

Health & Wellness Tracking Portal - Phase 1

The Health & Wellness Tracking Portal is an application designed to help patients monitor their health metrics and enable healthcare providers to track wellness trends. The system allows patients to log vital information such as blood pressure, sugar levels, and other health indicators, while doctors and health coaches can analyze these inputs through dashboards and reports.

Beyond simple record keeping, the portal identifies at-risk patients, highlights common health issues, and promotes proactive healthcare management. It integrates health tracking, analytics, and patient-doctor engagement into a single platform—an innovative solution for lifestyle and wellness management.

Requirement Gathering

- ➤ Allow patients to log vitals such as blood pressure, sugar levels, weight, and heart rate.
- ➤ Enable healthcare providers (doctors/coaches) to view patient trends over time.
- ➤ Generate dashboards that highlight at-risk patients based on abnormal readings.
- ➤ Send automated alerts/notifications when a patient logs critical values.
- ➤ Optionally, track lifestyle details like exercise, sleep, and diet for holistic wellness management.

Stakeholder Analysis

- ➤ Primary User: Patients who log their vitals and wellness information.
- ➤ Admin Role: Configures the system, manages patient data structure, and sets automation rules.
- ➤ Healthcare Providers: Doctors and wellness coaches who monitor trends and provide advice.
- ➤ Secondary Users: Family members or caregivers with shared access to patient data.

Business Process Mapping

- ➤ Log Health Data: Patients enter their daily vitals (e.g., BP, sugar levels).
- ➤ Monitor & Track: Data is stored and linked to patient profiles for ongoing monitoring.
- ➤ Alerts & Notifications: Automated alerts are triggered when abnormal values are recorded.
- ➤ Review Trends: Healthcare providers use dashboards and reports to analyze wellness patterns.
- ➤ Intervention: Doctors/coaches take preventive action for at-risk patients based on trends.

Industry-specific Use Case Analysis


- ➤ Healthcare: Supports preventive care by monitoring health indicators in real time.

- ➤ Patient Engagement: Encourages active participation from patients in tracking their wellness.
- ➤ Analytics & Insights: Dashboards help healthcare providers identify trends and risks early.
- ➤ Lifestyle Management: Goes beyond treatment by including exercise, diet, and overall wellness tracking.

AppExchange Exploration

- ➤ Explored Salesforce Health Cloud and wellness-related apps for patient data tracking and engagement.
- ➤ Studied apps that automate alerts and integrate wearable data for best practices.
- ➤ The solution will be implemented using Salesforce tools like custom objects, flows, and dashboards, making it simple, scalable, and effective.


- **Phase-2: Org Setup & Configuration**
- **Step 1 — Company Profile**
- Configured the Salesforce org company profile to set basic organizational information.
 - Organization Name: Health & Wellness Tracking Portal
 - Default Time Zone: *(our timezone)*
 - Default Locale: English (India)
 - Default Currency: INR
 - Primary Contact: tejas/ health.@admin.com


SETUP
Company Information

Organization Detail
Edit
Deactivate Org

Organization Name	Health & Wellness Tracking Portal	Phone	
Primary Contact	Tejaswi Kiranagi	Fax	
Division		Default Locale	English (India)
Address	IN	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	378 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	23 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DWU00000W5rFo
		Organization Edition	Developer Edition
		Instance	SWE106

- **Step 2 — Business Hours & Holidays**
- Defined business hours and public holidays for proper case escalation.
- **Business Hours:**
 - Name: Default Business Hours
 - Days Open: Monday–Saturday
 - Hours: 09:00 AM – 06:00 PM
- **Holidays:**
 - New Year’s Day → Jan 1, 2025
 - Independence Day → Aug 15, 2025


SETUP
Business Hours

Organization Business Hours
Help for this Page

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.


Holidays [\[0\]](#)

Business Hours Detail
Edit

Business Hours Name	Default Business Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday No Hours Monday 9:00 am to 6:00 pm Tuesday 9:00 am to 6:00 pm Wednesday 9:00 am to 6:00 pm Thursday 9:00 am to 6:00 pm Friday 9:00 am to 6:00 pm Saturday 9:00 am to 6:00 pm	Default Business Hours	<input type="checkbox"/>
Active	<input type="checkbox"/>		
Created By	Tejaswi Kiranagi 23/09/2025, 8:12 pm	Last Modified By	Tejaswi Kiranagi 23/09/2025, 8:12 pm

- **Step 5 — Profiles**

- Created custom profiles by cloning Standard User to define role-specific permissions.
 - **Doctor Profile:** Access to Patients & Health Metrics, Reports & Dashboards.
 - **Patient Profile:** Limited access to Health Metrics (create/view own records).


