false</code> .	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0
fieldsWithoutConflictList	Fields Without Conflict Input	List of fields that must not have any conflicts for the record creation or update process.	Optional	55.0
ignoreFieldValueConflict	Boolean	Indicates whether to ignore conflicts in OCR (<code>true</code>) or not (<code>false</code>). Default value is <code>false</code> .	Optional	55.0
linkedObjectId	String	ID of the linked object record.	Optional	55.0
objectApiName	String	API name of the target object in which you want to create or update a record.	Optional	55.0
overrideConfidenceScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.	Optional	55.0
recordTypeId	String	ID of the record type of the target object.	Optional	55.0



Note: The value of this field overrides the confidence score threshold value set on the user interface.

Name	Type	Description	Required or Optional	Available Version
templateApiName	String	API name of the document template to retrieve.	Optional	59.0

Response body for PATCH[Document Process Output](#)**Split Documents**

Split a document and attach one or more pages from the transformed document to Salesforce records.

For example, suppose you receive a fax containing multiple patients' documents in a single scanned copy. As needed, separate the document pages and attach the split documents to the patient's record.

Resource

```
/connect/document-automation/contentDocuments/${contentDocumentId}/linkedObjects/${linkedObjectId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/document-automation/contentDocuments/0iRM0000004CqTYAU/linkedObjects/0OxRM0000004CqTYAU
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Parameters for POST

Parameter Name	Type	Description	Required or Optional	Available Version
contentDocumentID	String	The ID of the content document to be split.	Required	55.0
linkedObjectID	String	The ID of the linked object with which the split document must be associated. This is the ID of the DocumentChecklistItem object for Salesforce.	Required	55.0

Request body for POST**Root XML tag**

```
<DocumentManagementInput>
```

JSON example

```
{
  "pageSpecificationList": {
```

```

"pageSpecifications": [
    {
        "page":1,
        "rotation":0,
        "addToTargetFile":"true"
    },
    {
        "page":2,
        "rotation":0,
        "addToTargetFile":"true"
    }
],
"linkedObjectFieldsMap" : {
    "linkedObjectFields" : {"ReceivedDocumentId" : "0iox00000000ODAAY"}
},
"isOcrRequested" : true
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
isOcrRequested	Boolean	Indicates whether OCR is required to process the content document (<code>true</code>) or not (<code>false</code>). By default, OCR is performed on the first five pages of the content document.	Optional	55.0
linkedObjectFieldsMap	Map<String, String>	Represents the map that contains the linked object fields. For example, the linked object is the Document Checklist Item for Salesforce.	Optional	55.0
pageSpecificationList	Page Specification List Input[]	The page specifications list representation.	Required	55.0
targetFileName	String	The name of the target file that is created from the split document.	Optional	55.0

Response body for POST

[Document Management Result](#)

Patients (GET, POST, PUT)

Retrieve the FHIR patient resource record details. Create or update a patient record rather than making multiple separate calls to the objects in Salesforce.



Note: We recommend limiting the number of concurrent requests in your org to five. If you exceed this number, the Patients API request can fail.

The update request deletes all child records associated with a patient and recreates them. For example, when you update a patient record having three PersonName records and five Identifier records as child records, the API first deletes all the PersonName and Identifier child records and then reinserts them. If something goes wrong while updating data, the API rolls back to prevent leaving orphan records behind.

Resource for POST

```
/connect/health/patients
```

Resource for GET, PUT

```
/connect/health/patients/${patientId}
```

Example URI

```
/services/data/v53.0/connect/health/patients/001x0000005CQbtAAG
```

Available version

53.0

Requires Chatter

No

HTTP methods

GET, POST, PUT

Response body for GET

[Patient Get Output](#)

Request body for POST and PUT

JSON example

```
{
  "active": true,
  "identifier": [
    {
      "assigner": {
        "referenceResource": "Organization",
        "referenceId": "Org12345XYZ"
      },
      "type": {
        "text": "Passport Number",
        "coding": [
          {
            "display": "Passport number",
            "code": "PPN",
            "isActive": true,
            "use": "Identifier"
          }
        ]
      }
    }
  ]
}
```

```
        },
        "value": "ABCD5678XYZ"
    }
],
"name": [
{
    "use": "alias",
    "text": "Charles Green",
    "family": "Green",
    "given": "Charles",
    "prefix": "Mr.",
    "suffix": "Sr."
}
],
"communication": [
{
    "language": "English",
    "preferenceRank": 1
}
],
"address": [
{
    "use": "temp",
    "type": "postal",
    "line": "Green Household"
}
],
"telecom": [
{
    "system": "email",
    "value": "a@bc.com"
}
],
"gender": "male",
"birthDate": "2000-09-12T18:13:41Z",
"maritalStatus": "married",
"contact": [
{
    "relationship": {
        "coding": [
{
            "display": "Partner"
}
]
},
    "name": {
        "use": "Temp",
        "text": "Shawna Green",
        "family": "Green",
        "given": "Shawna",
        "prefix": "Mrs.",
        "suffix": "Jr."
},
    "telecom": [

```

```
{
  "system": "email",
  "value": "c@de.com"
},
{
  "system": "phone",
  "value": "12345678",
  "use": "temp",
  "rank": 1
}
],
"address": {
  "use": "temp",
  "type": "postal",
  "line": "Green Household"
}
},
"generalPractitioner": [
  {
    "referenceResource": "Practitioner",
    "referenceId": "PRAC789XYZ",
    "relationship": "Plastic Surgeon"
  }
],
"managingOrganisation": {
  "referenceResource": "Organization",
  "referenceId": "MI9007GBE"
}
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
active	Boolean	Indicates whether the patient record is active or not.	Optional	53.0
additional Information	Custom Field Value Input[]	Adds additional information to any fields not mapped in this API.	Optional	53.0
address	FHIR Address Input[]	The address of the patient.	Optional	53.0
birthDate	String	The date of birth of the patient.	Optional	53.0
communication	Patient Communication Language Input[]	The languages of communication associated with the patient.	Optional	53.0
contact	Contact Party For Patient Input[]	The contact associated with the patient record, modeled as a person account. Contacts are connected to patients using	Optional	53.0

Name	Type	Description	Required or Optional	Available Version
		the ContactContactRelation__c junction object.		
deceasedDateTime	String	The date and time of the patient's death.	Optional	53.0
gender	String	The gender of the patient.	Optional	53.0
generalPractitioner	FHIR Reference Input []	The practitioners associated with the patient, modeled as either person accounts or Contacts and HealthcareProvider records. Practitioners are connected to patients using the ContactContactRelation__c junction object.	Optional	53.0
identifier	FHIR Identifier Input []	The identifier information for the patient, stored as Identifier records that reference the patient record using their Identifier.ParentRecordId field.	Optional	53.0
managingOrganisation	FHIR Reference Input	The organization that manages the patient record, referenced using a lookup to the Account object. Managing organizations are connected to patients using the AccountContactRelation junction object.	Optional	53.0
maritalStatus	String	The current marital status of the patient.	Optional	53.0
multipleBirthInteger	Integer	The birth order of the patient, in the event that the patient was a part of a multiple birth event.	Optional	53.0
name	FHIR Human Name Input []	The names of the patient, stored as a PersonName record.	Optional	53.0
sourceSystemId	String	The source system ID associated with a patient record.	Optional	53.0
telecom	FHIR Contact Point Input []	Contact details of the patient, such as phone numbers and email addresses. These contact details are stored as ContactPointPhone records that reference the patient records using their ContactPointPhone.ParentId field.	Optional	53.0

Response body for POST[Patient Upsert Output](#)**Response body for PUT**[Patient Update Output](#)

Provider Search

Search for Healthcare providers and accounts based on a free-text input, either from internal Salesforce data or an external system. This API returns account information, including healthcare providers and matching contact point addresses.

Resource

```
/connect/life-sciences/commercial/provider-search
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/life-sciences/commercial/provider-search?externalSearch=true
```

Available version

65.0

HTTP methods

POST

Query parameters for POST

Parameter Name	Type	Description	Required or Optional
externalSearch	Boolean	Indicates whether to perform the search on an external system (<code>true</code>) or not (<code>false</code>). By default, this value is set to <code>false</code> and an internal search is performed.	Optional

Request body for POST

```
{
  "searchInput": "Acme.Corp Dermatology",
  "countryCodes": [
    "US",
    "IN"
  ]
}
```

Name	Type	Description	Required
searchInput	String	Free-text input to search for accounts.	Required
countryCodes	List<String>	List of country codes to restrict the search to.	Required

Response body for POST[Provider Search Output](#) on page 1845

Providers

Use these resources to create practitioner or facility records, or update existing fields in provider records and insert new fields.

[Create Provider](#)

This API creates healthcare provider records along with the corresponding Account records (for facilities) or Contact records (for practitioners). You can also use it to manage information about practitioner credentials.

[Upsert Provider](#)

This business-level API enables you to upsert data in Salesforce to represent a practitioner and all the objects and fields in the Provider data model relevant to a Practitioner, such as NPI, provider specialty, and provider taxonomy.

Create Provider

This API creates healthcare provider records along with the corresponding Account records (for facilities) or Contact records (for practitioners). You can also use it to manage information about practitioner credentials.

[Use Cases](#)

The Create Provider API is mainly intended to support the operations of payer employees who handle provider records, such as credentialing specialists.

[Prerequisites](#)

Notes about lookups

[Supported Fields](#)

The Create provider API supports all standard and custom fields.

[Resources](#)

Details and JSON samples

[Code Samples](#)

Here are some JSON samples that you can use as a starting point to build request bodies and interpret responses.

[Error Handling](#)

This API supports bulk transactions, but Healthcare Provider records are committed one at a time. An input request can succeed in full or in part. Each provider included in the request succeeds or fails on its own.

Use Cases

The Create Provider API is mainly intended to support the operations of payer employees who handle provider records, such as credentialing specialists.

Credentialing Specialist

Goals:

- Create provider records.
- Collect and store credential-related data.

Activities:

- When the provider has gone through the lead process, add maximum credential information to it so supervisor can make an approval decision.

- When a new provider is added to the Health Plan Network, add its contact to the system so call center agent can direct patients to that new provider.
- When new information is received about a provider, edit its contact info so the provider information is up to date.

Success Measures:

- Account, Contact, and HealthCareProvider records are created.
- Records in related entities (optionally, for example in License, Person Education, Operating Hours, Specialty records) can be created if customer provides values in the JSON.
- Data created can be viewed and edited according to user's access permission.

Prerequisites

Notes about lookups

To ensure uniqueness, when you create a HealthcareProviderSpecialty record with a SpecialtyId lookup field, a CareSpecialty record must exist with the CareSpecialty.SpecialtyCode field populated.

When you create a HealthcareProviderTaxonomy record, a CareTaxonomy.TaxonomyCode field must exist.

When you create a HealthcareFacilityNetworkSame record, a HealthcarePayerNetwork.Code field must exist.

You can look up to Operating Hours records if they exist, or create Operating Hours records via API.

For all other lookups, information should be provided in this format:

```
"AccountId": {  
    "value": "101",  
    "referenceField": "HCGA__SourceSystemId__c"  
}
```

In this example,

- `AccountId` is the API name of the lookup field you want to populate.
- `referenceField` is the field on the lookup object to establish the relationship. You can choose any reference field for these lookups as long as the values are unique.
- `value` is the value of the `referenceField`.

When a single request includes multiple lookups to an object, use the same reference field for all those lookups.

For example, suppose you have created custom lookup fields to the Account object in HealthcareProviderSpecialty and healthcareTaxonomy. The lookup fields are called `C_Account1` and `C_Account2`. `Account1` record has its `sourceSystem` field set to `A1`, and `Account2` record has the `sourceSystem` field set to `A2`. You want `C_Account1` to be populated with the `Account1` record and `C_Account2` to be populated with `Account2`. The reference field to find the account record is `SourceSystem`. If `sourceSystem` is `A1`, you get the `Account1` record, and if `sourceSystem` is `A2` you get the `Account2` record.

HealthcareFacilityNetwork has lookups to Account, Practitioner and HealthcarePractitionerFacility. You can create a HealthcareFacilityNetwork record in an input request in any of these ways:

- Create a record with an account lookup for the facility you are creating.
- Create a record with a practitioner lookup for the practitioner you are creating.
- Create a record with a lookup to HealthcarePractitionerFacility for a practitioner at a given facility.

Apex is not directly supported. However, you can call this API using the [HttpRequest Apex](#) class.

Supported Fields

The Create provider API supports all standard and custom fields.

Any field that is required in the object specification is required in JSON request bodies for this API.

All fields specified in your JSON request body must be writable. The user must have read-write access.

If no user input is provided, the Name field is populated automatically using this format:

```
HealthcareProviderSpecialty entity: Jimmy James Specialty - 10-20-20 11:22:33
```

Note:

- Users can edit the Name field after it has been auto-populated.
- When a user enters data from the UI, the Name field is not auto-populated.

If person accounts are enabled, use the recordType parameter in your input to identify a person account.

If you are updating a practitioner record that has already been created, you only need practitioner ID, not Account or Contact.

Resources

Details and JSON samples

Resource

```
/connect/health/providers
```

Available version

49.0 and later

Authentication

Authorization: Bearer **token**



Note: The Lightning Platform REST API supports OAuth 2.0 (an open protocol to allow secure API authorization). See [Authorize Apps with OAuth](#) in *Salesforce Help* for more details.

HTTP methods

POST

Supported Objects

Object	Required	Auto-filled Name field	Required Fields	Input/Output JSON key name
Account (for facility) or Contact (for practitioner)	No	NA		account/contact
AccountContactRelationship	No	Yes		providerAffiliations
Accreditation	No	Yes	Name	accreditations
Award	No	Yes	Name	awards
BoardCertification	No	Yes	Name	boardCertifications
BusinessLicense	No	Yes	Name	businessLicenses
CareProviderAdverseAction	No	Yes	Name	careProviderAdverseActions
CareProviderFacilitySpecialty	No	Yes	Name	facilitySpecialties

Object	Required	Auto-filled Name field	Required Fields	Input/Output JSON key name
ContactProfile	No	Yes		contactProfile
HealthcareFacilityNetwork	No	Yes	Name	facilityNetworks
HealthcarePractitionerFacility	No	Yes	Name	practitionerFacilities
HealthcareProvider	Yes	Yes	Name	healthcareProvider
HealthcareProviderNpi	No	Yes	Name	npi
HealthcareProviderSpecialty	No	Yes	Name	specialties
HealthcareProviderTaxonomy	No	Yes	Name	taxonomies
HealthcareProviderService	No	Yes		providerServices
HlthCareProvTreatedCondition	No	Yes		treatedConditions
Identifier	No			
OperatingHours	No	Yes	Name, TimeZone	operatingHours
PersonEducation (Practitioner only)		Yes	Name	personEducations
PersonEmployment (Practitioner only)		Yes	Name, RelatedPerson (Account/Contact)	personEmployments
TimeSlots	No	No	OperatingHours, StartTime, EndTime, DayOfWeek	TimeSlots

Code Samples

Here are some JSON samples that you can use as a starting point to build request bodies and interpret responses.

- Associate a practitioner with a facility. Each Contact record must have an associated Account record.
- Use the API name of the field, such as RecordType, not the label, such as Record Type.
- Strings with trailing spaces aren't supported.
- The comments in these samples aren't meant to be valid JSON.

Sample Input: Create a Practitioner

```
{
  "providers": [
    {
      "type": "practitioner",
      "contact": {
        "fields": {
          "FirstName": "Rachel",
          "LastName": "Green",
          "Description" : "Rachel is a specialist surgeon."
        }
      }
    }
  ]
}
```

```

        }
    },
    "healthcareProvider": {
        "fields": {
            "ProviderType": "Medical Doctor",
            "ProviderClass": "Solo Practitioner"
        }
    }
}
]
}
}

```

Sample Input - Create a Practitioner from an Existing Contact

 **Note:** In the sample input, the reference field can be any unique field.

```
{
    "providers": [
        {
            "type": "practitioner",
            "contact": {
                "id": {
                    "value": "003RM000007FnBvYAK",
                    "referenceField": "Id"
                }
            },
            "healthcareProvider": {
                "fields": {
                    "ProviderType": "Physician",
                    "EffectiveFrom": "2019-01-01 00:00:00"
                }
            }
        }
    ]
}
```

Sample Input - Create a Practitioner as a Person Account

```
{
    "providers": [
        {
            "type": "practitioner",
            "account": {
                "fields": {
                    "FirstName": "Jimmy",
                    "LastName": "James",
                    "Email": "jj@newsradio.com",
                    "About": "Jimmy James is a doctor.",
                    "RecordType": "PersonAccount"
                }
            },
            "healthcareProvider": {
                "fields": {
                    "ProviderType": "Physician",
                    "EffectiveFrom": "2019-01-01",
                }
            }
        }
    ]
}
```

```
        }
    ]
}
```

Sample Input - Create a Practitioner to Be Synced for Provider Search

-  **Note:** To use the following code sample, ensure that the org has:
- A facility Account record (Id 001RM000005J5UTYA0 in the code sample)
 - CareSpecialty records (SpecialtyCode 15 and 22 in the code sample)

```
{
  "providers": [
    {
      "type": "practitioner",
      "contact": {
        "fields": {
          "FirstName": "Will",
          "LastName": "Doc",
          "Email": "WillDoc@gmail.com",
          "Description": "Will is a doctor."
        }
      },
      "healthcareProvider": {
        "fields": {
          "ProviderType": "Medical Doctor",
          "ProviderClass": "Solo Practitioner"
        }
      },
      "npis": [
        {
          "fields": {
            "Npi": "WD-14",
            "NpiType": "Individual",
            "IsActive": true
          }
        }
      ],
      "specialties": [
        {
          "fields": {
            "SpecialtyId": {
              "value": "15",
              "referenceField": "SpecialtyCode"
            },
            "SpecialtyRole": "Specialist",
            "IsActive": true
          }
        },
        {
          "fields": {
            "SpecialtyId": {
              "value": "22",
              "referenceField": "SpecialtyCode"
            },
            "SpecialtyRole": "Dual",
            "IsActive": true
          }
        }
      ]
    }
}
```

```
        }
    ],
    "practitionerFacilities": [
        "fields": {
            "AccountId": {
                "value": "001RM000005J5UTYA0",
                "referenceField": "Id"
            },
            "IsActive": true
        },
        "facilityNetworks": [
            "fields": {
                "PayerNetworkId": {
                    "value": "PPO",
                    "referenceField": "Code"
                },
                "IsActive": true,
                "LowestValidAge": 0,
                "PanelStatus": "Panel open",
                "PanelLimit": 100
            }
        ],
        {
            "fields": {
                "PayerNetworkId": {
                    "value": "HMO",
                    "referenceField": "Code"
                },
                "IsActive": true,
                "GenderRestriction": "Female",
                "LowestValidAge": 0,
                "PanelStatus": "Panel open",
                "PanelLimit": 100
            }
        }
    ],
    "facilitySpecialties": [
        "fields": {
            "SpecialtyId": {
                "value": "15",
                "referenceField": "SpecialtyCode"
            },
            "IsPrimarySpecialty": true,
            "SpecialtyRole": "Specialist",
            "IsActive": true
        }
    ]
}
]
}
]
```

Sample Input - Create a Facility

```
{
  "providers": [
    {
      "type": "facility",
      "account": {
        "fields": {
          "Name": "Geller Clinic",
          "Description": "Geller Clinic is an eye clinic.",
          "Website": "gellerclinic.com"
        },
        "operatingHours": {
          "fields": {
            "Name": "GellerClinicHours",
            "Description": "MWTF8-5"
          },
          "timeSlots": [
            {
              "fields": {
                "DayOfWeek": "Monday",
                "StartTime": "09:00:00",
                "EndTime": "17:30:00"
              }
            }
          ]
        }
      },
      "healthcareProvider": {
        "fields": {
          "ProviderType": "MedicalDoctor",
          "EffectiveFrom": "2019-01-01"
        }
      }
    }
  ]
}
```

Sample Input - Create a Facility from an Existing Account

```
{
  "providers": [
    {
      "type": "facility",
      "account": {
        "id": {
          "value": "Geller Clinic",
          "referenceField": "Name"
        }
      },
      "healthcareProvider": {
        "fields": {
          "ProviderType": "MedicalDoctor",
          "EffectiveFrom": "2019-01-01"
        }
      }
    }
  ]
}
```

Sample Input - Create a Facility to Be Synced for Provider Search

 **Note:** To use the following code sample, ensure that the org has a Specialty record (SpecialtyCode 15 in the code sample).

```
{  
    "providers": [ {  
        "type": "facility",  
        "account": {  
            "fields": {  
                "Name": "UCSF Hospital",  
                "Description": "Test UCSF hospital",  
                "Website": "UCSFHospital21@test.com"  
            },  
            "operatingHours": {  
                "fields": {  
                    "Name": "UCSF Hospital Hours",  
                    "Description": "MWTF8-5"  
                },  
                "timeSlots": [ {  
                    "fields": {  
                        "DayOfWeek": "Monday",  
                        "StartTime": "09:00:00",  
                        "EndTime": "17:30:00"  
                    }  
                } ]  
            }  
        },  
        "healthcareProvider": {  
            "fields": {  
                "ProviderType": "Hospital",  
                "Status": "Active",  
                "EffectiveFrom": "2019-01-01"  
            }  
        },  
        "npis": [ {  
            "fields": {  
                "Npi": "UCSFH21",  
                "NpiType": "Organization",  
                "IsActive": true  
            }  
        } ],  
        "specialties": [ {  
            "fields": {  
                "SpecialtyId": {  
                    "value": "15",  
                    "referenceField": "SpecialtyCode"  
                },  
                "IsPrimarySpecialty": true,  
                "SpecialtyRole": "Specialist",  
                "EffectiveFrom": "2019-01-01",  
                "EffectiveTo": "2036-01-01",  
                "IsActive": true  
            }  
        } ],  
        "boardCertifications": [ {  
    }
```

```
        "fields": {
            "CertificationType": "Dermatology",
            "ExpirationDate": "2030-11-12",
            "Status": "Certified"
        }
    }
}
```

Sample Input - Create a Practitioner with All Possible Related Objects



Note: Before you use the code sample, create existing lookup records in your org for the following objects:

- Care Specialty
 - Care Taxonomy
 - Operating Hours
 - Healthcare Payer Network
 - Account for Healthcare Practitioner Facility

```
[  
 {  
   "providers": [  
     {  
       "type": "practitioner",  
       "contact": {  
         "fields": {  
           "FirstName": "Jimmy",  
           "LastName": "James",  
           "Email": "jj@newsradio.com",  
           "Description": "Jimmy James is a doctor.",  
           "AccountId": "001xx000003GbOJAA0"  
         }  
       },  
     },  
     "contactProfile": {  
       "fields": {  
         "Ethnicity": "Asian.",  
         "Race": "Asian"  
       }  
     },  
     "healthcareProvider": {  
       "fields": {  
         "ProviderType": "Physician",  
         "EffectiveFrom": "2019-01-01",  
         "ProviderPhotoId": "069xx0000004CDSAAM"  
       }  
     },  
     "providerAffiliations": [  
       {  
         "fields": {  
           "AccountId": {  
             "value": "001xx000003GbPvAAK",  
             "referenceField": "Id"  
           }  
         }  
       }  
     ]  
   ]  
 }
```

```
        }
    }
],
"treatedConditions": [
{
    "fields": {
        "ConditionId": {
            "value": "118xx000000MbKkAAK",
            "referenceField": "Id"
        },
        "EffectiveFrom": "2019-01-01",
        "EffectiveTo": "2029-01-01",
        "IsActive": true
    }
}
],
"providerServices": [
{
    "fields": {
        "HealthcareServiceId": {
            "value": "13xxx0000004C92AAE",
            "referenceField": "Id"
        },
        "EffectiveFrom": "2019-01-01",
        "EffectiveTo": "2029-01-01",
        "IsActive": true
    }
}
],
"npis": [
{
    "fields": {
        "Npi": "12345123",
        "NpiType": "Individual",
        "IsActive": true
    }
}
],
"specialties": [
{
    "fields": {
        "SpecialtyId": {
            "value": "20",
            "referenceField": "SpecialtyCode"
        },
        "IsPrimarySpecialty": true,
        "SpecialtyRole": "Specialist",
        "EffectiveFrom": "2019-01-01",
        "EffectiveTo": "2020-01-01",
        "IsActive": true
    }
}
],
```

```
        "fields": {
            "SpecialtyId": {
                "value": "24",
                "referenceField": "SpecialtyCode"
            },
            "IsPrimarySpecialty": false,
            "SpecialtyRole": "Dual",
            "EffectiveFrom": "2019-01-01",
            "EffectiveTo": "2020-01-01",
            "IsActive": true
        }
    }
],
"taxonomies": [
    {
        "fields": {
            "TaxonomyId": {
                "value": "207X00000X",
                "referenceField": "TaxonomyCode"
            },
            "IsPrimaryTaxonomy": true,
            "SourceSystemIdentifier": "",
            "EffectiveFrom": "2019-01-01",
            "EffectiveTo": "2020-01-01",
            "IsActive": true
        }
    },
    {
        "fields": {
            "TaxonomyId": {
                "value": "208200000X",
                "referenceField": "TaxonomyCode"
            },
            "IsPrimaryTaxonomy": false,
            "EffectiveFrom": "2019-01-01",
            "EffectiveTo": "2020-01-01",
            "IsActive": true
        }
    }
],
"facilityNetworks": [
    {
        "fields": {
            "IsActive": true,
            "GenderRestriction": "None",
            "HighestValidAge": 99,
            "LowestValidAge": 10,
            "PanelStatus": "Panel open",
            "PanelLimit": 10
        }
    }
],
"facilityServices": [
    {
```

```
        "fields": {
            "HealthcareServiceId": {
                "value": "13xxx0000004C92AAE",
                "referenceField": "Id"
            },
            "EffectiveFrom": "2019-01-01",
            "EffectiveTo": "2029-01-01",
            "IsActive": true
        }
    }
],
"practitionerFacilities": [
{
    "fields": {
        "AccountId": {
            "value": "001xx000003GdxzAAC",
            "referenceField": "Id"
        },
        "LowestValidAge": 12,
        "OperatingHoursId": {
            "value": "123",
            "referenceField": "phone__c"
        }
    }
},
"providerFacilityServices": [
{
    "fields": {
        "HealthcareServiceId": {
            "value": "13xxx0000004C92AAE",
            "referenceField": "Id"
        },
        "EffectiveFrom": "2019-01-01",
        "EffectiveTo": "2029-01-01",
        "IsActive": true
    }
}
],
"facilityNetworks": [
{
    "fields": {
        "PayerNetworkId": {
            "value": "EB0012397",
            "referenceField": "Code"
        },
        "IsActive": true,
        "GenderRestriction": "Male",
        "HighestValidAge": 99,
        "LowestValidAge": 5,
        "PanelStatus": "Panel open",
        "PanelLimit": 10
    }
},
{
    "fields": {
```

```
        "PayerNetworkId": {
            "value": "UH23029",
            "referenceField": "Code"
        },
        "IsActive": true,
        "GenderRestriction": "Female",
        "HighestValidAge": 99,
        "LowestValidAge": 5,
        "PanelStatus": "Panel open",
        "PanelLimit": 10
    }
}
],
"facilitySpecialties": [
{
    "fields": {
        "SpecialtyId": {
            "value": "20",
            "referenceField": "SpecialtyCode"
        },
        "IsPrimarySpecialty": true,
        "SpecialtyRole": "Specialist"
    }
}
]
},
{
    "fields": {
        "AccountId": {
            "value": "001xx000003GdxzAAC",
            "referenceField": "Id"
        },
        "InitialStartDate": "2018-05-12"
    },
    "facilityNetworks": [
{
    "fields": {
        "PayerNetworkId": {
            "value": "UH23029",
            "referenceField": "Code"
        },
        "IsActive": true,
        "GenderRestriction": "Male",
        "HighestValidAge": 99,
        "LowestValidAge": 5,
        "PanelStatus": "Panel open",
        "PanelLimit": 10
    }
},
{
    "fields": {
        "PayerNetworkId": {
            "value": "UH23039",
            "referenceField": "Code"
        }
    }
}
]
```

```
        },
        "IsActive": true,
        "GenderRestriction": "Male",
        "HighestValidAge": 99,
        "LowestValidAge": 5,
        "PanelStatus": "Panel open",
        "PanelLimit": 10
    }
}
],
"facilitySpecialties": [
{
    "fields": {
        "SpecialtyId": {
            "value": "28",
            "referenceField": "SpecialtyCode"
        },
        "IsPrimarySpecialty": true,
        "SpecialtyRole": "Dual"
    }
}
]
},
"boardCertifications": [
{
    "fields": {
        "CertificationType": "Dermatology",
        "Status": "Certified"
    }
}
],
"awards": [
{
    "fields": {
        "AwardDate": "2019-08-15 17:30:00",
        "AwardedBy": "Barack Obama"
    }
}
],
"businessLicenses": [
{
    "fields": {
        "Name": "Pediatric lab technician",
        "Status": "Draft"
    }
}
],
"accreditations": [
{
    "fields": {
        "Type": "Hospital",
        "SubType": "Children's",
        "AccreditingBody": "Joint Commission",
        "Status": "Active"
    }
}
]
```

```
        "Status": "Accreditated",
        "SourceSystem": "Aetna-SF",
        "SourceSystemIdentifier": "abcd1234"
    }
},
{
    "fields": {
        "Type": "Clinic",
        "SubType": "Children's",
        "AccreditingBody": "Joint Commission",
        "Status": "Verifying"
    }
}
],
"personEducations": [
{
    "fields": {
        "Name": "MedicalDegree",
        "EducationLevel": "Masters",
        "IsActive": true
    }
}
],
"personEmployments": [
{
    "fields": {
        "AnnualIncome": "400000",
        "EmployerPhone": "4148767000"
    }
}
],
"careProviderAdverseActions": [
{
    "fields": {
        "AccreditationId": {
            "value": "123",
            "referenceField": "SourceSystemIdentifier"
        },
        "ActionType": "Disciplinary",
        "Status": "Verified"
    }
},
{
    "fields": {
        "AccreditationId": {
            "value": "123",
            "referenceField": "SourceSystemIdentifier"
        },
        "ActionType": "Disciplinary",
        "Status": "Verified"
    }
}
]
}
```

```
        ],
    },
{
  "providers": [
    {
      "type": "practitioner",
      "contact": {
        "fields": {
          "FirstName": "Rachel",
          "LastName": "Green",
          "Description": "Rachel is a specialist surgeon."
        }
      },
      "contactProfile": {
        "fields": {
          "Ethnicity": "Asian.",
          "Race": "Asian"
        }
      },
      "healthcareProvider": {
        "fields": {
          "ProviderType": "Medical Doctor",
          "ProviderClass": "Solo Practitioner",
          "ProviderPhotoId": "069xx0000004CDsAAM"
        }
      },
      "providerAffiliations": [
        {
          "fields": {
            "AccountId": {
              "value": "001xx000003GbPvAAK",
              "referenceField": "Id"
            }
          }
        }
      ],
      "treatedConditions": [
        {
          "fields": {
            "ConditionId": {
              "value": "118xx000000MbKkAAK",
              "referenceField": "Id"
            },
            "EffectiveFrom": "2019-01-01",
            "EffectiveTo": "2029-01-01",
            "IsActive": true
          }
        }
      ],
      "providerServices": [
        {
          "fields": {
            "HealthcareServiceId": {
              "value": "13xxx0000004C92AAE",
              "referenceField": "Id"
            }
          }
        }
      ]
    }
  ]
}
```

```
        "referenceField": "Id"
    },
    "EffectiveFrom": "2019-01-01",
    "EffectiveTo": "2029-01-01",
    "IsActive": true
}
],
"practitionerFacilities": [
{
    "fields": {
        "AccountId": {
            "value": "001xx000003GYikAAG",
            "referenceField": "Id"
        },
        "IsActive": true
    },
    "facilityNetworks": [
{
        "fields": {
            "PayerNetworkId": {
                "value": "PPO",
                "referenceField": "Code"
            },
            "IsActive": true,
            "LowestValidAge": 0,
            "PanelStatus": "Panel open",
            "PanelLimit": 100
        }
},
{
        "fields": {
            "PayerNetworkId": {
                "value": "HMO",
                "referenceField": "Code"
            },
            "IsActive": true,
            "GenderRestriction": "Female",
            "LowestValidAge": 0,
            "PanelStatus": "Panel open",
            "PanelLimit": 100
        }
}
],
"providerFacilityServices": [
{
    "fields": {
        "HealthcareServiceId": {
            "value": "13xxx0000004C92AAE",
            "referenceField": "Id"
        },
        "EffectiveFrom": "2019-01-01",
        "EffectiveTo": "2029-01-01",
        "IsActive": true
    }
}
]
```

```
        }
    }
],
"facilitySpecialties": [
{
    "fields": {
        "SpecialtyId": {
            "value": "15",
            "referenceField": "SpecialtyCode"
        },
        "IsPrimarySpecialty": true,
        "SpecialtyRole": "Specialist",
        "IsActive": true
    }
}
]
}
]
```

Sample Output Response for Creating a Practitioner with All Possible Related Objects

```
{
  "providers": [
    {
      "code": "201",
      "isSuccess": true,
      "message": "1 successfully processed - 0 failed",
      "providers": [
        {
          "accreditations": [
            {
              "fields": {},
              "id": "0Vlxx0000004CSOCA2"
            },
            {
              "fields": {},
              "id": "0Vlxx0000004CSPCA2"
            }
          ],
          "awards": [
            {
              "fields": {},
              "id": "0cFx00000000XtEAI"
            }
          ],
          "boardCertifications": [
            {
              "fields": {},
              "id": "0Ysxx00000000b7GAA"
            }
          ]
        }
      ]
    }
  ]
}
```

```
],
"businessLicenses": [
  {
    "fields": {},
    "id": "0cExx00000000BJEAY"
  }
],
"careProviderAdverseActions": [
  {
    "fields": {},
    "id": "0etxx0000000HlAAI"
  },
  {
    "fields": {},
    "id": "0etxx0000000HmAAI"
  }
],
"code": "201",
"contact": {
  "fields": {},
  "id": "003xx000004WmIiAAK"
},
"contactProfile": {
  "fields": {},
  "id": "11Axx0000004bCTEAY"
},
"facilityNetworks": [
  {
    "fields": {},
    "id": "0bYxx0000000srEAA"
  }
],
"healthcareProvider": {
  "fields": {},
  "id": "0cmxx00000003HFAAY"
},
"message": "SUCCESS",
"npis": [
  {
    "fields": {},
    "id": "0bNxx0000000rFEAQ"
  }
],
"personEducations": [
  {
    "fields": {},
    "id": "0Srxx0000004CIiCAM"
  }
],
"personEmployments": [
  {
    "fields": {},
    "id": "0Stxx0000004CPACA2"
  }
]
```

```
],
"practitionerFacilities": [
  {
    "facilityNetworks": [
      {
        "fields": {},
        "id": "0bYxx00000000ssEAA"
      },
      {
        "fields": {},
        "id": "0bYxx00000000stEAA"
      }
    ],
    "facilitySpecialties": [
      {
        "fields": {},
        "id": "0bXxx00000000ZVEAY"
      }
    ],
    "fields": {},
    "id": "0bSxx00000000srEAA",
    "identifiers": [],
    "providerFacilityServices": [
      {
        "fields": {},
        "id": "15Mxx0000004CgvEAE"
      }
    ]
  },
  {
    "facilityNetworks": [
      {
        "fields": {},
        "id": "0bYxx00000000suEAA"
      },
      {
        "fields": {},
        "id": "0bYxx00000000svEAA"
      }
    ],
    "facilitySpecialties": [
      {
        "fields": {},
        "id": "0bXxx00000000ZWEAY"
      }
    ],
    "fields": {},
    "id": "0bSxx00000000ssEAA",
    "identifiers": [],
    "providerFacilityServices": []
  }
],
"providerAffiliations": [
  {

```

```
        "fields": {},
        "id": "07kxx0000004D0HAAU"
    },
],
"providerServices": [
{
    "fields": {},
    "id": "15Mxx0000004CguEAE"
},
],
"specialties": [
{
    "fields": {},
    "id": "0bOxx00000000WHEAY"
},
{
    "fields": {},
    "id": "0bOxx00000000WIEAY"
}
],
"taxonomies": [
{
    "fields": {},
    "id": "0bPxx00000000WHEAY"
},
{
    "fields": {},
    "id": "0bPxx00000000WIEAY"
}
],
"treatedConditions": [
{
    "fields": {},
    "id": "1K4xx0000004D3UCAU"
}
],
"type": "practitioner"
}
]
},
{
"code": "201",
"isSuccess": true,
"message": "1 successfully processed - 0 failed",
"providers": [
{
    "accreditations": [],
    "awards": [],
    "boardCertifications": [],
    "businessLicenses": [],
    "careProviderAdverseActions": [],
    "code": "201",
    "contact": {
        "fields": {}
    }
}
```

```
        "id": "003xx000004Wj6KAAS"
    },
    "contactProfile": {
        "fields": {},
        "id": "11Axx0000004aebEAA"
    },
    "facilityNetworks": [],
    "healthcareProvider": {
        "fields": {},
        "id": "0cmxx000000149AAA",
        "providerServices": [
            {
                "fields": {},
                "id": "15Mxx0000004CLwEAM"
            }
        ],
        "treatedConditions": [
            {
                "fields": {},
                "id": "1K4xx0000004ClkCAE"
            }
        ]
    },
    "message": "SUCCESS",
    "npis": [],
    "personEducations": [],
    "personEmployments": [],
    "practitionerFacilities": [
        {
            "facilityNetworks": [
                {
                    "fields": {},
                    "id": "0bYxx00000000CvEAI"
                },
                {
                    "fields": {},
                    "id": "0bYxx00000000CwEAI"
                }
            ],
            "facilitySpecialties": [
                {
                    "fields": {},
                    "id": "0bXxx00000000BJEAY"
                }
            ],
            "fields": {},
            "id": "0bSxx00000000CvEAI",
            "identifiers": [],
            "providerFacilityServices": [
                {
                    "fields": {},
                    "id": "15Mxx0000004CLxEAM"
                }
            ]
        }
    ]
}
```

```

        }
    ],
    "specialties": [],
    "taxonomies": [],
    "type": "practitioner"
}
]
}
}
}
```

Sample Output Response - Partial Success

```
{
  "code": "207",
  "message": "all good",
  "success": true,
  "providers": [
    {
      "type": "facility",
      "code": "",
      "message": "Specialty Code \"409\" not found",
      "success": false,
      "healthcareProvider": {
        "fields": {
          "ProviderType": "Physician",
          "EffectiveFrom": "2019-01-01"
        }
      }
    },
    {
      "type": "practitioner",
      "code": "200",
      "message": "all good",
      "success": true,
      "Contact": {
        "id": "<contact id>"
      },
      "healthcareProvider": {
        "id": "provider id",
        "fields": {
          "ProviderType": "Physician",
          "EffectiveFrom": "2019-01-01",
          "Hc4a_language_c": "Spanish",
          "Hc4a_emergencyContactId_c": {
            "value": "SF21083209",
            "referenceField": "id"
          }
        }
      },
      "npis": [
        {
          "id": "npi id"
        }
      ],
      "specialties": [

```

```
        {
            "id": "specialty id"
        }
    ],
    "taxonomies": [
        {
            "id": "taxonomy id"
        }
    ],
    "practitionerFacilities": [
        {
            "id": "pract. fac. id",
            "facilityNetworks": [
                {
                    "id": "payer. network id"
                },
                {
                    "id": "payer. network id"
                }
            ],
            "facilitySpecialties": [
                {
                    "id": "fac. spec. id"
                }
            ]
        }
    ],
    "boardCertifications" : [
        {
            "id": "board certification id"
        }
    ],
    "awards" : [
        {
            "id": "award id"
        }
    ]
}
```

Error Handling

This API supports bulk transactions, but Healthcare Provider records are committed one at a time. An input request can succeed in full or in part. Each provider included in the request succeeds or fails on its own.

For each record requested, HealthcareProvider creation is rolled back, along with any Account or Contact records created, at the first error for the request. If one related object fails, the remaining related objects are not attempted.

For example, if an input request contains 50 provider records and 10 of those records fail, the remaining 40 records are created. You only need to resubmit the failed providers, not the whole request.

Response Codes

Error Code	Http Status Code	Error Message
Bad Request	400	Your request contains invalid data types. Correct the value in section <section name>, field <JSON key>.
INSUFFICIENT_ACCESS	403	You don't have permission to perform this action on <object name> records. Contact your Salesforce admin for help.
"ResourceApiException CANNOT_INSERT_UPDATE_ACTIVATE_ENTITY"		Account: bad field names on insert/update call: Name
"ResourceApiException CANNOT_INSERT_UPDATE_ACTIVATE_ENTITY"		sObject type 'HealthcareProvider' is not supported. If you are attempting to use a custom object, be sure to append the '__c' after the entity
"ResourceApiException CANNOT_INSERT_UPDATE_ACTIVATE_ENTITY"		Required fields are missing: [Name]
Exception		Invalid format of the given date-time object <input date/time>
Bad Request	400	There is no input in the request body. Resubmit the request with valid input in the request body.
Bad Request	400	We couldn't parse the JSON input. Restructure the JSON and try again.
Too Many Requests	429	Your request contains <XXX> records. Reduce the number of records to fewer than <YYY> and try again.
Wrong Record Type		An Account record is required for a facility. Resubmit the request with an Account record.
Too Many Record Types		Resubmit the request with an Account record or a Contact record but not both.
Specify Provider Type		Provider type is not specified. Resubmit the request indicating provider type as facility or practitioner.
Bad Request	400	"Out of Array of allowed Values(picklist) - for static picklist"
		PersonAccount isn't enabled in the org, if input request is for a PA
		Lookup not found, Specialty Code for eg
Bad Request	400	Missing required fields on standard objects

Upsert Provider

This business-level API enables you to upsert data in Salesforce to represent a practitioner and all the objects and fields in the Provider data model relevant to a Practitioner, such as NPI, provider specialty, and provider taxonomy.

Use this API to support single record create (such as CAQH integration) for multiple providers, along with all their associated data.

Use Cases

Upsert means updating data in healthcare provider record fields and inserting new fields with a single call. For example, you may want to update the operating hours of an existing provider account at the same time as you specify provider type.

- When a group of providers is up for re-credentialing due to changes in specialty or board certifications, bulk-update existing provider records.
- When Hospital Group ABC acquires Hospital Group XYZ, move the providers' affiliation from ABC to XYZ.
- When Hospital Group ABC extends its hours with an additional working day at one of its locations, bulk-update the operating hours for all the providers serving that location.

Supported Fields

The upsert provider API supports all standard and custom fields.

Resources

Details and JSON samples

Code Samples

Here are some JSON samples you can use as a starting point for building request bodies and interpreting responses.

Error Handling

This API supports bulk transactions, but Healthcare Provider records are committed one at a time. An input request can succeed in full or in part. Each provider included in the request succeeds or fails on its own.

Supported Fields

The upsert provider API supports all standard and custom fields.

Any field that is required in the object specification is required in JSON request bodies for this API.

All fields specified in your JSON request body must be writable. The user must have read-write access.

If no user input is provided, the Name field is populated automatically using this format:

```
HealthcareProviderSpecialty entity: Jimmy James Specialty - 10-20-20 11:22:33
```



Note:

- Users can edit the Name field after it has been auto-populated.
- When a user enters data from the UI, the Name field is not auto-populated.

If person accounts are enabled, use the recordType parameter in your input to identify a person account.

If you are updating a practitioner record that has already been created, you only need practitioner ID, not Account or Contact.

Resources

Details and JSON samples

Resource

```
/connect/health/providers
```

Available version

52.0 and later

Authentication

Authorization: Bearer **token**



Note: The Lightning Platform REST API supports OAuth 2.0 (an open protocol to allow secure API authorization). See [Authorize Apps with OAuth](#) in *Salesforce Help* for more details.

HTTP methods

PATCH

Supported Objects

Object	Required	Auto-filled Name field	Required Fields	Input/Output JSON key name
Account (for facility) or Contact (for practitioner)	No	NA		account/contact
Accreditation	No	Yes	Name	accreditations
Award	No	Yes	Name	awards
BoardCertification	No	Yes	Name	boardCertifications
BusinessLicense	No	Yes	Name	businessLicenses
CareProviderAdverseAction	No	Yes	Name	careProviderAdverseActions
CareProviderFacilitySpecialty	No	Yes	Name	facilitySpecialties
HealthcareFacilityNetwork	No	Yes	Name	facilityNetworks
HealthcarePractitionerFacility	No	Yes	Name	practitionerFacilities
HealthcareProvider	Yes	Yes	Name	healthcareProvider
HealthcareProviderNpi	No	Yes	Name	npi
HealthcareProviderSpecialty	No	Yes	Name	specialties
HealthcareProviderTaxonomy	No	Yes	Name	taxonomies
Identifier	No			
OperatingHours	No	Yes	Name, TimeZone	operatingHours
PersonEducation (Practitioner only)		Yes	Name	personEducations
PersonEmployment (Practitioner only)		Yes	Name, RelatedPerson (Account/Contact)	personEmployments
TimeSlots	No	No	OperatingHours, StartTime, EndTime, DayOfWeek	TimeSlots

Code Samples

Here are some JSON samples you can use as a starting point for building request bodies and interpreting responses.

You can create either a practitioner or a facility. A facility is always associated with an account. A practitioner can be associated with a contact or a person account.

- You can edit up to 25 provider records at a time.
- Use the API name of the field (such as RecordType), not the label (such as "Record Type").
- Strings with trailing spaces are not supported.

 **Note:** The comments in these samples are for documentation purposes only and aren't meant to be valid JSON.

Sample Input: Update an Existing Practitioner Field and Insert New Practitioner Fields

Here's what your JSON request body might look like when you change the last name on a practitioner's person account, and also specify that the practitioner is a doctor in a solo practice.

```
{  
  "providers": [  
    {  
      "type": "practitioner",  
      "account": {  
        "id": {  
          "value": "001B000001MVfilIAD",  
          "referenceField": "Id"  
        },  
        "fields": {  
          "LastName": "Stewart1"  
        }  
      }  
      "healthcareProvider": {  
        "fields": {  
          "ProviderType": "Medical Doctor",  
          "ProviderClass": "Solo Practitioner"  
        }  
      }  
    }  
  ]  
}
```

 **Note:** In this case, we are creating a practitioner as a person account.

Sample Input: Update an Existing Facility and Practitioner Field for a Provider and Insert New Fields

Here's what it might look like when you change the last name of a practitioner and also specify that the practitioner is a doctor in a solo practice. (A solo practice is treated as a facility with a single practitioner attached to it.)

```
{  
  "providers": [  
    {  
      "type": "facility",  
      "account": {  
        "id": {  
          "value": "001B000001MVfhEIAT",  
          "referenceField": "Id"  
        },  
        "fields": {  
          "ProviderType": "Medical Doctor",  
          "ProviderClass": "Solo Practitioner"  
        }  
      }  
    }  
  ]  
}
```

```

        "fields": {
            "Name": "Public Hospital 1"
        }
    },
    "healthcareProvider": {
        "fields": {
            "ProviderType": "Medical Doctor",
            "ProviderClass": "Solo Practitioner"
        }
    }
},
{
    "type": "practitioner",
    "contact": {
        "id": {
            "value": "003B000000IqubiIAB",
            "referenceField": "Id"
        },
        "fields": {
            "LastName": "King1"
        }
    },
    "healthcareProvider": {
        "fields": {
            "ProviderType": "Medical Doctor",
            "ProviderClass": "Solo Practitioner"
        }
    }
}
]
}

```



Note: In this case, we are creating a practitioner as a contact on an account. If we had set type to practitioner and specified an account, we would be creating a person account.

Error Handling

This API supports bulk transactions, but Healthcare Provider records are committed one at a time. An input request can succeed in full or in part. Each provider included in the request succeeds or fails on its own.

For each record requested, HealthcareProvider creation is rolled back, along with any Account or Contact records created, at the first error for the request. If one related object fails, the remaining related objects are not attempted.

For example, if an input request contains 50 provider records and 10 of those records fail, the remaining 40 records are created. You only need to resubmit the failed providers, not the whole request.

Response Codes

Error Code	Http Status Code	Error Message
Bad Request	400	Your request contains invalid data types. Correct the value in section <section name>, field <JSON key>.

Error Code	Http Status Code	Error Message
INSUFFICIENT_ACCESS	403	You don't have permission to perform this action on <object name> records. Contact your Salesforce admin for help.
"ResourceApiException CANNOT_INSERT_UPDATE_ACTIVATE_ENTITY"		Account: bad field names on insert/update call: Namea
"ResourceApiException CANNOT_INSERT_UPDATE_ACTIVATE_ENTITY"		sObject type 'HealthcareProvider' is not supported. If you are attempting to use a custom object, be sure to append the '__c' after the entity
"ResourceApiException CANNOT_INSERT_UPDATE_ACTIVATE_ENTITY"		Required fields are missing: [Name]
Exception		Invalid format of the given date-time object <input date/time>
Bad Request	400	There is no input in the request body. Resubmit the request with valid input in the request body.
Bad Request	400	We couldn't parse the JSON input. Restructure the JSON and try again.
Too Many Requests	429	Your request contains <XXX> records. Reduce the number of records to fewer than <YYY> and try again.
Wrong Record Type		An Account record is required for a facility. Resubmit the request with an Account record.
Too Many Record Types		Resubmit the request with an Account record or a Contact record but not both.
Specify Provider Type		Provider type is not specified. Resubmit the request indicating provider type as facility or practitioner.
Bad Request	400	"Out of Array of allowed Values(picklist) - for static picklist"
		PersonAccount isn't enabled in the org, if input request is for a PA
		Lookup not found, Specialty Code for eg
Bad Request	400	Missing required fields on standard objects

Sample Limits Validation (POST)

Validate the samples requested during a visit against the sample limits for that account, product, and sample limit template.

Resource

```
/connect/life-sciences/commercial/sample-limits-validation
```

Available version

65.0

HTTP methods

POST

Request body for POST**JSON example**

```
{  
  "sampleLimitsValidationRequest": {  
    "data": {  
      "providerVisitsData": {  
        "providerVisitData": [  
          {  
            "territory": "<ProviderVisit.Visit.Territory>",  
            "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000",  
            "productDisbursements": [  
              {  
                "productId": "2_childProduct1",  
                "productBatchItemId": "",  
                "accountId": "001XXXXXXXXXXXXAAG",  
                "quantity": 1  
              },  
              {  
                "productBatchItemId": "",  
                "productId": "2_childProduct2",  
                "quantity": 6,  
                "accountId": "001XXXXXXXXXXXXAAG"  
              }  
            ],  
            "providerVisitSampleLimitTransactions": {  
              "001XXXXXXXXXXXXAAG": [  
                {  
                  "providerVisitId": "a2TXXXXXXXXXXXXEAI",  
                  "limitProductId": "2_childProduct1",  
                  "productId": "2_childProduct1",  
                  "providerSampleLimitTemplateName": "PerYearTemplate",  
                  "providerVisitRequestedSampleId": "callSample1",  
                  "ProviderSampleLimitId": "sampleLimit1",  
                  "quantity": "1",  
                  "account": "001XXXXXXXXXXXXAAG",  
                  "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000"  
                },  
                {  
                  "limitProductId": "2_parentProduct1",  
                  "quantity": "6",  
                  "productId": "2_childProduct2",  
                  "ProductDisbursementId": "callSample2",  
                  "ProviderVisitId": "a2TXXXXXXXXXXXXEAI",  
                  "providerSampleLimitTemplateName": "parent_template1",  
                  "ProviderSampleLimitId": "defaultSampleLimit1",  
                  "account": "001XXXXXXXXXXXXAAG",  
                  "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000"  
                }  
              ]  
            }  
          ],  
          "childProviderVisitsData": {  
            "productDisbursements": [  
              {  
                "territory": "<ProviderVisit.Visit.Territory>",  
                "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000",  
                "productDisbursements": [  
                  {  
                    "productId": "2_childProduct1",  
                    "productBatchItemId": "",  
                    "accountId": "001XXXXXXXXXXXXAAG",  
                    "quantity": 1  
                  },  
                  {  
                    "productBatchItemId": "",  
                    "productId": "2_childProduct2",  
                    "quantity": 6,  
                    "accountId": "001XXXXXXXXXXXXAAG"  
                  }  
                ],  
                "providerVisitSampleLimitTransactions": {  
                  "001XXXXXXXXXXXXAAG": [  
                    {  
                      "providerVisitId": "a2TXXXXXXXXXXXXEAI",  
                      "limitProductId": "2_childProduct1",  
                      "productId": "2_childProduct1",  
                      "providerSampleLimitTemplateName": "PerYearTemplate",  
                      "providerVisitRequestedSampleId": "callSample1",  
                      "ProviderSampleLimitId": "sampleLimit1",  
                      "quantity": "1",  
                      "account": "001XXXXXXXXXXXXAAG",  
                      "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000"  
                    },  
                    {  
                      "limitProductId": "2_parentProduct1",  
                      "quantity": "6",  
                      "productId": "2_childProduct2",  
                      "ProductDisbursementId": "callSample2",  
                      "ProviderVisitId": "a2TXXXXXXXXXXXXEAI",  
                      "providerSampleLimitTemplateName": "parent_template1",  
                      "ProviderSampleLimitId": "defaultSampleLimit1",  
                      "account": "001XXXXXXXXXXXXAAG",  
                      "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000"  
                    }  
                  ]  
                }  
              ]  
            }  
          ]  
        ]  
      }  
    }  
  }  
}
```

```

    "accountId": "001XXXXXXXXXXXXXXAAG",
    "productId": "2_childProduct1",
    "productBatchItemId": "",
    "quantity": 1
},
{
    "accountId": "001XXXXXXXXXXXXXXAAG",
    "productId": "2_childProduct1",
    "productBatchItemId": "",
    "quantity": 1
},
{
    "accountId": "001XXXXXXXXXXXXXXAAG",
    "productId": "2_childProduct2",
    "productBatchItemId": "",
    "quantity": 1
}
],
"providerVisitSampleLimitTransactions": {
    "0010p000013CLb1AAG": [
        {
            "providerVisitId": "a2TXXXXXXXXXXXXXEA1",
            "limitProductId": "2_childProduct1",
            "productId": "2_childProduct1",
            "ProductDisbursementId": "",
            "providerVisitRequestedSampleId": "callSample3",
            "providerSampleLimitTemplateName": "PerYearTemplate",
            "ProviderSampleLimitId": "sampleLimit1",
            "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000",
            "account": "001XXXXXXXXXXXXXXAAG",
            "quantity": "1"
        },
        {
            "ProviderVisitId": "a2TXXXXXXXXXXXXXEA1",
            "limitProductId": "2_parentProduct1",
            "productId": "2_childProduct2",
            "ProductDisbursementId": "callSample4",
            "providerVisitRequestedSampleId": "",
            "providerSampleLimitTemplateName": "parent_template1",
            "ProviderSampleLimitId": "defaultSampleLimit1",
            "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000",
            "account": "001XXXXXXXXXXXXXXAAG",
            "quantity": "6"
        }
    ]
}
},
"pendingSyncData": {
    "providerVisitSampleLimitTransactions": {
        "001XXXXXXXXXXXXXXAAG": [
            {
                "providerVisitId": "lscpr1_call_c-639XXXXX-XXXX-XXXX-XXXX-XXXXXXXXXAEB",

```

```

        "providerVisitRequestedSampleId":  

        "lscpr1__callsampleorder_c-988XXXXX-XXXX-XXXX-XXXX-XXXXXXXXXX1BF",  

        "ProductDisbursementId": "",  

        "limitProductId": "a5AXXXXXXXXXXXXXEAU",  

        "productId": "a5AXXXXXXXXXXXXXEAU",  

        "quantity": "1",  

        "visitPlannedStartTime": "2024-12-11T18:28:31.404+0000",  

        "ProviderSampleLimitId": "a5cXXXXXXXXXXXXAAE",  

        "account": "001XXXXXXXXXXXXAAG",  

        "providerSampleLimitTemplateName": "PerYearTemplate"
    }
]
},
"productDisbursements": [
    {}
]
}
},
"action": "validate"
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
sampleLimitRequest Sample Limit Request on page 1774	SampleRequestInput	The payload that contains the sample limit validations to perform in JSON format.	Required	65.0

Response body for POST

[Sample Limits Validation Response Output](#) on page 1844

Visits (POST)

Create visits for sales representatives. For example, for a medical device visit, a sales representative visits the surgeon or a hospital location.

Resource

/connect/general-visit/visits

Resource example

`https://yourInstance.salesforce.com/services/data/vXX.X/connect/general-visit/visits`

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**Root XML tag**

<CreateVisitInput>

JSON example

```
{
  "visitType": "08qSG00000017VhYAI",
  "place": "131SG0000006yazYAA",
  "plannedVisitStartTime": "2023-12-28T09:07:21.205-07:00",
  "status": "Planned",
  "account": "001SG00000Cq7T8YAJ",
  "visitor": [
    {
      "user": "005SG000003z0p9YAC",
      "primary": true
    }
  ],
  "productRequired": [
    {
      "productId": "01tSG00000KOxRYAW",
      "quantity": 1
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
account	String	ID of the account that is associated with a visit.	Required	55.0
actionPlanTemplate	Action Plan Template Input	Represents the details of an action plan template. Action plan templates define the sets of tasks that your sales reps perform during visits.	Optional	55.0
context	String	Purpose of the visit, such as claim or work type.	Optional	55.0
place	String	Indicates the place that sales representatives visit.	Required	55.0
plannedVisitEndTime	String	Date and time when the visit is expected to end.	Optional	55.0
plannedVisitStartTime	String	Date and time when the visit is expected to start.	Required	55.0
productRequired	Product Required Attributes Input[]	Represents the products required for the visit.	Required	55.0

Name	Type	Description	Required or Optional	Available Version
status	String	Indicates the status of the visit. Valid values are: <ul style="list-style-type: none">• Abandoned• Completed• InProgress• Planned	Optional	55.0
statusRemarks	String	Additional remarks or comments provided by the sales representatives.	Optional	55.0
visitPriority	String	Priority of the visit. Valid values are: <ul style="list-style-type: none">• High• Low• Medium	Optional	55.0
visitType	String	ID of the visit type. This field is a lookup to the Worktype object.	Optional	55.0
visitedParty	Visited Party Attributes Input []	Represents the contacts from the customer organization who are being visited.	Optional	55.0
visitor	Visitor Attributes Input []	Represents the service resources from the organization who are executing the visit.	Required	55.0

Response body for POST[Create Visit Output](#)

Work Type Lead Time (POST)

Get a list of work types and their associated lead times that are optimized across regions for a specific advanced therapy.

An advanced therapy process (work procedure) comprises several stages (work types), steps, and tasks, each of which has its own completion time or lead time. For example, the zinotous disease therapy has multiple stages, such as, Apheresis, Manufacturing, and Infusion, each of which consists of discrete steps. Apheresis has a lead time of two days, following which the manufacturing stage begins. This API helps to automate and streamline the advanced therapy management process by getting the optimized work type lead times across various regions.

Resource

```
/connect/health/advanced-therapy-management/worktype-leadtime
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/health/advanced-therapy-management/worktype-leadtime
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "contextId": "0Wwxx0000000DWjCAM",
  "workProcedureId": "0zjSG00000000PpYAI",
  "priority": 5
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextId	String	ID of a program enrollee, an account, or opportunity.	Optional	60.0
priority	Integer	Number between one and ten indicating the priority associated with a country or service territory. This field is useful when you want to override the lead time based on a country or service territory.	Optional	60.0
workProcedureId	String	Advanced therapy ID.	Required	60.0

Response body for POST[Work Type Lead Time Output](#)

Request Bodies

This section lists the request bodies for Life Sciences Cloud Business APIs. The query parameters for an endpoint are listed along with each resource.

To create a JSON request body, specify the properties of the request body in JSON format. If a request body is top-level, it has a root XML tag listed. To create an XML request body, nest the properties as XML tags inside the root XML tag.

[Account User Territory Info Input](#)

Input representation of the Account User Territory Information.

[Action Plan Context Filters Input](#)

Input representation of the action plan context filters.

[Action Plan Template Input](#)

Input representation of an action plan template.

[Action Plan Template Item Filters Input](#)

Input representation of the action plan template item filters.

[Appointed Representative Input](#)

Person who is the appointed representative for the member.

[Assessment Links Input](#)

Associated assessments including id, category, reason and sequence.

[Book Slot Chain Input](#)

Input representation of the request to create service appointments.

[Bulk Presentation Pages Input](#)

Input representation for a presentation page.

[Bulk Presentation Input](#)

Input representation for bulk presentation.

[Bulk Presentation Update Input](#)

Input representation for bulk presentation update.

[Bulk Presentation Pages Update Input](#)

Input representation for a presentation page update.

[Build Identity Verification Context Input](#)

Input representation of the Build Identity Verification Context resource.

[Care Request Case Input](#)

Case related to the care request.

[Care Request Patient Input](#)

The patient for whom the request is being raised.

[Care Authorization Request Input](#)

A complete care authorization request.

[Care Diagnosis Input](#)

Associated diagnosis including code type, name, and description. One or more care diagnoses can be associated with a care request.

[Care Request Drug Input](#)

Requested drug including name, strength, frequency, and instructions for administration. One or more drug requests can be associated with a care request.

[Care Request Input](#)

The general details of a care-related request including member information, admission date, decision reason, and so on. A single request can contain multiple diagnoses or drugs. Care requests include prior authorizations for drugs and services, admission notifications, concurrent review of admissions, appeals, complaints, and grievances.

[Care Request Item Input](#)

The details of a care service request, including name, modifiers, and the effective date. One or more care service requests can be associated with a care request.

[Care Requests List Input](#)

A list of care authorization requests.

[Care Request Reviewer Input](#)

The general details of the care request, care request item, care request drug, or care diagnosis associated with the care request reviewer.

[Care Request Subscriber Input](#)

The primary member on the plan.

[Content Document Input](#)

Input representation for documents linked to the care request record.

[Create Visit Request Input](#)

Input representation of the create visit request.

[Custom Field Value Input](#)

Adds additional information to any fields not mapped by the medication statement API.

[Digital Verification Input](#)

Input representation of the request to perform verification tasks for digital verification records.

[Digital Verification Input Fields Map](#)

Input representation of the key-value pairs containing the fields to be updated for the digital verification.

[Dispenser Address Input](#)

Address of the pharmacy.

[Download Provider Input](#)

The request representation to download provider data using an external identifier.

[Document Management Input](#)

Input representation for the document split request.

[Document Process Input](#)

Input representation of the content document or received document record to create or update a Salesforce object record.

[Enrollee Product Input](#)

Data for a single enrollee product.

[Fields Without Conflict Input](#)

Input representation of the list of fields without conflict for record creation.

[FHIR Address Input](#)

Input representation for the Address FHIR object.

[FHIR Codeable Concept Input](#)

Input representation for the CodeableConcept FHIR object.

[FHIR Codeable Concept Or ID Input](#)

Input representation for FHIR Codeable Concept or ID.

[FHIR Coding Input](#)

Input representation for the Coding FHIR object.

[FHIR Contact Point Input](#)

Input representation for the ContactPoint FHIR object.

[FHIR Dispense Input](#)

The input representation of FHIR Dispense.

[FHIR Dosage Input](#)

The input representation of dosage information for a patient's medication.

[FHIR Dose](#)

Input representation for the dosage quantity.

[FHIR Dose And Rate](#)

Input representation of the specified dose and rate.

[FHIR Human Name Input](#)

The input representation for the name of a person and all its associated metadata.

[FHIR Identifier Input](#)

The input representation of the Identifier FHIR object.

[FHIR Medication Statement](#)

Input representation for the Medication Statement FHIR object.

[FHIR Medication Resource Input](#)

The input representation of FHIR Medication.

[FHIR Patient Input](#)

Input representation for the FHIR patient resource.

[FHIR Rate](#)

Input representation for dosage rate.

[FHIR Reference Input](#)

The input representation for the Reference FHIR object.

[FHIR Request](#)

Input representation for the supply of medication, along with information about how it should be administered.

[First Reviewer Input](#)

The name of the person who reviewed the request.

[FHIR Unit Of Measure](#)

Input representation for Unit of Measure.

[FHIR Unit Of Measure Or ID](#)

Input representation for Unit of Measure Or Id.

[General Practitioner Input](#)

Member's primary or general care practitioner.

[Medical Director Input](#)

Name of the medical director who reviewed the request.

[Merge Customers Input](#)

The request to merge a Consolidated Account with a Merged Account.

[Original Denial Medical Director Input](#)

The name of the medical director who denied the original request.

[Patient Contact Party Input](#)

The input representation of the patient contact party.

[Page Products Input](#)

Input representation that contains the product and guidance IDs associated with a presentation page.

[Page Specification Input](#)

Input representation of the page specification details.

[Page Specification List Input](#)

Input representation of the page specification list.

[Patient Communication Language Input](#)

Input representation of the patient communication language.

[Patient Input](#)

Input containing data for a single patient.

[Product Required Attributes Input](#)

Input representation of the products required for the visit.

[Program Enrollment Input](#)

Request body for care program enrollment.

[Slot Input](#)

Input representation of an appointment slot.

[Reopened By Input](#)

The name of the person who reopened the care request.

[Requesting Practitioner Input](#)

Ordering or referring practitioner for the request.

[Sample Limits Request Data Input](#)

Input representation for the sample limits data to validate.

[Sample Limits Validation Input](#)

Input representation for sample limits validation.

[Servicing Facility Input](#)

Facility where the service is being provided.

[Servicing Practitioner Input](#)

Practitioner administering the service.

[Search Input](#)

Input representation for Search API

[Transport Location Input](#)

Input representation for Transport Location

[User Credentials Input](#)

Input representation of the user credentials to perform digital verification.

[Visited Party Attributes Input](#)

Input representation of the visiting party. For example, for a medical device visit, the visiting party can be the surgeon and the anesthesiologist.

[Visitor Attributes Input](#)

Input representation of the visitor attributes. For example, for a medical device visit, visitor can be the sales representative and the clinical specialist.

[Work Type Lead Time Input](#)

Input representation of the request to get a list of work types and their associated lead times.

Account User Territory Info Input

Input representation of the Account User Territory Information.

JSON Example

```
{  
  "accountId": "00xxG00000n6bbxxAA",
```

```
"fieldNames": ["City", "IsActive", "LanguageLocaleKey"]
}
```

Properties

Parameter Name	Type	Description	Required or Optional	Available Version
accountId	String	The ID of the user. Using this ID, this API fetches users associated with territories linked to this account.	Required	64.0
fieldNames	<list>String	The additional user fields that you want to retrieve. The user ID and name is fetched by default.	Optional	64.0

Action Plan Context Filters Input

Input representation of the action plan context filters.

Properties

Name	Type	Description	Required or Optional	Available Version
contextId	String	ID of the Generic Visit Task Context record.	Optional	55.0
kpiIds	String[]	IDs of the corresponding key performance indicators (KPI) associated with the context ID.	Optional	55.0

Action Plan Template Input

Input representation of an action plan template.

JSON example

```
"actionPlanTemplate": {
  "templateId": "0PTxx0000004C92GAE",
  "templateItemFilters": [
    {
      "templateItemId": "0PJxx0000004C92GAE"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
templateId	String	ID of an action plan template.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
templateItemFilters	Action Plan Template Item Filters Input	Details of the action plan template item filters.	Optional	55.0

Action Plan Template Item Filters Input

Input representation of the action plan template item filters.

Properties

Name	Type	Description	Required or Optional	Available Version
contextFilters	Action Plan Context Filters Input	Details of the action plan context filters.	Optional	55.0
templateItemId	String	ID of the action plan template item.	Optional	55.0

Appointed Representative Input

Person who is the appointed representative for the member.

Root XML tag

```
<appointedRepresentative>
```

JSON example

```
{
  "firstName": "Jane",
  "lastName": "Doe"
}
```

Properties

Name	Type	Description	Required	Available Version
firstName	String	First Name of the appointed representative.	No	46.0
lastName	String	Last Name of the appointed representative.	No	46.0
suffix	String	Name suffix of the appointed representative.	No	46.0
birthDate	String	Birth date of the appointed representative.	No	46.0



Tip: All the fields in this input are optional. However, it is advisable to provide as much information as possible to find a unique appointed representative record to associate with your care request.

Assessment Links Input

Associated assessments including id, category, reason and sequence.

Root XML tag

```
<assessmentLinks>
```

JSON example

```
{
  "id": "0U3SG00000068Cb0AI",
  "category": "0iPSG0000024n0z2AA",
  "reason": "0iPSG0000024n0z2AA",
  "sequence": 333
}
]
```

Properties

Name	Type	Description	Required	Available Version
category	String	The category that the supporting content belongs to.	No	63.0
id	String	The assessment used as the supporting content.	Yes	55.0
reason	String	The reason why the supporting content is required.	No	63.0
sequence	String	The sequence number of the content when multiple contents are available.	No	63.0

Book Slot Chain Input

Input representation of the request to create service appointments.

JSON example

```
{
  "careProgramEnrolleeId": "08pxx0000004C92AAE",
  "workProcedureId": "08pxx0000004C92AAE",
  "slots": [
    {
      "schedStartTime": "2022-03-26T16:30:00.000+0000",
      "schedEndTime": "2022-03-26T16:30:00.000+0000",
      "workTypeId": "08pxx0000004C92AAE",
      "serviceTerritoryId": "08pxx0000004C92AAE",
      "serviceResourceId": "08pxx0000004C92AAE",
      "contactId": "08pxx0000004C92AAE",
      "appointmentType": "08pxx0000004C92AAE",
      "subject": "Apheresis",
      "additionalInformation": "Needs Cab Assistance",
      "street": "1 Market Street",
    }
  ]
}
```

```

    "city":"San Francisco",
    "state":"CA",
    "postalCode":"94105",
    "country":"USA",
    "comments":"",
    "status":"Scheduled"
},
{
    "schedStartTime":"2022-03-26T16:30:00.000+0000",
    "schedEndTime":"2022-03-26T16:30:00.000+0000",
    "workTypeId":"08pxx0000004C92AAE",
    "serviceTerritoryId":"08pxx0000004C92AAE",
    "serviceResourceId":"08pxx0000004C92AAE",
    "contactId":"08pxx0000004C92AAE",
    "appointmentType":"08pxx0000004C92AAE",
    "subject":"Apheresis",
    "additionalInformation":"Needs Cab Assistance",
    "street":"1 Market Street",
    "city":"San Francisco",
    "state":"CA",
    "postalCode":"94105",
    "country":"USA",
    "comments":"",
    "status":"Scheduled"
},
{
    "schedStartTime":"2022-03-26T16:30:00.000+0000",
    "schedEndTime":"2022-03-26T16:30:00.000+0000",
    "workTypeId":"08pxx0000004C92AAE",
    "serviceTerritoryId":"08pxx0000004C92AAE",
    "serviceResourceId":"08pxx0000004C92AAE",
    "contactId":"08pxx0000004C92AAE",
    "appointmentType":"08pxx0000004C92AAE",
    "subject":"Apheresis",
    "additionalInformation":"Needs Cab Assistance",
    "street":"1 Market Street",
    "city":"San Francisco",
    "state":"CA",
    "postalCode":"94105",
    "country":"USA",
    "comments":"",
    "status":"Scheduled"
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
careProgramEnrolleeId	String	ID of the care program enrollee for whom the service appointments must be created.	Required	60.0
slots	Slots []	Appointment slots to be booked.	Required	60.0

Name	Type	Description	Required or Optional	Available Version
workProcedureId	String	ID of the work procedure for which the service appointments are to be created.	Required	60.0

Bulk Presentation Pages Input

Input representation for a presentation page.

Properties

Property Name	Type	Description	Required	Available version
activationDate	Datetime	Date and time when the page becomes active.	Optional	65.0
contentDocumentId	String	ID of the content document for the page. You cannot provide this parameter when you pass the <code>fileId</code> as only one of the two parameters are allowed. For the <code>PRESENTATION_PDF</code> content type, provide the file input (<code>contentDocumentId</code> or <code>fileId</code>) within the <code>metadata</code> only for the first page (<code>pageNumber 1</code>) in the <code>pages</code> list.	Required when <code>contentType</code> is <code>PRESENTATION_ZIP</code> , <code>PRESENTATION_PAGE</code> , <code>PRESENTATION_PDF</code>	65.0
customFields	Object	Map of custom field names and their values for the page.	Optional	65.0
deactivationDate	Datetime	Date and time when the page becomes inactive.	Optional	65.0
fileId	String	File ID for the page content. You can pass this parameter if you wish to process a new file that you will include in the request. You cannot provide this parameter when you pass the <code>contentDocumentId</code> as only one of the two are allowed. For the <code>PRESENTATION_PDF</code> content type, provide the file input (<code>contentDocumentId</code> or <code>fileId</code>) within the <code>metadata</code> only for the first page (<code>pageNumber 1</code>) in the <code>pages</code> list.	Required when <code>contentType</code> is <code>PRESENTATION_ZIP</code> .	65.0
id	String	ID of the presentation page. This is either the source system ID or the Salesforce ID.	Required	65.0

Property Name	Type	Description	Required	Available version
isAdditionalContent	Boolean	Indicates whether the page contains additional content (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Optional	65.0
mandatory	Boolean	Indicates if the page is mandatory for the presentation (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Optional	65.0
name	String	Name of the presentation page.	Required only if the <code>contentType</code> is <code>PRESENTATION_PDF</code> or <code>PRESENTATION_ZIP</code>	65.0
pageNumber	Integer	Page number for the presentation page. This value must be unique and within the range of 1 to 200.	Required only when <code>contentType</code> is <code>PRESENTATION_PDF</code> . This field is not required when the <code>contentType</code> is <code>PRESENTATION_ZIP</code> or <code>PRESENTATION_PAGE</code>	65.0
products	List< Products Input on page 1769>	List of products and their associated guidance IDs for the page.	Optional	65.0

Bulk Presentation Input

Input representation for bulk presentation.

Properties

Property Name	Type	Description	Required	Available version
activationDate	Datetime	Date when the presentation becomes active. If no value is provided, the default is the current date and time.	Optional	65.0
customFields	Object	Map of custom field names and their values for the presentation.	Optional	65.0
deactivationDate	Datetime	Date when the presentation becomes inactive.	Optional	65.0
enableDoubleTapZoom	Boolean	Indicates if double-tap zoom is enabled for the presentation (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Optional	65.0
enablePinchZoom	Boolean	Indicates if pinch zoom is enabled for the presentation (<code>true</code>) or not (<code>false</code>).	Optional	65.0
id	String	ID of the presentation.	Optional	65.0

Property Name	Type	Description	Required	Available version
name	String	Name of the presentation.	Required	65.0
playerGesture	String	Player gesture type. Possible values are: <ul style="list-style-type: none">• TAPTOP• TAPBOTTOM• SWIPEUP• SWIPEDOWN.	Optional	65.0
publicContent Name	String	Public name for the content.	Optional	65.0
publicContent Url	String	URL for the public content.	Optional	65.0
sendByEmail	Boolean	Indicates if the presentation can be sent by email (<code>true</code>) or not (<code>false</code>).	Optional	65.0
topics	List<String>	List of topics associated with the presentation. TopicAssignment must be enabled for Presentation before using this field.	Optional	65.0

Bulk Presentation Update Input

Input representation for bulk presentation update.

Properties

Property Name	Type	Description	Required	Available version
activation Date	Datetime	Date when the presentation becomes active.	Optional	65.0
customFields	Object	Map of custom field names and their values for the presentation.	Optional	65.0
deactivation Date	Datetime	Date when the presentation becomes inactive.	Optional	65.0
enableDouble TapZoom	Boolean	Indicates if double-tap zoom is enabled for the presentation (<code>true</code>) or not (<code>false</code>).	Optional	65.0
enablePinch Zoom	Boolean	Indicates if pinch zoom is enabled for the presentation (<code>true</code>) or not (<code>false</code>).	Optional	65.0
id	String	ID of the presentation.	Required	65.0
name	String	Name of the presentation.	Optional	65.0

Property Name	Type	Description	Required	Available version
playerGesture	String	Player gesture type. Possible values are: <ul style="list-style-type: none">• TAPTOP• TAPBOTTOM• SWIPEUP• SWIPEDOWN.	Optional	65.0
publicContent Name	String	Public name for the content.	Optional	65.0
publicContent Url	String	URL for the public content.	Optional	65.0
sendByEmail	Boolean	Indicates if the presentation can be sent by email (<code>true</code>) or not (<code>false</code>).	Optional	65.0
topics	List<String>	List of topics associated with the presentation.	Optional	65.0

Bulk Presentation Pages Update Input

Input representation for a presentation page update.

Properties

Property Name	Type	Description	Required	Available version
activation Date	Datetime	Date and time when the page becomes active.	Optional	65.0
content DocumentId	String	ID of the content document for the page. You cannot provide this parameter when you pass the <code>fileId</code> as only one of the two parameters are allowed as only one of the two are allowed. For bulk presentation PATCH request, this parameter is not mandatory when the <code>contentType</code> is <code>PRESENTATION_PDF</code> .	Required when <code>contentType</code> is <code>PRESENTATION_ZIP</code> .	65.0
customFields	Object	Map of custom field names and their values for the page.	Optional	65.0
deactivation Date	Datetime	Date and time when the page becomes inactive.	Optional	65.0
fileId	String	File ID for the page content. Pass this parameter if you want to process a new file that you will include in the request. You cannot provide this parameter when you pass the <code>contentDocumentId</code> as	Required when <code>contentType</code> is <code>PRESENTATION_ZIP</code> .	65.0

Property Name	Type	Description	Required	Available version
		only one of the two are allowed. For bulk presentation PATCH request, this parameter is not mandatory when the contentType is PRESENTATION_PDF.		
id	String	ID of the presentation page. This is either the source system ID or the Salesforce ID.	Optional	65.0
isAdditionalContent	Boolean	Indicates whether the page contains additional content (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Optional	65.0
mandatory	Boolean	Indicates if the page is mandatory for the presentation (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>	Optional	65.0
name	String	Name of the presentation page.	Optional	65.0
pageNumber	Integer	Page number for the presentation page. This value must be unique and within the range of 1 to 200.	Required when contentType is PRESENTATION_PDF.	65.0
products	List<Products Input on page 1769>	List of products and their associated guidance IDs for the page.	Optional	65.0

Build Identity Verification Context Input

Input representation of the Build Identity Verification Context resource.

Root XML tag

```
<buildVerificationContextInput>
```

JSON example

```
{
  "objectName": "Account",
  "selectedRecordId": "001xx000003GZeFAAW"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
objectName	String	The API name of the caller's object.	Optional	54.0
selectedRecordId	String	The record ID of the caller.	Optional	54.0

Care Request Case Input

Case related to the care request.

Root XML tag

<case>

Properties

Name	Type	Description	Required	Available Version
caseOrigin	String	The source of the case, such as Email, Phone, or Web. Maps to: Case.Origin	Yes	46.0
caseReason	String	The reason why the case was created, such as Instructions not clear, or User didn't attend training. Maps to: Case.Reason	No	46.0
description	String	A text description of the case. Limit: 32 KB. Maps to: Case.Description	No	46.0
parentCaseNumber	String	The ID of the parent case in the hierarchy. Maps to: Case.ParentId	No	46.0
priority	String	The importance or urgency of the case, such as High, Medium, or Low. Maps to: Case.Priority	No	46.0
status	String	The status of the case. Maps to: Case.Status	No	46.0
subject	String	The subject of the case. Limit: 255 characters. Maps to: Case.Subject	Yes	46.0
type	String	The type of case, such as Feature Request or Question. Maps to: Case.Type	No	46.0
suppliedCompany	String	The company name that was entered when the case was created. This field can't be updated after the case has been created. Maps to: Case.SuppliedCompany	No	46.0
suppliedEmail	String	The email address that was entered when the case was created. This field can't be updated after the case has been created. Maps to: Case.SuppliedEmail	No	46.0
suppliedName	String	The name that was entered when the case was created. This field can't be updated after the case has been created. Maps to: Case.SuppliedName	No	46.0
suppliedPhone	String	The phone number that was entered when the case was created. This field can't be updated after the case has been created. Maps to: Case.SuppliedPhone	No	46.0

Care Request Patient Input

The patient for whom the request is being raised.

Root XML tag

```
<patient>
```

Properties

Name	Type	Description	Required	Available Version
addressLine1	String	Patient's address line 1.	No	46.0
addressLine2	String	Patient's Address Line 2.	No	46.0
birthDate	String	Date of birth of the patient. Maps to: <code>CareRequest.MemberDateOfBirth</code>	No	46.0
		 Note: Required if birth date is specified in the member account record. Must be in <code>DateTime</code> format; for example: <code>1970-04-30T00:00:00</code> .		
city	String	City where the patient lives.	No	46.0
firstName	String	First name of the patient.	No	46.0
gender	String	Gender of the patient. Maps to: <code>CareRequest.MemberGender</code>	No	46.0
lastName	String	Last name of the patient.	Yes	46.0
medicareCoverage	Boolean	Indicates whether the patient has Medicare coverage. Maps to: <code>CareRequestExtension.IsMedicareCoverage</code>	No	46.0
memberCondition	String	Free-form description of the patient's condition. Maps to: <code>CareRequest.MemberCondition</code>	No	46.0
memberID	String	Lookup to MemberPlan.MemberNumber.  Note: Not the insurance identifier for the member in Account.	Yes	46.0
memberPrognosis	String	Indicator of the provider's prognosis for the patient. Maps to: <code>CareRequest.MemberPrognosis</code>	No	46.0
memberStatus	String	The patient's status at admission, date of outpatient service, or start of care. Maps to: <code>CareRequest.MemberStatus</code>	No	46.0
middleName	String	Middle name of the patient.	No	46.0

Name	Type	Description	Required	Available Version
state	String	State where the patient lives.	No	46.0
suffix	String	Name suffix of the patient.	No	46.0
zipCode	String	ZIP code of the patient's address.	No	46.0

Care Authorization Request Input

A complete care authorization request.

Root XML tag

```
<careAuthorization>
```

JSON example

```
{
  "careRequestCase": {
    "caseOrigin": "Web",
    "subject": "Case No 10"
  },
  "contentDocumentLinks": [
    {
      "id": "069xx0000004CNZAA2"
    },
    {
      "id": "069xx0000004CNYAA2"
    }
  ],
  "assessmentLinks": [
    {
      "id": "0U3SG00000068Cb0AI"
    }
  ],
  "patient": {
    "lastName": "Fedex",
    "firstName": "Roger"
  },
  "careRequestItems": [
    {
      "name": "95810",
      "codeType": "CPT",
      "sourceSystem": "source_system_name",
      "codeDescription": "Dysuria",
      "sourceSystemIdentifier": "0015cmi",
      "quantity": "15"
    }
  ],
  "careRequestDrugs": [
    {
      "sourceSystem": "source_system_name",
      "daysSupply": "10",
      "frequency": "16",
      "name": "Dihydrocodeine Phosphate"
    }
  ]
}
```

```

        "name": "Metoprolol"
    }
],
"careRequest": {
    "requestingPractitionerSpecialty": "Neurologist",
    "placeOfService": "InPatient",
    "sourceSystemIdentifier": "0015",
    "name": "Care Request 15",
    "requestingPractitionerLicense": "M.D",
    "sourceSystem": "source_system_name",
    "servicingPractitionerLicense": "M.D",
    "servicingPractitionerSpecialty": "Hospitalist",
    "recordType": "Complaint"
},
"careDiagnoses": [
{
    "sourceSystem": "ajSource",
    "name": "G47.30",
    "codeDescription": "Sleep apnea, unspecified",
    "codeType": "ICD-10-CM"
}
]
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
assessmentLinks	Assessment Links Input []	The details of the associated assessments used as the supporting content.	Optional	55.0
careDiagnoses	Care Diagnosis Input []	List of associated diagnosis including code type, name, and description. One or more care diagnoses can be associated with a care request.	Optional	46.0
careRequest	Care Request Input []	The general details of a care-related request including member information, admission date, decision reason, and so on. A single request can contain multiple diagnoses, services, or drugs. Care requests include prior authorizations for drugs and services, admission notifications, concurrent review of admissions, appeals, complaints, and grievances.	Optional	46.0
careRequestDrugs	Care Request Drug Input []	List of requested drug including name, strength, frequency, and instructions for administration. One or more drug requests can be associated with a care request.	Optional	46.0
careRequestItems	Care Request Item Input []	The details of a care service request, including name, modifiers, and the	Optional	46.0

Name	Type	Description	Required or Optional	Available Version
		effective date. One or more care service requests can be associated with a care request.		
contentDocumentLinks	Documents Input	List of clinical documents to be attached as content document links to the prior authorization request.	Optional	55.0
careRequestCase	Care Request Case Input	Case related to the care request.	Optional	46.0
patient	Care Request Patient Input	The patient for whom the request is being raised.	Optional	46.0
subscriber	Care Request Subscriber Input	The primary member on the plan.	Optional	46.0
transportLocations	Transport Location Input	List of Transport Locations.	Optional	46.0

Care Diagnosis Input

Associated diagnosis including code type, name, and description. One or more care diagnoses can be associated with a care request.

Root XML tag

```
<careDiagnosis>
```

JSON example

```
{
  "sourceSystem": "source_system_name",
  "name": "G47.30",
  "codeDescription": "Sleep apnea, unspecified",
  "codeType": "ICD-10-CM"
}
```

Properties

Name	Type	Description	Required	Available Version
careRequestReviewers	Care Request Reviewer Input	The care diagnosis associated with the care request reviewer. Maps to: <code>CareDiagnosis.CareRequestReviewers</code>	No	52.0
codeDescription	String	Diagnosis code description. Maps to: <code>CareDiagnosis.CodeDescription</code>	No	46.0
codeType	String	Code type for the diagnosis. Maps to: <code>CareDiagnosis.CodeType</code>	No	46.0

Name	Type	Description	Required	Available Version
codeTypeID	String	ID of the code type for the diagnosis. Maps to: <code>CareDiagnosis.CodeTypeIdentifier</code>	No	46.0
diagnosisCodeSet	String	The diagnosis code set. Maps to: <code>CareDiagnosis.DiagnosisCodeSet</code>	No	52.0
dischargeCode	String	Discharge diagnosis code. Maps to: <code>CareDiagnosis.DischargeCode</code>	No	46.0
dischargeCodeDescription	String	Description of the discharge diagnosis code. Maps to: <code>CareDiagnosis.DischargeCodeDescription</code>	No	46.0
dischargeCodeType	String	Code type for the discharge diagnosis. Maps to: <code>CareDiagnosis.DischargeCodeType</code>	No	46.0
dischargeCodeTypeId	String	ID of the code type for the discharge diagnosis. Maps to: <code>CareDiagnosis.DischargeCodeTypeIdentifier</code>	No	46.0
dischargeDiagnosisCodeSet	String	The discharge diagnosis code set associated with the care diagnosis. Maps to: <code>CareDiagnosis.DischargeDiagnosisCodeSet</code>	No	52.0
dischargeDiagnosisEffectiveDate	String	Effective date for the discharge diagnosis. Maps to: <code>CareDiagnosis.DischargeDiagnosisEffectiveDate</code>	No	46.0
dischargeDiagnosisEndDate	String	Termination date for the discharge diagnosis. Maps to: <code>CareDiagnosis.DischargeDiagnosisEndDate</code>	No	46.0
effectiveDate	String	Effective date for the diagnosis. Maps to: <code>CareDiagnosis.EffectiveDate</code>	No	46.0
endDate	String	Termination date for the diagnosis. Maps to: <code>CareDiagnosis.EndDate</code>	No	46.0
healthcareDiagnosisCode	String	Healthcare Diagnosis Code.	No	46.0
healthConditionId	String	The health condition that's associated with the member. Maps to: <code>CareDiagnosis.HealthCondition</code>	No	57.0
id	String	ID of the Care Diagnosis.	Required for PATCH	46.0
modifiedCode	String	Modified diagnosis code. Maps to: <code>CareDiagnosis.ModifiedCode</code>	No	46.0

Name	Type	Description	Required	Available Version
modifiedCode Description	String	Modified diagnosis code description. Maps to: <code>CareDiagnosis.ModifiedCodeDescription</code>	No	46.0
modifiedCode Type	String	Code type for the modified diagnosis. Maps to: <code>CareDiagnosis.ModifiedCodeType</code>	No	46.0
modifiedCode TypeId	String	ID of the code type for the modified diagnosis. Maps to: <code>CareDiagnosis.ModifiedCodeTypeIdentifier</code>	No	46.0
modifiedDiagnosis CodeSet	String	The modified diagnosis code set associated with the care diagnosis. Maps to: <code>CareDiagnosis.ModifiedDiagnosisCodeSet</code>	No	52.0
modifiedEffective Date	String	Modified effective date for the diagnosis. Maps to: <code>CareDiagnosis.ModifiedEffectiveDate</code>	No	46.0
modifiedEnd Date	String	Modified termination date for the diagnosis. Maps to: <code>CareDiagnosis.ModifiedEndDate</code>	No	46.0
modifiedPrimary Diagnosis	Boolean	Modified Primary Diagnosis	No	46.0
name	String	Name of the diagnosis code. Maps to: <code>CareDiagnosis.Name</code>	Yes	46.0
presentOn Admission	String	Specifies if the health condition was present at the time of member admission. Maps to: <code>CareDiagnosis.PresentOnAdmission</code>	No	57.0
primary	Boolean	Indicates whether it is a primary diagnosis (<code>true</code>) or not (<code>false</code>).	No	46.0
primaryDischarge Diagnosis	Boolean	Indicates whether it is a primary Discharge Diagnosis (<code>true</code>) or not (<code>false</code>).	No	46.0
sourceSystem	String	System from which this request was sourced. Maps to: <code>CareDiagnosis.SourceSystem</code>	No	46.0
sourceSystem Identifier	String	ID of the system from which the request was sourced. Maps to: <code>CareDiagnosis.SourceSystemIdentifier</code>	No	46.0
sourceSystem Modified	String	Timestamp of the most recent update from the source system. Maps to: <code>CareDiagnosis.SourceSystemModified</code>	No	46.0

Care Request Drug Input

Requested drug including name, strength, frequency, and instructions for administration. One or more drug requests can be associated with a care request.

Root XML tag

```
<careRequestDrug>
```

JSON example

```
{
  "sourceSystem": "source_system_name",
  "daysSupply": "10",
  "frequency": "16",
  "name": "Metoprolol"
}
```

Properties

Name	Type	Description	Required	Available Version
approvedUnits	Integer	Approved quantity of the drug. Maps to: <code>CareRequestDrug.ApprovedUnits</code>	No	46.0
AssertionIdentifier	String	The unique identifier of the coverage assertion. This is unavailable for PATCH requests.	No	63.0
authApprovalIdentifier	String	The unique identifier assigned to the drug on approval of the authorization request. Maps to: <code>CareRequestDrug.AuthApprovalIdentifier</code>	No	57.0
authorizationRefIdentifier	String	The unique identifier of the authorization request associated with this requested drug. Maps to: <code>CareRequestDrug.AuthorizationRefIdentifier</code>	No	57.0
careRequestReviewers	Care Request Reviewer Input	The care request drug associated with the care request reviewer. Maps to: <code>CareRequestDrug.CareRequestReviewers</code>	No	52.0
clinicalDetermination	String	The clinical determination of the drug request. Maps to: <code>CareRequestDrug.ClinicalDetermination</code>	No	52.0
clinicalDeterminationNote	String	The notes related to the clinical determination. Maps to: <code>CareRequestDrug.ClinicalDeterminationNote</code>	No	52.0
clinicalDeterminationReason	String	The reason for the clinical determination. Maps to: <code>CareRequestDrug.ClinicalDeterminationReason</code>	No	52.0

Name	Type	Description	Required	Available Version
code	String	Code for the drug. Maps to: CareRequestDrug.Code	No	46.0
codeType	String	ID code type for the drug. Maps to: CareRequestDrug.CodeType	No	46.0
daysSupply	Integer	Number of days to supply the drug. Maps to: CareRequestDrug.DaysSupply	No	46.0
decisionDate	String	The date and time when the decision was made for this drug request. Maps to: CareRequestDrug.DecisionDate	No	52.0
deniedUnits	Integer	Denied quantity of the drug. Maps to: CareRequestDrug.DeniedUnits	No	46.0
dispenserAddress	Dispenser Address Input	Pharmacy address.	No	46.0
dispenserFaxNumber	String	Pharmacy fax number. Maps to: CareRequestDrug.DispenserFaxNumber	No	46.0
dispenserId	String	ID for the pharmacy. Maps to: CareRequestDrug.DispenserIdentifier	No	46.0
dispenserName	String	Name of the pharmacy. Maps to: CareRequestDrug.DispenserName	No	46.0
dispenserPhone	String	Pharmacy phone number. Maps to: CareRequestDrug.DispenserPhoneNumber	No	46.0
dispenserTaxId	String	Pharmacy tax identification number. Maps to: CareRequestDrug.DispenserTaxIdentifier	No	46.0
dispensingPharmacy	String	The pharmacy that dispenses the drug. Maps to: CareRequestDrug.DispensingPharmacy	No	52.0
dose	String	Dose of the drug. Maps to: CareRequestDrug.Dose	No	46.0
drugAdministrationSetting	String	The setting in which the drug is expected to be administered to the patient. Maps to: CareRequestDrug.DrugAdministrationSetting	No	57.0
frequency	String	Frequency of the drug. Maps to: CareRequestDrug.Frequency	No	46.0

Name	Type	Description	Required	Available Version
medicationCode	String	The code of the care request drug. Maps to: CareRequestDrug.MedicationCode	No	52.0
id	String	ID of the Care Request Drug.	Required for PATCH.	46.0
modifiedCode	String	Code for the modified drug. Maps to: CareRequestDrug.ModifiedCode	No	46.0
modifiedCodeType	String	ID code type for the modified drug. Maps to: CareRequestDrug.ModifiedCodeType	No	46.0
medicationRef ObjectId	String	The medication request or statement associated with the care request drug.	No	57.0
modifiedDays Supply	Integer	Number of days of supply for the modified drug. Maps to: CareRequestDrug.ModifiedDaysSupply	No	46.0
modifiedDose	String	Dose of the modified drug. Maps to: CareRequestDrug.ModifiedDose	No	46.0
modifiedFrequency	String	Frequency of the modified drug. Maps to: CareRequestDrug.ModifiedFrequency	No	46.0
modifiedName	String	Name of the modified drug. Maps to: CareRequestDrug.ModifiedName	No	46.0
modifiedSig	String	Directions for use of the modified drug. Maps to: CareRequestDrug.ModifiedSig	No	46.0
modifiedStrength	String	Strength of the modified drug. Maps to: CareRequestDrug.ModifiedStrength	No	46.0
modifiedTherapy Duration	Integer	Duration of therapy for the modified drug. Maps to: CareRequestDrug.ModifiedTherapyDuration	No	46.0
modifiedUnits	Integer	Modified quantity of the drug. Maps to: CareRequestDrug.ModifiedUnits	No	46.0
name	String	Name of the drug. Maps to: CareRequestDrug.Name	No	46.0
prescription Date	String	Date for the prescription. Maps to: CareRequestDrug.PrescriptionDate	No	46.0
prescription FillDate	String	Date of fills for the prescription. Maps to: CareRequestDrug.PrescriptionFillDate	No	57.0

Name	Type	Description	Required	Available Version
prescriptionFills	Integer	Number of fills for the prescription. Maps to: <code>CareRequestDrug.PrescriptionFills</code>	No	46.0
priority	String	The priority representing the urgency of the drug's authorization request. Maps to: <code>CareRequestDrug.Priority</code>	No	57.0
requestType	String	The type of drug request. Maps to: <code>CareRequestDrug.RequestType</code>	No	57.0
responseDateTime	String	The date and time when the response was sent for the drug request. This is unavailable for PATCH requests.	No	63.0
serviceCategory	String	Name of the service type such as medical care, diagnostic radiology, pharmacy, or diagnostic laboratory. Maps to: <code>CareRequestDrug.ServiceCategory</code>	No	46.0
serviceCategoryCode	String	Alphanumeric code that uniquely identifies a service type. Maps to: <code>CareRequestDrug.ServiceCategoryCode</code>	No	46.0
servicingFacility	Servicing Facility Input	The facility where a patient receives service of the requested drug. Maps to: <code>CareRequestDrug.ServicingFacility</code>	No	57.0
servicingProvider	Servicing Practitioner Input	The healthcare provider who provides the service of the requested drug. Maps to: <code>CareRequestDrug.ServicingProvider</code>	No	57.0
sig	String	Directions for use of the drug. Maps to: <code>CareRequestDrug.Sig</code>	No	46.0
sourceSystem	String	System from which this request was sourced. Maps to: <code>CareRequestDrug.SourceSystem</code>	No	46.0
sourceSystemIdentifier	String	ID of the system from which the request was sourced. Maps to: <code>CareRequestDrug.SourceSystemIdentifier</code>	No	46.0
sourceSystemModified	String	Timestamp of the most recent update from the source system. Maps to: <code>CareRequestDrug.SourceSystemModified</code>	No	46.0
status	String	The authorization status of the requested drug. Maps to: <code>CareRequestDrug.Status</code>	No	57.0

Name	Type	Description	Required	Available Version
statusReason	String	The reason for the authorization status of the requested drug. Maps to: CareRequestDrug.StatusReason	No	57.0
strength	String	Strength of the drug. Maps to: CareRequestDrug.Strength	No	46.0
submittedDateTime	String	The date and time when the drug request was submitted. This is unavailable for PATCH requests.	No	63.0
therapyDuration	Integer	Duration of therapy for the drug. Maps to: CareRequestDrug.TherapyDuration	No	46.0
transactionNumber	Integer	The transaction number assigned to the drug request. This is unavailable with PATCH requests.	No	63.0
units	Integer	Quantity of the drug. Maps to: CareRequestDrug.Units	No	46.0

Care Request Input

The general details of a care-related request including member information, admission date, decision reason, and so on. A single request can contain multiple diagnoses or drugs. Care requests include prior authorizations for drugs and services, admission notifications, concurrent review of admissions, appeals, complaints, and grievances.