SETUP
Users

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

New User Reset Password(s) Add Multiple Users

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	admin_Admin User	admin	health@admin.com		✓	System Administrator
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00dww0000w5rfo2aj_bctcdulc3jjo@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	health_Dr. Smith	drsmith	health@doctor.com		✓	Standard Platform User
<input type="checkbox"/>	Edit	health_John Patient	patient	health@patient.com		✓	Standard Platform User
<input type="checkbox"/>	Edit	Kiranagi, Tejaswi	TKira	tejaswibk@salesforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	User_Integration	integ	integration@00dww0000w5rfo2aj.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00dww0000w5rfo2aj.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

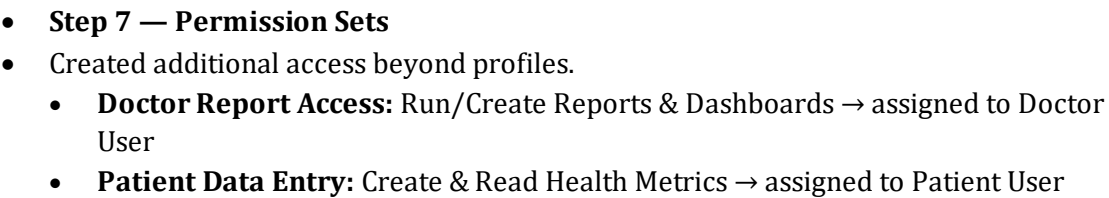
- **Step 6 — Roles & Role Hierarchy**

- Defined role hierarchy for record-level access control.
- **Hierarchy:**
- System Admin
 - └ Doctor
 - └ Patient



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

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


[Help for this Page](#)

On this page you can create, view, and manage permission sets.

All Permission Sets [Edit](#) | [Delete](#) | [Create New View](#)



New



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
X

Y


Z

Other

All

<input type="checkbox"/>	Action	Permission Set Name 	Description	License
<input type="checkbox"/>	Clone	Authenticated Payer	An authenticated external user with the ability to mak...	Salesforce Payments External
<input type="checkbox"/>	Clone	Buyer	Allows access to the store. Lets users see products a...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to ...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific ...	Cloud Integration User
<input type="checkbox"/>	Clone	CRM User	Denotes that the user is a Sales Cloud or Service ...	CRM User
<input type="checkbox"/>	Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/>	Clone	Commerce Session	Allow access to session-based permissions.	Commerce Session Permission Set License Seats

- **Step 8 — OWD & Sharing Rules**
- Configured baseline record access and exceptions.
- **Organization-Wide Defaults:**
 - Patient → Private
 - Health Metric → Private
 - Doctor → Public Read Only
- **Sharing Rules:**
 - Doctors can view & edit assigned Patient records.
 - Doctors can view assigned Health Metrics.


Sharing Settings

Sharing Settings

Help for this Page ?

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects


[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults
[Edit](#)
[Organization-Wide Defaults Help ?](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>


- **Step 9 — Login Access Policies**
- Enabled administrator login access for testing & support.
 - Admins can log in as any user.
 - Salesforce Support access enabled (optional).


Login Access Policies

Login Access Policies

Help for this Page ?

Control which support organizations your users can grant login access to.


 Changes Saved

Manage Support Options
[Save](#)
[Cancel](#)

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only i
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

[Save](#)
[Cancel](#)

- **Step 10 — Developer Org Setup**

- Set up a Salesforce **Developer Org** to serve as the main environment for the project.
 - Developer Org provides a permanent org for testing, building, and showcasing the project.
 - Recreated Phase-2 configurations (company profile, users, profiles, roles, OWD, permission sets) in this org.

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- **Step 11 — Sandbox Usage**

- Explored Salesforce **Sandbox usage**:
 - Sandboxes allow testing changes without affecting production data.
 - Developer Orgs do not have Sandboxes by default.
 - Used Playground environments as testing grounds before replicating configurations in the main Dev Org.

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- **Step 12 — Deployment Basics**

- Learned deployment methods in Salesforce:
 - **Change Sets**: Add components in source org → upload → deploy in target org.
 - Alternative options: Salesforce CLI, third-party CI/CD tools.

For this project, Change Sets are documented conceptually for future deployment.