Root XML tag

```
<careRequest>
```

JSON example

```
{
  "requestingPractitionerSpecialty": "Neurologist",
  "placeOfService": "InPatient",
  "sourceSystemIdentifier": "0015",
  "name": "Care Request 15",
  "requestingPractitionerLicense": "M.D",
  "sourceSystem": "source_system_name",
  "servicingPractitionerLicense": "M.D",
  "servicingPractitionerSpecialty": "Hospitalist",
  "recordType": "Complaint"
}
```

Properties

Name	Type	Description	Required	Available Version
acknowledgement LetterSentDate	String	Date and time when an acknowledgment letter was sent to the requester. Maps to: <code>CareRequest.AcknowledgementLetterSentDate</code>	No	46.0
actualAdmission Date	String	Actual admission date for the patient. Maps to: <code>CareRequest.ActualAdmissionDate</code>	No	46.0
actualDischarge Date	String	Actual discharge date for the patient. Maps to: <code>CareRequest.ActualDischargeDate</code>	No	46.0
admission Notes	String	Notes related to the admission. Maps to: <code>CareRequest.AdmissionNotes</code>	No	46.0
admission Source	String	Where the patient was admitted from, for example, a clinic or an emergency room. Maps to: <code>CareRequest.AdmissionSource</code>	No	46.0
admissionType	String	Type of admission, for example, emergency or elective. Maps to: <code>CareRequest.AdmissionType</code>	No	46.0
ambulanceTransport Distance	Integer	Ambulance Transport Distance	No	46.0
ambulanceTransport Reason	String	Reason for ambulance transport. Maps to: <code>CareRequestExtension.AmbulanceTransportReason</code>	No	46.0
ambulanceTransport Type	String	Type of ambulance transport. Maps to: <code>CareRequestExtension.AmbulanceTransportType</code>	No	46.0
aorReceived Date	String	Date and time when the Appointment of Representative (AOR) form was received. Maps to: <code>CareRequest.AorReceivedDate</code>	No	46.0
aorRequestedDate	String	Date and time when the AOR form was requested. Maps to: <code>CareRequest.AorRequestedDate</code>	No	46.0
appealEffectuation DateTime	String	The effective date of the outcome of the appeal request. For example, if a claim was successfully appealed, this field displays the date when the claim was paid. Maps to: <code>CareRequestExtension.AppealEffectuationDateTime</code>	No	52.0

Name	Type	Description	Required	Available Version
appealRequestReasonType	String	Specifies the reason for raising the appeal request. Maps to: <code>CareRequest.AppealRequestReasonType</code>	No	52.0
appointedRepVerbalContactDate	String	Date and time of verbal contact with the member's appointed representative. Maps to: <code>CareRequest.AppointedRepVerbalContactDate</code>	No	46.0
appointedRepWrittenContactDate	String	Date and time correspondence was sent to the member's appointed representative. Maps to: <code>CareRequest.AppointedRepWrittenContactDate</code>	No	46.0
appointedRepresentativeInput	Appointed Representative Input	Appointed representative for the member. If provided, the first name, last name, birthdate, and suffix fields are used to find a unique Id, which is used to update <code>CareRequest.AppointedRepresentativeId</code> field.	No	46.0
approvedLengthOfStay	Integer	Approved number of days for the admission. Maps to: <code>CareRequest.ApprovedLengthOfStay</code>	No	46.0
approvedLevelOfCare	String	Approved level of care for the patient, for example, Hospital-Observation or SNF-Rehabilitation. Screen reader support enabled. Maps to: <code>CareRequest.ApprovedLevelOfCare</code>	No	46.0
authorizationRefIdentifier	String	The unique identifier of the authorization request. Maps to: <code>CareRequestExtension.AuthorizationRefIdentifier</code>	No	57.0
careRequestReviewers	Care Request Reviewer Input	The care request associated with the care request reviewer. Maps to: <code>CareRequest.CareRequestReviewers</code>	No	52.0
caseSubStatus	String	Sub status of care request in each stage of care request. Maps to: <code>CareRequest.CaseSubStatus</code>	No	57.0
claimNumber	String	Claim number for the medical service or medication, if one exists. Maps to: <code>CareRequest.ClaimNumber</code>	No	46.0
clientSourceIdentifier	String	An identifier of the client's source system that sent the care request. This is unavailable for PATCH requests.	No	63.0

Name	Type	Description	Required	Available Version
clinicalCaseType	String	Clinical case type for the patient, for example, High Risk Fall or Adult Diabetes. Maps to: <code>CareRequest.ClinicalCaseType</code>	No	46.0
criteriaMet	String	Indicates whether criteria for care was met. Maps to: <code>CareRequest.CriteriaMet</code>	No	46.0
cumulativeLengthOfStay	Integer	Total number of days for the admission. Maps to: <code>CareRequest.CumulativeLengthOfStay</code>	No	46.0
currentLevelOfCare	String	Level of care that the patient is receiving. Maps to: <code>CareRequest.CurrentLevelOfCare</code>	No	46.0
decisionDate	String	Date by which the decision must be made for the request. Maps to: <code>CareRequest.DecisionDate</code>	No	46.0
decisionLetter	String	The text of the determination letter sent to the member and provider. Maps to: <code>CareRequest.DecisionLetter</code>	No	46.0
decisionNotes	String	Notes related to the decision. Maps to: <code>CareRequest.DecisionNotes</code>	No	46.0
decisionReason	String	Reason for the decision. Maps to: <code>CareRequest.DecisionReason</code>	No	46.0
decisionReasonDescription	String	Text describing the reason for the decision. Maps to: <code>CareRequest.DecisionReasonDescription</code>	No	46.0
deniedLengthOfStay	Integer	Number of days denied for the admission. Maps to: <code>CareRequest.DeniedLengthOfStay</code>	No	46.0
deniedLevelOfCare	String	Level of care denied for the patient. Maps to: <code>CareRequest.DeniedLevelOfCare</code>	No	46.0
dispositionNotes	String	Notes related to the disposition of the request. Maps to: <code>CareRequest.DispositionNotes</code>	No	46.0
documentAttachmentStatus	String	The current status of the document upload based on the checklist provided to the reviewers. Maps to: <code>CareRequestExtension.DocumentAttachmentStatus</code>	No	55.0

Name	Type	Description	Required	Available Version
		<p>Valid values are:</p> <ul style="list-style-type: none"> • Complete • Incomplete 		
dueDate	String	Date the request is due for completion. Maps to: <code>CareRequest.DueDate</code>	No	46.0
effectiveFrom	String	The start date for an effective-date range. Maps to: <code>CareRequest.EffectiveFrom</code>	No	46.0
effectiveTo	String	The end date for an effective-date range. Maps to: <code>CareRequest.EffectiveTo</code>	No	46.0
expirationDate	String	Expiration date for the request. Maps to: <code>CareRequest.ExpirationDate</code>	No	46.0
extendedRequest	Boolean	Indicates whether a request was extended. Maps to: <code>CareRequest.IsExtendedRequest</code>	No	46.0
extensionRequest ReceivedDate	String	Date and time an extension was requested. Maps to: <code>CareRequest.ExtensionRequestReceivedDate</code>	No	46.0
external ComplaintId	String	Complaint ID number. Maps to: <code>CareRequest.ExternalComplaintIdentifier</code>	No	46.0
facility RecordNumber	String	The medical record number used to identify a patient. Maps to: <code>CareRequest.FacilityRecordNumber</code>	No	46.0
facility RoomBedType	String	Type of facility bed for the patient. Maps to: <code>CareRequest.FacilityRoomBedType</code>	No	46.0
facilityRoom Number	String	The facility room number for the patient. Maps to: <code>CareRequest.FacilityRoomNumber</code>	No	46.0
finalLevel OfCare	String	Final level of care the patient. Maps to: <code>CareRequest.FinalLevelOfCare</code>	No	46.0
firstReviewer	First Reviewer Input	The person who reviewed the request.	No	46.0
first ReviewerNotes	String	Notes from the first reviewer related to the case. Maps to: <code>CareRequest.FirstReviewerNotes</code>	No	46.0

Name	Type	Description	Required	Available Version
generalPractitioner	General Practitioner Input	Member's primary or general care practitioner. Maps to: CareRequest.generalPractitioner	No	46.0
generalPractitionerVerbalNotificationDate	Date	Date when the primary care practitioner was verbally notified of the decision. Maps to: CareRequest.GeneralPractitionerVerbalNotificationDate	No	46.0
generalPractitionerWrittenNotificationDate	Date	Date when the primary care practitioner was notified of the decision by written correspondence. Maps to: CareRequest.GeneralPractitionerWrittenNotificationDate	No	46.0
grievanceType	String	Specifies the type of grievance. Maps to: CareRequest.GrievanceType	No	52.0
healthCareProvider	String	The healthcare provider associated with the care request against whom the Grievance is filed. Maps to: CareRequestExtension.HealthCareProvider	No	52.0
homeHealthCertificationEndDate	Date	Certification end date for home health care. Maps to: CareRequestExtension.HomeHealthCertificationEndDate	No	46.0
homeHealthCertificationStartDate	Date	Certification start date for home health care. Maps to: CareRequestExtension.HomeHealthCertificationStartDate	No	46.0
homeHealthStartDate	Date	Date that home health services are scheduled or anticipated to start. Maps to: CareRequestExtension.HomeHealthStartDate	No	46.0
id	String	ID of the Care Request.	Required for PATCH.	46.0
independentReviewDetermination	String	The determination made by the independent review. Maps to: CareRequestExtension.IndependentReviewDetermination	No	52.0
independentReviewDeterminationDate	Date	The date when the determination was made by the independent review. Maps to: CareRequestExtension.IndependentReviewDeterminationDate	No	52.0
independentReviewSubmissionDate	Date	The date when the review request was submitted for independent review. Maps to: CareRequestExtension.IndependentReviewSubmissionDate	No	52.0

Name	Type	Description	Required	Available Version
infoReceived Date	String	Date and time when additional information was received from the provider or member. Maps to: <code>CareRequest.InfoReceivedDate</code>	No	46.0
infoRequested Date	String	Date and time when additional information was requested from the provider or member. Maps to: <code>CareRequest.InfoRequestedDate</code>	No	46.0
initialDenial NotificationDate	String	Date of initial denial notification. Maps to: <code>CareRequest.InitialDenialNotificationDate</code>	No	46.0
initialDenial NotificationTime	String	The time when the initial care request was denied. Maps to <code>CareRequest.InitialDenialNotificationTime</code>	No	52.0
isIndependentReview Required	Boolean	Indicates whether independent review is required. Maps to <code>CareRequestExtension.IsIndependentReviewRequired</code>	No	52.0
isReadmission	Boolean	Indicates whether the care request is for a readmission. Maps to <code>CareRequest.IsReadmission</code>	No	52.0
medicalDirector Medical Director Input	String	The medical director who reviewed the request.	No	46.0
medicalDirector Notes	String	Notes from the medical director related to the request. Maps to: <code>CareRequest.MedicalDirectorNotes</code>	No	46.0
memberContact Date	String	Date and time when the member was contacted. Maps to: <code>CareRequest.MemberContactDateTime</code>	No	46.0
memberGroup Number	String	Insurance group number for the member. Maps to: <code>CareRequest.MemberGroupNumber</code>	No	46.0
memberPrimary Plan	String	The primary insurance plan of a member associated with the care request when the member is insured under multiple plans. Maps to: <code>CareRequest.MemberPrimaryPlan</code>	No	52.0
memberSecondary Plan	String	The secondary insurance plan of a member associated with the care request when the member is insured under multiple plans. Maps to: <code>CareRequest.MemberSecondaryPlan</code>	No	52.0

Name	Type	Description	Required	Available Version
memberVerbalNotificationDate	String	Date when the member was verbally notified of the decision. Maps to: <code>CareRequest.MemberVerbalNotificationDate</code>	No	46.0
memberWrittenNotificationDate	String	Date when the member was notified of the decision by written correspondence. Maps to: <code>CareRequest.MemberWrittenNotificationDate</code>	No	46.0
modificationDate	String	Date the case was modified. Maps to: <code>CareRequest.ModificationDate</code>	No	46.0
modifiedLengthOfStay	Integer	Modified number of days for the admission. Maps to: <code>CareRequest.ModifiedLengthOfStay</code>	No	46.0
modifiedLevelOfCare	String	Modified level of care for the patient. Maps to: <code>CareRequest.ModifiedLevelOfCare</code>	No	46.0
name	String	Name of the Care Request. Maps to: <code>CareRequest.Name</code>	Yes	46.0
nextReviewDate	String	Date the next review is scheduled for completion. Maps to: <code>CareRequest.NextReviewDate</code>	No	46.0
nursingHomeResidentialStatus	String	Nursing home-resident status at the time of service. Maps to: <code>CareRequestExtension.NursingHomeResidentialStatus</code>	No	46.0
originalDenialMedicalDirectorInput	Original Denial Medical Director Input	The medical director who denied the original request.	No	46.0
parProvider	String	Indicator of whether this provider has entered into an agreement with the insurance carrier. Maps to: <code>CareRequest.ParProvider</code>	No	46.0
placeOfService	String	Place of service for the member's care such as an inpatient hospital or an ambulatory surgery center. Maps to: <code>CareRequest.PlaceOfService</code>	No	46.0
practitionerContactDate	String	Date and time when the provider was contacted. Maps to: <code>CareRequest.PractitionerContactDateTime</code>	No	46.0

Name	Type	Description	Required	Available Version
priorDischargeStatus	String	Specifies the previous discharge status of the member. Maps to: <code>CareRequestExtension.PriorDischargeStatus</code>	No	52.0
quantity	Integer	Quantity of the request.	No	46.0
quantityType	String	Quantity type for the request such as days, units, or visits. Maps to: <code>CareRequest.QuantityType</code>	No	46.0
receivedDate	String	Date the request was received. Maps to: <code>CareRequest.ReceivedDate</code>	No	46.0
reconsiderationDenialNotificationDate	String	Date of reconsideration denial notification. Maps to: <code>CareRequest.ReconsiderationDenialNotificationDate</code>	No	46.0
reconsiderationDenialNotificationTime	String	The time of reconsideration denial notification. Maps to: <code>CareRequest.ReconsiderationDenialNotificationTime</code>	No	52.0
recordType	String	Record type of the care request object.	No	46.0
recordTypeId	String	ID of the record type of the care request object.	No	46.0
referenceCareRequestCase	String	The reference care request case number associated with the care request. Maps to: <code>CareRequest.ReferenceCareRequestCase</code>	No	52.0
referenceCaseNumber	String	Reference authorization number for an appeal, complaint, or grievance. Maps to: <code>CareRequest.ReferenceCaseNumber</code>	No	46.0
reopenDecisionDateTime	String	Date and time the request was reopened. Maps to: <code>CareRequest.ReopenDecisionDateTime</code>	No	52.0
reopenReason	String	Reason the request was reopened. Maps to: <code>CareRequest.ReopenReason</code>	No	46.0
reopenReasonDescription	String	Description of why the request was reopened. Maps to: <code>CareRequest.ReopenReasonDescription</code>	No	46.0
reopenRequestOutcome	String	The result of the reopen request. Maps to: <code>CareRequestExtension.ReopenRequestOutcome</code>	No	52.0
reopenRequestType	String	The type of reopen request. Maps to: <code>CareRequestExtension.ReopenRequestType</code>	No	52.0

Name	Type	Description	Required	Available Version
reopenedBy	Reopened By Input	The user who reopened the care request. Maps to: <code>CareRequestExtension.ReopenedBy</code>	No	52.0
reopenedByUserId	String	The ID of the user who reopened the care request. Maps to: <code>CareRequestExtension.ReopenedByUserId</code>	No	52.0
reopenedDate	Date	Date the request was reopened. Maps to: <code>CareRequest.ReopenedDate</code>	No	46.0
requestExtensionReason	String	The reason for requesting the care extension. Maps to: <code>CareRequestExtension.RequestExtensionReason</code>	No	52.0
requestExtnDecisionDateTime	DateTime	The date when the decision to extend the care request extension was made. Maps to: <code>CareRequestExtension.RequestExtnDecisionDateTime</code>	No	52.0
requestOutcome	String	Specifies the outcome of the request. Maps to: <code>CareRequestExtension.RequestOutcome</code>	No	52.0
requestOutcomeDesc	String	The description of the request outcome. Maps to: <code>CareRequestExtension.RequestOutcomeDesc</code>	No	52.0
requestType	String	Category type of the request. Maps to: <code>CareRequestExtension.RequestType</code>	No	46.0
requestedDate	Date	Date the request was originally requested. Maps to: <code>CareRequest.RequestedDate</code>	No	46.0
requestedLengthOfStay	Integer	Requested length of stay for the patient. Maps to: <code>CareRequest.RequestedLengthOfStay</code>	No	57.0
requestedLevelOfCare	String	Requested level of care for the patient. Maps to: <code>CareRequest.RequestedLevelOfCare</code>	No	46.0
requesterType	String	Indicates the role of the individual initiating the request. Maps to: <code>CareRequest.RequesterType</code>	No	46.0
requestingPractitioner	Requesting Practitioner Input	Ordering or referring practitioner for the request.	No	46.0
requestingPractitionerLicense	String	Requesting Practitioner License Maps to: <code>CareRequest.RequestingPractitionerLicense</code>	No	46.0

Name	Type	Description	Required	Available Version
requestingPractitionerSpecialty	String	Specialty of the practitioner, for example, Family Practice or General Surgery. Maps to: <code>CareRequest.RequestingPractitioner.Specialty</code>	No	46.0
requestingPractitionerVerbalNotificationDate	String	Date when the practitioner was verbally notified of the decision. Maps to: <code>CareRequest.RequestingPractitioner.VerbalNotificationDate</code>	No	46.0
requestingPractitionerWrittenNotificationDate	String	Date when the practitioner was notified of the decision by written correspondence. Maps to: <code>CareRequest.RequestingPractitioner.WrittenNotificationDate</code>	No	46.0
resolutionDate	String	Date when the complaint, appeal, or grievance was resolved. Maps to: <code>CareRequest.ResolutionDate</code>	No	46.0
resolutionDescription	String	The resolution details provided for the complaint, appeal, or grievance. Maps to: <code>CareRequestExtension.ResolutionDescription</code>	No	52.0
resolutionLetterSentDate	String	Date and time when a resolution letter was sent to the requester. Maps to: <code>CareRequest.ResolutionLetterSentDate</code>	No	46.0
resolutionNotes	String	Resolution notes for the request. Maps to: <code>CareRequest.ResolutionNotes</code>	No	46.0
reviewDate	String	Date the review was completed. Maps to: <code>CareRequest.ReviewDate</code>	No	46.0
rootCauseNotes	String	Field for notes related to the root cause for the request. Maps to: <code>CareRequest.RootCauseNotes</code>	No	46.0
scheduledAdmissionDate	String	Anticipated admission date for the patient. Maps to: <code>CareRequest.ScheduledAdmissionDate</code>	No	46.0
scheduledDischargeDate	String	Scheduled discharge date for the patient. Maps to: <code>CareRequest.ScheduledDischargeDate</code>	No	46.0
serviceDate	String	Date when patient received the service. Maps to: <code>CareRequest.ServiceDate</code>	No	46.0
serviceLevel	String	The level of service rendered. Maps to: <code>CareRequestExtension.ServiceLevel</code>	No	46.0

Name	Type	Description	Required	Available Version
serviceType	String	Classification of the type of service. Maps to: <code>CareRequestExtension.ServiceType</code>	No	46.0
serviceor MedicationReceived	Boolean	Indicates whether the member has already received the medial service or medication. Maps to: <code>CareRequest.IsServiceOrMedicationReceived</code>	No	46.0
servicingFacility	Servicing Facility Input	Facility where the service is being provided.	No	46.0
servicingPractitioner	Servicing Practitioner Input	Practitioner administering the service.	No	46.0
servicingPractitioner License	String	License type of the practitioner. Maps to: <code>CareRequest.ServicingPractitionerLicense</code>	No	46.0
servicingPractitioner Specialty	String	Specialty of the practitioner. Maps to: <code>CareRequest.ServicingPractitionerSpecialty</code>	No	46.0
sourceSystem	String	System from which this request was sourced. Maps to: <code>CareRequest.SourceSystem</code>	No	46.0
sourceSystem Identifier	String	ID of the system from which the request was sourced. Maps to: <code>CareRequest.SourceSystemIdentifier</code>	No	46.0
sourceSystem Modified	String	The timestamp of the most recent update from the source system. Maps to: <code>CareRequest.SourceSystemModified</code>	No	46.0
supportingDocUrl	String	The URL of supporting documentation such as a questionnaire. This is unavailable for PATCH requests.	No	63.0
unitOfMeasure	String	The unit of measure associated with the prior authorization request. Maps to: <code>CareRequestExtension.UnitOfMeasure</code> This field is a lookup to <code>UnitOfMeasure</code> .	No	55.0

Care Request Item Input

The details of a care service request, including name, modifiers, and the effective date. One or more care service requests can be associated with a care request.

Root XML tag

```
<careRequestItem>
```

JSON example

```
{
  "name": "95810",
  "codeType": "CPT",
  "sourceSystem": "source_system_name",
  "codeDescription": "Dysuria",
  "sourceSystemIdentifier": "0015cmi",
  "quantity": "15"
}
```

Properties

Name	Type	Description	Required	Available Version
approvedLengthOfStay	Integer	The number of days requested for the admission. Maps to: CareRequestItem.ApprovedLengthOfStay	No	52.0
approvedLevelOfCare	Integer	Specifies the approved level of care for the patient. Maps to: CareRequestItem.ApprovedLevelOfCare	No	52.0
approvedQuantity	Integer	The approved quantity of the care item. Maps to: CareRequestItem.ApprovedQuantity	No	46.0
approvedServiceEndDate	String	The end date of the approved service that the patient received. Maps to: CareRequestItem.ApprovedServiceEndDate	No	52.0
approvedServiceStartDate	String	The start date of the approved service that the patient received. Maps to: CareRequestItem.ApprovedServiceStartDate	No	52.0
AssertionIdentifier	String	The unique identifier of the coverage assertion. This is unavailable for PATCH requests.	No	63.0
authApprovalIdentifier	String	The unique identifier assigned to the item on approval of the prior authorization request. Maps to: CareRequestItem.AuthApprovalIdentifier	No	57.0
authorizationRefIdentifier	String	The unique identifier of the prior authorization request associated with this requested item. Maps to: CareRequestItem.AuthorizationRefIdentifier	No	57.0
careRequestReviewers	Care Request Reviewer Input	The care request item associated with the care request reviewer. Maps to: CareRequestItem.CareRequestReviewers	No	52.0

Name	Type	Description	Required	Available Version
clinicalDetermination	String	The clinical determination of the care request. Maps to: <code>CareRequestItem.ClinicalDetermination</code>	No	52.0
clinicalDeterminationNotes	String	The notes related to the clinical determination. Maps to: <code>CareRequestItem.ClinicalDeterminationNotes</code>	No	52.0
clinicalDeterminationReason	String	The reason for the clinical determination. Maps to: <code>CareRequestItem.ClinicalDeterminationReason</code>	No	52.0
clinicalServiceRequestId	String	The clinical service request associated with the care request item. Maps to: <code>CareRequestItem.ClinicalServiceRequest</code>	No	57.0
code	String	ID of the service code. Maps to: <code>CareRequestItem.Name</code>	No	46.0
codeDescription	String	Description of the denied service code. Maps to: <code>CareRequestItem.CodeDescription</code>	No	46.0
codeType	String	Code type for the service. Maps to: <code>CareRequestItem.CodeType</code>	No	46.0
codeTypeId	String	ID of the code type for the service. Maps to: <code>CareRequestItem.CodeTypeIdentifier</code>	No	46.0
cumulativeLengthOfStay	Integer	The number of days a patient is admitted. Maps to: <code>CareRequestItem.CumulativeLengthOfStay</code>	No	52.0
currentLevelOfCare	String	Specifies the level of care the patient is receiving. Maps to: <code>CareRequestItem.CurrentLevelOfCare</code>	No	52.0
decisionDate	String	The date and time when the last decision was made for this care request item. Maps to: <code>CareRequestItem.DecisionDate</code>	No	52.0
deniedLevelOfCare	String	The level of care denied for the patient. Maps to: <code>CareRequestItem.DeniedLevelOfCare</code>	No	52.0
deniedQuantity	Integer	The quantity of the denied service. Maps to: <code>CareRequestItem.DeniedQuantity</code>	No	46.0

Name	Type	Description	Required	Available Version
effectiveDate	String	Effective date for the diagnosis. Maps to: <code>CareRequestItem.EffectiveDate</code>	No	46.0
endDate	String	Termination date for the service. Maps to: <code>CareRequestItem.EndDate</code>	No	46.0
freeFormProcedureDescription	String	Free-form description of the procedure. Maps to: <code>CareRequestItem.FreeFormProcedureDescription</code>	No	46.0
healthcareProcedureCode	String	Healthcare Procedure Code.	No	46.0
id	String	ID of the <code>CareRequestItem</code> .	Required for PATCH.	46.0
modifiedCareEndDate	String	Modified Care End Date	No	46.0
modifiedCode	String	Modified Code	No	46.0
modifiedCodeDescription	String	Description of the modified service code. Maps to: <code>CareRequestItem.ModifiedCodeDescription</code>	No	46.0
modifiedCodeType	String	Code type for the modified service. Maps to: <code>CareRequestItem.ModifiedCodeType</code>	No	46.0
modifiedCodeTypeId	String	ID of the code type for the modified service. Maps to: <code>CareRequestItem.ModifiedCodeTypeIdentifier</code>	No	46.0
modifiedEffectiveDate	String	Effective date for the modified service. Maps to: <code>CareRequestItem.ModifiedEffectiveDate</code>	No	46.0
modifiedLevelOfCare	String	Specifies the modified level of care for the patient. Maps to: <code>CareRequestItem.ModifiedLevelOfCare</code>	No	52.0
modifiedModifier	String	Modifier for modified service code. Maps to: <code>CareRequestItem.ModifiedModifier</code>	No	46.0
modifiedModifierDescription	String	Modifier description for modified service code. Maps to: <code>CareRequestItem.ModifiedModifierDescription</code>	No	46.0
modifiedProcedureCodeSet	String	The code set for the modified service, drug, or device associated with the care request item. Maps to: <code>CareRequestItem.ModifiedProcedureCodeSet</code>	No	52.0

Name	Type	Description	Required	Available Version
modifiedQuantity	Integer	The modified quantity of requested care. Maps to: <code>CareRequestItem.ModifiedQuantity</code>	No	46.0
modifier1	String	First modifier for the service code. Maps to: <code>CareRequestItem.Modifier</code>	No	46.0
modifier1Description	String	Description for the first modifier for the service code. Maps to: <code>CareRequestItem.ModifierDescription</code>	No	46.0
modifier2	String	Second modifier for service code. Maps to: <code>CareRequestItem.Modifier2</code>	No	46.0
modifier2Description	String	Description of the second modifier for the service code. Maps to: <code>CareRequestItem.Modifier2Description</code>	No	46.0
modifier3	String	Third modifier for service code. Maps to: <code>CareRequestItem.Modifier3</code>	No	46.0
modifier3Description	String	Description of the third modifier for the service code. Maps to: <code>CareRequestItem.Modifier3Description</code>	No	46.0
modifier4	String	Fourth modifier for service code. Maps to: <code>CareRequestItem.Modifier4</code>	No	46.0
modifier4Description	String	Description of the fourth modifier for the service code. Maps to: <code>CareRequestItem.Modifier4Description</code>	No	46.0
modifierCodeSet	String	The modifier code set for the service code associated with the care request item. Maps to <code>CareRequestItem.ModifierCodeSet</code>	No	52.0
name	String	Name of the care request item. Maps to <code>CareRequestItem.Name</code>	No	46.0
priority	String	The priority representing the urgency of the item's authorization request. Maps to <code>CareRequestItem.Priority</code>	No	57.0
procedureCodeSet	String	The code set for the service, drug, or device associated with the care request item. Maps to <code>CareRequestItem.ProcedureCodeSet</code>	No	52.0
quantity	Integer	The quantity of the item that is requested. Maps to: <code>CareRequestItem.Quantity</code>	No	46.0

Name	Type	Description	Required	Available Version
quantityType	String	Quantity type for the request such as days, units, or visits. Maps to: <code>CareRequestItem.QualityType</code>	No	46.0
reasonCode	String	The reason justifying the care request of the item. Maps to: <code>CareRequestItem.ReasonCode</code>	No	57.0
requestType	String	The type of item request. Maps to: <code>CareRequestItem.RequestType</code>	No	57.0
requestedLengthOfStay	Integer	The number of days requested for the admission. Maps to: <code>CareRequestItem.RequestedLengthOfStay</code>	No	52.0
requestedLevelOfCare	String	Specifies the requested level of care for the patient. Maps to: <code>CareRequestItem.RequestedLevelOfCare</code>	No	52.0
requestedServiceEndDate	String	The end date of the requested service. Maps to: <code>CareRequestItem.RequestedServiceEndDate</code>	No	52.0
requestedServiceStartDate	String	The start date of the requested service. Maps to: <code>CareRequestItem.RequestedServiceStartDate</code>	No	52.0
responseDateTime	String	The date and time when the response was sent for the drug request.	No	63.0
serviceCategory	String	Name of the service type such as medical care, diagnostic radiology, pharmacy, or diagnostic laboratory. Maps to: <code>CareRequestItem.ServiceCategory</code>	No	46.0
serviceCategoryCode	String	Alphanumeric code that uniquely identifies a service type. Maps to: <code>CareRequestItem.ServiceCategoryCode</code>	No	46.0
servicingFacility	Servicing Facility Input	The facility where a patient receives service of the requested item. Maps to: <code>CareRequestItem.ServicingFacility</code>	No	57.0
servicingProvider	Servicing Practitioner Input	The healthcare provider who provides the service of the requested item. Maps to: <code>CareRequestItem.ServicingProvider</code>	No	57.0
sourceSystem	String	System from which the request was sourced. Maps to: <code>CareRequestItem.SourceSystem</code>	No	46.0

Name	Type	Description	Required	Available Version
sourceSystem Identifier	String	ID of the system from which the request was sourced. Maps to: <code>CareRequestItem.SourceSystemIdentifier</code>	No	46.0
sourceSystem Modified	String	Timestamp of the most recent update from the source system. Maps to: <code>CareRequestItem.SourceSystemModified</code>	No	46.0
status	String	The authorization status of this service. Maps to: <code>CareRequestItem.Status</code>	No	46.0
statusReason	String	Reason for the authorization status of this service. Maps to: <code>CareRequestItem.StatusReason</code>	No	46.0
submittedDateTime	String	The date and time when the drug request was submitted. This is unavailable for PATCH requests.	Yes	63.0
transactionNumber	Integer	The transaction number assigned to the drug request. This is unavailable for PATCH requests.	No	63.0

Care Requests List Input

A list of care authorization requests.

Root XML tag

```
<careRequestsList>
```

JSON Schema

```
{
  "careRequestsList": [
    {
      "careRequestCase": {
        "caseOrigin": "Web"
      },
      "careRequest": {
        "recordType": "Admission",
        "authorizationRefIdentifier": "1234",
        "name": "Headache",
        "member": "001RM000005XHdbYAG",
        "memberPrimaryPlan": "0SqRM0000000Fp0AI",
        "caseSubStatus": "active",
        "servicingFacility": {
          "npi": "742963",
          "servicingFacilityId": "0klRM000004CBnYAM"
        }
      }
    }
  ]
}
```

```
"requestingPractitioner": {
    "npi": "11111",
    "healthCareProviderId": "0cmRM0000000tldYAA"
},
"careRequestItems": [
{
    "authApprovalIdentifier": "123",
    "authorizationRefIdentifier": "123",
    "name": "CRI Connect-1.0",
    "procedureCodeSet": "0hxxG0000008hKxxAI",
    "requestType": "Order",
    "priority": "Stat",
    "healthcareProcedureCode": "0XSxx000000SXxxA2",
    "reasonCode": "0hsRM00000003ytYAA",
    "servicingFacility": {
        "npi": "742963",
        "servicingFacilityId": "0klRM0000004CBnYAM"
    },
    "servicingProvider": {
        "npi": "11111",
        "healthCareProviderId": "0cmRM0000000tldYAA"
    },
    "clinicalServiceRequestId": "0jyRM0000004CAGYA2"
}
],
"careDiagnoses": [
{
    "name": "CD Connect 1.0",
    "presentOnAdmission": "Yes",
    "diagnosisCodeSet": "0hsSG0000008hKjYAI",
    "healthcareDiagnosisCode": "0XNSG000000PjB4AU",
    "healthConditionId": "0j4RM0000004Mk9YAE"
}
],
"careRequestDrugs": [
{
    "name": "CRD Connect 1.0",
    "status": "Active",
    "statusReason": "Insufficient Information",
    "requestType": "Filler Order",
    "drugAdministrationSetting": "Inpatient",
    "priority": "Routine",
    "medicationRefObjectId": "0kmRM0000004CSeYAM",
    "authApprovalIdentifier": "123",
    "authorizationRefIdentifier": "123",
    "servicingFacility": {
        "npi": "742963",
        "servicingFacilityId": "0klRM0000004CBnYAM"
    },
    "servicingProvider": {
        "npi": "11111",
        "healthCareProviderId": "0cmRM0000000tldYAA"
    }
}]
```

```

        }
    ],
    "assessmentLinks": [
        {
            "id": "0U3SG00000068Cb0AI"
        },
        "patient": {
            "memberId": "001RM000005XHdbYAG",
            "lastName": "Green",
            "firstName": "Charles",
            "birthDate": "2001-10-26T21:32:52"
        }
    ]
}

```

Properties

Name	Type	Description	Required	Available Version
careRequestsList	Care Authorization Request Input	List of Care Requests to be created or updated. (Up to 25 items.)	Yes	46.0

Care Request Reviewer Input

The general details of the care request, care request item, care request drug, or care diagnosis associated with the care request reviewer.

Root XML tag

```
<careRequestReviewer>
```

JSON example

```

"careRequestReviewers": [
    {
        "reviewer": "0cmx0000000JP7WAAW",
        "reviewerType": "Registered Nurse Review",
        "status": "In process",
        "reviewDate": "2021-04-20T13:09:04.359Z",
        "reviewerNotes": "Care Request Review is In Process"
    }
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
contentDocument	Content Document Input	The details of the content document.	No	57.0
id	String	The ID of the care request reviewer.	Yes	52.0
reviewDate	String	The date when the care request was reviewed.	No	52.0

Name	Type	Description	Required or Optional	Available Version
reviewer	String	The name of the user who reviewed the care request.	Yes	52.0
reviewerNotes	String	The notes related to the review.	No	52.0
reviewerType	String	The type of the reviewer who reviewed the care request. Possible values are: <ul style="list-style-type: none">• Medical Director Review• Registered Nurse Review• Physician Review• Peer Review	No	52.0
status	String	The status of the care request. Possible values are: <ul style="list-style-type: none">• Approved• Denied• In process	No	52.0

Care Request Subscriber Input

The primary member on the plan.

Root XML tag

```
<subscriber>
```

Properties

Name	Type	Description	Required	Available Version
addressLine1	String	Subscriber's address line 1.	No	46.0
addressLine2	String	Subscriber's address line 2.	No	46.0
city	String	Subscriber's city.	No	46.0
firstName	String	First name of the subscriber. Maps to: Account.FirstName	No	46.0
lastName	String	Last name of the subscriber. Maps to: Account.LastName	Yes	46.0
memberID	String	Subscriber Member ID.	Yes	46.0
middleName	String	Middle name of the subscriber. Maps to: Account.MiddleName	No	46.0

Name	Type	Description	Required	Available Version
state	String	Subscriber's state.	No	46.0
suffix	String	Name suffix of the subscriber for a person account. Maximum size is 40 characters. Maps to: Account.Suffix	No	46.0
zipCode	String	Subscriber's zip code.	No	46.0

Content Document Input

Input representation for documents linked to the care request record.

Root XML tag

```
<documents>
```

Properties

Name	Type	Description	Required or Optional	Available Version
category	String	The category that the supporting content belongs to. This is unavailable for PATCH requests.	Required	63.0
id	String	ID of the clinical document present in the ContentDocument object.	Required	55.0
reason	String	The code representing the reason why the supporting content is required. This is unavailable for PATCH requests.	Optional	63.0
sequence	String	The sequence number of the content when multiple contents are available. This is unavailable for PATCH requests.	Optional	63.0

Create Visit Request Input

Input representation of the create visit request.

Root XML tag

```
<CreateVisitInput>
```

JSON example

```
{
  "visitType": "08qSG00000017VhYAI",
  "place": "131SG0000006yazYAA",
  "plannedVisitStartTime": "2023-12-28T09:07:21.205-07:00",
  "status": "Planned",
  "account": "001SG00000Cq7T8YAJ",
  "visitor": [
```

```
{
  "user": "005SG000003Z0p9YAC",
  "primary": true
}
],
"productRequired": [
{
  "productId": "01tSG00000K0xRYAW",
  "quantity": 1
}
]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
account	String	ID of the account that is associated with a visit.	Required	55.0
actionPlanTemplate	Action Plan Template Input	Represents the details of an action plan template. Action plan templates define the sets of tasks that your sales reps perform during visits.	Optional	55.0
context	String	Purpose of the visit, such as claim or work type.	Optional	55.0
place	String	Indicates the place that sales representatives visit.	Required	55.0
plannedVisitEndTime	String	Date and time when the visit is expected to end.	Optional	55.0
plannedVisitStartTime	String	Date and time when the visit is expected to start.	Required	55.0
productRequired	Product Required Attributes Input[]	Represents the products required for the visit.	Required	55.0
status	String	Indicates the status of the visit. Valid values are: <ul style="list-style-type: none">• Abandoned• Completed• InProgress• Planned	Optional	55.0
statusRemarks	String	Additional remarks or comments provided by the sales representatives.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
visitPriority	String	<p>Priority of the visit.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • High • Low • Medium 	Optional	55.0
visitType	String	ID of the visit type. This field is a lookup to the Worktype object.	Optional	55.0
visitedParty	Visited Party Attributes Input []	Represents the contacts from the customer organization who are being visited.	Optional	55.0
visitor	Visitor Attributes Input []	Represents the service resources from the organization who are executing the visit.	Required	55.0

Custom Field Value Input

Adds additional information to any fields not mapped by the medication statement API.

Root XML tag

```
<CustomFieldValue>
```

JSON example

```
{
  "CustomFieldValue": [ {
    "fieldName": "Laterality__c",
    "dataType": "picklist",
    "fieldValue": "Bilateral",
  } ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
dataType	String	<p>Specifies the primitive data type of a field.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Boolean • DateOnly • DateTime • Number • String • TimeOnly 	Required	53.0
fieldName	String	The name of the field.	Required	53.0

Name	Type	Description	Required or Optional	Available Version
fieldValue	Object	The value of the field.	Required	53.0

Digital Verification Input

Input representation of the request to perform verification tasks for digital verification records.

JSON example

```
{
  "digitalVerificationInputFieldsMap": {
    "VerificationStatusCategory": "Completed",
    "Comment": "done successfully",
    "VerificationSite": "USA"
  },
  "userCredentials": {
    "loginId": "sanampreet.singh@salesforce.com",
    "password": "123456"
  },
  "digitalVerificationId": "15Exx0000004CAeEAM",
  sessionId:12Exz0022004CAFABM
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
digital Verification Id	String	ID of the digital verification record for which the digital verification is to be performed.	Required	60.0
sessionId	String	ID that tracks the session established through a connected app or remote system in Salesforce.	Optional	60.0
user Credentials	User Credentials Input	Authentication credentials of the user performing the digital verification.	Required	60.0
digital Verification InputFields Map	Digital Verification Input Fields Map	Map structure holding key-value pairs of digital verification input fields.	Required	60.0

Digital Verification Input Fields Map

Input representation of the key-value pairs containing the fields to be updated for the digital verification.

JSON example

```
{
  "digitalVerificationInputFieldsMap": {
    "VerificationStatusCategory": "Completed",
    "Comment": "done successfully",
    "VerificationSite": "USA"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
digital Verification InputFields Map	Map<String, String>	Specifies the map holding the digital verification record details to be modified.	Required	60.0

Dispenser Address Input

Address of the pharmacy.

Root XML tag

```
<dispenserAddress>
```

Properties

Name	Type	Description	Required	Available Version
city	String	City of the pharmacy.	No	46.0
country	String	Country of the pharmacy.	No	46.0
postalCode	String	Postal code of the pharmacy.	No	46.0
state	String	State of the pharmacy.	No	46.0
street	String	Street of the pharmacy.	No	46.0

Download Provider Input

The request representation to download provider data using an external identifier.

Properties

Property Name	Type	Description	Required	Available Version
country Code	String	The country code where the search was performed.	Required	66.0

Property Name	Type	Description	Required	Available Version
data source	String	The external data source, such as One Key.	Optional	66.0
entity Type	String	The type of entity, such as individual or workplace.	Required	66.0
external Id	String	The unique external ID from the search response.	Required	66.0
in Contract	Boolean	Indicates whether the record is currently in contract.	Optional	66.0

Document Management Input

Input representation for the document split request.

Root XML tag

```
<DocumentManagementInput>
```

JSON example

```
{
    "pageSpecificationList": {
        "pageSpecifications": [
            {
                "page":1,
                "rotation":0,
                "addToTargetFile":"true"
            },
            {
                "page":2,
                "rotation":0,
                "addToTargetFile":"true"
            }
        ]
    },
    "linkedObjectFieldsMap" : {
        "linkedObjectFields" : {"ReceivedDocumentId" : "0iox000000000DAAY"}
    },
    "isOcrRequested" : true
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
isOcrRequested	Boolean	<p>Indicates whether OCR is required to process the content document (<code>true</code>) or not (<code>false</code>).</p> <p>By default, OCR is performed on the first five pages of the content document.</p> <p> Note: Set this field value to true to perform OCR on all the pages of a content document that contains more than five pages.</p>	Optional	55.0
linkedObjectFieldsMap	Map<String, String>	Represents the map that contains the linked object fields. For example, the linked object is the Document Checklist Item for Salesforce.	Optional	55.0
pageSpecificationList	Page Specification List Input[]	The page specifications list representation.	Required	55.0
targetFileName	String	The name of the target file that is created from the split document.	Optional	55.0

Document Process Input

Input representation of the content document or received document record to create or update a Salesforce object record.

Properties

Name	Type	Description	Required or Optional	Available Version
additionalFields	Map<String, Object>	List of additional fields that you want to create or update in the target object and which are not present in the Intelligent Form Reader field mappings.	Optional	55.0
attachDocument	Boolean	<p>Indicates whether to automatically create the DocumentChecklistItem (DCI) and ContentDocumentLink records to link the document to the target object (<code>true</code>) or not (<code>false</code>).</p> <p>Default value is <code>false</code>.</p>	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
fieldsWithoutConflictList	Fields Without Conflict Input[]	List of fields that must not have any conflicts for the record creation or update process.	Optional	55.0
ignoreFieldValueConflict	Boolean	Indicates whether to ignore conflicts in OCR (<code>true</code>) or not (<code>false</code>). Default value is <code>false</code> .	Optional	55.0
linkedObjectId	String	ID of the linked object record.	Optional	55.0
objectApiName	String	API name of the target object in which you want to create or update a record.	Optional	55.0
overrideConfidenceScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.	Optional	55.0
		 Note: The value of this field overrides the confidence score threshold value set on the user interface.		
recordTypeId	String	ID of the record type of the target object.	Optional	55.0
templateApiName	String	API name of the document template to retrieve.	Optional	59.0

Enrollee Product Input

Data for a single enrollee product.

Root XML tag

```
<careProgramProductData>
```

JSON example

```
{
    "providerId": "provider3",
    "productId": "product4"
}
```

Properties

Name	Type	Description	Required	Available Version
productId	String	ID of the Product2 object as configured in the Care System Field Mapping.	Yes	46.0
providerId	String	ID of the provider's account as configured in the Care System Field Mapping.	No	46.0

Fields Without Conflict Input

Input representation of the list of fields without conflict for record creation.

Root XML tag

```
<FieldsWithoutConflict>
```

Properties

Name	Type	Description	Required or Optional	Available Version
field	String	The name of the field.	Optional	55.0

FHIR Address Input

Input representation for the Address FHIR object.

The Address FHIR object maps to the [ContactPointAddress](#) object in Salesforce.

JSON example

```
{
  "address": [ {
    "use": "temp",
    "type": "postal",
    "city": "San Francisco",
    "state": "California",
    "country": "U.S",
    "postalCode": "12345",
    "line": "Salesforce",
    "periodStart": "1999-11-09T15:40:30.000Z",
    "periodEnd": "2020-01-02T15:40:30.000Z"
  } ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additional Information	Custom Field Value Input[]	Adds additional information to any fields not mapped in this API.	Optional	53.0
city	String	The city of the address.	Optional	53.0
country	String	The country of the address.	Optional	53.0
line	String	The street of the address.	Optional	53.0
periodEnd	String	The date until when the address is active.	Optional	53.0
periodStart	String	The date from when the address is active.	Optional	53.0
postalCode	String	The postal code for the address.	Optional	53.0
state	String	The state or province of the address.	Optional	53.0

Name	Type	Description	Required or Optional	Available Version
type	String	The type of address. For example, postal and physical.	Optional	53.0
use	String	The usage type of the address.	Optional	53.0

FHIR Codeable Concept Input

Input representation for the CodeableConcept FHIR object.

The CodeableConcept FHIR object maps to the [CodeSetBundle](#) object in Salesforce.

Root XML tag

```
<FhirCodeableConceptInput>
```

JSON example

```
{
  "codeableConcept": {
    "text": "Burn of Ear",
    "coding": [ {
      "display": "Burn of ear",
      "code": "1234567",
      "system": "http://sfdc.co",
      "version": "2.16.840.1.113883.6.96",
      "isActive": true,
      "isPrimary": true,
      "use": "Clinical",
      "userSelected": true,
      "startDate": "1993-11-09T15:40:30.000Z",
      "endDate": "2021-08-24T17:00:00.000Z",
      "additionalInformation": [ {
        "fieldName": "IsCustomCode",
        "dataType": "boolean",
        "fieldValue": true
      } ]
    }, {
      "display": "Burn of ear",
      "code": "9876543",
      "system": "http://sfdc.org",
      "version": "3.17.841.2.113884.7.97",
      "isActive": true,
      "isPrimary": true,
      "use": "Clinical",
      "userSelected": true,
      "startDate": "1997-01-25T03:40:30.000Z",
      "endDate": "2021-08-24T05:00:00.000Z",
      "additionalInformation": [ {
        "fieldName": "IsCustomCode",
        "dataType": "boolean",
        "fieldValue": true
      } ]
    } ]
  }
}
```

```

        }
    }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additional Information	Custom Field Value Input[]	Adds additional information to any fields not mapped in this API.	Optional	53.0
coding	FHIR Coding Input[]	The codes that are part of this codeableConcept. You can specify up to 15 codings for a concept.	Optional	53.0
hash	String	The unique key that represents the concept with its combination of codings. If this value isn't specified explicitly, a value is auto-generated by the system.	Optional	53.0
recordId	String	recordId	Optional	53.0
text	String	The human-readable textual representation of the concept represented by the codeableConcept and its codings.	Optional	53.0

FHIR Codeable Concept Or ID Input

Input representation for FHIR Codeable Concept or ID.

Root XML tag

```
<FhirCodeableConceptOrIdInput>
```

JSON example

```
{
  "codeableConcept": {
    "text": "Burn of Ear status reason",
    "coding": [
      {
        "display": "Burn of status reasonn ear",
        "code": "1234995607",
        "system": "http://sfdc.co",
        "version": "2.16.840.1.113883.6.96",
        "isActive": true,
        "isPrimary": true,
        "use": "Clinical",
        "userSelected": true,
        "startDate": "1993-11-09T15:40:30.000Z",
        "endDate": "2021-08-24T17:00:00.000Z"
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
codeableConcept	FHIR Codeable Concept	Represents the CodeableConcept FHIR object.	Required	54.0
 Note:	Optional if <code>salesforceId</code> is specified.			
<code>salesforceId</code>	String	The ID of the Salesforce record.	Required	54.0
 Note:	Optional if <code>codeableConcept</code> is specified.			

FHIR Coding Input

Input representation for the Coding FHIR object.

The Coding FHIR object maps to the [CodeSet](#) object in Salesforce.

Root XML tag

```
<FhirCodingInput>
```

JSON example

```
"coding": [ {
    "display": "Burn of ear",
    "code": "1234567",
    "system": "http://sfdc.co",
    "version": "2.16.840.1.113883.6.96",
    "isActive": true,
    "isPrimary": true,
    "use": "Clinical",
    "userSelected": true
    "startDate": "1993-11-09T15:40:30.000Z",
    "endDate": "2021-08-24T17:00:00.000Z",
    "additionalInformation": [ {
        "fieldName": "IsCustomCode",
        "dataType": "boolean",
        "fieldValue": true
    } ]
} ]
```

Properties

Name	Type	Description	Required or Optional	Available Version
additional Information	Custom Field Value Input[]	Adds additional information to any fields not mapped in this API.	Optional	53.0
code	String	The industry-defined code that represents a concept and is defined by its system version.	Optional	53.0
display	String	The human-readable text representation of the code.	Optional	53.0
endDate	String	The date until when the code is valid.	Optional	53.0
hash	String	The code set key associated with the code set record create for this coding. This field is a text field with a unique value to identify the code set record. You can either manually assign a code set key, or let the system generate one for you if you don't specify it in your request.	Optional	53.0
isActive	Boolean	Indicates whether the code is active (<code>true</code>) or not (<code>false</code>).	Optional	53.0
isCustomCode	Boolean	Indicates whether the defined code is a custom code (<code>true</code>) or not (<code>false</code>).	Optional	54.0
recordId	String	The Salesforce record ID of the code.	Optional	53.0
startDate	String	The date from when the code is valid.	Optional	53.0
system	String	The terminology system that defines the code.	Optional	53.0
use	String	The code set type associated with the code set record, stored as a picklist value.	Optional	53.0
userSelected	Boolean	Indicates whether the code was selected directly by the user and is intended to be the primary code for the concept.	Optional	53.0
version	String	The version of the system that defines the code.	Optional	53.0

FHIR Contact Point Input

Input representation for the ContactPoint FHIR object.

The ContactPoint FHIR object maps to the [ContactPoint](#) object in Salesforce.

JSON example

```
{
  "ContactPoint": [ {
    "system": "email",
    "value": "a@bc.com",
    "use": "office",
    "rank": "1",
    "periodStart": "1998-05-26T15:40:30.000Z",
    "periodEnd": "2021-08-09T15:40:30.000Z"
  } ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additional Information	Custom Field Value Input[]	Adds additional information to any fields not mapped in this API.	Optional	53.0
periodEnd	String	The date until when the contact detail is active.	Optional	53.0
periodStart	String	The date from when the contact detail is active.	Optional	53.0
rank	Integer	The preference rank of the contact detail among all the contact details associated with a person.	Optional	53.0
system	String	The system of the contact detail. For example, email and phone.	Optional	53.0
use	String	The usage type of the contact detail. For example, home and office.	Optional	53.0
value	String	The actual details of the patient's contact point phone record stored in the ContactPointPhone.Telephone Number, ContactPointPhone .AreaCode, ContactPointPhone .ExtensionNumber, and Contact.Email fields.	Optional	53.0

FHIR Dispense Input

The input representation of FHIR Dispense.

Root XML tag

```
<FhirDispenseInput>
```

Properties

Name	Type	Description	Required or Optional	Available Version
medicationReference	String	The reference of the medication request.	Optional	54.0

FHIR Dosage Input

The input representation of dosage information for a patient's medication.

The Dosage FHIR resource maps to the [PatientMedicationDosage](#) object in Salesforce.

Root XML tag

```
<FhirDosageInput>
```

JSON example

```
{
  "sequence": "10.0",
  "text": "commentsText",
  "additionalInstruction": "Additioanl Instructions",
  "patientInstruction": "Patient Instructions",
  "asNeeded": "true",
  "site": {
    "salesforceId": "0iPxx00000000MbEAI" },
  "route": {
    "codeableConcept": {
      "text": "Burn of Ear route",
      "coding": [
        {
          "display": "Burn of ear route",
          "code": "123456700",
          "system": "http://sfdc.co",
          "version": "2.16.840.1.113883.6.96",
          "isActive": true,
          "isPrimary": true,
          "use": "Clinical",
          "userSelected": true,
          "startDate": "1993-11-09T15:40:30.000Z",
          "endDate": "2021-08-24T17:00:00.000Z",
        }
      ]
    }
  },
  "method": {
    "codeableConcept": {
      "text": "Burn of Ear Method",
      "coding": [
        {
          "display": "Burn of ear",
          "code": "1234567777",
          "system": "http://sfdc.co",
          "version": "2.16.840.1.113883.6.96",
          "isActive": true,
        }
      ]
    }
  }
}
```

```

    "isPrimary":true,
    "use":"Clinical",
    "userSelected":true,
    "startDate":"1993-11-09T15:40:30.000Z",
    "endDate":"2021-08-24T17:00:00.000Z",
    } ]
}
},
"doseAndRate": {
  "type": "Ordered",
  "dose": {
    "dosageQuantityType": "Dose",
    "dosageQuantityNumerator": "10",
    "dosageQuantityDenominator": "20",
    "dosageUnit": {
      "unitOfMeasure": {
        "unitCode": "MGTest",
        "description": "MG description",
        "type": "Custom"
      }
    },
    "rate": {
      "dosageRateType": "Frequency Ratio",
      "dosageRateNumerator": "2",
      "dosageRateDenominator": "3",
      "dosageRateUnit": {
        "salesforceId": "0hExx0000000001EAA"
      }
    },
    "sourceSystem": "http://sfdc.co",
    "sourceSystemId": "567890",
    "sourceSystemModified": "2012-07-26T15:40:30.000Z"
  }
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalInformation	Custom Field Value Input	The additional information associated with the medication for the patient.	Optional	54.0
additionalInstruction	String	The supplemental instructions or warnings associated with the medication for the patient.	Optional	54.0
asNeeded	Boolean	Indicates whether the medication is taken on an as-needed basis.	Optional	54.0
doseAndRate	FHIR Dose And Rate Input	The amount of dosage administration.	Optional	54.0
method	FHIR Codeable Concept Or ID Input	The method of dosage administration.	Optional	54.0

Name	Type	Description	Required or Optional	Available Version
patientInstruction	String	The patient or consumer instructions associated with this medication.	Optional	54.0
route	FHIR Codeable Concept Or ID Input	The route of dosage administration.	Optional	54.0
sequence	Double	The position of this medication in the sequence of medications prescribed to a patient.	Optional	54.0
site	FHIR Codeable Concept Or ID Input	The site of dosage administration.	Optional	54.0
sourceSystem	String	The source system from where the dosage record was brought into Salesforce.	Optional	54.0
sourceSystemId	String	The identifier of the dosage record in its source system.	Optional	54.0
sourceSystemModified	String	The date and time when the dosage record was last modified in its source system.	Optional	54.0
text	String	The free text dosage instructions associated with the medication for the patient.	Optional	54.0

FHIR Dose

Input representation for the dosage quantity.

Root XML tag

```
<FhirDoseInput>
```

JSON example

```
{
  "dosageQuantityType": "Dose",
  "dosageQuantityNumerator": "10",
  "dosageQuantityDenominator": "20",
  "dosageUnit": {
    "unitOfMeasure": {
      "unitCode": "MGTttest",
      "description": "MG description",
      "type": "Custom"
    }
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
<code>dosageQuantityDenominator</code>	Double	The denominator value for the quantity of medication per dose. This field can be used to record a simple quantity or a quantity range.	Optional	54.0
<code>dosageQuantityNumerator</code>	Double	The numerator value for the quantity of medication per dose. This field can be used to record a simple quantity or a quantity range.	Optional	54.0
<code>dosageQuantityType</code>	String	The type of dosage quantity recorded in <code>DosageQuantityNumerator</code> and <code>DosageQuantityDenominator</code> . Possible values are: <ul style="list-style-type: none">• Dose• Dose Range	Optional	54.0
<code>dosageUnit</code>	FHIR Unit Of Measure Or ID	The unit of dosage quantity.	Optional	54.0

FHIR Dose And Rate

Input representation of the specified dose and rate.

Root XML tag

```
<FhirDoseAndRateInput>
```

JSON example

```
{
  "type": "Ordered",
  "dose": {
    "dosageQuantityType": "Dose",
    "dosageQuantityNumerator": "10",
    "dosageQuantityDenominator": "20",
    "dosageUnit": {
      "unitOfMeasure": {
        "unitCode": "MGTttest",
        "description": "MG description",
        "type": "Custom"
      }
    }
  },
  "rate": {
    "dosageRateType": "Frequency Ratio",
    "dosageRateNumerator": "2",
    "dosageRateDenominator": "3",
    "dosageRateUnit": {
      "unitOfMeasure": {
        "unitCode": "min",
        "description": "per minute"
      }
    }
  }
}
```

```

    "dosageRateUnit": {
      "unitOfMeasure": {
        "unitCode": "MGTeste2",
        "description": "MG description2",
        "type": "Custom"
      }
    }
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
dose	FHIR Dose Input	Represents the dosage quantity.	Optional	54.0
rate	FHIR Rate Input	Represents the dosage rate.	Optional	54.0
type	String	The type of the specified dose.	Optional	54.0

FHIR Human Name Input

The input representation for the name of a person and all its associated metadata.

The HumanName FHIR object maps to the [HumanName](#) object in Salesforce.

JSON example

```

"humanName": [
  {
    "use": "Official",
    "text": "Charles Green",
    "family": "Green",
    "given": "Charles",
    "prefix": "Mr.",
    "suffix": "Jr.",
    "periodStart": "1998-05-26T15:40:30.000Z",
    "periodEnd": "2021-08-09T15:40:30.000Z",
    "sourceSystem": "http://sfdc.co",
    "sourceSystemId": "567890",
    "sourceSystemModified": "2012-07-26T15:40:30.000Z"
  }
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
additional Information	Custom Field Value []	Adds additional information to any fields not mapped in this API.	Optional	53.0

Name	Type	Description	Required or Optional	Available Version
family	String	The last name of the patient. This field stores a combination of the patient's middle and last name.	Optional	53.0
given	String	The first name of the patient.	Optional	53.0
periodEnd	String	The date until when the name is active.	Optional	53.0
periodStart	String	The date from when the name is active.	Optional	53.0
prefix	String	The prefix of the name.	Optional	53.0
sourceSystem	String	The source system from where the humanName is brought into Salesforce.	Optional	53.0
sourceSystemId	String	The identifier of the humanName record in its source system.	Optional	53.0
sourceSystemModifiedate	String	The date and time when the humanName record was last modified in its source system.	Optional	53.0
suffix	String	The suffix of the name.	Optional	53.0
text	String	The full name of the person.	Optional	53.0
use	String	The usage type of the name.	Optional	53.0

FHIR Identifier Input

The input representation of the Identifier FHIR object.

The Identifier FHIR object maps to the [Identifier](#) object in Salesforce.

Root XML tag

```
<FhirIdentifierInput>
```

JSON example

```
{
  "identifier": [ {
    "assigner": {
      "referenceResource": "Organization",
      "referenceId": "XYZId"
    },
    "type": {
      "text": "Passport number",
      "coding": [ {
        "display": "Passport number",
        "code": "PPN",
        "isActive": true,
        "use": "Identifier"
      } ]
    }
  },
  "type": {
    "text": "Passport number",
    "coding": [ {
      "display": "Passport number",
      "code": "PPN",
      "isActive": true,
      "use": "Identifier"
    } ]
  }
}
```

```

    "value": "ABCD5678",
    "use": "Official",
    "periodStart": "1998-05-26T15:40:30.000Z",
    "periodEnd": "2021-08-09T15:40:30.000Z",
    "sourceSystem": "http://sfdc.co",
    "sourceSystemId": "567890",
    "sourceSystemModified": "2012-07-26T15:40:30.000Z"
  } ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalInformation	Custom Field Value Input []	Adds additional information to any fields not mapped in this API.	Optional	53.0
assigner	FHIR Reference Input	The authorized body that issued the identifier, stored as a reference to the Account object.	Optional	53.0
periodEnd	String	The date and time until when the Identifier is active, recorded in DateTime format.	Optional	53.0
periodStart	String	The date and time from when the Identifier is active, recorded in DateTime format.	Optional	53.0
sourceSystem	String	The source system from which the identifier record was brought into Salesforce.	Optional	53.0
sourceSystemId	String	The identifier of the identifier record in its source system.	Optional	53.0
sourceSystemModifiedDate	String	The date and time when the identifier record was last modified in its source system.	Optional	53.0
type	FHIR Codeable Concept Input	The system-defined code that represents the type of ID the identifier record is.	Optional	53.0
use	String	The usage type of the Identifier record.	Optional	53.0
value	String	The value associated with an Identifier record.	Optional	53.0

FHIR Medication Statement

Input representation for the Medication Statement FHIR object.

This is a record of medication that the patient is currently taking or has taken in the past. The Medication Statement FHIR resource maps to the [MedicationStatement](#) object in Salesforce.

Root XML tag

```
<FhirMedicationStatementInput>
```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalInformation	Custom Field Value Input	Additional information associated with the medication statement.	Optional	54.0
basedOn	FHIR Reference Input	Additional information based on which the medication statement is prepared.	Optional	54.0
category	String	The category of the medication statement.	Optional	54.0
context	FHIR Reference Input	The specific context associated with the medication.	Optional	54.0
dateAsserted	String	The date and time the medication statement is made.	Optional	54.0
derivedFrom	FHIR Reference Input	Additional information about where the medication statement is derived.	Optional	54.0
dosage	FHIR Dosage Input	Represents the dosage information set for medication.	Optional	54.0
effectiveEndDateTime	String	The stated end date and time for the medication.	Optional	54.0
effectiveStartDateTime	String	The stated start date and time for the medication.	Optional	54.0
identifier	FHIR Identifier Input	Set an identifier value to the medication statement.	Optional	54.0
informationSource	FHIR Reference Input	Set who or where the information in the medication statement came from.	Optional	54.0
medication	FHIR Medication Resource Input	Represents detailed information about different medications.	Required	54.0
partOf	FHIR Reference Input	Validates only references of medication dispense, medication statement, procedure, observation are passed.	Optional	54.0
reasonCode	FHIR Codeable Concept Or ID Input	The system-defined code that specifies the reason for the medication.	Optional	54.0
reasonReference	FHIR Reference Input	The observation, condition, or diagnostic report that warranted the medication.	Optional	54.0
sourceSystem	String	The name of the system this record came from.	Optional	54.0

Name	Type	Description	Required or Optional	Available Version
sourceSystemId	String	The ID of this record in its source system.	Optional	54.0
sourceSystemModified	String	The date on which this item was last changed in the source system.	Optional	54.0
status	String	The status of the medication in this statement. Possible values are: <ul style="list-style-type: none">• Active• Completed• Entered-in-Error• Intended• Not-Taken• On-Hold• Stopped• Unknown	Required	54.0
statusReason	FHIR Codeable Concept Or ID Input[]	The reason for the medication status.	Optional	54.0

FHIR Medication Resource Input

The input representation of FHIR Medication.

The medication FHIR resource maps to the [Medication](#) object in Salesforce.

Root XML tag

```
<FhirMedicationResourceInput>
```

JSON example

```
{
  "medicationReference": {
    "referenceResource": "Medication",
    "referenceId": "",
    "salesforceId": "0itRM0000004CUkYAM",
    "relationship": ""
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
medicationCodeableConcept	FHIR Codeable Concept Or ID Input	The codeable concept value of the medication.	Optional	54.0
medicationReference	FHIR Reference Input	The reference of the medication request.	Optional	54.0

FHIR Patient Input

Input representation for the FHIR patient resource.

The Patient FHIR resource maps to the [Patient](#) objects in Salesforce. Patients are modeled using Person Accounts.

JSON example

```
{
  "active": true,
  "identifier": [
    {
      "assigner": {
        "referenceResource": "Organization",
        "referenceId": "Org12345XYZ"
      },
      "type": {
        "text": "Passport Number",
        "coding": [
          {
            "display": "Passport number",
            "code": "PPN",
            "isActive": true,
            "use": "Identifier"
          }
        ]
      },
      "value": "ABCD5678XYZ"
    }
  ],
}
```

```
"name": [
  {
    "use": "alias",
    "text": "Charles Green",
    "family": "Green",
    "given": "Charles",
    "prefix": "Mr.",
    "suffix": "Sr."
  }
],
"communication": [
  {
    "language": "English",
    "preferenceRank": 1
  }
],
"address": [
  {
    "use": "temp",
    "type": "postal",
    "line": "Green Household"
  }
],
"telecom": [
  {
    "system": "email",
    "value": "a@bc.com"
  }
],
"gender": "male",
"birthDate": "2000-09-12T18:13:41Z",
"maritalStatus": "married",
"contact": [
  {
    "relationship": {
      "coding": [
        {
          "display": "Partner"
        }
      ]
    },
    "name": {
      "use": "Temp",
      "text": "Shawna Green",
      "family": "Green",
      "given": "Shawna",
      "prefix": "Mrs.",
      "suffix": "Jr."
    },
    "telecom": [
      {
        "system": "email",
        "value": "c@de.com"
      }
    ]
  }
]
```

```
{
  "system": "phone",
  "value": "12345678",
  "use": "temp",
  "rank": 1
}
],
"address": {
  "use": "temp",
  "type": "postal",
  "line": "Green Household"
}
}
],
"generalPractitioner": [
{
  "referenceResource": "Practitioner",
  "referenceId": "PRAC789XYZ",
  "relationship": "Plastic Surgeon"
}
],
"managingOrganisation": {
  "referenceResource": "Organization",
  "referenceId": "MI9007GBE"
}
}
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
active	Boolean	Indicates whether the patient record is active or not.	Optional	53.0
additional Information	Custom Field Value Input []	Adds additional information to any fields not mapped in this API.	Optional	53.0
address	FHIR Address Input []	The address of the patient.	Optional	53.0
birthDate	String	The date of birth of the patient.	Optional	53.0
communication	Patient Communication Language Input []	The languages of communication associated with the patient.	Optional	53.0
contact	Contact Party For Patient Input []	The contact associated with the patient record, modeled as a person account. Contacts are connected to patients using the ContactContactRelation__c junction object.	Optional	53.0
deceased DateTime	String	The date and time of the patient's death.	Optional	53.0

Name	Type	Description	Required or Optional	Available Version
gender	String	The gender of the patient.	Optional	53.0
general Practitioner	FHIR Reference Input[]	The practitioners associated with the patient, modeled as either person accounts or Contacts and HealthcareProvider records. Practitioners are connected to patients using the ContactContact Relation__c junction object.	Optional	53.0
identifier	FHIR Identifier Input[]	The identifier information for the patient, stored as Identifier records that reference the patient record using their Identifier.ParentRecordId field.	Optional	53.0
managing Organisation	FHIR Reference Input	The organization that manages the patient record, referenced using a lookup to the Account object. Managing organizations are connected to patients using the AccountContactRelation junction object.	Optional	53.0
maritalStatus	String	The current marital status of the patient.	Optional	53.0
multiple BirthInteger	Integer	The birth order of the patient, in the event that the patient was a part of a multiple birth event.	Optional	53.0
name	FHIR Human Name Input[]	The names of the patient, stored as a PersonName record.	Optional	53.0
sourceSystemId	String	The source system ID associated with a patient record.	Optional	53.0
telecom	FHIR Contact Point Input[]	Contact details of the patient, such as phone numbers and email addresses. These contact details are stored as Contact PointPhone records that reference the patient records using their Contact PointPhone.ParentId field.	Optional	53.0

FHIR Rate

Input representation for dosage rate.

Root XML tag

```
<FhirRateInput>
```

JSON example

```
{
  "dosageRateType": "Frequency Ratio",
```

```

    "dosageRateNumerator":"2",
    "dosageRateDenominator":"3",
    "dosageRateUnit": {
      "unitOfMeasure": {
        "unitCode": "MGTeste2",
        "description": "MG description2",
        "type": "Custom"
      }
    }
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
<code>dosageRateDenominator</code>	Double	The denominator value for the rate of medication in the dosage. That is, amount of medication per unit of time. This field can be used to record a simple rate, a rate ratio, or a rate range	Optional	54.0
<code>dosageRateNumerator</code>	Double	The numerator value for the rate of medication in the dosage. That is, amount of medication per unit of time. This field can be used to record a simple rate, a rate ratio, or a rate range.	Optional	54.0
<code>dosageRateType</code>	String	The type of dosage rate recorded in <code>DosageRateNumerator</code> and <code>DosageRateDenominator</code> . Possible values are: <ul style="list-style-type: none">• Frequency• Frequency Range• Frequency Ratio	Optional	54.0
<code>dosageRateUnit</code>	FHIR Unit Of Measure Or ID	The unit of dosage rate.	Optional	54.0

FHIR Reference Input

The input representation for the Reference FHIR object.

Root XML tag

```
<FhirReferenceInput>
```

JSON example

```
{
  "reference": {
    "referenceResource": "practitioner",
    "referenceType": "Practitioner"
  }
}
```

```

    "referenceId": "ABCId",
    "relationship": "Oncologist"
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
referenceId	String	The ID of the medication or practitioner (healthcare provider) record or the managing organization (account) record in the source system.	Required	53.0
referenceResource	String	The FHIR resource referred to. For example, organization or practitioner.	Required	53.0
relationship	String	The relationship between the patient and the healthcare provider or the managing organization, stored using the Reciprocal Roles records.	Optional	53.0
salesforceId	String	The Salesforce ID of the record that's created in Salesforce.	Required	54.0

FHIR Request

Input representation for the supply of medication, along with information about how it should be administered.

The MedicationRequest FHIR resource maps to the [MedicationRequest](#) object in Salesforce.

Root XML tag

```
<FhirRequestInput>
```

Properties

Name	Type	Description	Required or Optional	Available Version
medicationReference	String	The reference of the medication request.	Optional	54.0
status	String	The status of the medication request. Possible values are: <ul style="list-style-type: none">• Active• Cancelled	Optional	54.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> • Completed • Draft • Entered-in-Error • On-Hold • Stopped • Unknown 		
type	String	<p>The type of the medication request.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Filler Order • Instance Order • Option • Original Order • Plan • Proposal • Reflex Order 	Optional	54.0

First Reviewer Input

The name of the person who reviewed the request.

Root XML tag

```
<firstReviewer>
```

Properties

Name	Type	Description	Required	Available Version
username	String	User name of the first reviewer.	Yes	46.0

FHIR Unit Of Measure

Input representation for Unit of Measure.

Root XML tag

```
<FhirUnitOfMeasureInput>
```

JSON example

```
{
  "unitCode": "MGTeste2",
  "description": "MG description2",
  "type": "Custom"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	The description of this unit of measure.	Optional	54.0
type	String	The type of the unit of measure. For example, weight, distance, and period.	Required	54.0
unitCode	String	The code for this unit of measure. For example, mm[Hg], mcg/mL, kgs, and lbs.	Required	54.0

FHIR Unit Of Measure Or ID

Input representation for Unit of Measure Or Id.

Root XML tag

```
<FhirUnitOfMeasureOrIdInput>
```

JSON example

```
{
  "unitOfMeasure": {
    "unitCode": "MGTeste2",
    "description": "MG description2",
    "type": "Custom"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
salesforceId	String	The Salesforce ID of the unit of measure record.	Required	54.0
unitOfMeasure	FHIR Unit Of Measure	Represents the unit of measures for care metrics and care observations.	Optional	54.0

 **Note:**
Optional if
`unitOfMeasure`
is specified.

 **Note:**
Optional if
`salesforceId`
is specified.

General Practitioner Input

Member's primary or general care practitioner.

Root XML tag

```
<generalPractitioner>
```

Properties

Name	Type	Description	Required	Available Version
npi	String	General Practitioner NPI number.	Yes	46.0

Medical Director Input

Name of the medical director who reviewed the request.

Root XML tag

```
<medicalDirector>
```

Properties

Name	Type	Description	Required	Available Version
username	String	Medical Director's username.	Yes	46.0

Merge Customers Input

The request to merge a Consolidated Account with a Merged Account.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Properties

Property Name	Type	Description	Required	Available Version
winningId	String	The Salesforce ID of the Consolidated Account. Required when a Consolidated Account external ID isn't provided. Must be unique within the request.	Required	65.0
winningExternalId	String	The external ID of the Consolidated Account. Required when a Consolidated Account ID isn't provided.	Required	65.0
losingId	String	The Salesforce ID of the Merged Account. Required when a Merged Account external ID isn't provided. Must be unique within the request.	Required	65.0

Property Name	Type	Description	Required	Available Version
losingExternalId	String	The external ID of the Merged Account. Required when a Merged Account ID isn't provided.	Required	65.0

Original Denial Medical Director Input

The name of the medical director who denied the original request.

Root XML tag

```
<originalDenialMedicalDirector>
```

Properties

Name	Type	Description	Required	Available Version
username	String	Original Denial Medical Director's username.	Yes	46.0

Patient Contact Party Input

The input representation of the patient contact party.

JSON example

```
{
  "PatientContactParty": [ {
    "relationship": {
      "coding": [
        {
          "display": "relative"
        }
      ]
    },
    "name": {
      "use": "official",
      "text": "Shawna Green",
      "family": "Green",
      "given": "Shawna",
      "prefix": "Mrs.",
      "suffix": "Sr."
    },
    "telecom": [
      {
        "system": "email",
        "value": "c@d3.com"
      },
      {
        "system": "phone",
        "value": "+1 (555) 123-4567"
      }
    ]
  }]
}
```

```

        "value": "12345678",
        "use": "temp",
        "rank": 1
    }
],
"address": {
    "use": "temp",
    "type": "postal",
    "line": "Green Household"
},
"organization": {
    "referenceResource": "Green Family Business",
    "referenceId": "XYZId"
},
"gender": "female",
"periodStart": "1998-05-26T15:40:30.000Z",
"periodEnd": "2021-08-09T15:40:30.000Z",
}
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalInformation	Custom Field Value Input []	Adds additional information to any fields not mapped in this API.	Optional	53.0
address	FHIR Address Input	The address associated with the contact party, stored as ContactPointAddress records.	Optional	53.0
gender	String	The gender of the contact party.	Optional	53.0
name	FHIR Human Name Input	The name of the contact party, stored as PersonName records.	Optional	53.0
organisation	FHIR Reference Input	The organization associated with the contact party.	Optional	53.0
periodEnd	String	The date until when the contact is associated with the patient.	Optional	53.0
periodStart	String	The date from when the contact is associated with the patient.	Optional	53.0
relationship	FHIR Codeable Concept Input	The type of relationship between the contact party and the patient, recorded using a reference to Reciprocal Roles.	Optional	53.0
telecom	FHIR Contact Point Input []	The telecom information for the contact party, stored as ContactPointPhone records.	Optional	53.0

Page Products Input

Input representation that contains the product and guidance IDs associated with a presentation page.

Properties

Property Name	Type	Description	Required	Available Version
guidanceIDs	List<Object>	List of guidance IDs.	Optional	65.0
productId	String	ID of the product.	Optional	65.0

Page Specification Input

Input representation of the page specification details.

Root XML tag

<PageSpecification>

Properties

Name	Type	Description	Required or Optional	Available Version
addToTargetFile	Boolean	Indicates whether the page must be added to the target file (<code>true</code>) or not (<code>false</code>).	Required	55.0
page	Integer	The page number of the document to be split.	Required	55.0
rotation	Integer	The angle at which the page needs to be rotated. Valid values are: 0, 90, 180, 270, or 360.	Required	55.0

Page Specification List Input

Input representation of the page specification list.

Properties

Name	Type	Description	Required or Optional	Available Version
pageSpecifications	Page Specification	Represents the page specification details of the content document that needs to be split.	Required	55.0

Patient Communication Language Input

Input representation of the patient communication language.

The PatientCommunicationLanguage FHIR object maps to the [PersonLanguage](#) object in Salesforce.

JSON example

```
"PatientCommunicationLanguage": [
  {
    "language": "High Elvish",
    "preferenceRank": 2
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
additional Information	Custom Field Value Input []	Adds additional information to any fields not mapped in this API.	Optional	53.0
language	String	The language used by the person.	Optional	53.0
preferenceRank	Integer	The ranked order of preference the person has for the language as a medium of communication.	Optional	53.0

Patient Input

Input containing data for a single patient.

Root XML tag

```
<patientData>
```

JSON example

```
{
  "patientId": "patient2",
  "careProgramProductData": [
    {
      "providerId": "provider3",
      "productId": "product4"
    }
  ]
}
```

Properties

Name	Type	Description	Required	Available Version
careProgramProductData	Enrollee Product Input []	List of all objects that contain data related to the enrollee's care program product.	No	46.0
patientId	String	ID of the patient as configured in the care system field mappings.	Yes	46.0

Product Required Attributes Input

Input representation of the products required for the visit.

Properties

Name	Type	Description	Required or Optional	Available Version
productId	String	ID of the product.	Required	55.0
quantity	Integer	Quantity of the product.	Required	55.0

Program Enrollment Input

Request body for care program enrollment.

Root XML tag

```
<careProgramEnrollmentData>
```

JSON example

```
{
  "programId": "programId1",
  "sourceSystem": "source-system-name",
  "patientData": [
    {
      "patientId": "patient1",
      "careProgramProductData": [
        {
          "providerId": "provider1",
          "productId": "product1"
        },
        {
          "providerId": "provider1",
          "productId": "product2"
        }
      ]
    },
    {
      "patientId": "patient2",
      "careProgramProductData": [
        {
          "providerId": "provider3",
          "productId": "product4"
        }
      ]
    }
  ]
}
```

Properties

Name	Type	Description	Required	Available Version
patientData	Patient Input []	List of all objects that contain patients data. You can have up to 200 items in this list.	Yes	46.0
programId	String	ID of the care program as configured in the care system field mappings.	Yes	46.0
sourceSystem	String	Name of the source system as configured in the care system field mappings.	Yes	46.0

Slot Input

Input representation of an appointment slot.

Properties

Name	Type	Description	Required or Optional	Available Version
additionalInformation	String	Additional information about the appointment slot to be booked.	Optional	60.0
appointmentType	String	ID of the Service Appointment record's appointment type.	Optional	60.0
city	String	Name of the city in which the appointment slot must be booked.	Optional	60.0
comments	String	Appointment slot comments.	Optional	60.0
contactId	String	ID of the contact for whom the appointment slot must be booked.	Optional	60.0
country	String	Name of the country in which the appointment slot must be booked.	Optional	60.0
description	String	Description for the appointment slot.	Optional	60.0
postalCode	String	Postal code of the city in which the appointment slot must be booked.	Optional	60.0
schedEndTime	String	Appointment end time.	Required	60.0
schedStartTime	String	Appointment start time.	Required	60.0
serviceAppointmentId	String	ID of the Service Appointment record associated with the appointment slot.	Optional	60.0
serviceResourceId	String	ID of the Service Resource record associated with the appointment slot.	Required	60.0

Name	Type	Description	Required or Optional	Available Version
serviceTerritoryId	String	ID of the service territory in which the appointment slot must be booked.	Required	60.0
state	String	Name of the state in which the appointment slot must be booked.	Optional	60.0
status	String	Status of the appointment slot. Possible values are the enum values configured for the status field of the Service Appointment object on the Salesforce Scheduler.	Required	60.0
street	String	Name of the street in which the appointment slot must be booked.	Optional	60.0
subject	String	Subject for the appointment slot.	Optional	60.0
workTypeId	String	ID of the work type for which the appointment slot must be booked.	Required	60.0

Reopened By Input

The name of the person who reopened the care request.

Root XML tag

```
<reopenedBy>
```

JSON example

```
"reopenedBy": {
    "username": "admin@um.org"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
username	String	The user who reopened the care request.	No	52.0



Note: This field is required if `reopenedBy` is passed in the request.

Requesting Practitioner Input

Ordering or referring practitioner for the request.

Root XML tag

```
<requestingPractitioner>
```

Properties

Name	Type	Description	Required	Available Version
healthCareProviderId	String	The provider associated with request creation for this prior authorization. This field is a lookup to HealthcareProviderId.	Yes	55.0
npi	String	Requesting Practitioner's NPI number.	Yes	46.0

Sample Limits Request Data Input

Input representation for the sample limits data to validate.

Properties

Name	Type	Description	Required or Optional	Available Version
action	String	The action to perform. Supported values are: <ul style="list-style-type: none">• validate	Required	65.0
data	Object	The records to validate.	Required	65.0

Sample Limits Validation Input

Input representation for sample limits validation.

JSON example

```
{
  "sampleLimitsValidationRequest": {
    "data": {
      "providerVisitsData": {
        "providerVisitData": {
          "territory": "<ProviderVisit.Visit.Territory>",
          "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000",
          "productDisbursements": [
            {
              "productId": "2_childProduct1",
              "productBatchItemId": "",
              "accountId": "001XXXXXXXXXXXXAAG",
              "quantity": 1
            },
            {
              "productBatchItemId": ""
            }
          ]
        }
      }
    }
  }
}
```

```

        "productId": "2_childProduct2",
        "quantity": 6,
        "accountId": "001XXXXXXXXXXXXAAG"
    }
],
"providerVisitSampleLimitTransactions": {
    "001XXXXXXXXXXXXAAG": [
        {
            "providerVisitId": "a2TXXXXXXXXXXXXEAI",
            "limitProductId": "2_childProduct1",
            "productId": "2_childProduct1",
            "providerSampleLimitTemplateName": "PerYearTemplate",
            "providerVisitRequestedSampleId": "callSample1",
            "ProviderSampleLimitId": "sampleLimit1",
            "quantity": "1",
            "account": "001XXXXXXXXXXXXAAG",
            "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000"
        },
        {
            "limitProductId": "2_parentProduct1",
            "quantity": "6",
            "productId": "2_childProduct2",
            "ProductDisbursementId": "callSample2",
            "ProviderVisitId": "a2TXXXXXXXXXXXXEAI",
            "providerSampleLimitTemplateName": "parent_template1",
            "ProviderSampleLimitId": "defaultSampleLimit1",
            "account": "001XXXXXXXXXXXXAAG",
            "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000"
        }
    ]
},
"childProviderVisitsData": {
    "productDisbursements": [
        {
            "accountId": "001XXXXXXXXXXXXAAG",
            "productId": "2_childProduct1",
            "productBatchItemId": "",
            "quantity": 1
        },
        {
            "accountId": "001XXXXXXXXXXXXAAG",
            "productId": "2_childProduct1",
            "productBatchItemId": "",
            "quantity": 1
        },
        {
            "accountId": "001XXXXXXXXXXXXAAG",
            "productId": "2_childProduct2",
            "productBatchItemId": "",
            "quantity": 1
        }
    ],
    "providerVisitSampleLimitTransactions": {

```

```

    "0010p000013CLb1AAG": [
      {
        "providerVisitId": "a2TXXXXXXXXXXXXXEA1",
        "limitProductId": "2_childProduct1",
        "productId": "2_childProduct1",
        "ProductDisbursementId": "",
        "providerVisitRequestedSampleId": "callSample3",
        "providerSampleLimitTemplateName": "PerYearTemplate",
        "ProviderSampleLimitId": "sampleLimit1",
        "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000",
        "account": "001XXXXXXXXXXXXXAAAG",
        "quantity": "1"
      },
      {
        "ProviderVisitId": "a2TXXXXXXXXXXXXXEA1",
        "limitProductId": "2_parentProduct1",
        "productId": "2_childProduct2",
        "ProductDisbursementId": "callSample4",
        "providerVisitRequestedSampleId": "",
        "providerSampleLimitTemplateName": "parent_template1",
        "ProviderSampleLimitId": "defaultSampleLimit1",
        "visitPlannedStartTime": "2025-01-01T15:45:00.000+0000",
        "account": "001XXXXXXXXXXXXXAAAG",
        "quantity": "6"
      }
    ]
  }
},
"pendingSyncData": {
  "providerVisitSampleLimitTransactions": {
    "001XXXXXXXXXXXXXAAAG": [
      {
        "providerVisitId": "lscpr1_call_c-639XXXXX-XXXX-XXXX-XXXX-XXXXXXXXXAEB",
        "providerVisitRequestedSampleId": "lscpr1_callsampleorder_c-988XXXXX-XXXX-XXXX-XXXX-XXXXXXXXX1BF",
        "ProductDisbursementId": "",
        "limitProductId": "a5AXXXXXXXXXXXXXXEAU",
        "productId": "a5AXXXXXXXXXXXXXXEAU",
        "quantity": "1",
        "visitPlannedStartTime": "2024-12-11T18:28:31.404+0000",
        "ProviderSampleLimitId": "a5cXXXXXXXXXXXXXAAE",
        "account": "001XXXXXXXXXXXXXAAAG",
        "providerSampleLimitTemplateName": "PerYearTemplate"
      }
    ]
  },
  "productDisbursements": [
    {}
  ]
},
"action": "validate"

```

```

    }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
sampleLimitRequest	SimpleRequestInput	The payload that contains the sample limit validations to perform in JSON format.	Required	65.0

Servicing Facility Input

Facility where the service is being provided.

Root XML tag

```
<servicingFacility>
```

Properties

Name	Type	Description	Required	Available Version
npi	String	Servicing facility's NPI number.	Yes	46.0
servicingFacilityId	String	ID of the facility where the patient is receiving the service for this care request.	Yes	55.0

Servicing Practitioner Input

Practitioner administering the service.

Root XML tag

```
<servicingPractitioner>
```

Properties

Name	Type	Description	Required	Available Version
healthCareProviderId	String	The provider associated with providing the service for this care request. This field is a lookup to HealthcareProviderId .	Yes	55.0
npi	String	Servicing practitioner's NPI number.	Yes	46.0

Search Input

Input representation for Search API

Root XML tag

```
<searchInput>
```

JSON example

```
{  
    "searchTerm": "Joe Tester",  
    "verificationContext": {  
        "processDefinition": {  
            "processDetail": {  
                "processDetailList": [  
                    {  
                        "verificationProcessFieldList": {  
                            "verificationProcessFields": [  
                                {  
                                    "dataSourceType": "Salesforce",  
                                    "developerName": "SampleAccountName",  
                                    "fieldName": "Name",  
                                    "fieldType": "optionalVerifier",  
                                    "label": "Account Name"  
                                }, {  
                                    "dataSourceType": "Salesforce",  
                                    "developerName": "SampleAccountNumber",  
                                    "fieldName": "AccountNumber",  
                                    "fieldType": "optionalVerifier",  
                                    "label": "Account Number"  
                                }, {  
                                    "dataSourceType": "Salesforce",  
                                    "developerName": "SamplePhone",  
                                    "fieldName": "Phone",  
                                    "fieldType": "optionalVerifier",  
                                    "label": "Phone"  
                                }, {  
                                    "dataSourceType": "Salesforce",  
                                    "developerName": "SamplePostalCode",  
                                    "fieldName": "BillingPostalCode",  
                                    "fieldType": "optionalVerifier",  
                                    "label": "Billing Zip/Postal Code"  
                                }, {  
                                    "dataSourceType": "Salesforce",  
                                    "developerName": "SampleAccount",  
                                    "fieldName": "Name",  
                                    "fieldType": "resultField",  
                                    "label": "Account Name"  
                                }, {  
                                    "dataSourceType": "Salesforce",  
                                    "developerName": "AccountNumberSample",  
                                    "fieldName": "AccountNumber",  
                                    "fieldType": "resultField",  
                                    "label": "Account Number"  
                                }, {  
                                    "dataSourceType": "Salesforce",  
                                    "developerName": "SamplePhoneNumber",  
                                    "fieldName": "Phone",  
                                    "fieldType": "resultField",  
                                    "label": "Phone"  
                                }  
                            ]  
                        }  
                    }  
                ]  
            }  
        }  
    }  
}
```

```
        ]
      },
      "searchType": "Text-Based",
      "searchSequenceNo": 1,
      "searchResultUniqueIdField": "Id",
      "searchObjectName": "Account",
      "optionalVerifierCount": 1,
      "dataSourceType": "Salesforce"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
searchTerm	String	The search term for the account to use when performing a search.	Required	54.0
verificationContext	Verification Context Input	The structure that contains the setup data and context required to perform the search.	Required	54.0

Transport Location Input

Input representation for Transport Location

Root XML tag

<transportLocation>

Properties

Name	Type	Description	Required	Available Version
ambulanceTransportDistance	Double	Distance traveled during ambulance transport. Maps to: CareRequestItem.AmbulanceTransportDistance	No	46.0
ambulanceTransportReason	String	Reason for ambulance transport. Maps to: CareRequestItem.AmbulanceTransportReason	No	46.0
ambulanceTransportType	String	Type of ambulance transport. Maps to: CareRequestItem.AmbulanceTransportType	No	46.0
name	String	Name of the transport location.	Yes	46.0

User Credentials Input

Input representation of the user credentials to perform digital verification.

JSON example

```
{
  "userCredentials": {
    "loginId": "david.chavez@salesforce.com",
    "password": "123456"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
loginId	String	Login ID or username used by the user to authenticate for the digital verification.	Required	60.0
password	String	Password used by the user to authenticate for the digital verification.	Required	60.0

Visited Party Attributes Input

Input representation of the visiting party. For example, for a medical device visit, the visiting party can be the surgeon and the anesthesiologist.

Properties

Name	Type	Description	Required or Optional	Available Version
primary	Boolean	Indicates whether the contact of the visited party is a primary contact (<code>true</code>) or not (<code>false</code>).	Optional	55.0
user	String	ID of the person from the customer account being visited.	Optional	55.0

Visitor Attributes Input

Input representation of the visitor attributes. For example, for a medical device visit, visitor can be the sales representative and the clinical specialist.

JSON example

```
"visitor": [
  {
    "user": "005xx000001X7fNAAS",
    "primaryVisitor": true
```

```

        }
    ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
primary	Boolean	Indicates whether a service resource is the primary resource (<code>true</code>) or not (<code>false</code>) for a visit.	Required	55.0
user	String	ID of the assigned service resource.	Required	55.0

Work Type Lead Time Input

Input representation of the request to get a list of work types and their associated lead times.

JSON example

```
{
  "contextId": "0Wwxx0000000DWjCAM",
  "workProcedureId": "0zjSG00000000PpYAI",
  "priority": 5
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextId	String	ID of a program enrollee, an account, or opportunity.	Optional	60.0
priority	Integer	Number between one and ten indicating the priority associated with a country or service territory. This field is useful when you want to override the lead time based on a country or service territory.	Optional	60.0
workProcedureId	String	Advanced therapy ID.	Required	60.0

Response Bodies

A resource can return a response body in either JSON or XML format.

Refer to [HTTP response code](#) to find out whether the request was successful or not, as well as the error messages for the failed requests.

Account User Territory Info

The details of the users and the territories associated with the account.

Account Manual Alignment Output

Represents the output for the request to align customer account manually.

[Appointed Representative](#)

Person who is an appointed representative for the member.

[Book Slot Chain Output](#)

Output representation of the request to create service appointments.

[Care Request Case](#)

Case related to the care request.

[Care Request Patient](#)

The patient for whom the request is being raised.

[Care Authorization Request](#)

Output of create or update request for care services review.

[Care Authorization Request Related Record](#)

Care Authorization request related record output representation

[Care Authorization Request Result](#)

Result of POST or PATCH request.

[Create or Update Care Authorization Request Result](#)

Response to create or update care services review request.

[Care Diagnosis](#)

Associated diagnosis including code type, name, and description. One or more care diagnoses can be associated with a care request.

[Care Program Enrollment Result](#)

Result containing details about a single patient enrollment.

[Care Request Drug](#)

Requested drug including name, strength, frequency, and instructions for administration. One or more drug requests can be associated with a care request.

[Care Request Item](#)

The details of a care service request, including name, modifiers, and the effective date. One or more care service requests can be associated with a care request.

[Care Request](#)

The general details of a care-related request including member information, admission date, decision reason, and so on. A single request can contain multiple diagnoses, services, or drugs. Care requests include prior authorizations for drugs and services, admission notifications, concurrent review of admissions, appeals, complaints, and grievances.

[Care Request Reviewer Output](#)

Output representation of the care request reviewer.

[Care Authorization Request Response](#)

The response body for the Care Services Review GET request.

[Create Visit Output](#)

Output representation of the create visit request.

[Content Document Output](#)

Content document output representation.

[Content Management Output](#)

Represents the information about the job status and any associated messages returned for Content Management APIs.

[Custom Field Value](#)

The output representation of the custom field values.

[Customer Account Merge Output](#)

Output representation of the response for a successful account merge operation.

[Digital Verification Output](#)

Output Representation for the digital verification API request.

[Dispenser Address](#)

Pharmacy address.

[Download Provider Output](#)

The response representation containing the status of the provider download request and the resulting data.

[Document Conflict Field](#)

Output representation of the target object field with conflict.

[Document Conflict Field List](#)

Output representation of the target object fields with conflicts.

[Document Management Result](#)

Output representation of the document split request.

[Document Process Output](#)

Output representation of the document process creation or update request.

[Error Response Output](#)

Error response representation.

[Enrollee Product Result](#)

Details about the enrollee's products.

[Enrollment Card Result](#)

Details of the enrollment care for a single enrollee.

[Error Message](#)

A generic error message containing error code and the message text.

[First Reviewer](#)

The name of the person who reviewed the request first.

[FHIR Reference](#)

The output representation of the FHIR reference values.

[Field Value Output](#)

Represents the value of a field.

[FHIR Address](#)

The output representation of the FHIR address values.

[FHIR Codeable Concept](#)

The output representation of the Code Set Bundle records created to represent a codeableConcept value.

[FHIR Coding](#)

The output representation of the Code Set records created to represent a Coding value.

[FHIR Human Name](#)

The output representation of a PersonName record created to represent a humanName value.

[FHIR Contact Point](#)

The output representation of contact details stored as a ContactPointPhone record.

[FHIR Identifier](#)

The output representation of the Identified records created to represent an identifier value.

[FHIR Patient](#)

The output representation of the patient stored in Salesforce, as specified in the input request.

[General Practitioner](#)

Member's primary or general care practitioner.

[Medical Director](#)

Name of the medical director who reviewed the request.

[Merge Customer Account with Status Output](#)

The response body for the merge customer account with status request.

[Original Denial Medical Director](#)

The name of the medical director who denied the original request.

[Object Field](#)

Output representation of the target object field.

[Object Field List](#)

Output representation of the target object fields list.

[OCR Document Scan Result](#)

Output representation of the OCR document scan result ID.

[OCR Document Scan Result List](#)

Output representation of the list of the OCR document scan results IDs.

[Patient Communication Language](#)

The output representation of the PersonLanguage records that represent the communication preferences of a person.

[Patient Contact Party](#)

The output representation of contact parties associated with a patient.

[Patient Get](#)

Output representation of details of a patient record.

[Patient Upsert](#)

Output representation of result after a Patient FHIR resource is created.

[Patient Update](#)

Output representation of result after a Patient FHIR resource is updated.

[Payload Output](#)

Output representation of the details communicated to the recipient.

[Presentation Page Product Output](#)

Represents the output for Presentation Page Products API.

[Program Enrollment Result](#)

Result containing details of all patient enrollment status. If there is success, it contains `id` of new records created for each patient.

[Rejected Merge Request Output](#)

A merge request that was rejected due to invalid input.

[Requesting Practitioner](#)

Ordering or referring practitioner for the request.

[Reopened By Output](#)

The name of the person who reopened the care request.

[Sample Limits Validation Response Output](#)

Output representation for a sample limits validation request.

[Search Results Output](#)

Output representation for provider search request.

[Servicing Facility](#)

Facility where the service is being provided.

[Servicing Practitioner](#)

Practitioner administering the service.

[Subscriber](#)

The primary member on the plan.

[Tracked Communication Output](#)

Output representation of tracked communications for a care request.

[Transport Location](#)

Transport Location output representation

[Verifier Output](#)

Represents a verifier.

[Work Type Lead Time Output](#)

Output representation of a list of work types and their associated lead times.

Account User Territory Info

The details of the users and the territories associated with the account.

JSON example

```
{
  "code": "200",
  "message": null,
  "response": {
    "warnings": null,
    "UserTerritoryInfo": [
      {
        "userInformation": {
          "Name": "John Doe",
          "IsActive": true,
          "Username": "jdoe@example.org",
          "Id": "005xx00000ElNh3xxF"
        },
        "territoryInformation": {
          "Name": "RD - Midwest 20A",
          "Id": "0MISxx00000NLzpxxG"
        }
      }
    ]
  }
}
```

```
{
  "userInformation": {
    "Name": "Peter Pan",
    "IsActive": true,
    "Username": "ppan@example.com",
    "Id": "005xx00000EnxilxxB"
  },
  "territoryInformation": {
    "Name": "RD - Midwest 20A",
    "Id": "0MISxx00000NLzpxxG"
  }
},
"errors": null
},
"success": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	The API response code.	Small, 64.0	64.0
message	String	If the parameters were invalid, this property contains the error message.	Small, 64.0	64.0
response	Map <String, Object>	Data related to the users and territories	Small, 64.0	64.0
success	Boolean	This flag indicates if the request was successful or not..	Small, 64.0	64.0

Account Manual Alignment Output

Represents the output for the request to align customer account manually.

Properties

Property Name	Type	Description	FILTER Group and Version	Available version
success	Boolean	Indicates if the API request was successful (<code>true</code>) or not (<code>false</code>).	Small, 65.0	65.0
message	String	Message related to the API request, which can help in case of failure.	Small, 65.0	65.0
code	String	HTTP status code for the API response.	Small, 65.0	65.0
response	Map<String, Object>	Map that holds the account and territory data.	Small, 65.0	65.0

Example

```
{
  "success": true,
  "message": "",
  "code": "200",
  "response": {
    "ProviderAcctTerritoryInfo": [
      {
        "attributes": {
          "type": "ProviderAcctTerritoryInfo",
          "url": "/services/data/v65.0/sobjects/ProviderAcctTerritoryInfo/1GxxM000001G5hxxAC"
        },
        "Id": "1GxxM000001G5hxxAC",
        "Name": "PATI-000000008",
        "AccountId": "00xxM00000FyWOxxAV",
        "Territory2Id": "OxxSM0000028E4xxAE"
      }
    ]
  }
}
```

Appointed Representative

Person who is an appointed representative for the member.

Property Name	Type	Description	Filter Group and Version	Available Version
firstName	String	First Name of the appointed representative. Maps to: Account.FirstName	Big, 46.0	46.0
lastName	String	Last Name of the appointed representative. Maps to: Account.LastName	Big, 46.0	46.0

Book Slot Chain Output

Output representation of the request to create service appointments.

JSON example

```
{
  "isSuccess":true,
  "serviceAppointmentIds": [
    "08pxx0000004C92AAE",
    "08pxx0000004C92AAE",
    "08pxx0000004C92AAE"
  ],
  "serviceAppointmentGroupId": "08pxx0000004C92AAE",
  "message": "",
  "code":200
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	API response code.	Small, 60.0	60.0
isSuccess	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
message	String	Error message when the request fails.	Small, 60.0	60.0
serviceAppointmentGroup	String	ID of the service appointment group to which the created service appointments belong to.	Small, 60.0	60.0
serviceAppointmentIds	String[]	IDs of the created service appointments.	Big, 60.0	60.0

Care Request Case

Case related to the care request.

Property Name	Type	Description	Filter Group and Version	Available Version
accountName	String	Name of the account.	Big, 46.0	46.0
caseNumber	String	Case number.	Big, 46.0	46.0
caseOrigin	String	The source of the case, such as Email, Phone, or Web. Maps to: <code>Case.Origin</code>	Big, 46.0	46.0
caseOwner	String	Case owner.	Big, 46.0	46.0
caseReason	String	The reason why the case was created, such as Instructions not clear, or User didn't attend training. Maps to: <code>Case.Reason</code>	Big, 46.0	46.0
closed	Boolean	Indicates if the case is closed.	Big, 46.0	46.0
contactName	String	Contact Name.	Big, 46.0	46.0
createdBy	String	Case created by.	Big, 46.0	46.0
dateClosed	String	Date and time when the case was closed.	Big, 46.0	46.0
dateOpened	String	Date and time when the case was opened.	Big, 46.0	46.0
description	String	A text description of the case.	Big, 46.0	46.0
escalated	Boolean	Indicates if the case is escalated.	Big, 46.0	46.0
lastModifiedBy	String	Last modified by.	Big, 46.0	46.0
lastModifiedDate	String	Last modified date of the case.	Big, 46.0	46.0
lastReferencedDate	String	Last referenced date of the case.	Big, 46.0	46.0
lastViewedDate	String	Last viewed date of the case.	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
parentCase	String	Parent Case.	Big, 46.0	46.0
priority	String	The importance or urgency of the case, such as High, Medium, or Low. Maps to: <code>Case.Priority</code>	Big, 46.0	46.0
status	String	The status of the case. Maps to: <code>Case.Status</code>	Big, 46.0	46.0
subject	String	The subject of the case. Maps to: <code>Case.Subject</code>	Big, 46.0	46.0
type	String	The type of case, such as Feature Request or Question. Maps to: <code>Case.Type</code>	Big, 46.0	46.0
webCompany	String	The company name that was entered when the case was created. This field can't be updated after the case has been created. Maps to: <code>Case.SuppliedCompany</code>	Big, 46.0	46.0
webEmail	String	The email address that was entered when the case was created. This field can't be updated after the case has been created. Maps to: <code>Case.SuppliedEmail</code>	Big, 46.0	46.0
webName	String	The name that was entered when the case was created. This field can't be updated after the case has been created. Maps to: <code>Case.SuppliedName</code>	Big, 46.0	46.0
webPhone	String	The phone number that was entered when the case was created. This field can't be updated after the case has been created. Maps to: <code>Case.SuppliedPhone</code>	Big, 46.0	46.0

Care Request Patient

The patient for whom the request is being raised.

Property Name	Type	Description	Filter Group and Version	Available Version
birthDate	String	Date of birth of the patient.	Big, 46.0	46.0
firstName	String	First name of the patient.	Big, 46.0	46.0
lastName	String	Last name of the patient.	Big, 46.0	46.0
memberId	String	Insurance identifier for the member.	Big, 46.0	46.0

Care Authorization Request

Output of create or update request for care services review.

Property Name	Type	Description	Filter Group and Version	Available Version
careDiagnoses	Care Diagnoses []	A list of associated diagnoses including code type, name, and description. One or more care diagnoses can be associated with a care request.	Big, 46.0	46.0
careRequest	Care Request	The general details of a care-related request including member information, admission date, decision reason, and so on. A single request can contain multiple diagnoses, services, or drugs. Care requests include prior authorizations for drugs and services, admission notifications, concurrent review of admissions, appeals, complaints, and grievances.	Big, 46.0	46.0
careRequestCase	Care Request Case	Case related to the care request.	Big, 46.0	46.0
careRequestDrugs	Care Request Drug []	A list of requested drugs including name, strength, frequency, and instructions for administration. One or more drug requests can be associated with a care request.	Big, 46.0	46.0
careRequestItems	Care Request Item []	A list of care request items containing name, modifiers, and the effective date. One or more care service requests can be associated with a care request.	Big, 46.0	46.0
patient	Patient	The patient for whom the request is raised.	Big, 46.0	46.0
subscriber	Subscriber	The primary member on the plan.	Big, 46.0	46.0
tracked Communications	Tracked Communication Output []	A list of tracked communications for a care request.	Big, 57.0	57.0
transportLocations	Transport Locations []	Transport location output.	Big, 46.0	46.0

Care Authorization Request Related Record

Care Authorization request related record output representation

Property Name	Type	Description	Filter Group and Version	Available Version
isSuccess	Boolean	Indicates if the operation was a success.	Small, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
created	Boolean	Indicate if the record was created.	Big, 46.0	46.0
id	String	Id for the newly created record.	Big, 46.0	46.0
objectType	String	The type of the object created.	Big, 46.0	46.0
status	String	Indicates the status of the record creation.	Big, 46.0	46.0

Care Authorization Request Result

Result of POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
relatedRecords	Care Authorization Request Related Record []	List of related records	Big, 46.0	46.0

Create or Update Care Authorization Request Result

Response to create or update care services review request.

JSON example

```
{
  "code": "SUCCESS",
  "isSuccess": true,
  "result": [
    {
      "created": true,
      "id": "0Umxx0000004FA9CAM",
      "objectType": "CareRequest",
      "relatedRecords": [
        {
          "created": true,
          "id": "0VDxx0000004DwLGAU",
          "objectType": "CareRequestDrug"
        },
        {
          "created": true,
          "id": "0VKxx0000004DwMGAU",
          "objectType": "CareRequestItem"
        },
        {
          "created": true,
          "id": "0VKxx0000004DwNGAU",
          "objectType": "CareRequestItem"
        }
      ]
    }
  ]
}
```

```

    "created": true,
    "id": "0VCxx0000004DwMGAU",
    "objectType": "CareDiagnosis"
},
{
    "created": true,
    "id": "0VCxx0000004DwNGAU",
    "objectType": "CareDiagnosis"
},
{
    "created": true,
    "id": "06Hxx0000004DWbEAM",
    "objectType": "CareRequestReviewer"
},
{
    "created": true,
    "id": "06Hxx0000004DWcEAM",
    "objectType": "CareRequestReviewer"
},
{
    "created": true,
    "id": "06Hxx0000004DWdEAM",
    "objectType": "CareRequestReviewer"
},
{
    "created": true,
    "id": "06Hxx0000004DWeEAM",
    "objectType": "CareRequestReviewer"
},
{
    "created": true,
    "id": "06Hxx0000004DWfEAM",
    "objectType": "CareRequestReviewer"
}
]
}
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Care Authorization returned code	Small, 46.0	46.0
isSuccess	Boolean	Flag to indicate if the request was successful.	Small, 46.0	46.0
message	String	If there is any error, this property contains the error message.	Small, 46.0	46.0
outputResults	Care Authorization Request[]	Care Authorization Request results output	Small, 46.0	46.0
result	Care Authorization Request Result[]	Care Authorization Request result	Small, 46.0	46.0

Care Diagnosis

Associated diagnosis including code type, name, and description. One or more care diagnoses can be associated with a care request.

Property Name	Type	Description	Filter Group and Version	Available Version
careRequestReviewers	Care Request Reviewer Output[]	The care diagnosis associated with the care request reviewer. Maps to: CareDiagnosis.CareRequestReviewers	Big, 52.0	52.0
code	String	Name of the diagnosis code. Maps to: CareDiagnosis.Name	Big, 46.0	46.0
codeDescription	String	Diagnosis code description. Maps to: CareDiagnosis.CodeDescription	Big, 46.0	46.0
codeType	String	Code type for the diagnosis. Maps to: CareDiagnosis.CodeType	Big, 46.0	46.0
codeTypeID	String	ID of the code type for the diagnosis. Maps to: CareDiagnosis.CodeTypeIdentifier	Big, 46.0	46.0
diagnosisCodeSet	String	The diagnosis code set. Maps toCareDiagnosis.DiagnosisCodeSet	Big, 52.0	52.0
dischargeCode	String	Discharge diagnosis code. Maps to: CareDiagnosis.DischargeCode	Big, 46.0	46.0
dischargeCodeDescription	String	Description of the discharge diagnosis code. Maps to: CareDiagnosis.DischargeCodeDescription	Big, 46.0	46.0
dischargeCodeType	String	Code type for the discharge diagnosis. Maps to: CareDiagnosis.DischargeCodeType	Big, 46.0	46.0
dischargeCodeTypeID	String	ID of the code type for the discharge diagnosis. Maps to: CareDiagnosis.DischargeCodeTypeIdentifier	Big, 46.0	46.0
dischargeDiagnosisisEffectiveDate	String	Effective date for the discharge diagnosis. Maps to: CareDiagnosis.DischargeDiagnosisisEffectiveDate	Big, 46.0	46.0
dischargeDiagnosisCodeSet	String	The discharge diagnosis code set associated with the care diagnosis. Maps to: CareDiagnosis.DischargeDiagnosisCodeSet	Big, 52.0	52.0
dischargeDiagnosisisEndDate	String	Termination date for the discharge diagnosis. Maps to: CareDiagnosis.DischargeDiagnosisisEndDate	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
effectiveDate	String	Effective date for the diagnosis. Maps to: <code>CareDiagnosis.EffectiveDate</code>	Big, 46.0	46.0
endDate	String	Termination date for the diagnosis. Maps to: <code>CareDiagnosis.EndDate</code>	Big, 46.0	46.0
healthcare DiagnosisCode	String	Healthcare Diagnosis Code.	Big, 46.0	46.0
healthCondition Id	String	The health condition that's associated with the member. Maps to: <code>CareDiagnosis.HealthCondition</code>	Big, 57.0	57.0
id	String	ID of the Care Diagnosis.	Big, 46.0	46.0
modifiedCode	String	Modified diagnosis code. Maps to: <code>CareDiagnosis.ModifiedCode</code>	Big, 46.0	46.0
modifiedCode Description	String	Modified diagnosis code description. Maps to: <code>CareDiagnosis.ModifiedCodeDescription</code>	Big, 46.0	46.0
modifiedCodeType	String	Code type for the modified diagnosis. Maps to: <code>CareDiagnosis.ModifiedCodeType</code>	Big, 46.0	46.0
modifiedCodeType Id	String	ID of the code type for the modified diagnosis. Maps to: <code>CareDiagnosis.ModifiedCodeTypeIdentifier</code>	Big, 46.0	46.0
modifiedDiagnosis CodeSet	String	The modified diagnosis code set associated with the care diagnosis. Maps to: <code>CareDiagnosis.ModifiedDiagnosisCodeSet</code>	Big, 52.0	52.0
modifiedEffective Date	String	Modified effective date for the diagnosis. Maps to: <code>CareDiagnosis.ModifiedEffectiveDate</code>	Big, 46.0	46.0
modifiedEndDate	String	Modified termination date for the diagnosis. Maps to: <code>CareDiagnosis.ModifiedEndDate</code>	Big, 46.0	46.0
modifiedPrimary Diagnosis	Boolean	Modified Primary Diagnosis	Big, 46.0	46.0
name	String	Name of the diagnosis code. Maps to: <code>CareDiagnosis.Name</code>	Big, 46.0	46.0
presentOn Admission	String	Specifies if the health condition was present at the time of member admission. Maps to: <code>CareDiagnosis.PresentOnAdmission</code>	Big, 57.0	57.0

Property Name	Type	Description	Filter Group and Version	Available Version
primary	Boolean	Indicates whether it is a primary diagnosis (<code>true</code>) or not (<code>false</code>).	Big, 46.0	46.0
primaryDischarge Diagnosis	Boolean	Indicates whether it is a primary Discharge Diagnosis (<code>true</code>) or not (<code>false</code>).	Big, 46.0	46.0
sourceSystem	String	System from which this request was sourced. Maps to: <code>CareDiagnosis.SourceSystem</code>	Big, 46.0	46.0
sourceSystem Identifier	String	ID of the system from which the request was sourced. Maps to: <code>CareDiagnosis.SourceSystemIdentifier</code>	Big, 46.0	46.0
sourceSystem Modified	String	Timestamp of the most recent update from the source system. Maps to: <code>CareDiagnosis.SourceSystemModified</code>	Big, 46.0	46.0

Care Program Enrollment Result

Result containing details about a single patient enrollment.

Property Name	Type	Description	Filter Group and Version	Available Version
enrolleeProducts	Enrollee Product Result[]	A list containing results of care program enrollee products creation for each enrollee.	Small, 46.0	46.0
enrollmentCard	Enrollment Card Result	Results of care program enrollment card creation for the enrollee.	Small, 46.0	46.0
error	Error Message	Error code and message.	Small, 46.0	46.0
isSuccess	Boolean	Indicates if the operation was a success.	Small, 46.0	46.0
created	Boolean	Indicate if the record was created.	Big, 46.0	46.0
id	String	Id for the newly created <code>CareProgramEnrollee</code> record.	Big, 46.0	46.0
objectType	String	The type of the object created. In this case, it is <code>CareProgramEnrollee</code> .	Big, 46.0	46.0
status	String	Indicates the status of the record creation.	Big, 46.0	46.0

Care Request Drug

Requested drug including name, strength, frequency, and instructions for administration. One or more drug requests can be associated with a care request.

Property Name	Type	Description	Filter Group and Version	Available Version
approvedUnits	Integer	Approved quantity of the drug. Maps to: <code>CareRequestDrug.ApprovedUnits</code>	Big, 46.0	46.0
authApprovalIdentifier	String	The unique identifier assigned to the drug on approval of the authorization request. Maps to: <code>CareRequestDrug.AuthApprovalIdentifier</code>	Big, 57.0	57.0
authorizationRefIdentifier	String	The unique identifier of the authorization request associated with this requested drug. Maps to: <code>CareRequestDrug.AuthorizationRefIdentifier</code>	Big, 57.0	57.0
careRequestReviewers	Care Request Reviewer Output[]	The care request drug associated with the care request reviewer. Maps to: <code>CareRequestDrug.CareRequestReviewers</code>	Big, 52.0	52.0
clinicalDetermination	String	The clinical determination of the drug request. Maps to: <code>CareRequestDrug.ClinicalDetermination</code>	Big, 52.0	52.0
clinicalDeterminationNote	String	The notes related to the clinical determination. Maps to: <code>CareRequestDrug.ClinicalDeterminationNote</code>	Big, 52.0	52.0
clinicalDeterminationReason	String	The reason for the clinical determination. Maps to: <code>CareRequestDrug.ClinicalDeterminationReason</code>	Big, 52.0	52.0
code	String	Code for the drug. Maps to: <code>CareRequestDrug.Code</code>	Big, 46.0	46.0
codeType	String	ID code type for the drug. Maps to: <code>CareRequestDrug.CodeType</code>	Big, 46.0	46.0
daysSupply	Integer	Number of days to supply the drug. Maps to: <code>CareRequestDrug.DaysSupply</code>	Big, 46.0	46.0
deniedUnits	Integer	Denied quantity of the drug. Maps to: <code>CareRequestDrug.DeniedUnits</code>	Big, 46.0	46.0
dispenserAddress	Dispenser Address	Pharmacy address.	Big, 46.0	46.0
dispenserFaxNumber	String	Pharmacy fax number. Maps to: <code>CareRequestDrug.DispenserFaxNumber</code>	Big, 46.0	46.0
dispenserId	String	ID for the pharmacy. Maps to: <code>CareRequestDrug.DispenserIdentifier</code>	Big, 46.0	46.0
dispenserName	String	Name of the pharmacy. Maps to: <code>CareRequestDrug.DispenserName</code>	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
dispenserPhone Number	String	Pharmacy phone number. Maps to: <code>CareRequestDrug.DispenserPhoneNumber</code>	Big, 46.0	46.0
dispenserTaxId	String	Pharmacy tax identification number. Maps to: <code>CareRequestDrug.DispenserTaxIdentifier</code>	Big, 46.0	46.0
dose	String	Dose of the drug. Maps to: <code>CareRequestDrug.Dose</code>	Big, 46.0	46.0
drugAdministration Setting	String	The setting in which the drug is expected to be administered to the patient. Maps to: <code>CareRequestDrug.DrugAdministrationSetting</code>	Big, 57.0	57.0
frequency	String	Frequency of the drug. Maps to: <code>CareRequestDrug.Frequency</code>	Big, 46.0	46.0
id	String	Id	Big, 46.0	46.0
modifiedCode	String	Code for the modified drug. Maps to: <code>CareRequestDrug.ModifiedCode</code>	Big, 46.0	46.0
medicationRef ObjectId	String	The medication request or statement associated with the care request drug. Maps to: <code>CareRequestDrug.MedicationRefObject</code>	Big, 57.0	57.0
modifiedCode Type	String	ID code type for the modified drug. Maps to: <code>CareRequestDrug.ModifiedCodeType</code>	Big, 46.0	46.0
modifiedDays Supply	Integer	Number of days of supply for the modified drug. Maps to: <code>CareRequestDrug.ModifiedDaysSupply</code>	Big, 46.0	46.0
modifiedDose	String	Dose of the modified drug. Maps to: <code>CareRequestDrug.ModifiedDose</code>	Big, 46.0	46.0
modifiedFrequency	String	Frequency of the modified drug. Maps to: <code>CareRequestDrug.ModifiedFrequency</code>	Big, 46.0	46.0
modifiedName	String	Name of the modified drug. Maps to: <code>CareRequestDrug.ModifiedName</code>	Big, 46.0	46.0
modifiedSig	String	Directions for use of the modified drug. Maps to: <code>CareRequestDrug.ModifiedSig</code>	Big, 46.0	46.0
modifiedStrength	String	Strength of the modified drug. Maps to: <code>CareRequestDrug.ModifiedStrength</code>	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
modifiedTherapy Duration	Integer	Duration of therapy for the modified drug. Maps to: <code>CareRequestDrug.ModifiedTherapyDuration</code>	Big, 46.0	46.0
modifiedUnits	Integer	Modified quantity of the drug. Maps to: <code>CareRequestDrug.ModifiedUnits</code>	Big, 46.0	46.0
name	String	Name of the drug. Maps to: <code>CareRequestDrug.Name</code>	Big, 46.0	46.0
prescriptionDate	String	Date for the prescription. Maps to: <code>CareRequestDrug.PrescriptionDate</code>	Big, 46.0	46.0
prescription FillDate	String	Date for the prescription fills. Maps to: <code>CareRequestDrug.PrescriptionFillDate</code>	Big, 57.0	57.0
prescriptionFills	Integer	Number of fills for the prescription. Maps to: <code>CareRequestDrug.PrescriptionFills</code>	Big, 46.0	46.0
priority	String	The priority representing the urgency of the drug's authorization request. Maps to: <code>CareRequestDrug.Priority</code>	Big, 57.0	57.0
requestType	String	The type of drug request. Maps to: <code>CareRequestDrug.RequestType</code>	Big, 57.0	57.0
serviceCategory String Code	String	Name of the service type such as medical care, diagnostic radiology, pharmacy, or diagnostic laboratory. Maps to: <code>CareRequestDrug.ServiceCategory</code>	Big, 46.0	46.0
serviceCategory String Code	String	Alphanumeric code that uniquely identifies a service type. Maps to: <code>CareRequestDrug.ServiceCategoryCode</code>	Big, 46.0	46.0
servicingFacility Servicing Facility Output	Servicing Facility Output	The facility where a patient receives service of the requested drug. Maps to: <code>CareRequestDrug.ServicingFacility</code>	Big, 57.0	57.0
servicingProvider Servicing Practitioner Output	Servicing Practitioner Output	The healthcare provider who provides the service of the requested drug. Maps to: <code>CareRequestDrug.ServicingProvider</code>	Big, 57.0	57.0
sig	String	Directions for use of the drug. Maps to: <code>CareRequestDrug.Sig</code>	Big, 46.0	46.0
sourceSystem	String	System from which this request was sourced. Maps to: <code>CareRequestDrug.SourceSystem</code>	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
sourceSystemIdentifier	String	ID of the system from which the request was sourced. Maps to: <code>CareRequestDrug.SourceSystemIdentifier</code>	Big, 46.0	46.0
sourceSystemModified	String	Timestamp of the most recent update from the source system. Maps to: <code>CareRequestDrug.SourceSystemModified</code>	Big, 46.0	46.0
status	String	The authorization status of the requested drug. Maps to: <code>CareRequestDrug.Status</code>	Big, 57.0	57.0
statusReason	String	The reason for the authorization status of the requested drug. Maps to: <code>CareRequestDrug.StatusReason</code>	Big, 57.0	57.0
strength	String	Strength of the drug. Maps to: <code>CareRequestDrug.Strength</code>	Big, 46.0	46.0
therapyDuration	Integer	Duration of therapy for the drug. Maps to: <code>CareRequestDrug.TherapyDuration</code>	Big, 46.0	46.0
units	Integer	Quantity of the drug. Maps to: <code>CareRequestDrug.Units</code>	Big, 46.0	46.0

Care Request Item

The details of a care service request, including name, modifiers, and the effective date. One or more care service requests can be associated with a care request.

Property Name	Type	Description	Filter Group and Version	Available Version
approvedLengthOfStay	Integer	The number of days requested for the admission. Maps to: <code>CareRequestItem.ApprovedLengthOfStay</code>	Big, 52.0	52.0
approvedLevelOfCare	String	Specifies the approved level of care for the patient. Maps to: <code>CareRequestItem.ApprovedLevelOfCare</code>	Big, 52.0	52.0
approvedQuantity	Integer	The approved quantity of the care item. Maps to: <code>CareRequestItem.ApprovedQuantity</code>	Big, 46.0	46.0
approvedServiceEndDate	String	The end date of the approved service that the patient received. Maps to: <code>CareRequestItem.ApprovedServiceEndDate</code>	Big, 52.0	52.0

Property Name	Type	Description	Filter Group and Version	Available Version
approvedServiceStartDate	String	The start date of the approved service that the patient received. Maps to: <code>CareRequestItem.ApprovedServiceStartDate</code>	Big, 52.0	52.0
authApprovalIdentifier	String	The unique identifier assigned to the item on approval of the prior authorization request. Maps to: <code>CareRequestItem.AuthApprovalIdentifier</code>	Big, 57.0	57.0
authorizationRefIdentifier	String	The unique identifier of the prior authorization request associated with this requested item. Maps to: <code>CareRequestItem.AuthorizationRefIdentifier</code>	Big, 57.0	57.0
careRequestReviewers	Care Request Reviewer Output[]	The care request item associated with the care request reviewer. Maps to: <code>CareRequestItem.CareRequestReviewers</code>	Big, 52.0	52.0
clinicalDetermination	String	The clinical determination of the care request. Maps to: <code>CareRequestItem.ClinicalDetermination</code>	Big, 52.0	52.0
clinicalDeterminationNotes	String	The notes related to the clinical determination. Maps to: <code>CareRequestItem.ClinicalDeterminationNotes</code>	Big, 52.0	52.0
clinicalDeterminationReason	String	The reason for the clinical determination. Maps to: <code>CareRequestItem.ClinicalDeterminationReason</code>	Big, 52.0	52.0
clinicalServiceRequestId	String	The clinical service request associated with the care request item. Maps to: <code>CareRequestItem.ClinicalServiceRequest</code>	Big, 57.0	57.0
codeDescription	String	Description of the denied service code. Maps to: <code>CareRequestItem.CodeDescription</code>	Big, 46.0	46.0
codeType	String	Code type for the service. Maps to: <code>CareRequestItem.CodeType</code>	Big, 46.0	46.0
codeTypeId	String	ID of the code type for the service. Maps to: <code>CareRequestItem.CodeTypeIdentifier</code>	Big, 46.0	46.0
cumulativeLengthOfStay	Integer	The number of days a patient is admitted. Maps to: <code>CareRequestItem.CumulativeLengthOfStay</code>	Big, 52.0	52.0
currentLevelOfCare	String	Specifies the level of care the patient is receiving. Maps to: <code>CareRequestItem.CurrentLevelOfCare</code>	Big, 52.0	52.0

Property Name	Type	Description	Filter Group and Version	Available Version
decisionDate	String	The date and time when the last decision was made for this care request item. Maps to: <code>CareRequestItem.DecisionDate</code>	Big, 52.0	52.0
deniedLevelOfCare	String	The level of care denied for the patient. Maps to: <code>CareRequestItem.DeniedLevelOfCare</code>	Big, 52.0	52.0
deniedQuantity	Integer	The quantity of the denied service. Maps to: <code>CareRequestItem.DeniedQuantity</code>	Big, 46.0	46.0
effectiveDate	String	Effective date for the diagnosis Maps to: <code>CareRequestItem.EffectiveDate</code>	Big, 46.0	46.0
endDate	String	Termination date for the service. Maps to: <code>CareRequestItem.EndDate</code>	Big, 46.0	46.0
freeFormProcedureDescription	String	Free-form description of the procedure. Maps to: <code>CareRequestItem.FreeFormProcedureDescription</code>	Big, 46.0	46.0
healthcareProcedureCode	String	Healthcare Procedure Code.	Big, 46.0	46.0
id	String	ID of the <code>CareRequestItem</code> .	Big, 46.0	46.0
modifiedCareEndDate	String	Modified Care End Date.	Big, 46.0	46.0
modifiedCode	String	Modified Code.	Big, 46.0	46.0
modifiedCodeDescription	String	Description of the modified service code. Maps to: <code>CareRequestItem.ModifiedCodeDescription</code>	Big, 46.0	46.0
modifiedCodeType	String	Code type for the modified service. Maps to: <code>CareRequestItem.ModifiedCodeType</code>	Big, 46.0	46.0
modifiedCodeTypeId	String	ID of the code type for the modified service. Maps to: <code>CareRequestItem.ModifiedCodeTypeIdentifier</code>	Big, 46.0	46.0
modifiedEffectiveDate	String	Effective date for the modified service. Maps to: <code>CareRequestItem.ModifiedEffectiveDate</code>	Big, 46.0	46.0
modifiedLevelOfCare	String	Specifies the modified level of care for the patient. Maps to: <code>CareRequestItem.ModifiedLevelOfCare</code>	Big, 52.0	52.0

Property Name	Type	Description	Filter Group and Version	Available Version
modifiedModifier	String	Modifier for modified service code. Maps to: <code>CareRequestItem.ModifiedModifier</code>	Big, 46.0	46.0
modifiedModifier Description	String	Modifier description for modified service code. Maps to: <code>CareRequestItem.ModifiedModifierDescription</code>	Big, 46.0	46.0
modified ProcedureCodeSet	String	The code set for the modified service, drug, or device associated with the care request item. Maps to: <code>CareRequestItem.ModifiedProcedureCodeSet</code>	Big, 52.0	52.0
modifiedQuantity	Integer	The modified quantity of requested care. Maps to: <code>CareRequestItem.ModifiedQuantity</code>	Big, 46.0	46.0
modifier1	String	First modifier for the service code. Maps to: <code>CareRequestItem.Modifier</code>	Big, 46.0	46.0
modifier1 Description	String	Description for the first modifier for the service code. Maps to: <code>CareRequestItem.ModifierDescription</code>	Big, 46.0	46.0
modifier2	String	Second modifier for service code. Maps to: <code>CareRequestItem.Modifier2</code>	Big, 46.0	46.0
modifier2 Description	String	Description of the second modifier for the service code. Maps to: <code>CareRequestItem.Modifier2Description</code>	Big, 46.0	46.0
modifier3	String	Third modifier for service code. Maps to: <code>CareRequestItem.Modifier3</code>	Big, 46.0	46.0
modifier3 Description	String	Description of the third modifier for the service code. Maps to: <code>CareRequestItem.Modifier3Description</code>	Big, 46.0	46.0
modifier4	String	Fourth modifier for service code. Maps to: <code>CareRequestItem.Modifier4</code>	Big, 46.0	46.0
modifier4 Description	String	Description of the fourth modifier for the service code. Maps to: <code>CareRequestItem.Modifier4Description</code>	Big, 46.0	46.0
modifierCode Set	String	The modifier code set for the service code associated with the care request item. Maps to: <code>CareRequestItem.ModifierCodeSet</code>	Big, 52.0	52.0
name	String	Name of the care request item. Maps to: <code>CareRequestItem.Name</code>	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
priority	String	The priority representing the urgency of the item's authorization request. Maps to <code>CareRequestItem.Priority</code>	Big, 57.0	57.0
procedureCodeSet	String	The code set for the service, drug, or device associated with the care request item. Maps to <code>CareRequestItem.ProcedureCodeSet</code>	Big, 52.0	52.0
quantity	Integer	The quantity of the item that is requested. Maps to: <code>CareRequestItem.Quantity</code>	Big, 46.0	46.0
quantityType	String	Quantity type for the request such as days, units, or visits. Maps to: <code>CareRequestItem.QualityType</code>	Big, 46.0	46.0
serviceCategory	String	Name of the service type such as medical care, diagnostic radiology, pharmacy, or diagnostic laboratory. Maps to: <code>CareRequestItem.ServiceCategory</code>	Big, 46.0	46.0
reasonCode	String	The reason justifying the care request of the item. Maps to: <code>CareRequestItem.ReasonCode</code>	Big, 57.0	57.0
requestType	String	The type of item request. Maps to: <code>CareRequestItem.RequestType</code>	Big, 57.0	57.0
requestedLengthOfStay	Integer	The number of days requested for the admission. Maps to: <code>CareRequestItem.RequestedLengthOfStay</code>	Big, 52.0	52.0
requestedLevelOfCare	String	Specifies the requested level of care for the patient. Maps to: <code>CareRequestItem.RequestedLevelOfCare</code>	Big, 52.0	52.0
requestedServiceEndDate	String	The end date of the requested service. Maps to: <code>CareRequestItem.RequestedServiceEndDate</code>	Big, 52.0	52.0
requestedServiceStartDate	String	The start date of the requested service. Maps to: <code>CareRequestItem.RequestedServiceStartDate</code>	Big, 52.0	52.0
serviceCategoryCode	String	Alphanumeric code that uniquely identifies a service type. Maps to: <code>CareRequestItem.ServiceCategoryCode</code>	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
servicingFacility	Servicing Facility Output	The facility where a patient receives service of the requested item. Maps to: CareRequestItem.ServicingFacility	Big, 57.0	57.0
servicingProvider	Servicing Practitioner Output	The healthcare provider who provides the service of the requested item. Maps to: CareRequestItem.ServicingProvider	Big, 57.0	57.0
sourceSystem	String	System from which the request was sourced. Maps to: CareRequestItem.SourceSystem	Big, 46.0	46.0
sourceSystemIdentifier	String	ID of the system from which the request was sourced. Maps to: CareRequestItem.SourceSystemIdentifier	Big, 46.0	46.0
sourceSystemModified	String	Timestamp of the most recent update from the source system. Maps to: CareRequestItem.SourceSystemModified	Big, 46.0	46.0
status	String	The authorization status of this service. Maps to: CareRequestItem.Status	Big, 46.0	46.0
statusReason	String	Reason for the authorization status of this service. Maps to: CareRequestItem.StatusReason	Big, 46.0	46.0

Care Request

The general details of a care-related request including member information, admission date, decision reason, and so on. A single request can contain multiple diagnoses, services, or drugs. Care requests include prior authorizations for drugs and services, admission notifications, concurrent review of admissions, appeals, complaints, and grievances.

Property Name	Type	Description	Filter Group and Version	Available Version
acknowledgementLetterSentDate	String	Date and time when an acknowledgment letter was sent to the requester. Maps to: CareRequest.AcknowledgementLetterSentDate	Big, 46.0	46.0
actualAdmissionDate	String	Actual admission date for the patient. Maps to: CareRequest.ActualAdmissionDate	Big, 46.0	46.0
actualDischargeDate	String	Actual discharge date for the patient. Maps to: CareRequest.ActualDischargeDate	Big, 46.0	46.0
admissionNotes	String	Notes related to the admission. Maps to: CareRequest.AdmissionNotes	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
admissionSource	String	Where the patient was admitted from, for example, a clinic or an emergency room. Maps to: <code>CareRequest.AdmisionSource</code>	Big, 46.0	46.0
admissionType	String	Type of admission, for example, emergency or elective. Maps to: <code>CareRequest.AdmisionType</code>	Big, 46.0	46.0
ambulanceTransportDistance	Integer	Ambulance Transport Distance	Big, 46.0	46.0
ambulanceTransportReason	String	Reason for ambulance transport. Maps to: <code>CareRequestExtension.AmbulanceTransportReason</code>	Big, 46.0	46.0
ambulanceTransportType	String	Type of ambulance transport. Maps to: <code>CareRequestExtension.AmbulanceTransportType</code>	Big, 46.0	46.0
aorReceivedDate	Date	Date and time when the Appointment of Representative (AOR) form was received. Maps to: <code>CareRequest.AorReceivedDate</code>	Big, 46.0	46.0
aorRequestedDate	Date	Date and time when the AOR form was requested. Maps to: <code>CareRequest.AorRequestedDate</code>	Big, 46.0	46.0
appealEffectuationDateTime	String	The effective date of the outcome of the appeal request. For example, if a claim was successfully appealed, this field displays the date when the claim was paid. Maps to: <code>CareRequestExtension.AppealEffectuationDateTime</code>	Big, 52.0	52.0
appealRequestReasonType	String	Specifies the reason for raising the appeal request. Maps to: <code>CareRequest.AppealRequestReasonType</code>	Big, 52.0	52.0
appointedRepVerbalContactDate	Date	Date and time of verbal contact with the member's appointed representative. Maps to: <code>CareRequest.AppointedRepVerbalContactDate</code>	Big, 46.0	46.0
appointedRepWrittenContactDate	Date	Date and time correspondence was sent to the member's appointed representative. Maps to: <code>CareRequest.AppointedRepWrittenContactDate</code>	Big, 46.0	46.0
appointedRepresentative	Appointed Representative	Appointed representative for the member.	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
approvedLengthOfStay	Integer	Approved number of days for the admission. Maps to: CareRequest.ApprovedLengthOfStay	Big, 46.0	46.0
approvedLevelOfCare	String	Approved level of care for the patient, for example, Hospital-Observation or SNF-Rehabilitation. Maps to: CareRequest.ApprovedLevelOfCare	Big, 46.0	46.0
authorizationRefIdentifier	String	The unique identifier of the authorization request. Maps to: CareRequestExtension.AuthorizationRefIdentifier	Big, 57.0	57.0
careRequestReviewers	Care Request Reviewer Output[]	The care request associated with the care request reviewer. Maps to: CareRequest.CareRequestReviewers	Big, 52.0	52.0
caseSubStatus	String	Sub status of care request in each stage of care request. Maps to: CareRequest.CaseSubStatus	Big, 57.0	57.0
claimNumber	String	Claim number for the medical service or medication, if one exists. Maps to: CareRequest.ClaimNumber	Big, 46.0	46.0
clinicalCaseType	String	Clinical case type for the patient, for example, High Risk Fall or Adult Diabetes. Maps to: CareRequest.ClinicalCaseType	Big, 46.0	46.0
criteriaMet	String	Indicates whether criteria for care was met. Maps to: CareRequest.CriteriaMet	Big, 46.0	46.0
cumulativeLengthOfStay	Integer	Total number of days for the admission. Maps to: CareRequest.CumulativeLengthOfStay	Big, 46.0	46.0
currentLevelOfCare	String	Level of care that the patient is receiving. Maps to: CareRequest.CurrentLevelOfCare	Big, 46.0	46.0
decisionDate	String	Date by which the decision must be made for the request. Maps to: CareRequest.DecisionDate	Big, 46.0	46.0
decisionDaysRemaining	Integer	Number of days remaining for a decision or resolution. Maps to: CareRequest.DecisionDaysRemaining	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
decisionLetter	String	The text of the determination letter sent to the member and provider. Maps to: <code>CareRequest.DecisionLetter</code>	Big, 46.0	46.0
decisionNotes	String	Notes related to the decision. Maps to: <code>CareRequest.DecisionNotes</code>	Big, 46.0	46.0
decisionReason	String	Reason for the decision. Maps to: <code>CareRequest.DecisionReason</code>	Big, 46.0	46.0
decisionReason Description	String	Text describing the reason for the decision. Maps to: <code>CareRequest.DecisionReasonDescription</code>	Big, 46.0	46.0
deniedLength ofStay	Integer	Number of days denied for the admission. Maps to: <code>CareRequest.DeniedLengthOfStay</code>	Big, 46.0	46.0
deniedLevel ofCare	String	Level of care denied for the patient. Maps to: <code>CareRequest.DeniedLevelOfCare</code>	Big, 46.0	46.0
disposition Notes	String	Notes related to the disposition of the request. Maps to: <code>CareRequest.DispositionNotes</code>	Big, 46.0	46.0
documentAttachment Status	String	The status of the document upload based on the checklist provided to the reviewers. Maps to: <code>CareRequestExtension.DocumentAttachmentStatus</code> Valid values are: <ul style="list-style-type: none">• Complete• Incomplete	Big, 55.0	55.0
dueDate	String	Date the request is due for completion. Maps to: <code>CareRequest.DueDate</code>	Big, 46.0	46.0
effectiveFrom	String	The start date for an effective-date range. Maps to: <code>CareRequest.EffectiveFrom</code>	Big, 46.0	46.0
effectiveTo	String	The end date for an effective-date range. Maps to: <code>CareRequest.EffectiveTo</code>	Big, 46.0	46.0
expirationDate	String	Expiration date for the request. Maps to: <code>CareRequest.ExpirationDate</code>	Big, 46.0	46.0
extendedRequest	Boolean	Extended Request Maps to: <code>CareRequest.</code>	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
extensionRequestReceivedDate	String	Date and time an extension was requested. Maps to: <code>CareRequest.ExtensionRequestReceivedDate</code>	Big, 46.0	46.0
externalComplaintID	String	Complaint ID number. Maps to: <code>CareRequest.ExternalComplaintIdentifier</code>	Big, 46.0	46.0
facilityRecordNumber	String	The medical record number used to identify a patient. Maps to: <code>CareRequest.FacilityRecordNumber</code>	Big, 46.0	46.0
facilityRoomBedType	String	Type of facility bed for the patient. Maps to: <code>CareRequest.FacilityRoomBedType</code>	Big, 46.0	46.0
facilityRoomNumber	String	The facility room number for the patient. Maps to: <code>CareRequest.FacilityRoomNumber</code>	Big, 46.0	46.0
finalLevelOfCare	String	Final level of care the patient. Maps to: <code>CareRequest.FinalLevelOfCare</code>	Big, 46.0	46.0
firstReviewer	First Reviewer	The person who reviewed the request.	Big, 46.0	46.0
firstReviewerNotes	String	Notes from the first reviewer related to the case. Maps to: <code>CareRequest.FirstReviewerNotes</code>	Big, 46.0	46.0
generalPractitioner	General Practitioner	Member's primary or general care practitioner.	Big, 46.0	46.0
generalPractitionerVerbalNotificationDate	String	Date when the primary care practitioner was verbally notified of the decision. Maps to: <code>CareRequest.GeneralPractitionerVerbalNotifiedDate</code>	Big, 46.0	46.0
generalPractitionerWrittenNotificationDate	String	Date when the primary care practitioner was notified of the decision by written correspondence. Maps to: <code>CareRequest.GeneralPractitionerWrittenNotifiedDate</code>	Big, 46.0	46.0
grievanceType	String	Specifies the type of grievance. Maps to: <code>CareRequest.GrievanceType</code>	Big, 52.0	52.0
healthcareProvider	String	The healthcare provider associated with the care request against whom the Grievance is filed. Maps to: <code>CareRequestExtension.HealthCareProvider</code>	Big, 52.0	52.0
homeHealthCertificationEndDate	String	Certification end date for home health care. Maps to: <code>CareRequestExtension.HomeHealthCertificationEndDate</code>	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
homeHealthCertificationStartDate	String	Certification start date for home health care. Maps to: CareRequestExtension.HomeHealthCertificationStartDate	Big, 46.0	46.0
homeHealthStartDate	String	Date that home health services are scheduled or anticipated to start. Maps to: CareRequestExtension.HomeHealthStartDate	Big, 46.0	46.0
id	String	ID of the Care Request.	Big, 46.0	46.0
independentReviewDetermination	String	The determination made by the independent review. Maps to: CareRequestExtension.IndependentReviewDetermination	Big, 52.0	52.0
independentReviewDeterminationDate	String	The date when the determination was made by the independent review. Maps to: CareRequestExtension.IndependentReviewDeterminationDate	Big, 52.0	52.0
independentReviewSubmissionDate	String	The date when the review request was submitted for independent review. Maps to: CareRequestExtension.IndependentReviewSubmissionDate	Big, 52.0	52.0
infoReceivedDate	String	Date and time when additional information was received from the provider or member. Maps to: CareRequest.InfoReceivedDate	Big, 46.0	46.0
infoRequestedDate	String	Date and time when additional information was requested from the provider or member. Maps to: CareRequest.InfoRequestedDate	Big, 46.0	46.0
initialDenialNotificationDate	String	Date of initial denial notification. Maps to: CareRequest.InitialDenialNotificationDate	Big, 46.0	46.0
initialDenialNotificationTime	String	The time when the initial care request was denied. Maps to: CareRequest.InitialDenialNotificationTime	Big, 52.0	52.0
isIndependentReviewRequired	Boolean	Indicates whether independent review is required. Maps to: CareRequestExtension.IndependentReviewRequired	Big, 52.0	52.0
isReadmission	Boolean	Indicates whether the care request is for a readmission. Maps to: CareRequest.IsReadmission	Big, 52.0	52.0
lastModified	String	Last Modified Date	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
medicalDirector	Medical Director	The medical director who reviewed the request.	Big, 46.0	46.0
medicalDirector Notes	String	Notes from the medical director related to the request. Maps to: <code>CareRequest.MedicalDirectorNotes</code>	Big, 46.0	46.0
member	String	Insurance identifier for the member. Maps to: <code>CareRequest.MemberId</code>	Big, 46.0	46.0
memberContact Date	String	Member Contact Date Maps to: <code>CareRequest.</code>	Big, 46.0	46.0
memberGroup Number	String	Insurance group number for the member. Maps to: <code>CareRequest.MemberGroupNumber</code>	Big, 46.0	46.0
memberPrimary Plan	String	The primary insurance plan of a member associated with the care request when the member is insured under multiple plans. Maps to: <code>CareRequest.MemberPrimaryPlan</code>	Big, 52.0	52.0
memberSecondary Plan	String	The secondary insurance plan of a member associated with the care request when the member is insured under multiple plans. Maps to: <code>CareRequest.MemberSecondaryPlan</code>	Big, 52.0	52.0
memberVerbalNotifi cationDate	String	Date when the member was verbally notified of the decision. Maps to: <code>CareRequest.MemberVerbalNotificationDate</code>	Big, 46.0	46.0
memberWrittenNotifi cationDate	String	Date when the member was notified of the decision by written correspondence. Maps to: <code>CareRequest.MemberWrittenNotificationDate</code>	Big, 46.0	46.0
modification Date	String	Date the case was modified. Maps to: <code>CareRequest.ModificationDate</code>	Big, 46.0	46.0
modifiedLength ofStay	Integer	Modified number of days for the admission. Maps to: <code>CareRequest.ModifiedLengthOfStay</code>	Big, 46.0	46.0
modifiedLevel ofCare	String	Modified level of care for the patient. Maps to: <code>CareRequest.ModifiedLevelOfCare</code>	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
nextReviewDate	String	Date the next review is scheduled for completion. Maps to: <code>CareRequest.NextReviewDate</code>	Big, 46.0	46.0
nursingHomeResidentialStatus	String	Nursing home resident status at the time of service. Maps to: <code>CareRequestExtension.NursingHomeResidentialStatus</code>	Big, 46.0	46.0
originalDenialMedicalDirector	Original Denial Medical Director	The medical director who denied the original request.	Big, 46.0	46.0
parProvider	String	Indicator of whether this provider has entered into an agreement with the insurance carrier. Maps to: <code>CareRequest.ParProvider</code>	Big, 46.0	46.0
placeofService	String	Place of service for the member's care such as an inpatient hospital or an ambulatory surgery center. Maps to: <code>CareRequest.PlaceOfService</code>	Big, 46.0	46.0
practitionerContactDate	String	Date and time when the provider was contacted. Maps to: <code>CareRequest.PractitionerContactDateTime</code>	Big, 46.0	46.0
priorDischargeStatus	String	Specifies the previous discharge status of the member. Maps to: <code>CareRequestExtension.PriorDischargeStatus</code>	Big, 52.0	52.0
quantity	Integer	Quantity of the request.	Big, 46.0	46.0
quantityType	String	Quantity type for the request such as days, units, or visits. Maps to: <code>CareRequest.QuantityType</code>	Big, 46.0	46.0
receivedDate	String	Date the request was received. Maps to: <code>CareRequest.ReceivedDate</code>	Big, 46.0	46.0
reconsiderationDenialNotificationDate	String	Date of reconsideration denial notification. Maps to: <code>CareRequest.ReconsiderationDenialNotificationDate</code>	Big, 46.0	46.0
reconsiderationDenialNotificationTime	String	The time of reconsideration denial notification. Maps to: <code>CareRequest.ReconsiderationDenialNotificationTime</code>	Big, 52.0	52.0
recordType	String	Record type of the care request object.	Big, 46.0	46.0
referenceCareRequestCase	String	The reference care request case number associated with the care request. Maps to: <code>CareRequest.ReferenceCareRequestCase</code>	Big, 52.0	52.0

Property Name	Type	Description	Filter Group and Version	Available Version
referenceCaseNumber	String	Reference authorization number for an appeal, complaint, or grievance. Maps to: CareRequest.ReferenceCaseNumber	Big, 46.0	46.0
reopenDecisionDateTime	String DateTime	Date and time the request was reopened. Maps to: CareRequest.ReopenDecisionDateTime	Big, 52.0	52.0
reopenReason	String	Reason the request was reopened. Maps to: CareRequest.ReopenReason	Big, 46.0	46.0
reopenReasonDescription	String Description	Description of why the request was reopened. Maps to: CareRequest.ReopenReasonDescription	Big, 46.0	46.0
reopenRequestOutcome	String	The result of the reopen request. Maps to: CareRequestExtension.ReopenRequestOutcome	Big, 52.0	52.0
reopenRequestType	String	The type of reopen request. Maps to: CareRequestExtension.ReopenRequestType	Big, 52.0	52.0
reopenedBy	Reopened By Output	The user who reopened the care request. Maps to: CareRequestExtension.ReopenedBy	Big, 52.0	52.0
reopenedDate	String	Date the request was reopened. Maps to: CareRequest.ReopenedDate	Big, 46.0	46.0
requestExtensionReason	String	The reason for requesting the care extension. Maps to: CareRequestExtension.RequestExtensionReason	Big, 52.0	52.0
requestExtnDecisionDateTime	String DecisionDateTime	The date when the decision to extend the care request extension was made. Maps to: CareRequestExtension.RequestExtnDecisionDateTime	Big, 52.0	52.0
requestOutcome	String	Specifies the outcome of the request. Maps to: CareRequestExtension.RequestOutcome	Big, 52.0	52.0
requestOutcomeDesc	String	The description of the request outcome. Maps to: CareRequestExtension.RequestOutcomeDesc	Big, 52.0	52.0
requestType	String	Category type of the request. Maps to: CareRequestExtension.RequestType	Big, 46.0	46.0
requestedDate	String	Date the request was originally requested. Maps to: CareRequest.RequestedDate	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
requestedLengthOfStay	Integer	Requested length of stay for the patient. Maps to: <code>CareRequest.RequestedLengthOfStay</code>	Big, 57.0	57.0
requestedLevelOfCare	String	Requested level of care for the patient. Maps to: <code>CareRequest.RequestedLevelOfCare</code>	Big, 46.0	46.0
requesterType	String	Indicates the role of the individual initiating the request. Maps to: <code>CareRequest.RequesterType</code>	Big, 46.0	46.0
requestingPractitioner	Requesting Practitioner	Ordering or referring practitioner for the request.	Big, 46.0	46.0
requestingPractitionerLicense	String	Requesting Practitioner License Maps to: <code>CareRequest.RequestingPractitionerLicense</code>	Big, 46.0	46.0
requestingPractitionerSpecialty	String	Specialty of the practitioner, for example, Family Practice or General Surgery. Maps to: <code>CareRequest.RequestingPractitionerSpecialty</code>	Big, 46.0	46.0
requestingPractitionerVerbalNotificationDate	String	Date when the practitioner was verbally notified of the decision. Maps to: <code>CareRequest.RequestingPractitionerVerbalNotificationDate</code>	Big, 46.0	46.0
requestingPractitionerWrittenNotificationDate	String	Date when the practitioner was notified of the decision by written correspondence. Maps to: <code>CareRequest.RequestingPractitionerWrittenNotificationDate</code>	Big, 46.0	46.0
resolutionDate	String	Date when the complaint, appeal, or grievance was resolved. Maps to: <code>CareRequest.ResolutionDate</code>	Big, 46.0	46.0
resolutionDescription	String	The resolution details provided for the complaint, appeal, or grievance. Maps to: <code>CareRequestExtension.ResolutionDescription</code>	Big, 52.0	52.0
resolutionLetterSentDate	String	Date and time when a resolution letter was sent to the requester. Maps to: <code>CareRequest.ResolutionLetterSentDate</code>	Big, 46.0	46.0
resolutionNotes	String	Resolution notes for the request. Maps to: <code>CareRequest.ResolutionNotes</code>	Big, 46.0	46.0
reviewDate	String	Date the review was completed. Maps to: <code>CareRequest.ReviewDate</code>	Big, 46.0	46.0
rootCauseNotes	String	Field for notes related to the root cause for the request. Maps to: <code>CareRequest.RootCauseNotes</code>	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
scheduledAdmission Date	String	Anticipated admission date for the patient. Maps to: <code>CareRequest.ScheduledAdmissionDate</code>	Big, 46.0	46.0
scheduledDischarge Date	String	Scheduled discharge date for the patient. Maps to: <code>CareRequest.ScheduledDischargeDate</code>	Big, 46.0	46.0
serviceDate	String	Date when patient received the service. Maps to: <code>CareRequest.ServiceDate</code>	Big, 46.0	46.0
serviceLevel	String	The level of service rendered. Maps to: <code>CareRequestExtension.ServiceLevel</code>	Big, 46.0	46.0
serviceType	String	Classification of the type of service. Maps to: <code>CareRequestExtension.ServiceType</code>	Big, 46.0	46.0
serviceOrMedication Received	Boolean	Indicates whether the member has already received the medial service or medication. Maps to: <code>CareRequest.IsServiceOrMedicationReceived</code>	Big, 46.0	46.0
servicingFacility	Servicing Facility	Facility where the service is being provided.	Big, 46.0	46.0
servicingPractitioner	Servicing Practitioner	Practitioner administering the service.	Big, 46.0	46.0
servicingPractitioner License	String	License type of the practitioner. Maps to: <code>CareRequest.ServicingPractitionerLicense</code>	Big, 46.0	46.0
servicingPractitioner Specialty	String	Specialty of the practitioner. Maps to: <code>CareRequest.ServicingPractitionerSpecialty</code>	Big, 46.0	46.0
sourceSystem	String	System from which this request was sourced. Maps to: <code>CareRequest.SourceSystem</code>	Big, 46.0	46.0
sourceSystemIdentifier	String	ID of the system from which the request was sourced. Maps to: <code>CareRequest.SourceSystemIdentifier</code>	Big, 46.0	46.0
sourceSystemModified	String	Timestamp of the most recent update from the source system. Maps to: <code>CareRequest.SourceSystemModified</code>	Big, 46.0	46.0
unitOfMeasure	String	The unit of measure associated with the prior authorization request. Maps to: <code>CareRequestExtension.UnitofMeasure</code>	Big, 55.0	55.0

Care Request Reviewer Output

Output representation of the care request reviewer.

Property Name	Type	Description	Filter Group and Version	Available Version
contentDocument	Content Document Output	The details of the content document.	Big, 57.0	57.0
id	String	The ID of the care request reviewer.	Big, 52.0	52.0
reviewDate	String	The date when the care request was reviewed.	Big, 52.0	52.0
reviewer	String	The name of the user who reviewed the care request.	Big, 52.0	52.0
reviewerNotes	String	The notes related to the review.	Big, 52.0	52.0
reviewerType	String	The type of the reviewer who reviewed the care request. Possible values are: <ul style="list-style-type: none">• Medical Director Review• Registered Nurse Review• Physician Review• Peer Review	Big, 52.0	52.0
status	String	The status of the care request. Possible values are: <ul style="list-style-type: none">• Approved• Denied• In process	Big, 52.0	52.0

Care Authorization Request Response

The response body for the Care Services Review GET request.

JSON example

```
{  
    "careAuthorizationRequests": [  
        {  
            "careDiagnoses": [  
                {  
                    "careRequestReviewers": [],  
                    "healthConditionId": "0j4RM0000004Mk9YAE",  
                    "id": "0VCRM0000004COJ4A2",  
                    "modifiedPrimaryDiagnosis": false,  
                    "primaryDiagnosis": "Hypertension",  
                    "status": "Active"  
                }  
            ]  
        }  
    ]  
}
```

```

        "name": "CD Connect 1.0",
        "presentOnAdmission": "Yes",
        "primary": false,
        "primaryDischargeDiagnosis": false
    }
],
"careRequest": {
    "appointedRepresentative": {},
    "authorizationRefIdentifier": "1234",
    "careRequestReviewers": [],
    "caseSubStatus": "active",
    "extendedRequest": false,
    "firstReviewer": {},
    "generalPractitioner": {
        "generalPractitionerNpi": "1234"
    },
    "id": "0UmRM0000004HOG0A2",
    "initialDenialNotificationTime": "",
    "isIndependentReviewRequired": false,
    "isReadmission": false,
    "lastModifiedDate": "2022-11-29T15:39:56.000Z",
    "medicalDirector": {},
    "member": "001RM000005XHdbYAG",
    "memberPrimaryPlan": "Gold Plan",
    "originalDenialMedicalDirector": {},
    "reconsiderationDenialNotificationTime": "",
    "recordType": "Admission",
    "reopenedBy": {},
    "requestingPractitioner": {
        "healthCareProviderId": "0cmRM0000000tldYAA",
        "requestingPractitionerNpi": "742963"
    },
    "serviceorMedicationReceived": false,
    "servicingFacility": {
        "servicingFacilityId": "0k1RM0000004CBnYAM",
        "servicingFacilityNpi": "742963"
    },
    "servicingPractitioner": {
        "servicingPractitionerNpi": "1234"
    }
},
"careRequestCase": {
    "caseNumber": "00001078",
    "caseOrigin": "Web",
    "caseOwner": "Chiranjeevi User",
    "closed": false,
    "createdBy": "005RM000002dmjJYAQ",
    "dateOpened": "2022-11-29T15:39:56.000Z",
    "escalated": false,
    "lastModifiedBy": "005RM000002dmjJYAQ",
    "lastModifiedDate": "2022-11-29T15:39:56.000Z",
    "lastReferencedDate": "2022-11-29T15:39:56.000Z",
    "lastViewedDate": "2022-11-29T15:39:56.000Z",
    "priority": "Medium",
}

```

```
        "status": "New"
    },
    "careRequestDrugs": [
        {
            "authApprovalIdentifier": "123",
            "authorizationRefIdentifier": "123",
            "careRequestReviewers": [],
            "dispenserAddress": {},
            "drugAdministrationSetting": "Inpatient",
            "id": "0VDRM0000004Cla4AE",
            "medicationRefObjectId": "0kmRM0000004CSeYAM",
            "name": "CRD Connect 1.0",
            "priority": "Routine",
            "requestType": "Filler Order",
            "servicingFacility": {
                "servicingFacilityId": "0klRM0000004CBnYAM",
                "servicingFacilityNpi": "742963"
            },
            "servicingProvider": {
                "healthCareProviderId": "0cmRM0000000tldYAA",
                "servicingPractitionerNpi": "1234"
            },
            "status": "Active",
            "statusReason": "Insufficient Information"
        }
    ],
    "careRequestItems": [
        {
            "authApprovalIdentifier": "123",
            "authorizationRefIdentifier": "123",
            "careRequestReviewers": [],
            "clinicalServiceRequestId": "0jyRM0000004CAGYA2",
            "id": "0VKRM0000004CPd4AM",
            "name": "CRI Connect-1.0",
            "priority": "Stat",
            "reasonCode": "0hsRM00000003ytYAA",
            "requestType": "Order",
            "servicingFacility": {
                "servicingFacilityId": "0klRM0000004CBnYAM",
                "servicingFacilityNpi": "742963"
            },
            "servicingProvider": {
                "healthCareProviderId": "0cmRM0000000tldYAA",
                "servicingPractitionerNpi": "1234"
            }
        }
    ],
    "patient": {
        "firstName": "Charles",
        "lastName": "Green",
        "memberId": "001RM000005XHdbYAG"
    },
    "subscriber": {},
    "trackedCommunications": [

```

```
{
  "categories": [
    "0hsRM00000003ytYAA"
  ],
  "mediums": [
    "0hsRM00000003ytYAA"
  ],
  "name": "CX Label Test",
  "notes": [
    "0nNRM0000000272AA"
  ],
  "payloads": [
    {
      "authorNoteId": "0nNRM0000000272AA",
      "codeSetBundleId": "0hsRM00000003ytYAA"
    }
  ],
  "priority": "Urgent",
  "reasonCodes": [
    "0hsRM00000003ytYAA"
  ],
  "recipients": [
    "001RM000005ZZgSYAW"
  ],
  "replacedItems": [
    "108RM0000004C9IYAU"
  ],
  "status": "Active",
  "statusReason": "Unknown",
  "type": "COMMUNICATIONREQUEST"
  },
  ],
  "transportLocations": []
}
],
"errorMessage": "",
"isSuccess": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
careAuthorizationRequests	Care Authorization Request[]	A list of care authorization requests.	Small, 46.0	46.0
errorMessage	String	If the parameters were invalid, this property contains the error message.	Small, 46.0	46.0
isSuccess	Boolean	This flag indicates if the request was successful or not.	Small, 46.0	46.0



Note: When you call the CareAuthorization GET API with the sectionNames attribute set, empty sections may appear in the response body. This is normal and can be ignored.

Create Visit Output

Output representation of the create visit request.

JSON example

```
{
  "code": "201",
  "errorCode": "",
  "errorMessage": "",
  "status": "Success",
  "visitId": "<visitId>"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Code returned by the create visit request.	Small, 55.0	55.0
errorCode	String	Error code with information about the error.	Small, 55.0	55.0
errorMessage	String	Message stating the reason for error, if any.	Small, 55.0	55.0
status	String	Status of the create visit request.	Small, 55.0	55.0
visitId	String	ID of the visit record that is created.	Small, 55.0	55.0

Content Document Output

Content document output representation.

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	The ID of the content document.	Big, 57.0	57.0

Content Management Output

Represents the information about the job status and any associated messages returned for Content Management APIs.

Properties

Property Name	Type	Description	Filter Group and Version	Available Version
isSuccess	Boolean	Indicates whether the request was successfully accepted or processed.	Small, 65.0	65.0
message	String	Message that provides details about the request outcome.	Small, 65.0	65.0
errors	List<String>	List of errors that occurred during the request validation.	Small, 65.0	65.0

Property Name	Type	Description	Filter Group and Version	Available Version
jobId	String	Job ID of the asynchronous processing of the request.	Small, 65.0	65.0

Example

```
{
    "isSuccess": true,
    "message": "Create Presentation Request Accepted for
processing",
    "errors": [],
    "jobId": "20V*****"
}
```

Custom Field Value

The output representation of the custom field values.

Property Name	Type	Description	Filter Group and Version	Available Version
dataType	String	Specifies the primitive data type of a field. Possible values are: <ul style="list-style-type: none">• Boolean• DateOnly• DateTime• Number• String• TimeOnly	Small, 53.0	53.0
fieldName	String	The name of the custom field.	Small, 53.0	53.0
fieldValue	Object	The value of the custom field.	Small, 53.0	53.0
message	String	A message with any errors that can encounter while processing the request.	Small, 53.0	53.0

Customer Account Merge Output

Output representation of the response for a successful account merge operation.

JSON example

```
{
    "code": "",
    "success": true,
    "message": "",
```

```

  "mergedAccountIds": [
    {
      "accountId": "001xx000002kl8xxFV"
    },
    {
      "accountId": "001xx000003mn9xxGW"
    }
  ]
}

```

Name	Type	Description	Filter Group and Version	Available Version
code	String	Code that represents the status of the operation.	Small, 65.0	65.0
merged AccountIds	String[]	List of the Consolidated Account IDs that were successfully merged.	Small, 65.0	65.0
message	String	Message related to the status of the operation.	Small, 65.0	65.0
success	Boolean	Indicates whether the entire merge operation was successful.	Small, 65.0	65.0

Digital Verification Output

Output Representation for the digital verification API request.

Sample Response

```

{
  "isSuccess": true,
  "message": "Performed all Steps of Digital Verification Successfully",
  "code": 200
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Response code of the Digital Verification API.	Small, 60.0	60.0
isSuccess	Boolean	Indicates whether the digital verification process was successful (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
message	String	Feedback message from the digital verification API request.	Small, 60.0	60.0

Dispenser Address

Pharmacy address.

Property Name	Type	Description	Filter Group and Version	Available Version
dispenserCity	String	Dispenser City	Big, 46.0	46.0
dispenserCountry	String	Dispenser Country	Big, 46.0	46.0
dispenserPostalCode	String	Dispenser Postal Code	Big, 46.0	46.0
dispenserState	String	Dispenser State	Big, 46.0	46.0
dispenserStreet	String	Dispenser Street	Big, 46.0	46.0

Download Provider Output

The response representation containing the status of the provider download request and the resulting data.

Properties

Property Name	Type	Description
code	String	The API response code, such as 200 or 500.
message	String	In case of a failure, this property provides error details.
response	Map<String, Object>	The actual response data, which includes information about the created entities such as accounts and contact point addresses.
success	Boolean	Indicates whether the API request was successful.

Document Conflict Field

Output representation of the target object field with conflict.

Property Name	Type	Description	Filter Group and Version	Available Version
objectFieldName	String	The name of the field in the target object that has a conflict.	Small, 55.0	55.0

Document Conflict Field List

Output representation of the target object fields with conflicts.

Property Name	Type	Description	Filter Group and Version	Available Version
conflictFieldList	Document Conflict Field[]	Representation of the target object fields that have conflicts.	Small, 55.0	55.0

Document Management Result

Output representation of the document split request.

JSON example

Example of a success response:

```
{
  "contentDocumentId": "069xx0000004D1sAAE",
  "isSuccess": true
}
```

Example of an error response:

```
{
  "error": {
    "code": "INVALID_INPUT",
    "message": "The ReceivedDocument field doesn't exist in the specified DocumentChecklistItem object."
  },
  "isSuccess": false
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contentDocumentId	String	The ID of the content document that is created after the request is successful.	Small, 55.0	55.0
error	Error Response Output	Error representation.	Small, 55.0	55.0
isSuccess	Boolean	Indicates whether the document split request is successful (<code>true</code>) or not (<code>false</code>).	Small, 55.0	55.0

Document Process Output

Output representation of the document process creation or update request.

Response body example for POST

```
{
  "isSuccess": true,
  "message": "Account record was created.",
  "objectFieldList": {
    "objectFieldList": [
      {
        "fieldName": "Name",
        "fieldValue": "Robert Weber"
      },
      {
        "fieldName": "AccountNumber",
        "fieldValue": "1962550079"
      }
    ]
  }
}
```

```

        ],
},
"ocrDocumentScanResultIdList": {
  "ocrDocumentScanResultIdList": [
    {
      "resultId": "0ixxx00000002t3AAA"
    }
  ]
},
"parentId": "001xx000003GeGFAA0"
}

```

Response body example for PATCH

```
{
  "isSuccess": true,
  "message": "Account record was updated.",
  "objectFieldList": {
    "objectFieldList": [
      {
        "fieldName": "Id",
        "fieldValue": "001xx000003GeGFAA0"
      },
      {
        "fieldName": "Name",
        "fieldValue": "Robert Weber"
      },
      {
        "fieldName": "AccountNumber",
        "fieldValue": "1962550079"
      }
    ],
    "ocrDocumentScanResultIdList": {
      "ocrDocumentScanResultIdList": [
        {
          "resultId": "0ixxx00000002t3AAA"
        }
      ]
    },
    "parentId": "001xx000003GeGFAA0"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	The code returned by the create or update API request.	Small, 55.0	55.0
conflictFieldList	Document Conflict Field List	The list of fields in the target object that have conflicts.	Small, 55.0	55.0
isSuccess	Boolean	Indicates whether the create or update request is successful (<code>true</code>) or not (<code>false</code>).	Small, 55.0	55.0

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The message of the create or update API request.	Small, 55.0	55.0
objectFieldList	Object Field List	The list of fields that are created or updated in the target object record.	Small, 55.0	55.0
ocrDocumentScanResultIdList	OCR Document Scan Result List	The list of the OCR document scan result record IDs.	Small, 55.0	55.0
parentId	String	The ID of the target object in which the record is created or updated.	Small, 55.0	55.0

Error Response Output

Error response representation.

JSON example

```
{
  "error": {
    "code": "INVALID_INPUT",
    "message": "The ReceivedDocument field doesn't exist in the specified DocumentChecklistItem object."
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Error code.	Small, 55.0	55.0
message	String	Message stating the reason for error, if any.	Small, 55.0	55.0

Enrollee Product Result

Details about the enrollee's products.

Property Name	Type	Description	Filter Group and Version	Available Version
error	Error Message	Error code and message.	Small, 46.0	46.0
isSuccess	Boolean	Indicates if the operation was a success.	Small, 46.0	46.0
productId	String	Id of the care program product.	Small, 46.0	46.0
providerId	String	Id of the care program provider.	Small, 46.0	46.0
created	Boolean	Indicate if the record was created.	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	Id for the newly created CareProgramEnrolleeProduct record.	Big, 46.0	46.0
objectType	String	The type of the object created. In this case, it is CareProgramEnrolleeProduct.	Big, 46.0	46.0
status	String	Indicates the status of the record creation.	Big, 46.0	46.0

Enrollment Card Result

Details of the enrollment care for a single enrollee.

Property Name	Type	Description	Filter Group and Version	Available Version
error	Error Message	Error code and message.	Small, 46.0	46.0
isSuccess	Boolean	Indicates if the operation was a success.	Small, 46.0	46.0
created	Boolean	Indicate if the record was created.	Big, 46.0	46.0
id	String	Id for the newly created CareProgramEnrollmentCard record.	Big, 46.0	46.0
objectType	String	The type of the object created. In this case, it is CareProgramEnrollmentCard.	Big, 46.0	46.0
status	String	Indicates the status of the record creation.	Big, 46.0	46.0

Error Message

A generic error message containing error code and the message text.

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Error code.	Small, 46.0	46.0
message	String	Error message text.	Small, 46.0	46.0

First Reviewer

The name of the person who reviewed the request first.

Property Name	Type	Description	Filter Group and Version	Available Version
username	String	username	Big, 46.0	46.0

FHIR Reference

The output representation of the FHIR reference values.

Property Name	Type	Description	Filter Group and Version	Available Version
accountContact RelationId	String	The Salesforce ID of junction record. This record is created to connect a person's person account record with the person account record of an associated person, such as a contact party or practitioner.	Small, 53.0	53.0
contactContact RelationId	String	The Salesforce ID of junction record. This record is created to connect a person's person account record with the business account record of an associated organization, such as an issuer or a managing organization.	Small, 53.0	53.0
message	String	A message with any errors that can encounter while processing the request.	Small, 53.0	53.0
referenceId	String	The source system ID of the person or organization referenced.	Small, 53.0	53.0
referenceResource	String	The FHIR resource type of the referenced entity, for instance practitioner or organization.	Small, 53.0	53.0
relationship	String	The relationship between the patient and the healthcare provider or the managing organization, stored using Reciprocal Roles records.	Small, 53.0	53.0
salesforceId	String	The Salesforce ID of the record that represents the referenced person or organization.	Small, 53.0	53.0

Field Value Output

Represents the value of a field.

Property Name	Type	Description	Filter Group and Version	Available Version
developerName	String	The developer name of a field.	Small, 54.0	54.0
value	String	The value of a field.	Small, 54.0	54.0

FHIR Address

The output representation of the FHIR address values.

Property Name	Type	Description	Filter Group and Version	Available Version
additionalInformation	Custom Field Value[]	The data stored in any custom fields as specified in the input request.	Small, 53.0	53.0
city	String	The city of the address.	Small, 53.0	53.0
country	String	The country of the address.	Small, 53.0	53.0
line	String	The street of the address.	Small, 53.0	53.0
message	String	A message with any errors that can encounter while processing the request.	Small, 53.0	53.0
periodEnd	String	The date until when the address is active.	Small, 53.0	53.0
periodStart	String	The date from when the address is active.	Small, 53.0	53.0
postalCode	String	The postal code for the address.	Small, 53.0	53.0
salesforceId	String	The Salesforce ID of the address record that's created in Salesforce.	Small, 53.0	53.0
state	String	The state or province of the address.	Small, 53.0	53.0
type	String	The type of the address. For example, physical and postal.	Small, 53.0	53.0
use	String	The usage type of the address.	Small, 53.0	53.0

FHIR Codeable Concept

The output representation of the Code Set Bundle records created to represent a codeableConcept value.

Property Name	Type	Description	Filter Group and Version	Available Version
additionalInformation	Custom Field Value[]	The data stored in any custom fields as specified in the input request.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
coding	.FHIR Coding[]	The code set records created to represent the codings specified in the codeableConcept input.	Small, 53.0	53.0
hash	String	The unique code set bundle key that represents the combination of code sets included in the code set bundle.	Small, 53.0	53.0
message	String	A message with any errors that can encounter while processing the request.	Small, 53.0	53.0
salesforceId	String	The Salesforce ID of the code set bundle records created in Salesforce to store the codeableConcept values.	Small, 53.0	53.0
text	String	The human-readable textual representation of the concept, as specified in the codeableConcept request.	Small, 53.0	53.0

FHIR Coding

The output representation of the Code Set records created to represent a Coding value.

Property Name	Type	Description	Filter Group and Version	Available Version
additional Information	Custom Field Value[]	The data stored in any custom fields as specified in the input request.	Small, 53.0	53.0
code	String	The industry-defined code that represents a concept, and is defined by a system and its version.	Small, 53.0	53.0
display	String	The human-readable textual representation of the concept represented by the code.	Small, 53.0	53.0
endDate	String	The date until when the code set is valid.	Small, 53.0	53.0
hash	String	The unique code set key associated with the code set record.	Small, 53.0	53.0
isActive	Boolean	Indicates whether the code set is active or not.	Small, 53.0	53.0
message	String	A message with any errors that can encounter while processing the request.	Small, 53.0	53.0
salesforceId	String	The Salesforce ID of the code set record created to store a coding value.	Small, 53.0	53.0
startDate	String	The date from when the code set is valid.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
system	String	The terminology system that defines the meaning of the code set.	Small, 53.0	53.0
use	String	The code set usage type associated with the code set record, stored as a picklist value.	Small, 53.0	53.0
userSelected	Boolean	Indicates whether the code was selected directly by the user and is intended to be the primary code for the concept.	Small, 53.0	53.0
version	String	The version of the system that defines a code set.	Small, 53.0	53.0

FHIR Human Name

The output representation of a PersonName record created to represent a humanName value.

Property Name	Type	Description	Filter Group and Version	Available Version
additionalInformation	Custom Field Value	The data stored in any custom fields as specified in the input request.	Small, 53.0	53.0
family	String	The family name of the patient. This field stores a combination of the person's middle and last names.	Small, 53.0	53.0
given	String	The first name of the person.	Small, 53.0	53.0
message	String	A message with any errors that can encounter while processing the request.	Small, 53.0	53.0
periodEnd	String	The date until when the name is active.	Small, 53.0	53.0
periodStart	String	The date from when the name is active.	Small, 53.0	53.0
prefix	String	The prefix attached to the person's name.	Small, 53.0	53.0
salesforceId	String	The Salesforce ID of the PersonName record created to store the humanName value.	Small, 53.0	53.0
sourceSystem	String	The source system from where the PersonName record was brought into Salesforce.	Small, 53.0	53.0
sourceSystemId	String	The identifier of the person name record in its source system.	Small, 53.0	53.0
sourceSystemModifiedDate	String	The date and time when the person name record was last modified in its source system.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
suffix	String	The suffix attached to the person's name.	Small, 53.0	53.0
text	String	The full name of the person.	Small, 53.0	53.0
use	String	The type of use the name is meant for. For example, temp, official, or alias.	Small, 53.0	53.0

FHIR Contact Point

The output representation of contact details stored as a ContactPointPhone record.

Property Name	Type	Description	Filter Group and Version	Available Version
additional Information	Custom Field Value[]	The data stored in any custom fields as specified in the input request.	Small, 53.0	53.0
message	String	A message with any errors that can encounter while processing the request.	Small, 53.0	53.0
periodEnd	String	The date until when a contact detail is active.	Small, 53.0	53.0
periodStart	String	The date from when a contact detail is active.	Small, 53.0	53.0
rank	Integer	The preferred order in which the patient's contact details are to be used.	Small, 53.0	53.0
salesforceId	String	The Salesforce ID of the record created to store the contact detail.	Small, 53.0	53.0
system	String	The communication system associated with a contact detail. For example, phone and email.	Small, 53.0	53.0
use	String	The usage type of the contact detail.	Small, 53.0	53.0
value	String	The contact number or email address stored in the ContactPointPhone .PhoneNumber, ContactPointPhone .AreaCode, ContactPointPhone .ExtensionNumber, and Contact .Email fields.	Small, 53.0	53.0

FHIR Identifier

The output representation of the Identified records created to represent an identifier value.

Property Name	Type	Description	Filter Group and Version	Available Version
additionalInformation	Custom Field Value []	The data stored in any custom fields as specified in the input request.	Small, 53.0	53.0
assigner	FHIR Reference	The authorized body that issued the identifier, specified as a reference to an Account record.	Small, 53.0	53.0
message	String	A message with any errors that can encounter while processing the request.	Small, 53.0	53.0
periodEnd	String	The date and time until when the Identifier is active, recorded in DateTime format.	Small, 53.0	53.0
periodStart	String	The date and time from when the Identifier is active, recorded in DateTime format.	Small, 53.0	53.0
salesforceId	String	The Salesforce ID of the Identifier record created to store the identifier value.	Small, 53.0	53.0
sourceSystem	String	The source system from which the identifier record was brought into Salesforce.	Small, 53.0	53.0
sourceSystemId	String	The identifier of the identifier record in its source system	Small, 53.0	53.0
sourceSystemModifiedDate	String	The date and time when the identifier record was last modified in its source system.	Small, 53.0	53.0
type	FHIR Codeable Concept	The system-defined code that represents the type of ID the identifier record is.	Small, 53.0	53.0
use	String	The usage type of the Identifier.	Small, 53.0	53.0
value	String	The ID value of the Identifier.	Small, 53.0	53.0

FHIR Patient

The output representation of the patient stored in Salesforce, as specified in the input request.

Property Name	Type	Description	Filter Group and Version	Available Version
active	Boolean	Indicates whether the patient is active or not.	Small, 53.0	53.0
additionalInformation	Custom Field Value Output []	The data stored in any custom fields as specified in the input request.	Small, 53.0	53.0
address	FHIR AddressOutput []	The addresses of the patient, stored as contact point address records.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
birthDate	String	The date of birth of the patient, recorded in Date format.	Small, 53.0	53.0
communication	Patient Communication Language[]	The languages of communication associated with the patient, recorded in the PersonLanguage object.	Small, 53.0	53.0
contact	Patient Contact Party[]	The contact party associated with the patient record. Contacts are connected to patients using a ContactContactRelation__c junction record.	Small, 53.0	53.0
deceasedDateTime	String	The date and time of the patient's death.	Small, 53.0	53.0
gender	String	The gender of the patient.	Small, 53.0	53.0
general Practitioner	FHIR Reference[]	The practitioner associated with the patient. Practitioners are connected to patients using a ContactContactRelation__c junction record.	Small, 53.0	53.0
identifier	FHIR Identifier[]	The identifier information for the patient, stored as Identifier records that reference the patient record using their Identifier.ParentRecordId field.	Small, 53.0	53.0
managing Organisation	FHIR Reference	The organization that manages the patient recorded. Managing organizations are connected to patients using the Account ContactRelation junction object.	Small, 53.0	53.0
maritalStatus	String	The current marital status of the patient.	Small, 53.0	53.0
message	String	A message with any errors that can encounter while processing the request.	Small, 53.0	53.0
multipleBirthInteger	Integer	The birth order of the patient in a multiple-birth event.	Small, 53.0	53.0
name	FHIR Human Name[]	The person name of the patient.	Small, 53.0	53.0
salesforceId	String	The Salesforce ID of the Person Account record that represents the patient.	Small, 53.0	53.0
sourceSystemId	String	The record identifier of the patient's record in its source system.	Small, 53.0	53.0
telecom	FHIR Contact Point[]	The contact details of the patient. For example, phone numbers and email addresses.	Small, 53.0	53.0

General Practitioner

Member's primary or general care practitioner.

Property Name	Type	Description	Filter Group and Version	Available Version
generalPractitionerNpi	String	General Practitioner NPI number.	Big, 46.0	46.0

Medical Director

Name of the medical director who reviewed the request.

Property Name	Type	Description	Filter Group and Version	Available Version
username	String	username	Big, 46.0	46.0

Merge Customer Account with Status Output

The response body for the merge customer account with status request.

JSON example

```
{
  "code": "",
  "success": true,
  "message": "",
  "jobId": "01pxx000001T7QxxAK",
  "accepted": [
    "a3Lxx000000MbzxxAC",
    "a3Lxx000000MbzxxBC"
  ],
  "rejected": [
    {
      "winningId": "001xx00001STZUxxTR",
      "winningExternalIdField": null,
      "losingId": "001xx00001SYtgxxUI",
      "losingExternalIdField": null,
      "errorMessage": "Unable to find the Account with salesforce id 001xx00001STZVxxAS."
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	A code that represents the status of the operation.	Small, 65.0	65.0
success	Boolean	Indicates whether the operation was successful.	Small, 65.0	65.0

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	A message related to the status of the operation.	Small, 65.0	65.0
jobId	String	ID of the asynchronous job created to process the requests.	Small, 65.0	65.0
accepted	String[]	A list of the Consolidated Account IDs for which the merge request was successfully accepted for processing.	Small, 65.0	65.0
rejected	RejectedMergeRequest[]	A list of merge requests that were rejected due to invalid input.		65.0

Original Denial Medical Director

The name of the medical director who denied the original request.

Property Name	Type	Description	Filter Group and Version	Available Version
username	String	username	Big, 46.0	46.0

Object Field

Output representation of the target object field.

Property Name	Type	Description	Filter Group and Version	Available Version
fieldName	String	The name of the field in the target object.	Small, 55.0	55.0
fieldValue	Object	The value of the field.	Small, 55.0	55.0

Object Field List

Output representation of the target object fields list.

Property Name	Type	Description	Filter Group and Version	Available Version
objectFieldList	Object Field[]	Represents the fields that are created or updated in the Salesforce object.	Small, 55.0	55.0

OCR Document Scan Result

Output representation of the OCR document scan result ID.

Property Name	Type	Description	Filter Group and Version	Available Version
resultId	String	The ID of the OCR document scan result.	Small, 55.0	55.0

OCR Document Scan Result List

The output representation of the list of the OCR document scan results IDs.

Property Name	Type	Description	Filter Group and Version	Available Version
ocrDocumentScanResultIdList	OCR Document Scan Result[]	Represents the OCR document scan result IDs.	Small, 55.0	55.0

Patient Communication Language

The output representation of the PersonLanguage records that represent the communication preferences of a person.

Property Name	Type	Description	Filter Group and Version	Available Version
additionalInformation	Custom Field Value[]	The data stored in any custom fields as specified in the input request.	Small, 53.0	53.0
language	String	The language specified for communication.	Small, 53.0	53.0
message	String	A message with any errors that can encounter while processing the request.	Small, 53.0	53.0
preferenceRank	Integer	The ranked order of preference the person has for being communicated with using the language.	Small, 53.0	53.0
salesforceId	String	The Salesforce ID of the PersonLanguage record that represents the communication preferences of a person.	Small, 53.0	53.0

Patient Contact Party

The output representation of contact parties associated with a patient.

Property Name	Type	Description	Filter Group and Version	Available Version
additionalInformation	Custom Field Value[]	The data stored in any custom fields as specified in the input request.	Small, 53.0	53.0
address	FHIR Address	The address associated with the contact party, stored as ContactPointAddress records.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
contactRelationId	Contact String	The Salesforce ID of the junction record that connects the patient and the contact party.	Small, 53.0	53.0
gender	String	The gender of the contact party.	Small, 53.0	53.0
message	String	A message with any errors that can encounter while processing the request.	Small, 53.0	53.0
name	FHIR Human Name	The names of the contact party, specified as PersonName records.	Small, 53.0	53.0
organisation	FHIR Reference	The organization associated with the contact party.	Small, 53.0	53.0
periodEnd	String	The date until when the person is a valid contact for the patient.	Small, 53.0	53.0
periodStart	String	The date from when the person is a valid contact for the patient.	Small, 53.0	53.0
relationship	FHIR Codeable Concept	The type of relationship between the contact party and the patient, specified with Reciprocal Role records.	Small, 53.0	53.0
salesforceId	String	The Salesforce ID of the Person Account record that represents the contact party.	Small, 53.0	53.0
telecom	FHIR Contact Point	The contact details of the contact party. For example, phone numbers and email addresses.	Small, 53.0	53.0

Patient Get

Output representation of details of a patient record.

JSON example

```
{
  "active": true,
  "identifier": [
    {
      "assigner": {
        "referenceResource": "Organization",
        "referenceId": "Org12345XYZ"
      },
      "type": {
        "text": "Passport Number",
        "coding": [
          {
            "display": "Passport number",
            "code": "PPN",
            "isActive": true,
            "system": "http://terminology.hl7.org/CodeSystem/v2-0203#PPN"
          }
        ]
      }
    }
  ],
  "name": [
    {
      "family": "Doe",
      "given": [
        "John"
      ],
      "prefix": [
        "Dr."
      ],
      "suffix": [
        "MD"
      ]
    }
  ],
  "telecom": [
    {
      "system": "phone",
      "value": "+1234567890"
    }
  ],
  "gender": "Male",
  "birthDate": "1990-01-01T00:00:00Z",
  "deceasedBoolean": false,
  "deceasedDateTime": null,
  "deceasedPeriod": null,
  "deceasedRange": null,
  "deceasedTime": null,
  "sex": "male"
}
```

```
        "use": "Identifier"
    }
]
},
"value": "ABCD5678XYZ"
}
],
"name": [
{
    "use": "alias",
    "text": "Charles Green",
    "family": "Green",
    "given": "Charles",
    "prefix": "Mr.",
    "suffix": "Sr."
}
],
"communication": [
{
    "language": "English",
    "preferenceRank": 1
}
],
"address": [
{
    "use": "temp",
    "type": "postal",
    "line": "Green Household"
}
],
"telecom": [
{
    "system": "email",
    "value": "a@bc.com"
}
],
"gender": "male",
"birthDate": "2000-09-12T18:13:41Z",
"maritalStatus": "married",
"contact": [
{
    "relationship": {
        "coding": [
            {
                "display": "Partner"
            }
        ]
    },
    "name": {
        "use": "Temp",
        "text": "Shawna Green",
        "family": "Green",
        "given": "Shawna",
        "prefix": "Mrs."
    }
}
```

```

        "suffix": "Jr."
    },
    "telecom": [
        {
            "system": "email",
            "value": "c@de.com"
        },
        {
            "system": "phone",
            "value": "12345678",
            "use": "temp",
            "rank": 1
        }
    ],
    "address": {
        "use": "temp",
        "type": "postal",
        "line": "Green Household"
    }
},
],
"sourceSystemId": "567890",
"deceasedDateTime": "2023-02-10T10:40:13.000Z",
"salesforceId": "0NBRM000004CGx4AM",
"generalPractitioner": [
    {
        "referenceResource": "Practitioner",
        "referenceId": "PRAC789XYZ",
        "relationship": "Plastic Surgeon"
    }
],
"managingOrganisation": {
    "referenceResource": "Organization",
    "referenceId": "MI9007GBE"
}
}
}

```

Properties

Property Name	Type	Description	Filter Group and Version	Available Version
active	Boolean	Indicates whether the patient record is active or not.	Small, 53.0	53.0
address	FHIR Address []	The addresses of the patient, stored as contact point address records.	Small, 53.0	53.0
birthDate	String	The date of birth of the patient, recorded in Date format.	Small, 53.0	53.0
communication	Patient Communication Language []	The languages of communication associated with the patient, recorded in the PersonLanguage object.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
contact	Patient Contact Party[]	The contact party associated with the patient record. Contacts are connected to patients using a ContactContact Relation__c junction record.	Small, 53.0	53.0
deceasedDateTime	String	The date and time of the patient's death.	Small, 53.0	53.0
gender	String	The gender of the patient.	Small, 53.0	53.0
general Practitioner	FHIR Reference[]	The practitioner associated with the patient. Practitioners are connected to patients using a ContactContact Relation__c junction record.	Small, 53.0	53.0
identifier	FHIR Identifier[]	The identifier information for the patient, stored as Identifier records that reference the patient record using their Identifier.ParentRecordId field.	Small, 53.0	53.0
managing Organisation	FHIR Reference[]	The organization that manages the patient recorded. Managing organizations are connected to patients using the Account ContactRelation junction object.	Small, 53.0	53.0
maritalStatus	String	The current marital status of the patient.	Small, 53.0	53.0
message	String	A message with any errors that can have been encountered while processing the request.	Small, 53.0	53.0
multiple BirthInteger	Integer	The birth order of the patient in a multiple-birth event.	Small, 53.0	53.0
name	FHIR Human Name[]	The person name of the patient.	Small, 53.0	53.0
resourceType	String	Reserved for future use.	Small, 53.0	53.0
salesforceId	String	The Salesforce ID of the Person Account record that represents the patient.	Small, 53.0	53.0
sourceSystemId	String	The record identifier of the patient's record in its source system.	Small, 53.0	53.0
telecom	FHIR Contact Point[]	The contact details of the patient, including phone numbers and email addresses.	Small, 53.0	53.0

Patient Upsert

Output representation of result after a Patient FHIR resource is created.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	Integer	The error code in case of failure.	Small, 53.0	53.0
errorMessage	String	The error message in case of failure.	Small, 53.0	53.0
failedCount	Integer	Specifies the failed count number.	Small, 53.0	53.0
failedRecords	FHIR Patient[]	Represents the failed records.	Small, 53.0	53.0
status	String	Specifies the status of the request. Possible values are: <ul style="list-style-type: none">• Failure—Specifies that the upsert request of the Patient FHIR resource couldn't be completed.• Success—Specifies that the upsert request of the Patient FHIR resource is successfully completed.	Small, 53.0	53.0
successRecords	FHIR Patient[]	Represents the records that got successfully created.	Small, 53.0	53.0

Patient Update

Output representation of result after a Patient FHIR resource is updated.

Property Name	Type	Description	Filter Group and Version	Available Version
code	Integer	The error in case of failure.	Small, 53.0	53.0
errorCode	Integer	The error code in case of failure.	Small, 53.0	53.0
errorMessage	String	The error message in case of failure.	Small, 53.0	53.0
status	String	Specifies the status of the request. Possible values are: <ul style="list-style-type: none">• Failure—Specifies that the update request of the Patient FHIR resource couldn't be completed.• PartialSuccess—Specifies that the update request of the Patient FHIR resource is partially completed.• Success—Specifies that the update request of the Patient FHIR resource is successfully completed.	Small, 53.0	53.0

Payload Output

Output representation of the details communicated to the recipient.

Property Name	Type	Description	Filter Group and Version	Available Version
authorNoteId	String	The author note ID that contains the communication details along with information about the author of the note and the time the note was authored.	Big, 57.0	57.0
codeSetBundleId	String	The ID of the code set bundle.	Big, 57.0	57.0

Presentation Page Product Output

Represents the output for Presentation Page Products API.

Properties

Property Name	Type	Description	Filter Group and Version	Available Version
isSuccess	Boolean	Indicates whether the request was successfully accepted or processed.	Small, 65.0	65.0
message	String	Message that provides details about the request outcome.	Small, 65.0	65.0
errors	List<String>	List of errors that occurred during the request validation.	Small, 65.0	65.0

Example

```
{
    "isSuccess": true,
    "message": "Presentation page products created successfully",

    "errors": []
}
```

Program Enrollment Result

Result containing details of all patient enrollment status. If there is success, it contains `id` of new records created for each patient.

Property Name	Type	Description	Filter Group and Version	Available Version
<code>careProgramResults</code>	Care Program Enrollment Result[]	A list containing the results of all the patient enrollments.	Small, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
error	Error Message	Error output containing the code and the message text.	Small, 46.0	46.0
isSuccess	Boolean	Indicates whether the enrollment was successful.	Small, 46.0	46.0

Rejected Merge Request Output

A merge request that was rejected due to invalid input.

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Properties

Property Name	Type	Description	Filter Group and Version	Available Version
winningId	String	The Salesforce ID of the Consolidated Account that was part of the rejected request.	Small, 65.0	65.0
winningExternalId	String	The external ID of the Consolidated Account that was part of the rejected request.	Small, 65.0	65.0
losingId	String	The Salesforce ID of the Merged Account that was part of the rejected request.	Small, 65.0	65.0
losingExternalId	String	The external ID of the Merged Account that was part of the rejected request.	Small, 65.0	65.0
errorMessage	String	The error message explaining why the request was rejected.	Small, 65.0	65.0

Requesting Practitioner

Ordering or referring practitioner for the request.

Property Name	Type	Description	Filter Group and Version	Available Version
healthCareProviderId	String	The provider associated with request creation for this prior authorization. This field is a lookup to HealthcareProviderId.	Big, 55.0	55.0

Property Name	Type	Description	Filter Group and Version	Available Version
requestingPractitionerNpi	String	Requesting Practitioner NPI number.	Big, 46.0	46.0

Reopened By Output

The name of the person who reopened the care request.

Property Name	Type	Description	Filter Group and Version	Available Version
username	String	The user who reopened the care request.	Big, 52.0	52.0

Sample Limits Validation Response Output

Output representation for a sample limits validation request.

JSON example

```
{
  "code": null,
  "message": null,
  "response": {
    "result": "Error",
    "validationResults": [
      {
        "message": "Quantity exceeds sample limits",
        "errors": [
          {
            "type": "sampleLimit",
            "message": "Quantity exceeds sample limits",
            "lotAllocationWarningMessage": null,
            "filters": [
              {
                "value": "1KeXXXXXXXXXXXX0AM",
                "field": "sample"
              }
            ],
            "accountId": "001XXXXXXXXXXXXAAG"
          }
        ],
        "errorLevel": "validation",
        "errorBehaviour": "Error"
      }
    ],
    "errorBehaviour": "Error",
    "message": "Quantity exceeds sample limits",
    "errors": [
      {
        "type": "sampleLimit",
        "message": "Quantity exceeds sample limits",
        "lotAllocationWarningMessage": null,
      }
    ]
  }
}
```

```

    "filters": [
      {
        "value": "1KeXXXXXXXXXXXXXXz0AM",
        "field": "sample"
      }
    ],
    "accountId": "001XXXXXXXXXXXX1AAG"
  ],
  "errorLevel": "validation"
},
"success": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	The API error code, if available.	Small, 65.0	65.0
message	String	The error or success message, if available.	Small, 65.0	65.0
response	Map<String, Object>	Data related to the sample limits validation results.	Small, 65.0	65.0
success	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 65.0	65.0

Search Results Output

Output representation for provider search request.

JSON example

```
{
  "success": true,
  "message": "",
  "code": "200",
  "response": {
    "simpleSearchFieldSetMembers": {
      "HCO": {},
      "HCP": {}
    },
    "groupAddressMatches": []
  }
}
```

Properties

Name	Type	Description	Filter Group and Version	Available version
success	Boolean	Indicates whether the API request was successful (<code>true</code>) or not (<code>false</code> ..	Small, 65.0	65.0

Name	Type	Description	Filter Group and Version	Available version
message	String	Message returned in case of an API failure.	Small, 65.0	65.0
code	String	HTTP response code.	Small, 65.0	65.0
response	Map<String, Object>	Actual search data, which includes results for <code>simpleSearchFieldSet</code> , <code>Members</code> and <code>groupAddressMatches</code> .	Small, 65.0	65.0

Servicing Facility

Facility where the service is being provided.

Property Name	Type	Description	Filter Group and Version	Available Version
<code>servicingFacilityId</code>	String	ID of the facility where the patient is receiving the service for this care request.	Big, 55.0	55.0
<code>servicingFacilityNpi</code>	String	Servicing Facility NPI number.	Big, 46.0	46.0

Servicing Practitioner

Practitioner administering the service.

Property Name	Type	Description	Filter Group and Version	Available Version
<code>healthCareProviderId</code>	String	ID of the provider associated with providing the service for this care request. This field is a lookup to <code>HealthcareProviderId</code> .	Big, 55.0	55.0
<code>servicingPractitionerNpi</code>	String	Servicing Practitioner NPI number.	Big, 46.0	46.0

Subscriber

The primary member on the plan.

Property Name	Type	Description	Filter Group and Version	Available Version
<code>firstName</code>	String	First name of the subscriber. Maps to: <code>Account.FirstName</code>	Big, 46.0	46.0
<code>lastName</code>	String	Last name of the subscriber. Maps to: <code>Account.LastName</code>	Big, 46.0	46.0

Property Name	Type	Description	Filter Group and Version	Available Version
memberID	String	Member ID for the subscriber. Maps to: <code>careRequestExtension.Subscriber.MemberIdentifier</code>	Big, 46.0	46.0

Tracked Communication Output

Output representation of tracked communications for a care request.

Property Name	Type	Description	Filter Group and Version	Available Version
categories	String[]	The categories of the communication.	Big, 57.0	57.0
communicatorReference	String	The individual sending this communication request.	Big, 57.0	57.0
contextReference	String	The clinical encounter for which the communication is created.	Big, 57.0	57.0
mediums	String[]	The mediums of the communication request.	Big, 57.0	57.0
name	String	The name of the communication request.	Big, 57.0	57.0
notes	String[]	The comments made about the communication request.	Big, 57.0	57.0
occurrenceEnd	String	The date by when the communication is expected to end.	Big, 57.0	57.0
occurrenceStart	String	The date from when the communication is expected to be sent.	Big, 57.0	57.0
payloads	Payload Output[]	Represents details of the communication.	Big, 57.0	57.0
priority	String	The priority of the communication.	Big, 57.0	57.0
reasonCodes	String[]	The codes that represent the reason for the communication.	Big, 57.0	57.0
recipients	String[]	The recipients of the communication.	Big, 57.0	57.0
replacedItems	String[]	The parent TrackedCommunication records to which the details are being added.	Big, 57.0	57.0
requesterReference	String	The requester of the communication.	Big, 57.0	57.0
status	String	The status of the communication.	Big, 57.0	57.0
statusReason	String	The reason for the status of the communication.	Big, 57.0	57.0
subject	String	The patient for whom the communication is created.	Big, 57.0	57.0

Property Name	Type	Description	Filter Group and Version	Available Version
type	String	The type of the communication.	Big, 57.0	57.0

Transport Location

Transport Location output representation

Property Name	Type	Description	Filter Group and Version	Available Version
ambulanceTransportDistance	Double	Distance traveled during ambulance transport. Maps to: <code>CareRequestItem.AmbulanceTransportDistance</code>	Big, 46.0	46.0
ambulanceTransportReason	String	Reason for ambulance transport. Maps to: <code>CareRequestItem.AmbulanceTransportReason</code>	Big, 46.0	46.0
ambulanceTransportType	String	Type of ambulance transport. Maps to: <code>CareRequestItem.AmbulanceTransportType</code>	Big, 46.0	46.0
name	String	Name	Big, 46.0	46.0

Verifier Output

Represents a verifier.

Property Name	Type	Description	Filter Group and Version	Available Version
developerName	String	The developer name of the verifier.	Small, 54.0	54.0
verificationState	String	Indicates whether the verifier was checked.	Small, 54.0	54.0

Work Type Lead Time Output

Output representation of a list of work types and their associated lead times.

JSON example

```
{
  "code": "202",
  "isSuccess": true,
  "message": "",
  "workTypeLeadTimeMap": {
    "08qxx0000004Q1UAAU": 1,
    "08qxx0000004QjsAAE": 1,
    "08qxx0000004Qn6AAE": 5
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	API response code.	Small, 60.0	60.0
isSuccess	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
message	String	Error message when the request fails.	Small, 60.0	60.0
workTypeLeadTimeMap	Map<String, Integer>	Key value pairs of work type IDs and their corresponding lead times in days.	Big, 60.0	60.0

Apex Reference

This Apex reference goes into detail about the built-in Apex classes, interfaces, methods, or enums for Life Sciences Cloud.

For Apex-related objects and SOAP API calls, see [Objects and SOAP API Calls and Headers for Apex](#) in the *SOAP API Developer Guide*.

[embeddedai Namespace](#)

The `embeddedai` namespace provides classes and methods to manage and represent records and data in Apex to support embedded AI features.

[ConnectApi Namespace](#)

The `ConnectApi` namespace (also called Connect in Apex) provides classes for accessing the same data available in Connect REST API. Use Connect in Apex to create custom experiences in Salesforce.

embeddedai Namespace

The `embeddedai` namespace provides classes and methods to manage and represent records and data in Apex to support embedded AI features.

These are the classes in the `embeddedai` namespace.

[ApexMap Class](#)

Create, clone, and convert string based key-value pairs to a JSON string format.

[RecordApexRepresentation Class](#)

Contains properties and a method to create a serializable representation of a record and its associated data for AI service integration and data processing.

ApexMap Class

Create, clone, and convert string based key-value pairs to a JSON string format.

Namespace

[embeddedai](#)

[ApexMap Constructors](#)

Learn more about the constructors available with the ApexMap class.

[ApexMap Properties](#)

[ApexMap Methods](#)

Create a copy of the ApexMap object and convert key-value pairs to string format.

ApexMap Constructors

Learn more about the constructors available with the ApexMap class.

The `ApexMap` class includes these constructors.

[ApexMap\(key, value\)](#)

Initializes a new instance of the ApexMap class by assigning the specified key and value. This constructor creates a single key–value entry that can be included in an embedded AI Apex map for passing contextual data to embedded AI logic.

[ApexMap\(\)](#)

Initializes the ApexMap class.

ApexMap (key, value)

Initializes a new instance of the ApexMap class by assigning the specified key and value. This constructor creates a single key–value entry that can be included in an embedded AI Apex map for passing contextual data to embedded AI logic.

Signature

```
public ApexMap(String key, String value)  
    embeddedai.ApexMap, newinstance, [String, String], embeddedai.ApexMap
```

Parameters

key

Type: String

The unique identifier for an entry in the embedded AI Apex map. This key references and retrieves the associated value during embedded AI processing.

value

Type: String

The data associated with the specified key in the embedded AI Apex map. This value stores the contextual information consumed by embedded AI logic.

ApexMap ()

Initializes the ApexMap class.

Signature

```
public ApexMap()  
    embeddedai.ApexMap, newinstance, [], embeddedai.ApexMap
```

ApexMap Properties

These are the properties for `ApexMap`.

key

Represents key of the key-value pair. This property is used to store the unique ID or name of the data.

value

Represents value of the key-value pair. This property is used to store the data associated with the key.

key

Represents key of the key-value pair. This property is used to store the unique ID or name of the data.

Signature

```
public String key {get; set;}  
    embeddedai.ApexMap, key
```

Property Value

Type: String

value

Represents value of the key-value pair. This property is used to store the data associated with the key.

Signature

```
public String value {get; set;}  
    embeddedai.ApexMap, value
```

Property Value

Type: String

ApexMap Methods

Create a copy of the `ApexMap` object and convert key-value pairs to string format.

These are the methods for `ApexMap`.

toString()

Returns a string representation of the `ApexMap` object.

toString()

Returns a string representation of the `ApexMap` object.

Signature

```
public String toString()
```

```
embeddedai.ApexMap, toString, [], String
```

Return Value

Type: String

RecordApexRepresentation Class

Contains properties and a method to create a serializable representation of a record and its associated data for AI service integration and data processing.

Namespace

[embeddedai](#)

[RecordApexRepresentation Constructors](#)

Learn more about the constructors available with the `RecordApexRepresentation` class.

[RecordApexRepresentation Properties](#)

[RecordApexRepresentation Methods](#)

Create detailed, hierarchical record objects and convert them to a custom JSON string for structured AI input.

RecordApexRepresentation Constructors

Learn more about the constructors available with the `RecordApexRepresentation` class.

The `RecordApexRepresentation` class includes these constructors.

[RecordApexRepresentation\(objectType, recordData, relatedRecordData\)](#)

Initializes a new instance of the `RecordApexRepresentation` class with the specified object type, primary record data, and related record data. This constructor represents a structured record and its relationships for consumption by embedded AI logic.

[RecordApexRepresentation\(\)](#)

Initializes the `RecordApexRepresentation` class.

RecordApexRepresentation(objectType, recordData, relatedRecordData)

Initializes a new instance of the `RecordApexRepresentation` class with the specified object type, primary record data, and related record data. This constructor represents a structured record and its relationships for consumption by embedded AI logic.

Signature

```
public RecordApexRepresentation(String objectType, List<embeddedai.ApexMap> recordData,  
List<embeddedai.RecordApexRepresentation> relatedRecordData)
```

```
embeddedai.RecordApexRepresentation, newinstance, [String, List<embeddedai.ApexMap>,  
List<embeddedai.RecordApexRepresentation>], embeddedai.RecordApexRepresentation
```

Parameters

objectType

Type: String

The object type represented by this record (for example, Account, Case, or a custom object). This value defines the context in which the record data is interpreted by embedded AI processing.

recordData

Type: List<[embeddedai.ApexMap](#) on page 1849>

The field-level data for the primary record as a collection of key–value pairs. Each ApexMap entry corresponds to a field name and its associated value used to construct the record context.

relatedRecordData

Type: List<[embeddedai.RecordApexRepresentation](#) on page 1852>

Related records associated with the primary record. Each entry represents a related object and its data, enabling hierarchical or relational record context to be passed to embedded AI logic.

RecordApexRepresentation()

Initializes the RecordApexRepresentation class.

Signature

```
public RecordApexRepresentation()
```

```
embeddedai.RecordApexRepresentation, newinstance, [], embeddedai.RecordApexRepresentation
```

RecordApexRepresentation Properties

The following are properties for RecordApexRepresentation.

[objectType](#)

Stores the type of the object.

[recordData](#)

Stores a list of objects, where each object holds a key-value pair.

[relatedRecordData](#)

Stores a list that contains a child or related records associated with the record data.

objectType

Stores the type of the object.

Signature

```
public String objectType {get; set;}  
embeddedai.RecordApexRepresentation, objectType
```

Property Value

Type: String

recordData

Stores a list of objects, where each object holds a key-value pair.

Signature

```
public List<embeddedai.ApexMap> recordData {get; set;}  
embeddedai.RecordApexRepresentation, recordData
```

Property Value

Type: [List<embeddedai.ApexMap>](#)

relatedRecordData

Stores a list that contains a child or related records associated with the record data.

Signature

```
public List<embeddedai.RecordApexRepresentation> relatedRecordData {get; set;}  
embeddedai.RecordApexRepresentation, relatedRecordData
```

Property Value

Type: [List<embeddedai.RecordApexRepresentation>](#)

RecordApexRepresentation Methods

Create detailed, hierarchical record objects and convert them to a custom JSON string for structured AI input.

The following are methods for `RecordApexRepresentation`.

[toRecordApexRep\(jsonString\)](#)

Converts a JSON-formatted string into a `RecordApexRepresentation` instance. This method parses the provided JSON and constructs a structured record representation that can be used by embedded AI logic.

[toString\(\)](#)

Returns a structured JSON string representation of the `RecordApexRepresentation` object and its nested related records.

toRecordApexRep (jsonString)

Converts a JSON-formatted string into a RecordApexRepresentation instance. This method parses the provided JSON and constructs a structured record representation that can be used by embedded AI logic.

Signature

```
public static embeddedai.RecordApexRepresentation toRecordApexRep(String jsonString)  
    embeddedai.RecordApexRepresentation, toRecordApexRep, [String],  
    embeddedai.RecordApexRepresentation
```

Parameters

jsonString

Type: String

The JSON-formatted string containing record data and related record information to be converted into a RecordApexRepresentation object.

Return Value

Type: embeddedai.RecordApexRepresentation

Returns a RecordApexRepresentation instance populated with the data parsed from the provided JSON string.

toString()

Returns a structured JSON string representation of the RecordApexRepresentation object and its nested related records.

Signature

```
public String toString()
```

```
    embeddedai.RecordApexRepresentation, toString, [], String
```

Return Value

Type: String

ConnectApi Namespace

The ConnectApi namespace (also called Connect in Apex) provides classes for accessing the same data available in Connect REST API. Use Connect in Apex to create custom experiences in Salesforce.

For information about working with the ConnectApi classes, see [Connect in Apex](#).

[LifeSciEmailTemplate Methods](#)

These are the LifeSciEmailTemplate methods for Life Sciences Cloud.

[LifeSciPresentation Methods](#)

These are the LifeSciPresentation methods for Life Sciences Cloud.

[LifeSciPresPageProductGuidance Methods](#)

These are the `LifeSciPresPageProductGuidance` methods for Life Sciences Cloud.

[Input Classes](#)

These are the Apex input classes for Life Sciences Cloud.

[Output Classes](#)

These are the Apex output classes for Life Sciences Cloud.

[ConnectApi Enums](#)

Enums specific to the `ConnectApi` namespace.

LifeSciEmailTemplate Methods

These are the `LifeSciEmailTemplate` methods for Life Sciences Cloud.

[createEmailTemplate\(emailTemplateInput\)](#)

Create an email template with the provided metadata.

[updateEmailTemplate\(emailTemplateInput\)](#)

Update an existing email template with the provided metadata.

createEmailTemplate (emailTemplateInput)

Create an email template with the provided metadata.

API Version

65.0

Requires Chatter

No

Signature

```
public static ConnectApi.GenericResponseOutputRepresentation  
createEmailTemplate(ConnectApi.EmailTemplateInputRepresentation emailTemplateInput)
```

Parameters

emailTemplateInput

Type: [ConnectApi.EmailTemplateInputRepresentation](#)

Input representation that contains the metadata for the email template. The `fileId` field is not accepted in this Apex representation.

Return Value

Type: [ConnectApi.GenericResponseOutputRepresentation](#)

Example

```
ConnectApi.EmailTemplateInput input = new ConnectApi.EmailTemplateInput();
input.name = 'Sample Email Template';
input.id = 'email-template-id';
input.emailSubject = 'Email Subject';
input.description = 'Email template description';
input.contentDocumentId = '069SB0000047U0mYAE';
input.activatedDate = Date.today();
input.deactivatedDate = Date.today().addDays(365);
input.senderType = 'SalesRep';
input.senderEmailFieldAPIName = 'noreply@company.com';
input.replyToType = 'SalesRep';
input.replyToEmailAddress = 'support@company.com';
input.bccEmailIdList = 'admin@company.com';
input.isActive = true;
input.isDefaultAutoEmailTemplate = false;
input.isSubjectLineEditable = true;
input.shouldIgnoreEmailConsent = false;
input.surveyId = '0KdYH0000000VyH0AU';
input.productId = '1KeYH0000001j2m0AA';
input.communicationSubscriptionId = 'comm-sub-source-system-id';
input.automatedEmailContextType = 'ProviderVisit';
input.automatedEmailActionType = 'Create';
input.languages = new List<String>();
input.languages.add('es_AD');
input.languages.add('es');
input.topics = new List<String>();
input.topics.add('Onboarding');
input.topics.add('User Engagement');
input.customFields = new List<ConnectApi.CustomFieldRepresentation>();
ConnectApi.CustomFieldRepresentation customField1 = new
ConnectApi.CustomFieldRepresentation();
customField1.fieldName = 'Email_Template_Category__c';
customField1.fieldValue = 'Product Information';
input.customFields.add(customField1);
ConnectApi.CustomFieldRepresentation customField2 = new
ConnectApi.CustomFieldRepresentation();
customField2.fieldName = 'Priority__c';
customField2.fieldValue = 'High';
input.customFields.add(customField2);
System.debug(ConnectApi.LifeSciEmailTemplate.createEmailTemplate(input));
```

updateEmailTemplate (emailTemplateInput)

Update an existing email template with the provided metadata.

API Version

65.0

Requires Chatter

No

Signature

```
public static ConnectApi.GenericResponseOutputRepresentation  
updateEmailTemplate(ConnectApi.EmailTemplateInputRepresentation emailTemplateInput)
```

Parameters

emailTemplateInput

Type: [ConnectApi.EmailTemplateInputRepresentation](#)

Input representation that contains the metadata for the email template. The fileld field is not accepted in this Apex representation.

Return Value

Type: [ConnectApi.GenericResponseOutputRepresentation](#)

Example

```
ConnectApi.EmailTemplateInput input = new ConnectApi.EmailTemplateInput();  
input.name = 'Sample Email Template Updated';  
input.id = 'email-template-id';  
input.emailSubject = 'Email Subject Updated';  
input.description = 'Email template description Updated';  
input.contentDocumentId = '069SB0000047U0mYAE';  
input.activatedDate = Date.today();  
input.deactivatedDate = Date.today().addDays(365);  
input.senderType = 'PredefinedEmail';  
input.senderEmailFieldAPIName = 'noreply@company.com';  
input.replyToType = 'PredefinedEmail';  
input.replyToEmailAddress = 'support@company.com';  
input.bccEmailIdList = 'admin@company.com';  
input.isActive = true;  
input.isDefaultAutoEmailTemplate = false;  
input.isSubjectLineEditable = true;  
input.shouldIgnoreEmailConsent = false;  
input.productId = '01t0000000000001';  
input.surveyId = 'survey-001';  
input.communicationSubscriptionId = 'comm-sub-001';  
input.automatedEmailContextType = 'ProviderVisit';  
input.automatedEmailActionType = 'Create';  
input.attachmentObjectTypes = new List<String>();  
input.attachmentObjectTypes.add('Account');  
input.languages = new List<String>();  
input.languages.add('es_ES');  
input.languages.add('es');  
input.topics = new List<String>();  
input.topics.add('Onboarding');  
input.topics.add('User Engagement');  
System.debug(ConnectApi.LifeSciEmailTemplate.updateEmailTemplate(input));
```

LifeSciPresentation Methods

These are the LifeSciPresentation methods for Life Sciences Cloud.

[createPresentationContent\(presentationContentInput\)](#)

Create new presentation content with the provided metadata.

[updatePresentationContent\(presentationContentInput\)](#)

Update existing presentation content with the provided metadata.

createPresentationContent (presentationContentInput)

Create new presentation content with the provided metadata.

API Version

65.0

Requires Chatter

No

Signature

```
public static ConnectApi.GenericResponseOutputRepresentation  
createPresentationContent(ConnectApi.PresentationContentInputRepresentation  
presentationContentInput)
```

Parameters

presentationContentInput

Type: [ConnectApi.PresentationContentInputRepresentation](#)

Input representation that contains the metadata for the presentation content. The fileId field is not accepted in this Apex representation.

Return Value

Type: [ConnectApi.GenericResponseOutputRepresentation](#)

Example

```
ConnectApi.PresentationContentInputRepresentation input = new  
ConnectApi.PresentationContentInputRepresentation();  
input.contentType = 'PRESENTATION_PDF';  
ConnectApi.PresentationInput presentation = new ConnectApi.PresentationInput();  
presentation.name = 'PDF Presentation Name';  
presentation.id = 'pdf-presentation-id';  
presentation.enableDoubleTapZoom = true;  
presentation.enablePinchZoom = true;  
presentation.playerGesture = 'SWIPEUP';  
presentation.activationDate = Date.today();  
presentation.deactivationDate = Date.today().addDays(365);  
input.presentation = presentation;  
input.pages = new List<ConnectApi.PresentationPageInput>();  
ConnectApi.PresentationPageInput page1 = new ConnectApi.PresentationPageInput();  
page1.pageNumber = 1;
```

```
page1.name = 'PDF Page 1 Name';
page1.id = 'pdf-page-name-1';
page1.mandatory = true;
page1.contentDocumentId = '069SB0000048cPDYAY';
page1.activationDate = Date.today();
page1.deactivationDate = Date.today().addDays(365);
ConnectApi.ProductGuidanceRepresentation product1 = new
ConnectApi.ProductGuidanceRepresentation();
product1.productId = '1KeYH0000001j2m0AA';
product1.guidanceIds = new List<String>();
product1.guidanceIds.add('guidance-id-1');
product1.guidanceIds.add('guidance-id-2');
page1.products = new List<ConnectApi.ProductGuidanceRepresentation>();
page1.products.add(product1);
input.pages.add(page1);
ConnectApi.PresentationPageInput page2 = new ConnectApi.PresentationPageInput();
page2.pageNumber = 2;
page2.name = 'PDF Page 2 Name';
page2.id = 'pdf-page-name-2';
page2.mandatory = true;
page2.activationDate = Date.today();
page2.deactivationDate = Date.today().addDays(365);
input.pages.add(page2);
System.debug(ConnectApi.LifeSciPresentation.createPresentationContent(input));
```

updatePresentationContent (presentationContentInput)

Update existing presentation content with the provided metadata.

API Version

65.0

Requires Chatter

No

Signature

```
public static ConnectApi.GenericResponseOutputRepresentation
updatePresentationContent(ConnectApi.PresentationContentInputRepresentation
presentationContentInput)
```

Parameters

presentationContentInput

Type: [ConnectApi.PresentationContentInputRepresentation](#)

Input representation that contains the metadata for the presentation content. The fileId field is not accepted in this Apex representation.

Return Value

Type: [ConnectApi.GenericResponseOutputRepresentation](#)

Example

```
ConnectApi.PresentationContentInputRepresentation input = new  
ConnectApi.PresentationContentInputRepresentation();  
input.contentType = 'PRESENTATION_PDF';  
ConnectApi.PresentationInput presentation = new ConnectApi.PresentationInput();  
presentation.name = 'Updated PDF Presentation Name';  
presentation.id = 'pdf-presentation-id';  
presentation.enableDoubleTapZoom = false;  
presentation.enablePinchZoom = false;  
presentation.playerGesture = 'TAPBOTTOM';  
presentation.activationDate = Date.today().addDays(1);  
presentation.deactivationDate = Date.today().addDays(400);  
input.presentation = presentation;  
input.pages = new List<ConnectApi.PresentationPageInput>();  
ConnectApi.PresentationPageInput page1 = new ConnectApi.PresentationPageInput();  
page1.pageNumber = 1;  
page1.name = 'Updated PDF Page 1 Name';  
page1.id = 'pdf-page-name-1';  
page1.mandatory = true;  
page1.contentDocumentId = '069SB0000048cPEYBZ';  
page1.activationDate = Date.today().addDays(1);  
page1.deactivationDate = Date.today().addDays(400);  
input.pages.add(page1);  
ConnectApi.PresentationPageInput page2 = new ConnectApi.PresentationPageInput();  
page2.pageNumber = 2;  
page2.name = 'Updated PDF Page 2 Name';  
page2.id = 'pdf-page-name-2';  
page2.mandatory = false;  
page2.activationDate = Date.today().addDays(1);  
page2.deactivationDate = Date.today().addDays(400);  
input.pages.add(page2);  
System.debug(ConnectApi.LifeSciPresentation.updatePresentationContent(input));
```

LifeSciPresPageProductGuidance Methods

These are the `LifeSciPresPageProductGuidance` methods for Life Sciences Cloud.

[createPresPageProductGuidance\(pageProductInput\)](#)

Create a new association between products and guidance with a presentation page.

[deletePresPageProductGuidance\(pageProductInput\)](#)

Delete the association between a presentation page and products or guidances.

createPresPageProductGuidance (pageProductInput)

Create a new association between products and guidance with a presentation page.

API Version

65.0

Requires Chatter

No

Signature

```
public static ConnectApi.GenericResponseOutputRepresentation  
createPresPageProductGuidance(ConnectApi.PageProductInputRepresentation pageProductInput)
```

Parameters

pageProductInput

Type: [ConnectApi.PageProductInputRepresentation](#)

Input representation that contains the presentation page ID and a list of associated products and guidances.

Return Value

Type: [ConnectApi.GenericResponseOutputRepresentation](#)

Example

```
ConnectApi.ProductContentInputRepresentation input = new  
ConnectApi.ProductContentInputRepresentation();  
input.pageProducts = new List<ConnectApi.PresentationPageProductRepresentation>();  
ConnectApi.PresentationPageProductRepresentation pageProduct = new  
ConnectApi.PresentationPageProductRepresentation();  
pageProduct.id = 'pdf-page-name-1';  
pageProduct.products = new List<ConnectApi.ProductGuidanceRepresentation>();  
ConnectApi.ProductGuidanceRepresentation product = new  
ConnectApi.ProductGuidanceRepresentation();  
product.productId = '1KeYH0000001j2m0AA';  
product.guidanceIds = new List<String>();  
product.guidanceIds.add('guidance-id-1');  
product.guidanceIds.add('guidance-id-2');  
pageProduct.products.add(product);  
input.pageProducts.add(pageProduct);  
System.debug(ConnectApi.LifeSciPresPageProductGuidance.createPresPageProductGuidance(input));
```

deletePresPageProductGuidance (pageProductInput)

Delete the association between a presentation page and products or guidances.

API Version

65.0

Requires Chatter

No

Signature

```
public static ConnectApi.GenericResponseOutputRepresentation  
deletePresPageProductGuidance(ConnectApi.PageProductInputRepresentation pageProductInput)
```

Parameters

pageProductInput

Type: [ConnectApi.PageProductInputRepresentation](#)

Input representation that contains the presentation page ID and a list of products and guidances to delete.

Return Value

Type: [ConnectApi.GenericResponseOutputRepresentation](#)

Example

```
ConnectApi.ProductContentInputRepresentation input = new  
ConnectApi.ProductContentInputRepresentation();  
input.pageProducts = new List<ConnectApi.PresentationPageProductRepresentation>();  
ConnectApi.PresentationPageProductRepresentation pageProduct = new  
ConnectApi.PresentationPageProductRepresentation();  
pageProduct.id = 'pdf-page-name-1';  
pageProduct.products = new List<ConnectApi.ProductGuidanceRepresentation>();  
ConnectApi.ProductGuidanceRepresentation product = new  
ConnectApi.ProductGuidanceRepresentation();  
product.productId = '1KeYH0000001j2m0AA';  
product.guidanceIds = new List<String>();  
product.guidanceIds.add('guidance-id-1');  
product.guidanceIds.add('guidance-id-2');  
pageProduct.products.add(product);  
input.pageProducts.add(pageProduct);  
System.debug(ConnectApi.LifeSciPresPageProductGuidance.deletePresPageProductGuidance(input));
```

Input Classes

These are the Apex input classes for Life Sciences Cloud.

[ConnectApi.EmailTemplateInputRepresentation](#)

Input representation for creating or updating an email template.

[ConnectApi.PageProductInputRepresentation](#)

Input representation for creating or deleting product guidance associations on a presentation page.

[ConnectApi.PresentationContentInputRepresentation](#)

Input representation for creating or updating presentation content.

[ConnectApi.EmailTemplateInputRepresentation](#)

Input representation for creating or updating an email template.

Property Name	Type	Description	Available Version
activatedDate	Date	Activation date for the email template.	65.0
attachmentObjectTypes	String	String representing the attachment object types.	65.0
automatedEmailActionType	String	Action type for the automated email.	65.0
automatedEmailContextType	String	Context type for the automated email.	65.0
bccEmailIdList	String	List of BCC email IDs.	65.0
communicationSubscriptionId	String	ID of the communication subscription associated with the email template.	65.0
contentDocumentId	String	ID of the Content Document of the email template.	65.0
customFields	Object	Custom fields for the email template.	65.0
deactivatedDate	Date	Deactivation date for the email template.	65.0
description	String	Description of the email template.	65.0
emailSubject	String	Subject of the email template.	65.0
id	String	ID of the email template.	65.0
isActive	Boolean	Indicates if the email template is active.	65.0
isDefaultAutoEmailTemplate	Boolean	Indicates if the email template is a default automated email template.	65.0
isSubjectLineEditable	Boolean	Indicates whether the subject line is editable.	65.0
languages	List<String>	List of languages for the email template.	65.0
name	String	Name of the email template.	65.0
productId	String	ID of the product associated with the email template.	65.0
replyToEmailAddress	String	Reply-to email address.	65.0
replyToType	String	Reply-to type for the email template.	65.0
senderEmailFieldAPIName	String	API name of the sender's email field.	65.0
senderType	String	Sender type for the email template.	65.0
shouldIgnoreEmailConsent	Boolean	Indicates whether email consent should be ignored.	65.0
surveyId	String	ID of the survey associated with the email template.	65.0
topics	List<String>	List of topics associated with the email template.	65.0

ConnectApi.PageProductInputRepresentation

Input representation for creating or deleting product guidance associations on a presentation page.

Property Name	Type	Description	Available Version
pageProducts	ConnectApi.PresentationInputRepresentation	List of presentation pages and their product and guidance associations.	65.0

ConnectApi.PresentationContentInputRepresentation

Input representation for creating or updating presentation content.

Property Name	Type	Description	Available Version
contentType	String	Type of content, such as: <ul style="list-style-type: none">• PRESENTATION_PDF• PRESENTATION_ZIP• PRESENTATION_PAGE	65.0
pages	ConnectApi.PresentationPageRepresentation	List of presentation pages and their associated metadata.	65.0
presentation	ConnectApi.PresentationRepresentation	Representation of the presentation, including its name, ID, and other properties.	65.0

Output Classes

These are the Apex output classes for Life Sciences Cloud.

ConnectApi.GenericResponseOutputRepresentation

Output representation for a generic response from a Connect API call.

ConnectApi.GenericResponseOutputRepresentation

Output representation for a generic response from a Connect API call.

Property Name	Type	Description	Available Version
isSuccess	Boolean	Indicates if the API call was successful.	65.0
errors	List<String>	List of errors encountered during the API call.	65.0
jobId	String	ID of the asynchronous processing job, if applicable.	65.0
message	String	Message describing the result of the API call.	65.0

ConnectApi Enums

Enums specific to the `ConnectApi` namespace.

`ConnectApi` enums inherit all properties and methods of Apex enums.

Enums are not versioned. Enum values are returned in all API versions. Clients should handle values they don't understand gracefully.

Enum	Description
ConnectApi.ContentType	Type of content for a presentation. <ul style="list-style-type: none">● ProviderVisit● ManagedEvent
ConnectApi.PlayerGesture	Player gesture for a presentation. <ul style="list-style-type: none">● TapTop● TapBottom● SwipeUp● SwipeDown
ConnectApi.SenderType	Sender type for an email template. <ul style="list-style-type: none">● SalesRep● PredefinedEmail
ConnectApi.ReplyToType	Reply-to type for an email template. <ul style="list-style-type: none">● SalesRep● PredefinedEmail
ConnectApi.AutomatedEmailContextType	Context type for an automated email. <ul style="list-style-type: none">● ProviderVisit
ConnectApi.AutomatedEmailActionType	Action type for an automated email. <ul style="list-style-type: none">● Create● Update● Cancel

Life Sciences Cloud Standard Invocable Actions

Use the standard invocable actions available with Life Sciences Cloud to streamline the process of enrolling participants in clinical trials.

[Assign Candidate to Research Study Group Action](#)

Assign candidates, enrolled in the clinical trials through randomization to research study comparison groups.

[Build Product Territory Detailed Availability Action](#)

Build Product Territory Detailed Availability records using existing Product Territory Availability records.

[Generate Research Study Blocks Action](#)

Generate research study randomization block records to link each block with a specific research study comparison group by using the randomization process.

[Get Context Data Action](#)

Retrieves the context data that is passed as an input to a prompt template that generates a summary of the data.

[Get Life Sciences Configuration Field Names and Values](#)

Gets key-value pairs of field names and their values for Life Sciences configuration records of a given category.

[Process Criteria Matching Response](#)

Parses a GPT-generated JSON response to evaluate each inclusion and exclusion criterion for a given Research Study Candidate, determining whether each criterion is matched or not. This action stores the GPT response in the Care Program Enrollment Evaluation Result entity and computes the number of matched inclusion criteria and exclusion criteria, returning these counts as output.

[Serialize Hierarchical Context Data](#)

Serializes the hierarchical context data from the Apex `embeddedai__RecordApexRepresentation` records that are passed as input to a prompt template that generates a summary of the data.

Assign Candidate to Research Study Group Action

Assign candidates, enrolled in the clinical trials through randomization to research study comparison groups.

This action is available in API version 61.0 and later.

Special Access Rules

The Assign Candidate to Research Study Group action is available in Enterprise and Unlimited Editions with Life Sciences Cloud and the Participant Enrollment Add-On license. Additionally, the org must be enabled with Research Study Randomization.

Supported REST HTTP Methods

URI

`/services/data/v66.0/actions/standard/assignCndtToResearchStudyGroup`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer `token`

Inputs

Input	Details
researchStudyCandidateId	Type string Description Required. ID of the research study candidate record that's randomly assigned to a research study comparison group.

Outputs

The `researchStudyComparisonGroupId` parameter is shown in the response body only if one of these conditions is met.

- The `DoesAsgnCandidatesToGroups` field on the `ResearchStdyRandomization` object is set to `false`.
- The `DoesAsgnCandidatesToGroups` field is set to `true` and the user has access to the `ResearchStdyCmprGroupCndt` object.

Output	Details
<code>candidateAllocationSourceId</code>	<p>Type string</p> <p>Description ID of the context object or process that's used to determine the group to assign a candidate to.</p>
<code>researchStudyComparisonGroupId</code>	<p>Type string</p> <p>Description ID of the research study comparison group that's assigned to a candidate.</p>

Example

POST

This sample request is for the Assign Candidate to Research Study Group action.

```
{
  "inputs": [
    {
      "researchStudyCandidateId": "7evxx00000000cjAAA"
    }
  ]
}
```

This sample response is for the Assign Candidate to Research Study Group action.

```
[
  {
    "actionName": "assignCndtToResearchStudyGroup",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outputValues": {
      "researchStudyComparisonGroupId": "1F0xx0000004CSPCA2",
      "candidateAllocationSourceId": "1LtSG0000002P8n"
    },
    "sortOrder": -1,
    "version": 1
  }
]
```

```
    }  
]
```

SEE ALSO:

[Salesforce Help: Enable Participant Management](#)

[Salesforce Help: Anonymize Participant Allocation Using Randomization](#)

Build Product Territory Detailed Availability Action

Build Product Territory Detailed Availability records using existing Product Territory Availability records.

This action is available in API version 65.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v66.0/actions/standard/buildProdTerrDtlAvlAction`

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer token`

Inputs

Input	Details
<code>productTerritoryAvailabilityId</code>	Type String Description Required ID of the Product Territory Availability record for the action to execute on.

Outputs

Output	Details
<code>resultText</code>	Type String Description Message indicating the result of the action.

Output	Details
success	<p>Type Boolean</p> <p>Description Indicates if the action was successful (<code>true</code>) or not (<code>false</code>).</p>

Example

This sample request is for the Build Product Territory Detailed Availability action.

```
{
  "inputs": [
    {
      "productTerritoryAvailabilityId": "1Kwxx0000004CxxCAE"
    }
  ]
}
```

This sample input is for calling the Build Product Territory Detailed Availability action from the Apex code.

```
Invocable.Action action =
Invocable.Action.createStandardAction('buildProdTerrDtlAvlAction');
action.setInvocationParameter('ProductTerritoryAvailabilityId', '1Kwxx0000004CxxCAE');
List<Invocable.Action.Result> results = action.invoke();
```

This sample response is for the Build Product Territory Detailed Availability action.

```
[
  {
    "outputValues": {
      "success": true,
      "resultText": "Product Territory Detailed Available built successfully."
    }
  }
]
```

Generate Research Study Blocks Action

Generate research study randomization block records to link each block with a specific research study comparison group by using the randomization process.

The Generate Research Study Blocks action generates blocks during the design time to verify the randomized assignment of groups and to test the required block multipliers.

This action is available in API version 61.0 and later.

Special Access Rules

The Generate Research Study Blocks action is available in Enterprise and Unlimited Editions with Life Sciences Cloud and the Participant Enrollment Add-On license. Additionally, the org must be enabled with Research Study Randomization.

Supported REST HTTP Methods

URI

`/services/data/v66.0/actions/standard/generateResearchStudyBlocks`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer **token**

Inputs

Input	Details
researchStudyRandomizationId	Type string Description Required. ID of the research study randomization record that you want to generate the blocks for.
researchStudyTargetCandidateCount	Type integer Description Required. Number of candidates that you want to generate the blocks for.

Outputs

Output	Details
researchStudyRandomizationBlockIds	Type string Description List of generated research study randomization block IDs.

Example

POST

This sample request is for the Generate Research Study Blocks action.

```
{  
    "inputs": [  
        {  
            "researchStudyRandomizationId": "1Rdxx0000004CguCAE",  
            "researchStudyTargetCandidateCount": 10  
        }  
    ]  
}
```

This sample response is for the Generate Research Study Blocks action.

```
[  
    {  
        "actionName": "generateResearchStudyBlocks",  
        "errors": null,  
        "invocationId": null,  
        "isSuccess": true,  
        "outputValues": {  
            "researchStudyRandomizationBlockIds": [  
                "1Mtxx0000004CLw",  
                "1Mtxx0000004CLx",  
                "1Mtxx0000004CLy"  
            ]  
        },  
        "sortOrder": -1,  
        "version": 1  
    }  
]
```

SEE ALSO:

[Salesforce Help: Enable Participant Management](#)

[Salesforce Help: Enroll Participants Using Block Generation](#)

Get Context Data Action

Retrieves the context data that is passed as an input to a prompt template that generates a summary of the data.

This action is available in API version 62.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v66.0/actions/standard/getContextData`

Formats

JSON, XML

HTTP Methods

GET

AuthenticationAuthorization: Bearer **token****Inputs**

Input	Details
contextInputRepresentation	<p>Type List<Apex></p> <p>Description Required A collection of Apex <code>embeddedai__ContextInputRep</code> records that contain details of the hierarchical data of the sObjects to get the context data for.</p>
contextDefinitionName	<p>Type String</p> <p>Description Required The name of the context definition to use to get the context data.</p>

Outputs

Output	Details
recordApexRepresentation	<p>Type List<Apex></p> <p>Description A collection of Apex <code>embeddedai__RecordApexRepresentation</code> records that contain the context data.</p>

Example

Sample Request

```
{
  "inputs": [
    {
      "contextInputRepresentation": [
        {
          "mappingName": "OutcomeSummaryMapping",
          "ids": [
            "90Cxx0000004C92GAE"
          ]
        }
      ]
    }
  ]
}
```

```

        ],
        "objectName": "Outcome",
        "nodeName": "SummaryContext"
    }
],
"contextDefinitionName": "CareProgramOutcomeSummary__stdctx"
}
]
}

```

Sample Response

```

[
{
    "recordApexRepresentation": [
        {
            "relatedRecordData": [
                {
                    "relatedRecordData": [
                        {
                            "recordData": [
                                {
                                    "value": "Percentage",
                                    "key": "UnitOfMeasureName"
                                },
                                {
                                    "value": "Symptom Monitoring",
                                    "key": "IndicatorDefinitionName"
                                }
                            ],
                            "objectType": "IndicatorAssignment"
                        }
                    ],
                    "recordData": [
                        {
                            "value": "Reduced Symptoms",
                            "key": "Name"
                        }
                    ],
                    "objectType": "Outcome"
                }
            ],
            "recordData": [
                {
                    "value": "Drug Use Satisfaction Improvement Program",
                    "key": "Name"
                }
            ],
            "objectType": "CareProgram"
        }
    ]
}
]
```

Get Life Sciences Configuration Field Names and Values

Gets key-value pairs of field names and their values for Life Sciences configuration records of a given category.

This action is available in API version 65.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v66.0/actions/standard/getLifeSciCnfgFieldNmAndVal`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer `token`

Inputs

Input	Details
userId	Type String Description Required ID of the user for whom the configuration record is fetched.
categoryName	Type String Description Required Name of the category whose configuration record is fetched. The category type is always <code>hierarchy</code> .
fieldNamesList	Type <code>List<String></code> Description Optional The comma-delimited list of field names of the configuration record that's fetched. If this parameter is empty, the invocable action returns all the fields of the given category of configuration record for the specified user.

Outputs

Output	Details
<code>configurationFieldOutputRepresentations</code>	<p>Type List<Apex></p> <p>Description Collection of Apex <code>RestApi.LsConfigFieldOutput</code> records that contain key-value pairs of field names and their values belonging to the active configuration record that was fetched.</p>

Example

This sample request is for the Get Life Sciences Configuration Field Names and Values action.

```
{
  "inputs": [
    {
      "userId" : "005xx00000114xxYAA",
      "categoryName": "ProviderSummarization",
      "fieldnamesList" : ["ProviderSummaryConfiguration"]
    }
  ]
}
```

This sample input is for calling the Get Life Sciences Configuration Field Names and Values action from the Apex code.

```
Invocable.Action action =
Invocable.Action.createStandardAction('getLifeSciCnfgFieldNmAndVal');
action.setInvocationParameter('userId', '005xx00000114xxYAA');
action.setInvocationParameter('categoryName', 'ProviderSummarization');
List<Invocable.Action.Result> results = action.invoke();
System.debug('result = ' + results);
```

This sample response is for the Get Life Sciences Configuration Field Names and Values action.

```
[
  {
    "actionName": "getLifeSciCnfgFieldNmAndVal",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "configurationFieldOutputRepresentations": [
        {
          "value": "lsc4ce_providersummary",
          "name": "ProviderSummaryConfiguration"
        }
      ]
    },
  }
```

```

        "sortOrder": -1,
        "version": 1
    }
]
```

Process Criteria Matching Response

Parses a GPT-generated JSON response to evaluate each inclusion and exclusion criterion for a given Research Study Candidate, determining whether each criterion is matched or not. This action stores the GPT response in the Care Program Enrollment Evaluation Result entity and computes the number of matched inclusion criteria and exclusion criteria, returning these counts as output.

This action is available in API version 62.0 and later.

Special Access Rules

The Assign Candidate to Research Study Group action is available in Enterprise and Unlimited Editions with Life Sciences Cloud and the Participant Enrollment Add-On license. Additionally, the org must be enabled with Research Study Randomization.

Supported REST HTTP Methods

URI

`/services/data/v66.0/actions/standard/processCriteriaMatchingResp`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer **token**

Inputs

Input	Details
researchStudyCandidateId	<p>Type string</p> <p>Description Required ID of the research study candidate for which GPT response is received.</p>
gptResponse	<p>Type string</p> <p>Description Required GPT Response of PromptTemplate Invocable action will be input to this action.</p>

Outputs

Output	Details
matchedInclusionCount	<p>Type string</p> <p>Description Number of inclusion criteria matched.</p>
matchedExclusionCount	<p>Type string</p> <p>Description Number of exclusion criteria matched.</p>

Example

POST

This sample request is for the Process Criteria Matching Response action.

```
{
  "inputs": [
    {
      "researchStudyCandidateId": "7evxx0000000001AAA",
      "gptResponse": {
        "EligibilityResponse": [
          {
            "Id": "Obkxx0000000001AAA",
            "EligibilityCriteria": "Adult SARI patients with 2019-ncov infection confirmed by PCR",
            "Result": "Unknown",
            "Reason": "No information provided"
          },
          {
            "Id": "Obkxx000000001dAAA",
            "EligibilityCriteria": "Age < 78",
            "Result": "Match",
            "Reason": "Patient is 50 years old."
          },
          {
            "Id": "Obkxx000000003FAAQ",
            "EligibilityCriteria": "Pregnant",
            "Result": "Not Match",
            "Reason": "Patient is male."
          },
          {
            "Id": "Obkxx000000004rAAA",
            "EligibilityCriteria": "Allergic to Gluten",
            "Result": "Match",
            "Reason": "Patient has Gluten Allergy."
          }
        ]
      }
    }
  ]
}
```

```

        ]
    }
]
}

```

This sample response is for the Process Criteria Matching Response action.

```
{
  "inclusionCriteriaMatchCount": 1,
  "exclusionCriteriaMatchCount": 1
}
```

Serialize Hierarchical Context Data

Serializes the hierarchical context data from the Apex `embeddedai__RecordApexRepresentation` records that are passed as input to a prompt template that generates a summary of the data.

This action is available in API version 62.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v66.0/actions/standard/serializeHierarchicalContextData`

Formats

JSON, XML

HTTP Methods

GET

Authentication

Authorization: Bearer `token`

Inputs

Input	Details
<code>recordApexRepresentation</code>	<p>Type Apex type</p> <p>Description Required</p> <p>A collection of Apex <code>embeddedai__RecordApexRepresentation</code> records that contain the details of the hierarchical data to serialize context data</p>

Outputs

Output	Details
serializedContextData	<p>Type String</p> <p>Description A JSON string of serialized hierarchical context data.</p>

Example

Sample Request

```
{
  "inputs": [
    {
      "recordApexRepresentation": {
        "relatedRecordData": [
          {
            "relatedRecordData": [
              {
                "recordData": [
                  {
                    "value": "Percentage",
                    "key": "UnitOfMeasureName"
                  },
                  {
                    "value": "Symptom Monitoring",
                    "key": "IndicatorDefinitionName"
                  }
                ],
                "objectType": "IndicatorAssignment"
              }
            ],
            "recordData": [
              {
                "value": "Reduced Symptoms",
                "key": "Name"
              }
            ],
            "objectType": "Outcome"
          }
        ],
        "recordData": [
          {
            "value": "Drug Use Satisfaction Improvement Program",
            "key": "Name"
          }
        ],
        "objectType": "CareProgram"
      }
    }
  ]
}
```

```
    ]  
}
```

Sample Response

```
{  
    "serializedContextData": {  
        "CareProgram": {  
            "Name": "Drug Use Satisfaction Improvement Program",  
            "Outcome": [  
                {  
                    "Name": "Reduced Symptoms",  
                    "IndicatorAssignment": [  
                        {  
                            "IndicatorDefinitionName": "Symptom Monitoring",  
                            "UnitOfMeasureName": "Percentage"  
                        }  
                    ]  
                }  
            ]  
        }  
    }  
}
```

Life Sciences Cloud Tooling API Objects

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata.

For more information about Tooling API objects and to find a complete reference of all the supported objects, see [Introducing Tooling API](#).

[AssessmentConfiguration](#)

Represents a configuration for Assessment component. An AssessmentConfiguration entry indicates configuration for user flows such as sending out emails or reminder actions on assessments initiated by the patient. This object is available in API version 58.0 and later.

[CareBenefitVerifySettings](#)

Configuration settings for benefit verification requests. This object is available in API version 53.0 and later.

[CareLimitType](#)

Defines the characteristics of limits on benefit provision. This object is available in API version 53.0 and later.

[CareProviderAfflRoleConfig](#)

Represents information about the affiliations of the healthcare provider. For example, this object represents an affiliation between a healthcare provider and a hospital. This object is available in API version 59.0 and later.

[CareProviderSearchConfig](#)

Represents fields that can appear in provider search results. Use this object to specify fields in arbitrary objects (source) that are made available in the search object (target). This object is available in API version 48.0 and later.

[CareRequestConfiguration](#)

Represents the details for a record type such as service request, drug request, or admission request. One or more record types can be associated with a care request.

[CareSystemFieldMapping](#)

Represents a mapping from fields in external source systems to Salesforce target entities and attributes

[TimelineObjectDefinition](#)

Stores timeline configurations. This object is available in API version 55.0 and later.

[Customer Engagement Tooling API Objects](#)

These Tooling API objects are available for Customer Engagement for Life Sciences Cloud.

[SearchableObjDataSyncInfo](#)

Represents information about the data synchronization for a search object, such as frequency of synchronization, status, and the date and time of the last synchronization. This object is available in API version 58.0 and later.

[SearchCriteriaConfiguration](#)

Represents the configuration details of searchable field sets such as the group of fields used as the basis for search, aggregation, sort, and result display. This object is available in API version 58.0 and later.

[SearchResultActionConfig](#)

Represents a collection of fields to set up the actions that a user can perform on results returned by criteria-based search. This object is available in API version 59.0 and later.

SEE ALSO:

[Tooling API Developer Guide: Introducing Tooling API](#)

AssessmentConfiguration

Represents a configuration for Assessment component. An AssessmentConfiguration entry indicates configuration for user flows such as sending out emails or reminder actions on assessments initiated by the patient. This object is available in API version 58.0 and later.

Supported SOAP API Calls

`create()`, `delete()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

`DELETE`, `GET`, `HEAD`, `PATCH`, `POST`, `Query`

Fields

Field	Details
Configuration	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description The configuration name that identifies the action. Possible values are:<ul style="list-style-type: none">● Send </p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is automatically generated, but you can supply your own value if you create the record using the API.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the AssessmentConfiguration</p>
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package. Possible values are:<ul style="list-style-type: none">● beta—Managed-Beta● deleted—Managed-Proposed-Deleted● deprecated—Managed-Proposed-DDeprecated● deprecatedEditable—SecondGen-Installed-DDeprecated● installed—Managed-Installed● installedEditable—SecondGen-Installed-Editable● released—Managed-Released● unmanaged—Unmanaged </p>

Field	Details
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Label that identifies the AssessmentConfiguration throughout the Salesforce user interface.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the namespacePrefix__componentName notation. The namespace prefix can have one of the following values. In Developer Edition orgs, NamespacePrefix is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer. In orgs that are not Developer Edition orgs, NamespacePrefix is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.</p>
ResolutionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The flow definition that is used to perform the action This field is a relationship field.</p> <p>Relationship Name Resolution</p> <p>Relationship Type Lookup</p> <p>Refers To FlowDefinition</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The feature-specific value for this assessment configuration.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>DiscoveryFramework</code>—Discovery Framework

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AssessmentConfigurationChangeEvent \(API version 60.0\)](#)

Change events are available for the object.

CareBenefitVerifySettings

Configuration settings for benefit verification requests. This object is available in API version 53.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create()`, `delete()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

`DELETE`, `GET`, `HEAD`, `PATCH`, `POST`, `Query`

Fields

Field	Details
<code>DeveloperName</code>	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Sort</p> <p>Description</p> <p>The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is</p>

Field	Details
	<p>automatically generated, but you can supply your own value if you create the record using the API.</p>
	 Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance may slow as a DeveloperName is generated for each record.
FullName	<p>Type string</p> <p>Properties Create, Group, Nillable</p> <p>Description The full name of the associated CareBenefitVerifySettings type in Metadata API. The full name can include a namespace prefix. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
Language	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The language of the CareBenefitVerifySettings. Possible values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_us—English • es—Spanish • es_mx—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_nl—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai

Field	Details
	<ul style="list-style-type: none"> zh_CN—Chinese (Simplified) zh_TW—Chinese (Traditional)
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> beta—Managed-Beta deleted—Managed-Proposed-Deleted deprecated—Managed-Proposed-DDeprecated deprecatedEditable—SecondGen-Installed-DDeprecated installed—Managed-Installed installedEditable—SecondGen-Installed-Editable released—Managed-Released unmanaged—Unmanaged
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Label that identifies the CareBenefitVerifySettings throughout the Salesforce user interface.</p>
Metadata	<p>Type complexvalue</p> <p>Properties Create, Nillable, Update</p> <p>Description The CareBenefitVerifySettings's metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <code>namespacePrefix__componentName</code> notation.</p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> • In Developer Edition orgs, NamespacePrefix is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer. • In orgs that are not Developer Edition orgs, NamespacePrefix is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
UriPath	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Nillable</p> <p>Description</p> <p>External endpoint where Salesforce can access the verification service data.</p>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

CareBenefitVerifySettingsChangeEvent (API version 60.0)

Change events are available for the object.

CareLimitType

Defines the characteristics of limits on benefit provision. This object is available in API version 53.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create()`, `delete()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

`DELETE`, `GET`, `HEAD`, `PATCH`, `POST`, `Query`

Fields

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is automatically generated, but you can supply your own value if you create the record using the API.</p> <p> Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance may slow as a DeveloperName is generated for each record.</p>
FullName	<p>Type string</p> <p>Properties Create, Group, Nillable</p> <p>Description The full name of the associated CareLimitType type in Metadata API. The full name can include a namespace prefix. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
Language	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The language of the CareLimitType. Possible values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_us—English • es—Spanish

Field	Details
	<ul style="list-style-type: none"> • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
LimitType	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Source of limit on benefit provision, such as a co-insurance requirement.</p>
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> • beta—Managed-Beta • deleted—Managed-Proposed-Deleted • deprecated—Managed-Proposed-DDeprecated • deprecatedEditable—SecondGen-Installed-DDeprecated • installed—Managed-Installed • installedEditable—SecondGen-Installed-Editable • released—Managed-Released • unmanaged—Unmanaged

Field	Details
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Label that identifies the CareLimitType throughout the Salesforce user interface.</p>
Metadata	<p>Type complexvalue</p> <p>Properties Create, Nillable, Update</p> <p>Description The CareLimitType's metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
MetricType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the quantity used for calculating the benefit limit, such as number of visits, amount spent, or percentage of allowed expenditure. Possible values are:</p> <ul style="list-style-type: none"> • Amount • Money • Percentage • Text
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <code>namespacePrefix__componentName</code> notation. The namespace prefix can have one of the following values.</p>

Field	Details
	<ul style="list-style-type: none"> In Developer Edition orgs, NamespacePrefix is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer. In orgs that are not Developer Edition orgs, NamespacePrefix is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

CareLimitTypeChangeEvent (API version 60.0)

Change events are available for the object.

CareProviderAfflRoleConfig

Represents information about the affiliations of the healthcare provider. For example, this object represents an affiliation between a healthcare provider and a hospital. This object is available in API version 59.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create()`, `delete()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

`DELETE`, `GET`, `HEAD`, `PATCH`, `POST`, `Query`

Fields

Field	Details
AffiliationType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Required.</p> <p>Specifies the affiliation of the configuration. This field is unique within your organization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> HospitalAffiliation

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name.</p>
FullName	<p>Type string</p> <p>Properties Create, Group, Nillable</p> <p>Description The full name of the associated CareProviderAfflRoleConfig type in Metadata API. The full name can include a namespace prefix. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
Language	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The language of the Care Provider Affiliation Role Configuration. Possible values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_us—English • es—Spanish • es_mx—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_nl—Dutch

Field	Details
	<ul style="list-style-type: none"> • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Label for the affiliation. In the UI, this field is Care Provider Affiliation Role Configuration.</p>
Metadata	<p>Type complexvalue</p> <p>Properties Create, Nillable, Update</p> <p>Description The CareProviderAfflRoleConfig's metadata. .Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
ProviderRole	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Required. The role of the healthcare provider in relation to the affiliate.</p>

CareProviderSearchConfig

Represents fields that can appear in provider search results. Use this object to specify fields in arbitrary objects (source) that are made available in the search object (target). This object is available in API version 48.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create(), delete(), describeSObjects(), query(), retrieve(), update(), upsert()`

Supported REST API Methods

`DELETE, GET, HEAD, PATCH, POST, Query`

Fields

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is automatically generated, but you can supply your own value if you create the record using the API.</p> <p> Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance may slow as a DeveloperName is generated for each record.</p>
FullName	<p>Type string</p> <p>Properties Create, Group, Nillable</p> <p>Description The full name of the associated CareProviderSearchConfig type in Metadata API. The full name can include a namespace prefix. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
IsActive	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p>

Field	Details
	<p>Description Indicates whether this configuration is active. The default value is <code>false</code>.</p>
Language	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The language of the CareProviderSearchConfig. Possible values are:</p> <ul style="list-style-type: none"> • <code>da</code>—Danish • <code>de</code>—German • <code>en_US</code>—English • <code>es</code>—Spanish • <code>es_MX</code>—Spanish (Mexico) • <code>fi</code>—Finnish • <code>fr</code>—French • <code>it</code>—Italian • <code>ja</code>—Japanese • <code>ko</code>—Korean • <code>nl_NL</code>—Dutch • <code>no</code>—Norwegian • <code>pt_BR</code>—Portuguese (Brazil) • <code>ru</code>—Russian • <code>sv</code>—Swedish • <code>th</code>—Thai • <code>zh_CN</code>—Chinese (Simplified) • <code>zh_TW</code>—Chinese (Traditional)
MappedObject	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Specifies the mapped objects where searches for providers are run. Possible values are:</p> <ul style="list-style-type: none"> • <code>HealthcarePractitionerFacility</code> • <code>HealthcareProvider</code>

Field	Details
	The default value is <code>HealthcareProvider</code> .
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Label that identifies the CareProviderSearchConfig throughout the Salesforce user interface.</p>
Metadata	<p>Type <code>complexvalue</code></p> <p>Properties Create, Nillable, Update</p> <p>Description The CareProviderSearchConfig's metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
SourceField	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The API name of the field that is copied to the target object.</p>
TargetField	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The API name of the field in the target object where data copied from SourceField is pasted.</p>

CareRequestConfiguration

Represents the details for a record type such as service request, drug request, or admission request. One or more record types can be associated with a care request.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create(), delete(), describeSObjects(), query(), retrieve(), update(), upsert()`

Supported REST API Methods

`DELETE, GET, HEAD, PATCH, POST, Query`

Fields

Field	Details
CareRequestRecordType	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The record type for the care request.</p>
CareRequestRecords	<p>Type multipicklist</p> <p>Properties Filter, Nillable</p> <p>Description The list of available objects used to configure the care request. The possible values are: Possible values are:<ul style="list-style-type: none">• CareDiagnosis• CareRequestDrug• CareRequestExtension• CareRequestItem</p>
CareRequestType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Type of care request. For example, an appeal, a service request, or an admission. Possible values are:<ul style="list-style-type: none">• Admission• Appeal• Complaint• Concurrent Review• Drug Request</p>

Field	Details
	<ul style="list-style-type: none"> • Grievance • Referral • Service Request
DeveloperName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is automatically generated, but you can supply your own value if you create the record using the API.</p> <p> Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance may slow as a DeveloperName is generated for each record.</p>
FullName	<p>Type string</p> <p>Properties Create, Group, Nullable</p> <p>Description The full name of the associated CareRequestConfiguration type in Metadata API. The full name can include a namespace prefix. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
IsActive	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether this configuration is active. The default value is <code>false</code>.</p>
IsDefaultRecordType	<p>Type boolean</p>

Field	Details
	<p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether this is the default record type. The default value is <code>false</code>.</p>
Language	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The language of the CareRequestConfiguration. Possible values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> • <code>beta</code>—Managed-Beta • <code>deleted</code>—Managed-Proposed-Deleted • <code>deprecated</code>—Managed-Proposed-DDeprecated • <code>deprecatedEditable</code>—SecondGen-Installed-DDeprecated • <code>installed</code>—Managed-Installed • <code>installedEditable</code>—SecondGen-Installed-Editable • <code>released</code>—Managed-Released • <code>unmanaged</code>—Unmanaged
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Label that identifies the CareRequestConfiguration throughout the Salesforce user interface.</p>
Metadata	<p>Type complexvalue</p> <p>Properties Create, Nillable, Update</p> <p>Description The CareRequestConfiguration's metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <code>namespacePrefix__componentName</code> notation. The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> • In Developer Edition orgs, NamespacePrefix is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer.

Field	Details
	<ul style="list-style-type: none"> In orgs that are not Developer Edition orgs, NamespacePrefix is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.

CareSystemFieldMapping

Represents a mapping from fields in external source systems to Salesforce target entities and attributes

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create()`, `delete()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

`DELETE`, `GET`, `HEAD`, `PATCH`, `POST`, `Query`

Fields

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is automatically generated, but you can supply your own value if you create the record using the API.</p> <p> Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance may slow as a DeveloperName is generated for each record.</p>
ExternalIdField	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The ID of the field in the external system.</p>
FullName	<p>Type string</p> <p>Properties Create, Group, Nullable</p> <p>Description The full name of the associated CareSystemFieldMapping type in Metadata API. The full name can include a namespace prefix. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
IsActive	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the mapping is active. The default value is <code>false</code>.</p>
Language	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nullable, Restricted picklist, Sort</p> <p>Description The language of CareSystemFieldMapping. Possible values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_us—English • es—Spanish • es_mx—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_nl—Dutch

Field	Details
	<ul style="list-style-type: none"> • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • beta—Managed-Beta • deleted—Managed-Proposed-Deleted • deprecated—Managed-Proposed-DDeprecated • deprecatedEditable—SecondGen-Installed-DDeprecated • installed—Managed-Installed • installedEditable—SecondGen-Installed-Editable • released—Managed-Released • unmanaged—Unmanaged
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Label that identifies the CareSystemFieldMapping throughout the Salesforce user interface.</p>
Metadata	<p>Type complexvalue</p> <p>Properties Create, Nillable, Update</p> <p>Description The CareSystemFieldMapping's metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>

Field	Details
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <code>namespacePrefix__componentName</code> notation.</p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> In Developer Edition orgs, NamespacePrefix is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer. In orgs that are not Developer Edition orgs, NamespacePrefix is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
Role	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description The role that the entity represents. Picklist values <code>RemoteMonitoringDevice</code> and <code>RemoteMonitoringPatient</code> are available from API version 49.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <code>NotApplicable</code>: This role is used when targetObject is set to CareProgram or Product, which means that there is no applicable role. <code>Patient</code>: When the role field is set to Patient, the Enrollment API uses the value of externalIdField as the patient ID. This role can be used when targetObject is set to Account. <code>RemoteMonitoringDevice</code>: Indicates which externalIdField on the Asset object maps to the Device field in the CareObservation object. This role can be used when targetObject is set to Asset. <code>RemoteMonitoringPatient</code>: Indicates which externalIdField on the Account object maps to the ObservedSubject field in the Care Observation object. This role is used when targetObject is set to Account. <code>ServiceProvider</code>: The Enrollment API uses the value of externalIdField as the provider ID. This role is used when targetObject is set to Account. <p>The default value is <code>NotApplicable</code>.</p>
SourceSystem	<p>Type string</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description System from which the record was sourced.</p>
TargetObject	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Name of the corresponding object where information from the source system is recorded.</p>

TimelineObjectDefinition

Stores timeline configurations. This object is available in API version 55.0 and later.

For more information, see [TimelineObjectDefinition](#).

Customer Engagement Tooling API Objects

These Tooling API objects are available for Customer Engagement for Life Sciences Cloud.

[LifeSciConfigAssignment](#)

Represents the assignments for a Life Sciences configuration record. This object is a child of LifeSciConfigRecord.

[LifeSciConfigCategory](#)

Represents the category that Life Sciences configuration records are organized into. This object is available in API version 65.0 and later.

[LifeSciConfigFieldValue](#)

Represents a field value for a Life Sciences configuration record. This object is a child of LifeSciConfigRecord.

[LifeSciConfigRecord](#)

Represents a configuration record for Life Sciences. This object is a child of LifeScienceConfigCategory.

[ProviderSampleLimitTemplate](#)

Contains definition and rules of sample limits templates.

LifeSciConfigAssignment

Represents the assignments for a Life Sciences configuration record. This object is a child of LifeSciConfigRecord.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create(), delete(), describeSObjects(), query(), retrieve(), update(), upsert()`

Supported REST API Methods

`DELETE, GET, HEAD, PATCH, POST, Query`

Fields

Field	Details
AssignedToId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The profile or user associated with the record. This field is a polymorphic relationship field.</p> <p>Relationship Name AssignedTo</p> <p>Relationship Type Lookup</p> <p>Refers To Profile, User</p>
AssignmentLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies the level of the assignment. Possible values are:</p> <ul style="list-style-type: none"> • Profile • User
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.</p>

Field	Details
	<p>In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is automatically generated, but you can supply your own value if you create the record using the API.</p> <p> Note: When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance may slow while Salesforce generates one for each record.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the LifeSciConfigAssignment.</p>
LifeSciConfigRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The configuration record associated with the assignment. This field is a relationship field.</p> <p>Relationship Name LifeSciConfigRecord</p> <p>Refers To LifeSciConfigRecord</p>
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> • <code>beta</code>—Managed-Beta • <code>deleted</code>—Managed-Proposed-Deleted • <code>deprecated</code>—Managed-Proposed-DDeprecated • <code>deprecatedEditable</code>—SecondGen-Installed-DDeprecated • <code>installed</code>—Managed-Installed • <code>installedEditable</code>—SecondGen-Installed-Editable

Field	Details
	<ul style="list-style-type: none"> • <code>released</code>—Managed-Released • <code>unmanaged</code>—Unmanaged
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The label for the configuration assignment. In the UI, this field is Label.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. The prefix is limited to a maximum of 15 characters. You can refer to a component in a managed package by using the <code>namespacePrefix__componentName</code> notation.</p>

LifeSciConfigCategory

Represents the category that Life Sciences configuration records are organized into. This object is available in API version 65.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create()`, `delete()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

`DELETE`, `GET`, `HEAD`, `PATCH`, `POST`, `Query`

Fields

Field	Details
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Required. The category used to organize the Life Sciences configuration records.</p> <p>Possible values are:</p> <ul style="list-style-type: none">• AccountProviderVisitRecordTypeMapping• AccountSearchSettings• ActivityHistoryAdministration• ActivityHistoryRelatedLabel• ActivityPlanConfiguration• ActivityPlanSettings• AddressSettings• AffiliationReverseRoleMapping• AffiliationSettings• ApplicationSettings• BestTimeSettings• BulkUpdateRestrictedEntity• BusinessHoursHolidayMapping• CalendarEvent• CallCustomDiscussionRecordType• CallDiscussionRecordType• CustomAction• CustomerMergeSettings• DEASettings• DTVComponentConfig• DTVObjectConfig• DbSchema• ExternalSearchPreferences• ExternalSearchUserSettings• FieldSetMapping• InventoryManagementSettings• KAM• KAMSettings• LogSettings• NavigationIcons• OptAdministration• PlannerAdministration• ProductAdminSettings• ProfileBasedAppSettings• ProviderSummarization

Field	Details
	<ul style="list-style-type: none"> • QuickAction • ReportsAndDashboardsSync • SearchBeforeCreate • SprintSettings • StateDistributorLicenseSettings • StateLicenseNumberSettings • SyncProcessorConfiguration • SyncTransactionAdminView • SyncTransactionConfig • SyncTransactionFieldBehaviour • TerritoryManagement • TimeOffTerritoryRule • TimeOffTerritorySettings • TimeOffTerritorySlots • TimeOffTerritoryWorkingDaySettings • TimelineActivitySetting • UISchema • VideoCallPhoneNumber • VideoCallSettings • WorkingDaysConfig
CategoryLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The custom label for the category.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is automatically generated, but you can supply your own value if you create the record using the API.</p>

Field	Details
	<p> Note: When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance may slow while Salesforce generates one for each record.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the LifeSciConfigCategory.</p>
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> • <code>beta</code>—Managed-Beta • <code>deleted</code>—Managed-Proposed-Deleted • <code>deprecated</code>—Managed-Proposed-DDeprecated • <code>deprecatedEditable</code>—SecondGen-Installed-DDeprecated • <code>installed</code>—Managed-Installed • <code>installedEditable</code>—SecondGen-Installed-Editable • <code>released</code>—Managed-Released • <code>unmanaged</code>—Unmanaged
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The label for the configuration category. In the UI, this field is Label.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. The prefix is limited to a</p>

Field	Details
	maximum of 15 characters. You can refer to a component in a managed package by using the namespacePrefix__componentName notation.

LifeSciConfigFieldValue

Represents a field value for a Life Sciences configuration record. This object is a child of LifeSciConfigRecord.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create()`, `delete()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

`DELETE`, `GET`, `HEAD`, `PATCH`, `POST`, `Query`

Fields

Field	Details
DataType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The data type of the field. Possible values are:</p> <ul style="list-style-type: none"> • BOOLEAN • DATE • DATETIME • FIELD • INTEGER • LONGTEXT • MULTIPICKLIST • NUMBER • OBJECT • PHONE • PICKLIST • RECORDREFERENCE • TEXT

Field	Details
	<ul style="list-style-type: none"> URL
DateTimeValue	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time value for the field.</p>
DateValue	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date value for the field.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is automatically generated, but you can supply your own value if you create the record using the API.</p> <p> Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance may slow while Salesforce generates one for each record.</p>
FieldName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The name of the field.</p>
FieldValue	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The field reference value for the field.</p>
HasBooleanValue	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the Boolean value of the field is <code>true</code> or <code>false</code>. The default value is <code>false</code>.</p>
IntegerValue	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The integer value for the field.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the LifeSciConfigFieldValue.</p>
LifeSciConfigRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The configuration record associated with the field value. This field is a relationship field.</p> <p>Relationship Name LifeSciConfigRecord</p> <p>Refers To LifeSciConfigRecord</p>
LongTextValue	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Nillable, Update</p> <p>Description The long text value for the field.</p>
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> • beta—Managed-Beta • deleted—Managed-Proposed-Deleted • deprecated—Managed-Proposed-DDeprecated • deprecatedEditable—SecondGen-Installed-DDeprecated • installed—Managed-Installed • installedEditable—SecondGen-Installed-Editable • released—Managed-Released • unmanaged—Unmanaged
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The label for the configuration category. In the UI, this field is Label.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. The prefix is limited to a maximum of 15 characters. You can refer to a component in a managed package by using the namespacePrefix__componentName notation.</p>
NumberValue	<p>Type double</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The number value for the field.</p>
ObjectValue	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The object reference value for the field.</p>
PhoneValue	<p>Type phone</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The phone value for the field.</p>
PicklistValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The picklist value for the field.</p>
TextValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The text value for the field.</p>
UrlValue	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The URL value for the field.</p>

LifeSciConfigRecord

Represents a configuration record for Life Sciences. This object is a child of LifeScienceConfigCategory.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create()`, `delete()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

`DELETE`, `GET`, `HEAD`, `PATCH`, `POST`, `Query`

Fields

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is automatically generated, but you can supply your own value if you create the record using the API.</p> <p> Note: When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance may slow while Salesforce generates one for each record.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the configuration is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsOrgLevel	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the configuration applies to every user in the org (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the LifeSciConfigRecord.</p>
LifeSciConfigCategoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The category associated with the configuration. This field is a relationship field.</p> <p>Relationship Name LifeSciConfigCategory</p> <p>Relationship Type Lookup</p> <p>Refers To LifeSciConfigCategory</p>
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> • <code>beta</code>—Managed-Beta • <code>deleted</code>—Managed-Proposed-Deleted • <code>deprecated</code>—Managed-Proposed-DDeprecated • <code>deprecatedEditable</code>—SecondGen-Installed-DDeprecated • <code>installed</code>—Managed-Installed • <code>installedEditable</code>—SecondGen-Installed-Editable

Field	Details
	<ul style="list-style-type: none"> • <code>released</code>—Managed-Released • <code>unmanaged</code>—Unmanaged
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The label for the configuration assignment. In the UI, this field is Label.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. The prefix is limited to a maximum of 15 characters. You can refer to a component in a managed package by using the <code>namespacePrefix__componentName</code> notation.</p>
ParentConfigRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The configuration's parent record. This field is a relationship field.</p> <p>Relationship Name ParentConfigRecord</p> <p>Relationship Type Lookup</p> <p>Refers To LifeSciConfigRecord</p>
Type	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the configuration. Type defines a relationship between related or similar configurations.</p>

ProviderSampleLimitTemplate

Contains definition and rules of sample limits templates.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create()`, `delete()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

`DELETE`, `GET`, `HEAD`, `PATCH`, `POST`, `Query`

Fields

Field	Details
DeveloperName	
DiscrepancyAlertType	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Specify whether a rule violation in the template is flagged as an error or a warning. Possible values are: <ul style="list-style-type: none">• Error• Warning The default value is <code>Error</code> .
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether this template is active or not. The default value is <code>false</code> .
IsAdvanced	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates the type of custom template. Defines whether or not the template is advanced.

Field	Details
	<p>The default value is <code>false</code>.</p>
IsCloned	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the template is a cloned generic template or not. Cloned generic templates and advanced templates not flagged as IsLawBased are flagged as True.</p> <p>The default value is <code>false</code>.</p>
IsLawBased	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether an advanced template is a country regulation or not. (If the template is law-based, the DiscrepancyAlertType setting is Error.)</p> <p>The default value is <code>false</code>.</p>
ManageableState	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> • beta • deleted • deprecated • deprecatedEditable • installed • installedEditable • released • unmanaged
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Label for this provider sample limit template value. This display value is the internal label that doesn't get translated.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <code>namespacePrefix__componentName</code> notation. The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> • In Developer Edition orgs, <code>NamespacePrefix</code> is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer. • In orgs that are not Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
PriorityNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Priority order of the cloned generic template to be applied to a product.</p>
RuleCondition	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description Required. The rules that establish the limits for this template.</p>
RuleExpression	<p>Type textarea</p> <p>Properties Create, Update</p>

Field	Details
	<p>Description Required. Specifies the rules to be evaluated and the boolean operation (AND/OR) for combining multiple rules.</p>

SearchableObjectDataSyncInfo

Represents information about the data synchronization for a search object, such as frequency of synchronization, status, and the date and time of the last synchronization. This object is available in API version 58.0 and later.

Supported SOAP API Calls

`create()`, `delete()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

`DELETE`, `GET`, `HEAD`, `PATCH`, `POST`, `Query`

Special Access Rules

Automotive and Criteria-Based Search and Filter must be enabled.

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The description of a searchable object data sync information record. Maximum length allowed is 255 characters.</p>
DeveloperName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The developer name of the record.</p>
FullName	<p>Type string</p>

Field	Details
	<p>Properties Create, Group, Nullable</p> <p>Description The full name of the associated metadata object in Metadata API. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
IsDataSyncActive	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the data synchronization operation for the search object is active (true) or not (false). This value does not indicate the status of a Data Processing Engine (DPE) definition, but the system job that executes that DPE definition. The default value is <code>false</code>.</p>
LastDataSyncRunDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p> <p>Description The last date and time at which the data synchronization job ran. This field does not indicate the date and time when the Data Processing Engine (DPE) last ran, but rather when the system job that executes the DPE definition last ran.</p>
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Master label for SearchableObjDataSyncInfo. This internal label doesn't get translated.</p>
Metadata	<p>Type complexvalue</p> <p>Properties Create, Nullable, Update</p> <p>Description Metadata that defines search criteria configurations. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>

Field	Details
ScheduleFrequencyInHours	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The frequency at which the data synchronization job is run to refresh data in the searchable object.</p>
SearchableObject	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description The object that's used for criteria-based search and filter. Possible values are:<ul style="list-style-type: none"> • VehicleSearchableField—This value is applicable for Automotive Cloud. </p>

SearchCriteriaConfiguration

Represents the configuration details of searchable field sets such as the group of fields used as the basis for search, aggregation, sort, and result display. This object is available in API version 58.0 and later.

Supported SOAP API Calls

`create()`, `delete()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

`DELETE`, `GET`, `HEAD`, `PATCH`, `POST`, `Query`

Special Access Rules

Automotive and Criteria-Based Search and Filter must be enabled.

Fields

Field	Details
ActionList	<p>Type textarea</p> <p>Properties Nillable</p>

Field	Details
	<p>Description The list of actions that can be launched for a search result. Available in API version 59.0 and later.</p>
AdditionalSearchCriteria	<p>Type string</p> <p>Properties Nullable</p> <p>Description The additional configuration attributes used in criteria-based search. Available in API version 63.0 and later.</p>
AggrCriteriaFieldsetId	<p>Type reference</p> <p>Properties Filter, Group, Nullable, Sort</p> <p>Description The set of fields in the searchable object that can be used as aggregation criteria. This field is a relationship field.</p> <p>Relationship Name AggrCriteriaFieldset</p> <p>Relationship Type Lookup</p> <p>Refers To FieldSet</p>
ConfigurationType	<p>Type picklist</p> <p>Properties Filter, Group, Nullable, Restricted picklist, Sort</p> <p>Description Specifies the type of search criteria configuration. Available in API version 63.0 and later. Possible values are:</p> <ul style="list-style-type: none"> • CLINICAL_TRAIL_SEARCH • DEFAULT_SEARCH
Description	<p>Type textarea</p> <p>Properties Filter, Group, Nullable, Sort</p>

Field	Details
	<p>Description The description of a search criteria configuration record. Maximum length allowed is 255 characters.</p>
DeveloperName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The developer name of the record.</p>
DistanceCriteria	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description A JSON string that stores the distance configuration attributes used in criteria-based search.</p>
FilterType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the type of filter criteria to use for criteria-based search and filter. Possible values are:<ul style="list-style-type: none"> • GROUPING_AND_AGGREGATION • MULTIPLE_FIELDS </p>
FullName	<p>Type string</p> <p>Properties Create, Group, Nillable</p> <p>Description The full name of the associated metadata object in Metadata API. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
IsActive	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p>

Field	Details
	<p>Description Indicates whether the search criteria configuration is active (true) or not (false). The default value is <code>false</code>.</p>
IsSingleFieldSort	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the search results are sorted based on a single field (<code>true</code>) or not (<code>false</code>). Available in API version 63.0 and later. The default value is <code>false</code>.</p>
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Master label for SearchCriteriaConfiguration. This internal label doesn't get translated.</p>
Metadata	<p>Type complexvalue</p> <p>Properties Create, Nillable, Update</p> <p>Description Metadata that defines search criteria configurations. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
ResultDisplayFormat	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies the display format of search results. Possible values are:<ul style="list-style-type: none"> • CARD • LIST </p>
ResultFieldsetId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The set of fields in the searchable object that can be used as search result columns. This field is a relationship field.</p> <p>Relationship Name ResultFieldset</p> <p>Relationship Type Lookup</p> <p>Refers To FieldSet</p>
ResultFlexCard	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the OmniStudio FlexCard used to display search results as cards.</p>
SearchCriteriaFieldsetId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The set of fields in the searchable object that can be used for querying data. This field is a relationship field.</p> <p>Relationship Name SearchCriteriaFieldset</p> <p>Relationship Type Lookup</p> <p>Refers To FieldSet</p>
SearchableObjDataSyncInfoId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The object that stores data sync information about the searchable object, such as whether the data sync job is active or not, and when the last data sync job was run. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name SearchableObjDataSyncInfo</p> <p>Relationship Type Lookup</p> <p>Refers To SearchableObjDataSyncInfo</p>
SearchableObject	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description The object that can be used for criteria-based search and filter. Possible values are:<ul style="list-style-type: none"> • VehicleSearchableField—This value is applicable for Automotive Cloud. </p>
SortingCriteriaFieldsetId	<p>Type reference</p> <p>Properties Filter, Group, Nullable, Sort</p> <p>Description The set of fields in the searchable object that can be used as sort criteria for search results. This field is a relationship field.</p> <p>Relationship Name SortingCriteriaFieldset</p> <p>Relationship Type Lookup</p> <p>Refers To FieldSet</p>

SearchResultActionConfig

Represents a collection of fields to set up the actions that a user can perform on results returned by criteria-based search. This object is available in API version 59.0 and later.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

`create(), delete(), describeObjects(), query(), retrieve(), update(), upsert()`

Supported REST API Methods

`DELETE, GET, HEAD, PATCH, POST, Query`

Special Access Rules

To access this object, Criteria-Based Search and Filter must be enabled in your org.

Fields

Field	Details
ActionReference	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description The action that a user can launch for a search result. Specify the ID of an instance that corresponds to your action type.</p>
ActionScope	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Specifies the scope of the action that the user can launch. Possible values are:<ul style="list-style-type: none">• Global—Select to apply the action to all record types in the search result.• Inline—Select to restrict the action to a single record.</p>
ActionType	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Specifies the type of action that a user can launch. Possible values are:<ul style="list-style-type: none">• FlowDefinition• LightningWebComponent• Omniscript—Available in API version 60.0 and later.</p>
AgentConfirmationMessage	<p>Type textarea</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The confirmation message displayed to the agent. The character limit is 255.</p>
Description	<p>Type textarea</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The description of the search result action configuration.</p>
DeveloperName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The developer name for the search result action configuration.</p>
IsAiAction	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the current action uses generative AI (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
Language	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The language of the search result action configuration.</p>
MasterLabel	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Label for the search result action configuration. In the UI, this field is Name.</p>

Field	Details
Metadata	<p>Type SearchResultActionConfig on page 1959</p> <p>Properties Create, Nullable, Update</p> <p>Description The search result action configuration's metadata.</p>

Life Sciences Cloud Metadata Types

Metadata API enables you to access some types and feature settings that you can customize in the user interface.

For more information about Metadata API and to find a complete reference of existing metadata types, see [Metadata API Developer Guide](#).

[CareBenefitVerifySettings](#)

Represents the configuration settings for benefit verification requests.

[CareLimitType](#)

Defines the characteristics of limits on benefit provision.

[CareRequestConfiguration](#)

Represents the details for a record type such as service request, drug request, or admission request. One or more record types can be associated with a care request.

[CareSystemFieldMapping](#)

Represents a mapping from source system fields to Salesforce objects and fields. This type extends the Metadata metadata type and inherits its `fullName` field.

[CareProviderSearchConfig](#)

Represents the information about the fields that appear in care provider search results. This type extends the Metadata metadata type and inherits its `fullName` field.

[Flow for Life Sciences Cloud](#)

The Flow for Life Sciences Cloud represents the metadata associated with a flow. Use Flow to create an application that takes users through a series of pages to query and update the records in the database. You can also run logic and provide branching capability based on user input to build dynamic applications.

[IndustriesSettings](#)

Represents settings for Life Sciences Cloud.

[IndustriesUnifiedInventorySettings](#)

Represents the settings for Industries Unified Inventory.

[LifeSciConfigCategory](#)

Represents the category that Life Sciences configuration records are organized into.

[LifeSciConfigRecord](#)

Represents the configuration records used in Life Sciences Cloud.

[SearchResultActionConfig](#)

Represents a collection of fields to set up the actions that a user can perform on results returned by criteria-based search.

[TimelineObjectDefinition](#)

Represents the container that stores the details of a timeline configuration. You can use this resource with Salesforce objects to see their records' related events in a linear time-sorted view.

[UIObjectRelationConfig](#)

Represents the admin-created configuration of the object relation UI component.

[Customer Engagement Metadata Type](#)

Metadata API enables you to access some types and feature settings for Customer Engagement for Life Sciences Cloud that you can customize in the user interface.

SEE ALSO:

[Metadata API Developer Guide: Understanding Metadata API](#)

CareBenefitVerifySettings

Represents the configuration settings for benefit verification requests.

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Parent Type

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

File Suffix and Directory Location

CareBenefitVerifySettings components have the suffix `.careBenefitVerifySettings` and are stored in the `careBenefitVerifySettings` folder.

Version

CareBenefitVerifySettings components are available in API version 52.0 and later.

Fields

Field Name	Description
codeSetType	Field Type string
	Description Specifies the code set type for the benefits verification service type codes.
defaultNpi	Field Type string

Field Name	Description
	<p>Description Default National Provider Identifier to be used in the benefits verification request.</p>
generalPlanServiceTypeCode	<p>Field Type</p>
	string
	<p>Description Service type code for the plan benefits as a whole.</p>
isDefault	<p>Field Type</p>
	boolean
	<p>Description Indicates whether this record is the default verification service (<code>true</code>) or not (<code>false</code>).</p>
masterLabel	<p>Field Type</p>
	string
	<p>Description Required. Name of the benefits verification service.</p>
organizationName	<p>Field Type</p>
	string
	<p>Description Specifies the organization name for the benefits verification request service.</p>
serviceApexClass	<p>Field Type</p>
	string
	<p>Description Apex class used to access the benefits verification service.</p>
serviceNamedCredential	<p>Field Type</p>
	string
	<p>Description Credential used to access the benefits verification service.</p>
serviceTypeSourceSystem	<p>Field Type</p>
	string
	<p>Description Service type code for the plan benefits as a whole.</p>
uriPath	<p>Field Type</p>
	string

Field Name	Description
Field Name	Description
	Link to payer endpoint.

Declarative Metadata Sample Definition

This is an example of a CareBenefitVerifySettings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<CareBenefitVerifySettings xmlns="http://soap.sforce.com/2006/04/metadata">
    <generalPlanServiceTypeCode>abc</generalPlanServiceTypeCode>
    <isDefault>true</isDefault>
    <masterLabel>test</masterLabel>
    <serviceApexClass>TestApexClass</serviceApexClass>
    <serviceNamedCredential>test</serviceNamedCredential>
    <uriPath>efgh</uriPath>
    <serviceTypeSourceSystem>Lorem ipsum dolor</serviceTypeSourceSystem>
    <codeSetType>Code set</codeSetType>
    <defaultNpi>Npi info</defaultNpi>
    <organizationName>Organization name</organizationName>
</CareBenefitVerifySettings>
```

This is an example package.xml that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>CareBenefitVerifySettings</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexClass</name>
    </types>
    <types>
        <members>*</members>
        <name>NamedCredential</name>
    </types>
    <version>52.0</version>
</Package>
```

Wildcard Support in the Manifest File

This metadata type supports the wildcard character * (asterisk) in the package.xml manifest file. For information about using the manifest file, see [Deploying and Retrieving Metadata with the Zip File](#).

CareLimitType

Defines the characteristics of limits on benefit provision.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Parent Type

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

File Suffix and Directory Location

CareLimitType components have the suffix `.careLimitType` and are stored in the `careLimitTypes` folder.

Version

CareLimitType components are available in API version 52.0 and later.

Fields

Field Name	Description
<code>isProtected</code>	Field Type boolean Description An auto-generated value that doesn't impact the behavior of the metadata type.
<code>limitType</code>	Field Type string Description Source of limit on benefit provision, such as a co-insurance requirement.
<code>masterLabel</code>	Field Type string Description Required. Name of the limit type.
<code>metricType</code>	Field Type CareLimitTypeMetricType (enumeration of type string) Description Metric to be used for calculating and displaying the benefit limit, such as number of visits, amount spent, or percentage of allowed expenditure. Valid values are: <ul style="list-style-type: none">• Amount• Money• Percentage

Field Name	Description
	<ul style="list-style-type: none"> Text

Declarative Metadata Sample Definition

This is an example of a CareLimitType component.

```
<?xml version="1.0" encoding="UTF-8"?>
<CareLimitType xmlns="http://soap.sforce.com/2006/04/metadata">
    <limitType>test</limitType>
    <masterLabel>test</masterLabel>
    <metricType>Money</metricType>
    <isProtected>false</isProtected>
</CareLimitType>
```

This is an example package.xml that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>CareLimitType</name>
    </types>
    <version>52.0</version>
</Package>
```

Wildcard Support in the Manifest File

This metadata type supports the wildcard character * (asterisk) in the package.xml manifest file. For information about using the manifest file, see [Deploying and Retrieving Metadata with the Zip File](#).

CareRequestConfiguration

Represents the details for a record type such as service request, drug request, or admission request. One or more record types can be associated with a care request.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Parent Type

This type extends the [Metadata](#) metadata type and inherits its fullName field.

File Suffix and Directory Location

CareRequestConfiguration components have the suffix .careRequestConfiguration and are stored in the careRequestConfigurations folder.

Version

CareRequestConfiguration components are available in API version 44.0 and later.

Fields

Field Name	Description
careRequestRecordType	<p>Field Type string</p> <p>Description Required. The record type for the care request.</p>
careRequestRecords	<p>Field Type CareRequestRecords[]</p> <p>Description The list of objects you can select to configure the care request.</p>
careRequestType	<p>Field Type string</p> <p>Description Required. The type of care request. For example, an appeal, a service request, or an admission.</p>
isActive	<p>Field Type boolean</p> <p>Description Indicates whether the care request is active (<code>true</code>) or not (<code>false</code>).</p>
isDefault	<p>Field Type boolean</p> <p>Description Indicates whether the record type of the care request is default (<code>true</code>) or not (<code>false</code>).</p>
name	<p>Field Type string</p> <p>Description Required. A user-friendly name for CareRequestConfiguration, which is defined when the CareRequestConfiguration is created.</p>

CareRequestRecords

Displays a list of objects to customize the care request.

Field Name	Description
careRequestRecord	Field Type
	string
Description	
	Required.
	The object selected to configure the care request.

Declarative Metadata Sample Definition

This is an example of a CareRequestConfiguration component.

```
<?xml version="1.0" encoding="UTF-8"?>
<CareRequestConfiguration xmlns="http://soap.sforce.com/2006/04/metadata">
    <careRequestRecordType>DrugRequest</careRequestRecordType>
    <careRequestRecords>
        <careRequestRecord>CareRequestItem</careRequestRecord>
    </careRequestRecords>
    <careRequestRecords>
        <careRequestRecord>CareRequestDrug</careRequestRecord>
    </careRequestRecords>
    <careRequestType>Drug Request</careRequestType>
    <isActive>false</isActive>
    <isDefaultRecordType>false</isDefaultRecordType>
    <masterLabel>DrugRequest</masterLabel>
</CareRequestConfiguration>
```

This is an example package.xml that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>Case.DrugRequest</members>
        <name>BusinessProcess</name>
    </types>
    <types>
        <members>*</members>
        <name>CareRequestConfiguration</name>
    </types>
    <types>
        <members>CareRequest.DrugRequest</members>
        <members>CareRequestDrug.DrugRequest</members>
        <members>CareRequestItem.DrugRequest</members>
        <members>Case.DrugRequest</members>
        <name>RecordType</name>
    </types>
```

```
<version>44.0</version>
</Package>
```

Wildcard Support in the Manifest File

This metadata type supports the wildcard character * (asterisk) in the `package.xml` manifest file. For information about using the manifest file, see [Deploying and Retrieving Metadata with the Zip File](#).

CareSystemFieldMapping

Represents a mapping from source system fields to Salesforce objects and fields. This type extends the Metadata metadata type and inherits its `fullName` field.

 **[other]:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

File Suffix and Directory Location

CareSystemFieldMapping components have the suffix `.careSystemFieldMapping` and are stored in the `careSystemFieldMappings` folder.

Version

CareSystemFieldMapping components are available in API version 49.0 and later.

Special Access Rules

To use this metadata type, your Salesforce org must have the Health Cloud or Life Sciences Cloud license and the user must have the Health Cloud Foundation (for Health Cloud) or Health Cloud Starter (for Life Sciences Cloud) permission set.

Fields

Field Name	Field Type	Description
<code>externalIdField</code>	string	The ID of the field in the external system.
<code>isActive</code>	boolean	Indicates whether this field mapping is active (<code>true</code>) or not (<code>false</code>). The default value is False.
<code>isProtected</code>	boolean	An auto-generated value that doesn't currently impact the behavior of the metadata type.
<code>masterLabel</code>	string	Required. The name of the care system field mapping.
<code>role</code>	SourceSystemFieldRole (enumeration of type string)	Required. The role the field represents. Valid values are: <ul style="list-style-type: none">• Patient—When the <code>role</code> field is set to <code>Patient</code>, the Enrollment API uses the value of <code>externalIdField</code> as the patient ID. This role can be used when <code>targetObject</code> is set to <code>Account</code>.

Field Name	Field Type	Description
		<ul style="list-style-type: none"> • RemoteMonitoringDevice—Indicates which <code>externalIdField</code> on the Asset object maps to the <code>Device</code> field in the CareObservation object. This role can be used when <code>targetObject</code> is set to Asset. • RemoteMonitoringPatient—Indicates which <code>externalIdField</code> on the Account object maps to the <code>ObservedSubject</code> field in the Care Observation object. This role is used when <code>targetObject</code> is set to Account. • ServiceProvider—The Enrollment API uses the value of <code>externalIdField</code> as the provider ID. This role is used when <code>targetObject</code> is set to Account. • NotApplicable—This role is used when <code>targetObject</code> is set to CareProgram or Product, which means that there is no applicable role.
<code>sourceSystem</code>	string	The system where the record originated.
<code>targetObject</code>	string	The name of the Salesforce object to which the external system field is mapped.

Declarative Metadata Sample Definition

The following is an example of a CareSystemFieldMapping component.

```
<?xml version="1.0" encoding="UTF-8"?>
<CareSystemFieldMapping xmlns="http://soap.sforce.com/2006/04/metadata">
    <externalIdField>AccountNumber</externalIdField>
    <isActive>true</isActive>
    <isProtected>false</isProtected>
    <masterLabel>Map1</masterLabel>
    <role>Patient</role>
    <sourceSystem>Epic</sourceSystem>
    <targetObject>Account</targetObject>
</CareSystemFieldMapping>
```

The following is an example `package.xml` that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>patient</members>
        <name>CareSystemFieldMapping</name>
    </types>
    <version>49.0</version>
</Package>
```

CareProviderSearchConfig

Represents the information about the fields that appear in care provider search results. This type extends the Metadata metadata type and inherits its `fullName` field.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

File Suffix and Directory Location

CareProviderSearchConfig components have the suffix `.careProviderSearchConfig` and are stored in the `careProviderSearchConfigs` folder.

Version

CareProviderSearchConfig components are available in API version 48.0 and later.

Fields

Field Name	Field Type	Description
<code>isActive</code>	boolean	Indicates whether this configuration is active (<code>true</code>) or not (<code>false</code>).
<code>isProtected</code>	boolean	An auto-generated value that doesn't currently impact the behavior of the metadata type.
<code>mappedObject</code>	ProviderSearch ObjectMapping (enumeration of type string)	Required. Indicates mapped objects. Possible values are; <ul style="list-style-type: none">• HealthCarePractitionerFacility• HealthCareProvider
<code>masterLabel</code>	string	Required. Name of the care provider.
<code>sourceField</code>	string	API name of the field that is copied to the target object.
<code>targetField</code>	string	API name of the field to copy the data to.

Declarative Metadata Sample Definition

The following is an example of a CareProviderSearchConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<CareProviderSearchConfig xmlns="http://soap.sforce.com/2006/04/metadata">
    <sourceField>Test1__c</sourceField>
    <targetField>Test1__c</targetField>
    <mappedObject>HealthcareProvider</mappedObject>
    <isProtected>false</isProtected>
    <isActive>true</isActive>
```

```
<masterLabel>testlabel</masterLabel>
</CareProviderSearchConfig>
```

The following is an example `package.xml` that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>HealthcareProvider.Test1__c</members>
    <name>CustomField</name>
  </types>
  <types>
    <members>CareProviderSearchableField.Test1__c</members>
    <name>CustomField</name>
  </types>
  <types>
    <members>Test</members>
    <name>CareProviderSearchConfig</name>
  </types>
  <version>48.0</version>
</Package>
```

Flow for Life Sciences Cloud

The Flow for Life Sciences Cloud represents the metadata associated with a flow. Use Flow to create an application that takes users through a series of pages to query and update the records in the database. You can also run logic and provide branching capability based on user input to build dynamic applications.

FlowActionCall

Life Sciences Cloud exposes additional `actionType` values for the `FlowActionCall` metadata type.

Field Name	Field Type	Description
<code>actionType</code>	InvokeableActionType (enumeration of type string)	<p>Required.</p> <p>The action type. Additional valid values for Life Sciences Cloud are:</p> <ul style="list-style-type: none"> • <code>assignCndtToResearchStudyGroup</code>—Assign candidates, enrolled in the clinical trials through randomization to research study comparison groups. • <code>generateResearchStudyBlocks</code>—Generate research study randomization block records to link each block with a specific research study comparison group by using the randomization process. • <code>getContextData</code>—Retrieves the context data that is passed as an input to a prompt template that generates a summary of the data. • <code>processCriteriaMatchingResp</code>—Parses a GPT-generated JSON response to evaluate each inclusion and exclusion criterion

Field Name	Field Type	Description
		<p>for a given Research Study Candidate, determining whether each criterion is matched or not. This action stores the GPT response in the Care Program Enrollment Evaluation Result entity and computes the number of matched inclusion criteria and exclusion criteria, returning these counts as output.</p> <ul style="list-style-type: none"> • <code>serializeHierarchicalContextData</code>—Serializes the hierarchical context data from the Apex <code>embeddedai__RecordApexRepresentation</code> records that are passed as input to a prompt template that generates a summary of the data.

IndustriesSettings

Represents settings for Life Sciences Cloud.

In the package manifest, all organization settings metadata types are accessed using the Settings name. See Settings for details.

Parent Type

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

File Suffix and Directory Location

IndustriesSettings are stored in a single file named `Industries.settings` in the `settings` directory.

Version

The settings for Life Sciences Cloud are available in API version 61.0 and later.

Fields for Life Sciences Cloud

Field Name	Field Type	Description
<code>enableAccountBasedSharing</code>	boolean	Indicates whether to enable Account-Based Sharing to control data access based on account ownership.
<code>enableAdverseEvents</code>	boolean	Indicates whether Adverse Events and its data model is enabled for your org (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> . Available in API version 61.0 and later.
<code>enableAppAlerts</code>	boolean	Indicates whether to enable in-app alerts and notifications.
<code>enableCarePlansPreference</code>	boolean	Indicates whether to enable user preferences for Care Plans.

Field Name	Field Type	Description
enableComprehendMedical	boolean	Indicates whether Comprehend Medical Analysis is enabled for your org (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> . This field is available in API version 54.0 and later.
enableCPBestConTimeSharing	boolean	Indicates whether to enable sharing of the best time to contact a patient within Care Plans.
enableCPSocialCustomSharing	boolean	Indicates whether to enable custom social sharing features within Care Plans.
enableGroupMembershipPref	boolean	Indicates whether to enable user preferences for group memberships.
enableIESentimentAnalysis	boolean	Indicates whether Industries Einstein Sentiment Insights is enabled for your org (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> . This field is available in API version 54.0 and later.
enableIndCrossObjChangelog	boolean	Indicates whether a cross-object change log to track changes across multiple related objects is enabled for your org.
enableLifeSciGenericWorkflow	boolean	Indicates whether to enable the generic workflow engine for life sciences processes.
enableLifeSciInquiry	boolean	Indicates whether to enable the Inquiry feature for managing and responding to inquiries in a life sciences context.
enableLifeSciListsAndFilters	boolean	Indicates whether to enable lists and filters for enhanced data sorting and searching in life sciences.
enableLifeSciencesActivityPlan	boolean	Indicates whether to enable the Activity Plan feature for creating and managing activity plans within life sciences.
enableLifeSciencesClinicalTrialManagement	boolean	Indicates whether Clinical Trial Management and its data model is enabled for your org (<code>true</code>) or not (<code>false</code>). Using this feature, organizations can design and execute clinical trials and manage trial participant journeys. The default value is <code>false</code> . Available in API version 61.0 and later.
enableLifeSciencesConsent	boolean	Indicates whether to enable the Consent feature for managing patient or customer consent within life sciences.
enableLifeSciencesCustomerEngagementBase	boolean	Indicates whether to enable the foundational components of the Life Sciences Customer Engagement (LS C4CE).
enableLifeSciencesMergeManagement	boolean	Indicates whether to enable the Merge Management feature for merging duplicate records within life sciences data.
enableLifeSciencesProviderEngagementCompliance	boolean	Indicates whether to enable compliance features for provider engagement within the life sciences industry.
enableLifeSciencesSiteManagement	boolean	Indicates whether to enable the Site Management feature for managing clinical trial or other sites in the life sciences industry.

Field Name	Field Type	Description
enableLSC4CEDocumentManagement	boolean	Indicates whether to enable Document Management for the Life Sciences Customer Engagement (LS C4CE).
enableLSC4CEEEmailAndTemplate	boolean	Indicates whether to enable email and template management features for the Life Sciences Customer Engagement (LS C4CE).
enableLSC4CEKeyAccountManagement	boolean	Indicates whether to enable Key Account Management functionality within the Life Sciences Customer Engagement (LS C4CE).
enableLSC4CEMedInsights	boolean	Indicates whether to enable Medical Insights functionality in the Life Sciences Customer Engagement (LS C4CE) platform to provide insights to medical teams.
enableLSC4CEPackage	boolean	Indicates whether to enable the core package for the Life Sciences Customer Engagement (LS C4CE).
enableLSC4CERemoteEngagement	boolean	Indicates whether to enable features for remote engagement with customers within the Life Sciences Customer Engagement (LS C4CE).
enableLSC4CEVisits	boolean	Indicates whether to enable the Visits feature to manage and track customer visits within the Life Sciences Customer Engagement (LS C4CE).
enableNextBestAction	boolean	Indicates whether to enable Next Best Action, a feature that provides AI-driven recommendations for the next best step to take with a customer or patient.
enableNextBestCustomer	boolean	Indicates whether to enable Next Best Customer, a feature that uses data to identify and recommend the most valuable customers.
enableNextBestMessage	boolean	Indicates whether to enable Next Best Message, a feature that recommends the most effective message to send to a customer or patient.
enablePATSTerritoryBasedSharing	boolean	Indicates whether to enable Territory-Based Sharing for the Provider and Affiliate Tracking System (PATS).
enablePrimaryProviderRestriction	boolean	Indicates whether to enable restrictions based on the primary provider.
enableProdAdminBusinessGrpFilter	boolean	Indicates whether to enable filtering by Business Group in the Product Administration interface.
enableProdTerrAlignPrtHrchyAcc	boolean	Indicates whether to enable access to the Product Territory Alignment Partner Hierarchy.
enableProdTerrAvlRecSharing	boolean	Indicates whether to enable sharing of available records for Product Territories.
enableProviderSummarization	boolean	Indicates whether to enable data summarization for provider records.
enableSampleLimits	boolean	Indicates whether to enable sample limits for product distribution.
enableTrialManagementRandomization	boolean	Indicates whether Research Study Randomization is enabled for your org (<code>true</code>) or not (<code>false</code>). Using this feature, users can design and

Field Name	Field Type	Description
		run randomization procedures for their clinical trials. The default value is <code>false</code> . Available in API version 61.0 and later.
enableVisitInventoryEnabled	boolean	Indicates whether to enable inventory tracking for visits.
enableVisitPlanningAndExecutionAction	boolean	Indicates whether to enable actions for Visit Planning and Execution.
enableWaitlistManagementPref	boolean	Indicates whether to enable preferences for Waitlist Management.

Declarative Metadata Sample Definition

The following is an example of a `Industries.Settings` metadata file.

```
<?xml version="1.0" encoding="UTF-8"?>
<IndustriesSettings xmlns="http://soap.sforce.com/2006/04/metadata">
    <enableLifeSciencesClinicalTrialManagement>true</enableLifeSciencesClinicalTrialManagement>

    <enableAdverseEvents>true</enableAdverseEvents>
    <enableTrialManagementRandomization>true</enableTrialManagementRandomization>
</IndustriesSettings>
```

The following is an example `package.xml` that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>Industries</members>
        <name>Settings</name>
    </types>
    <version>66.0</version>
</Package>
```

IndustriesUnifiedInventorySettings

Represents the settings for Industries Unified Inventory.

Parent Type

This type extends the Metadata metadata type and inherits its `fullName` field.

File Suffix and Directory Location

IndustriesUnifiedInventorySettings components have the suffix `IndustriesUnifiedInventory.settings` and are stored in the `settings` folder.

Version

IndustriesUnifiedInventorySettings components are available in API version 64.0 and later.

Fields

Field Name	Description
enableBatchManagement	Field Type Boolean
	Description
	Indicates whether the batch-based inventory management features are enabled (<code>true</code>) or not (<code>false</code>). Within Life Sciences Cloud, this is a core component of the Unified Inventory Extension Entities, supporting Sample Inventory use cases. When enabled, it provides access to the entities ProductionBatch, ProductBatchItem, and InventoryCntProdtBatchItem.
enableInventoryCount	Field Type Boolean
	Description
	Indicates whether the Inventory Count is enabled (<code>true</code>) or not (<code>false</code>). The Inventory Count provides the ability to manage inventory count processes by planning inventory counts, counting inventory at designated locations, and tracking count results.
enableProductInventoryOperations	Field Type Boolean
	Description
	Indicates whether the Product Inventory Operations that provides the capabilities to perform various actions related to managing product inventory is enabled (<code>true</code>) or not (<code>false</code>).

Declarative Metadata Sample Definition

The following is an example of an IndustriesUnifiedInventorySettings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<IndustriesUnifiedInventorySettings xmlns="http://soap.sforce.com/2006/04/metadata">
  <enableBatchManagement>true</enableBatchManagement>
  <enableInventoryCount>true</enableInventoryCount>
  <enableProductInventoryOperations>true</enableProductInventoryOperations>
</IndustriesUnifiedInventorySettings>
```

The following is an example package.xml that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>IndustriesUnifiedInventory</members>
    <name>Settings</name>
  </types>
  <version>64.0</version>
</Package>
```

LifeSciConfigCategory

Represents the category that Life Sciences configuration records are organized into.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Parent Type

This type extends the Metadata metadata type and inherits its `fullName` field.

File Suffix and Directory Location

LifeSciConfigCategory components have the suffix `.lifeSciConfigCategory` and are stored in the `lifeSciConfigCategories` folder.

Version

LifeSciConfigCategory components are available in API version 65.0 and later.

Fields

Field Name	Description
category	<p>Field Type LifeSciConfigCategoryType (enumeration of type string)</p> <p>Description</p> <p>Required</p> <p>Defines the category for the configuration.</p> <p>Possible values are:</p> <ul style="list-style-type: none">• AccountProviderVisitRecordTypeMapping• AccountSearchSettings• ActivityHistoryAdministration• ActivityHistoryRelatedLabel• ActivityPlanConfiguration• ActivityPlanSettings• AddressSettings• AffiliationReverseRoleMapping• AffiliationSettings• ApplicationSettings• BestTimeSettings• BulkUpdateRestrictedEntity• BusinessHoursHolidayMapping• CalendarEvent

Field Name	Description
	<ul style="list-style-type: none">• CallCustomDiscussionRecordType• CallDiscussionRecordType• CustomAction• CustomerMergeSettings• DbSchema• DEASettings• DTVComponentConfig• DTVOBJECTConfig• ExternalSearchPreferences• ExternalSearchUserSettings• FieldSetMapping• InsDocSettings• InsightSettings• InventoryManagementSettings• KAM• KAMSettings• LogSettings• NavigationIcons• NextBestCustomerSettings• OptAdministration• PlannerAdministration• ProductAdminSettings• ProfileBasedAppSettings• ProviderSummarization• QuickAction• ReportsAndDashboardsSync• SearchBeforeCreate• SprintSettings• StateDistributorLicenseSettings• StateLicenseNumberSettings• SyncProcessorConfiguration• SyncTransactionAdminView• SyncTransactionConfig• SyncTransactionFieldBehaviour• TerritoryManagement• TimeOffTerritoryRule• TimeOffTerritorySettings• TimeOffTerritorySlots

Field Name	Description
	<ul style="list-style-type: none"> • TimeOffTerritoryWorkingDaySettings • TimelineActivitySetting • UISchema • VideoCallPhoneNumber • VideoCallSettings • WorkingDaysConfig
categoryLabel	Field Type
	String
	Description
	The label for the categories.
isProtected	Field Type
	Boolean
	Description
	Indicates whether the field is protected (<code>true</code>) or not (<code>false</code>).
masterLabel	Field Type
	String
	Description
	Required
	The main label for the configuration.
type	Field Type
	LifeSciCategoryType (enumeration of type string)
	Description
	Type of configuration category.
	Values are:
	<ul style="list-style-type: none"> • Hierarchical • List

Declarative Metadata Sample Definition

The following is an example of a LifeSciConfigCategory component.

```
<?xml version="1.0" encoding="UTF-8"?>
<LifeSciConfigCategory xmlns="http://soap.sforce.com/2006/04/metadata">
<category>ApplicationSettings</category>
<masterLabel>ApplicationSettings</masterLabel>
</LifeSciConfigCategory>
```

The following is an example package.xml that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
<types>
<members>*
```

LifeSciConfigRecord

Represents the configuration records used in Life Sciences Cloud.

Parent Type

This type extends the Metadata metadata type and inherits its fullName field.

File Suffix and Directory Location

LifeSciConfigRecord components have the suffix .lifeSciConfigRecord and are stored in the lifeSciConfigRecords folder.

Version

LifeSciConfigRecord components are available in API version 65.0 and later.

Fields

Field Name	Description
assignments	<p>Field Type LifeSciConfigAssignment on page 1955</p> <p>Description Profiles or users assigned to a configuration record.</p>
fieldValue	<p>Field Type LifeSciConfigFieldValue on page 1956</p> <p>Description The value when it represents a field's name.</p>
isActive	<p>Field Type Boolean</p> <p>Description Indicates whether the configuration record is active. Supported values are true or false.</p>

Field Name	Description
isOrgLevel	Field Type Boolean
	Description Indicates whether the configuration record is at the organization level. Supported values are <code>true</code> or <code>false</code> .
isProtected	Field Type Boolean
	Description Indicates whether the configuration record is protected. Supported values are <code>true</code> or <code>false</code> .
lifeSciConfigCategory	Field Type String
	Description Required Category of the life science configuration.
masterLabel	Field Type String
	Description Required Main label for the configuration.
parentConfigRecord	Field Type String
	Description Parent configuration record.
type	Field Type String
	Description Type of configuration record.

LifeSciConfigAssignment

The following table describes the assignment for the LifeSciConfigAssignment component.

Field Name	Description
assignedTo	Field Type String Description User or profile to which the configuration is assigned.
assignmentLevel	Field Type LifeSciAssignmentLevel Description Required Level of assignment for the configuration. Supported values are Profile or User.

LifeSciConfigFieldValue Fields

The following table describes the fields for the LifeSciConfigFieldValue component.

Field Name	Description
dataType	Field Type LifeSciConfigFieldDataType Description Required Data type of the field. Possible values are: <ul style="list-style-type: none"> • TEXT • LONGTEXT • NUMBER • BOOLEAN • INTEGER • DATE • DATETIME • PHONE • PICKLIST • URL • OBJECT • FIELD • RECORDREFERENCE • MULTIPICKLIST
dateTimeValue	Field Type DateTime

Field Name	Description
	Description
	Date and time value of the field.
dateValue	Field Type
	Date
	Description
	Date value of the field.
fieldName	Field Type
	String
	Description
	Required
	The value when it represents a field's name.
fieldValue	Field Type
	String
	Description
	Required
	Value of the field.
hasBooleanValue	Field Type
	Boolean
	Description
	Indicates whether the value is a Boolean.
integerValue	Field Type
	Int
	Description
	Integer value of the field.
longTextValue	Field Type
	String
	Description
	Long text value of the field.
numberValue	Field Type
	Double
	Description
	Number value of the field.

Field Name	Description
objectValue	Field Type String
	Description
	The value when it represents an object's name.
phoneValue	Field Type String
	Description
	Phone value of the field.
picklistValue	Field Type String
	Description
	Picklist value of the field.
textValue	Field Type String
	Description
	Text value of the field.
urlValue	Field Type String
	Description
	URL value of the field.

Declarative Metadata Sample Definition

The following is an example of a LifeSciConfigRecord component.

```
<?xml version="1.0" encoding="UTF-8"?>
<LifeSciConfigRecord xmlns="http://soap.sforce.com/2006/04/metadata">
  <isActive>false</isActive>
  <isOrgLevel>true</isOrgLevel>
  <lifeSciConfigCategory>ApplicationSettings</lifeSciConfigCategory>
  <masterLabel>ApplicationSettings_OrgLevel</masterLabel>
</LifeSciConfigRecord>
```

The following is an example package.xml that references the LifeSciConfigRecord component.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>ApplicationSettings_OrgLevel</members>
    <name>LifeSciConfigRecord</name>
  </types>
```

```
<version>65.0</version>
</Package>
```

SearchResultActionConfig

Represents a collection of fields to set up the actions that a user can perform on results returned by criteria-based search.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Parent Type

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

File Suffix and Directory Location

SearchResultActionConfig components have the suffix `.SearchResultActionConfigSettings` and are stored in the `SearchResultActionConfigSettings` folder.

Version

SearchResultActionConfig components are available in API version 59.0 and later.

Special Access Rules

This type is available if Criteria-Based Search and Filter is enabled in your org.

Fields

Field Name	Description
<code>actionReference</code>	<p>Field Type string</p> <p>Description</p> <p>Required.</p> <p>The action that a user can launch for a search result. Specify the ID of an instance that corresponds to your action type.</p>
<code>actionScope</code>	<p>Field Type SearchResultActionScope (enumeration of type string)</p> <p>Description</p> <p>Required.</p> <p>Specifies the scope of the action that the user can launch.</p> <p>Valid values are:</p> <ul style="list-style-type: none">• <code>Global</code>—Select to apply the action to all record types in the search result.

Field Name	Description
	<ul style="list-style-type: none">• <code>Inline</code>—Select to restrict the action to a single record. Available in API version 64.0 and later.
actionType	<p>Field Type SearchResultActionType (enumeration of type string)</p> <p>Description</p> <p>Required.</p> <p>Specifies the type of action that a user can launch.</p> <p>Valid values are:</p> <ul style="list-style-type: none">• <code>FlowDefinition</code>• <code>LightningWebComponent</code>• <code>OmniScript</code>—Available in API version 60.0 and later.
agentConfirmationMessage	<p>Field Type string</p> <p>Description</p> <p>The confirmation message displayed to the agent. The character limit is 255. Available in API version 64.0 and later.</p>
description	<p>Field Type string</p> <p>Description</p> <p>The description of the search result action configuration.</p>
isAiAction	<p>Type boolean</p> <p>Description</p> <p>Indicates whether the current action uses generative AI (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 64.0 and later.</p>
masterLabel	<p>Field Type string</p> <p>Description</p> <p>Required.</p> <p>The name of the action that's displayed in the search page.</p>

Declarative Metadata Sample Definition

The following is an example of a SearchResultActionConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<SearchResultActionConfig xmlns="http://soap.sforce.com/2006/04/metadata">
    <actionReference>setup_service_experience__Create_Case</actionReference>
    <actionScope>Global</actionScope>
    <actionType>FlowDefinition</actionType>
    <agentConfirmationMessage>test confirmation message</agentConfirmationMessage>
    <description>Screen flow to create a case.</description>
    <isAiAction>true</isAiAction>
    <masterLabel>Create a Case</masterLabel>
</SearchResultActionConfig>
```

The following is an example package.xml that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>SearchResultActionConfig</name>
    </types>
    <version>59.0</version>
</Package>
```

Wildcard Support in the Manifest File

This metadata type supports the wildcard character * (asterisk) in the package.xml manifest file. For information about using the manifest file, see [Deploying and Retrieving Metadata with the Zip File](#).

TimelineObjectDefinition

Represents the container that stores the details of a timeline configuration. You can use this resource with Salesforce objects to see their records' related events in a linear time-sorted view.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Parent Type

This type extends the [Metadata](#) metadata type and inherits its fullName field.

File Suffix and Directory Location

TimelineObjectDefinition components have the suffix .timelineObjectDefinition and are stored in the timelineObjectDefinitions folder.

Version

TimelineObjectDefinition components are available in API version 55.0 and later.

Special Access Rules

`TimelineObjectDefinition` is available in any org that has the Timeline org preference enabled.

Fields

Field Name	Description
baseObject	<p>Field Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>The object on which a timeline is based. Information displayed in a timeline comes from objects that are related to the base object. The base object can be a Salesforce object or custom object.</p>
definition	<p>Field Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>The timeline definition in JSON format.</p>
isActive	<p>Field Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether the timeline is active (<code>true</code>) or not (<code>false</code>).</p>
masterLabel	<p>Field Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>The user interface label of the timeline object definition record.</p>

Declarative Metadata Sample Definition

The following is an example of a TimelineObjectDefinition component.

The following is an example `package.xml` that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
  xmlns="http://soap.sforce.com/2006/04/metadata">
<types>
  <members>*</members>
  <name>TimelineObjectDefinition</name>
</types>
<version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

This metadata type supports the wildcard character * (asterisk) in the `package.xml` manifest file. For information about using the manifest file, see [Deploying and Retrieving Metadata with the Zip File](#).

UIObjectRelationConfig

Represents the admin-created configuration of the object relation UI component.

- !** **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Parent Type

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

File Suffix and Directory Location

UIObjectRelationConfig components have the suffix `.uiObjectRelationConfig` and are stored in the `uiObjectRelationConfigs` folder.

Version

UIObjectRelationConfig components are available in API version 54.0 and later.

Special Access Rules

You must be a Health Cloud or Life Sciences Cloud customer to use this metadata type

Fields

Field Name	Description
contextObject	<p>Field Type string</p> <p>Description Required. The object that provides the context for this object relation configuration.</p>
contextObjectRecordType	<p>Field Type string</p> <p>Description The record type of the context object for this configuration, if applicable.</p>
directRelationshipField	<p>Field Type string</p> <p>Description For direct relationships, the child relationship field on the related object that matches the context object.</p>
indirectObjectContextField	<p>Field Type string</p> <p>Description For indirect relationships, the field on the junction object that matches the context object.</p>

Field Name	Description
indirectObjectRelatedField	Field Type string
	Description
	For indirect relationships, the field on the junction object that matches the related object.
indirectRelationshipObject	Field Type string
	Description
	For indirect relationships, the junction object representing the relationship between the related object and its context object.
isActive	Field Type boolean
	Description
	Indicates whether the configuration is active (<code>true</code>) or not (<code>false</code>).
masterLabel	Field Type string
	Description
	Required.
	Label for the UIObjectRelationConfig. In the UI, this field is UI Object Relation Config.
relatedObject	Field Type string
	Description
	Required.
	The object containing the data that this object relation configuration displays.
relatedObjectRecordType	Field Type string
	Description
	The record type of the related object for this configuration.
relationshipType	Field Type ObjectRelationshipType (enumeration of type string)
	Description
	Required.
	A string indicating the type of relationship between the related object and context object.
	Valid values are:

Field Name	Description
	<ul style="list-style-type: none"> • Direct • Indirect • InverseDirect • Self
UIObjectRelationFieldConfigs	<p>Field Type UIObjectRelationFieldConfig</p> <p>Description Provides a configuration for an object relation field on a specific row of content.</p>

UIObjectRelationFieldConfig

Represents a configuration for a single row of content on a specific object relation configuration.

Field Name	Description
displayLabel	<p>Field Type string</p> <p>Description Required. A string containing the user-defined label for this field, to be displayed on each object relation of this type.</p>
queryText	<p>Field Type string</p> <p>Description Required. A case-insensitive template query for generating the content in this field.</p>
rowOrder	<p>Field Type int</p> <p>Description Required. Determines the top-to-bottom display order of this field on the object relation UI.</p>

Declarative Metadata Sample Definition

This is an example of a UIObjectRelationConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<UIObjectRelationConfig xmlns="http://soap.sforce.com/2006/04/metadata">
```

```
<UIObjectRelationFieldConfigs>
    <displayLabel>Address:</displayLabel>
    <queryText>{
        "startNode": {
            "initialObject": "RelatedObject"
        },
        "traversalNodes": [],
        "fieldNode": {
            "fieldEnumOrId": "ShippingAddress"
        }
    }</queryText>
    <rowOrder>1</rowOrder>
</UIObjectRelationFieldConfigs>
<UIObjectRelationFieldConfigs>
    <displayLabel>Phone:</displayLabel>
    <queryText>{
        "startNode": {
            "initialObject": "RelatedObject"
        },
        "traversalNodes": [],
        "fieldNode": {
            "fieldEnumOrId": "Phone"
        }
    }</queryText>
    <rowOrder>2</rowOrder>
</UIObjectRelationFieldConfigs>
<UIObjectRelationFieldConfigs>
    <displayLabel>Fax:</displayLabel>
    <queryText>{
        "startNode": {
            "initialObject": "RelatedObject"
        },
        "traversalNodes": [],
        "fieldNode": {
            "fieldEnumOrId": "Fax"
        }
    }</queryText>
    <rowOrder>3</rowOrder>
</UIObjectRelationFieldConfigs>
<UIObjectRelationFieldConfigs>
    <displayLabel>Parent Organization:</displayLabel>
    <queryText>{
        "startNode": {
            "initialObject": "RelatedObject"
        },
        "traversalNodes": [
            {
                "destinationObjectEnumOrId": "Account",
                "fieldEnumOrId": "ParentId",
                "traversalDirection": "parent"
            }
        ],
        "fieldNode": {
            "fieldEnumOrId": "Name"
        }
    }</queryText>
```

```

        }
    }</queryText>
    <rowOrder>4</rowOrder>
</UIObjectRelationFieldConfigs>
<contextObject>Contact</contextObject>
<directRelationshipField>AccountId</directRelationshipField>
<isActive>true</isActive>
<masterLabel>Sample Primary Account Configuration</masterLabel>
<relatedObject>Account</relatedObject>
<relationshipType>Direct</relationshipType>
<indirectObjectRelatedField></indirectObjectRelatedField>
<indirectObjectContextField></indirectObjectContextField>
<contextObjectRecordType></contextObjectRecordType>
<indirectRelationshipObject></indirectRelationshipObject>
<relatedObjectRecordType></relatedObjectRecordType>
</UIObjectRelationConfig>

```

This is an example package.xml that references the previous definition.

```

<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*

```

Wildcard Support in the Manifest File

This metadata type supports the wildcard character * (asterisk) in the package.xml manifest file. For information about using the manifest file, see [Deploying and Retrieving Metadata with the Zip File](#).

Customer Engagement Metadata Type

Metadata API enables you to access some types and feature settings for Customer Engagement for Life Sciences Cloud that you can customize in the user interface.

ActionableListDefinition

Represents the data source definition details associated with an actionable list.

ActionableListDefinition

Represents the data source definition details associated with an actionable list.

! **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Parent Type

This type extends the Metadata metadata type and inherits its fullName field.

File Suffix and Directory Location

ActionableListDefinition components have the suffix `.actionableListDefinition` and are stored in the `actionableListDefinitions` folder.

Version

ActionableListDefinition components are available in API version 57.0 and later.

Fields

Field Name	Description
<code>actionableListDatasetColumns</code>	<p>Field Type ActionableListDatasetColumn[]</p> <p>Description The object that stores columns in a dataset associated with an actionable list.</p>
<code>actionableListMemberStatuses</code>	<p>Field Type ActionableListMemberStatus[]</p> <p>Description The object that stores the status and the corresponding status icon details of an individual actionable list member.</p>
<code>batchCalcJobDefinition</code>	<p>Field Type string</p> <p>Description The batch calculation job definition that's associated with the creation of an actionable list. This field is a relationship field.</p>
<code>datasetName</code>	<p>Field Type string</p> <p>Description The name of the dataset that is associated with the actionable list.</p>
<code>edgeMart</code>	<p>Field Type string</p> <p>Description The edgemart dataset that's associated with the actionable list. Available in API version 58.0 and later.</p>
<code>isActive</code>	<p>Field Type boolean</p> <p>Description Indicates whether the actionable list definition is active (<code>true</code>) or not (<code>false</code>).</p>

Field Name	Description
masterLabel	<p>The default value is <code>false</code>.</p>
objectName	<p>Field Type string</p> <p>Description Required. The master label of the actionable list definition.</p> <p>Field Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The object for which the actionable list is created. Possible values are:</p> <ul style="list-style-type: none"> • Account • Asset • CareRequest • CareRequestItem • Case • Claim • ClinicalServiceRequest • Contact • HealthcareFacility • InsurancePolicy • Lead • MemberPlan • Opportunity • PersonLifeEvent <p>The default value is <code>LifeScience</code>.</p>
type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of the actionable list that can be built using the actionable list definition. Possible values are:</p>

Field Name	Description
	<ul style="list-style-type: none"> • RetailStoreList • HealthcareProviderList

ActionableListDatasetColumn

Represents the information about the columns in a dataset associated with an actionable list.

Table 53: Fields

Field Name	Description
dataDomain	<p>Field Type DatasetColumnDataType (enumeration of type string)</p> <p>Description The data domain that is mapped to the data type of the dataset column. Possible values are:</p> <ul style="list-style-type: none"> • Dates • Dimensions • Measures
dataType	<p>Field Type DatatableDataType (enumeration of type string)</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The data type of the dataset column in the actionable list. Available in API version 58.0 and later. Possible values are:</p> <ul style="list-style-type: none"> • Boolean • Currency • Date • DateTime • Email • Location • Number • Percent • Phone • Text • Url

Field Name	Description
displayOrder	<p>Field Type int</p> <p>Properties Create, Filter, Group, Nullable, Sort, Update</p> <p>Description The order in which the actionable list dataset columns are displayed. Available in API version 58.0 and later.</p>
isDefault	<p>Field Type boolean</p> <p>Description Indicates whether the dataset column is added to the actionable list by default (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
isGroupedByListDefObj	<p>Field Type boolean</p> <p>Description Indicates whether the dataset column is grouped by the object defined in the actionable list definition (<code>true</code>) or not (<code>false</code>). Available in API version 59.0 and later.</p>
IsTypeAheadSearchEnabled	<p>Field Type boolean</p> <p>Description Indicates whether the type-ahead search for filters is enabled (<code>true</code>) or not (<code>false</code>). Available in API version 60.0 and later.</p>
objectName	<p>Field Type string</p> <p>Description The name of the object that's associated with the dataset column. Possible values are:</p> <ul style="list-style-type: none"> • Account • Asset • CareRequest • CareRequestItem • Case • Claim • ClinicalServiceRequest • Contact • HealthcareFacility

Field Name	Description
	<ul style="list-style-type: none"> • InsurancePolicy • Lead • MemberPlan • Opportunity • PersonLifeEvent
sourceColumnApiName	<p>Field Type string</p> <p>Description The API name of the column in the source dataset.</p>
sourceFieldName	<p>Field Type string</p> <p>Description The name of the field in the object for which the actionable list dataset is created.</p>

ActionableListMemberStatus

Represents the status and the corresponding status icon details of an individual actionable list member.

Table 54: Fields

Field Name	Description
iconName	<p>Field Type string</p> <p>Description The name of the icon that's mapped to the status.</p>
status	<p>Field Type string</p> <p>Description The status of the actionable list member.</p>

Declarative Metadata Sample Definition

The following is an example of a ActionableListDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ActionableListDefinition
    xmlns="http://soap.sforce.com/2006/04/metadata">
    <actionableListDatasetColumns>
        <isDefault>true</isDefault>
```

```
<sourceFieldName>NewColumn1</sourceFieldName>
</actionableListDatasetColumns>
<actionableListDatasetColumns>
  <sourceColumnApiName>ApiName</sourceColumnApiName>
  <dataDomain>Dimensions</dataDomain>
  <isDefault>false</isDefault>
  <sourceFieldName>NewColumn2</sourceFieldName>
  <objectName>Account</objectName>
  <displayOrder>1</displayOrder>
  <dataType>Text</dataType>
</actionableListDatasetColumns>
<actionableListMemberStatuses>
  <iconName>NewMember1</iconName>
  <status>Active</status>
</actionableListMemberStatuses>
<isActive>true</isActive>
<masterLabel>NewMember2</masterLabel>
<objectName>Account</objectName>
<isProtected>true</isProtected>
<batchCalcJobDefinition>Test1</batchCalcJobDefinition>
<datasetName>AccountDef</datasetName>
</ActionableListDefinition>
```

The following is an example `package.xml` that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>*</members>
    <name>ActionableListDefinition</name>
  </types>
  <version>66.0</version>
</Package>
```

Wildcard Support in the Manifest File

This metadata type supports the wildcard character * (asterisk) in the `package.xml` manifest file. For information about using the manifest file, see Deploying and Retrieving Metadata with the Zip File.

API End-of-Life Policy

Salesforce is committed to supporting each API version for a minimum of 3 years from the date of first release. To improve the quality and performance of the API, versions that are over 3 years old sometimes are no longer supported.

Salesforce notifies customers who use an API version scheduled for deprecation at least 1 year before support for the version ends.