

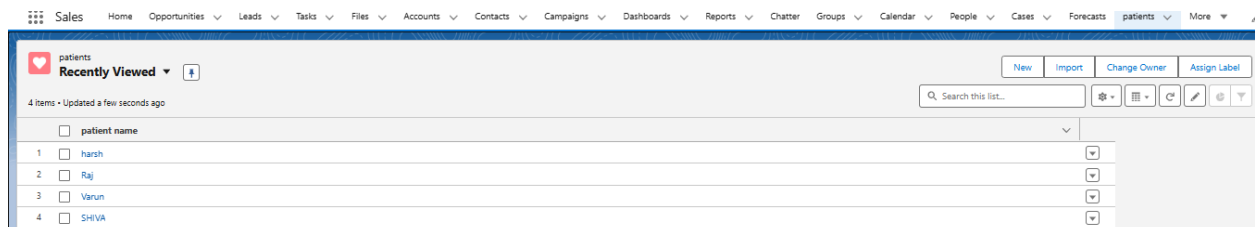
□ Phase 9: Reporting, Dashboards & Security Review

□ Reports

Created multiple report formats to support healthcare workflows:

- **Tabular Reports:** For listing new patients and appointments with key fields like Patient Name, Doctor, Visit Type, and Status.
- **Summary Reports:** Grouped appointments by Doctor and Visit Type to visualize workload and emergency cases.
- **Matrix Reports:** Compared appointment types across doctors and time periods for trend analysis.
- **Joined Reports:** Combined patient and appointment data to show full care history in one view.

These reports support quick decision-making, patient tracking, and doctor performance analysis.



□ Report Types

Leveraged both standard and custom report types:

- Created custom report types linking Appointment__c, Doctor__c, and Patient__c
- Enabled healthcare-specific filters like Visit Mode, Appointment Status, and Insurance Verified
- Ensured all report types are deployed and accessible to relevant profiles.

Sales Home Opportunities ▾ Leads ▾ Tasks ▾ Files ▾ Accounts ▾ Contacts ▾ Campaigns ▾ Dashboards ▾ Reports

REPORT ▾

Doctor-wise Appointment Overview ✎ appointments with Doctor

✔ Previewing a limited number of records. Run the report to see everything.

Doctor User ↑ ▾	appointment: appointment object Name ▾	Doctor: Doctor Name ▾	Status ▾	Type ▾	patient ▾
Dr. Priya Yadav (3)	Test Emergency Appointment 001	priya	-	Emergency	-
	Test New Appointment 002	DR. SUMAN	-	NEW	-
	Test Emergency Appointment 5	DR. KAVEER	Pending	NEW	-
Subtotal					
Palak Yadav (2)	Test Emergency Appointment 003	DR. HARSH	Locked	Emergency	-
	Test Emergency Appointment 004	DR. NIDHI	Pending	NEW	-
Subtotal					
Total (5)					

Outline ▾ Filters 1

Groups

GROUP ROWS

Add group... Q

Doctor User X

GROUP COLUMNS

Add group... Q

Columns ▾

Add column... Q

appointment: appointment object ↑ X

Doctor: Doctor Name X

Status X

Type X

patient X

SETUP

Custom Report Types

Appointments with Patients

Preview LayoutEdit LayoutCloneDeleteClose

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

Details

Display Label

Appointments with Patients

API Name

Appointments_with_Patients

Description

"Custom report for appointment and patient mapping"

Created By

Palak Yadav, 10/1/25, 9:31 PM

Store in Category

other

Deployment Status

Deployed

Modified By

Palak Yadav, 10/1/25, 9:33 PM

Fields

Source Object	Included Fields
appointments	43

Object Relationships

appointments (A)

A

↓

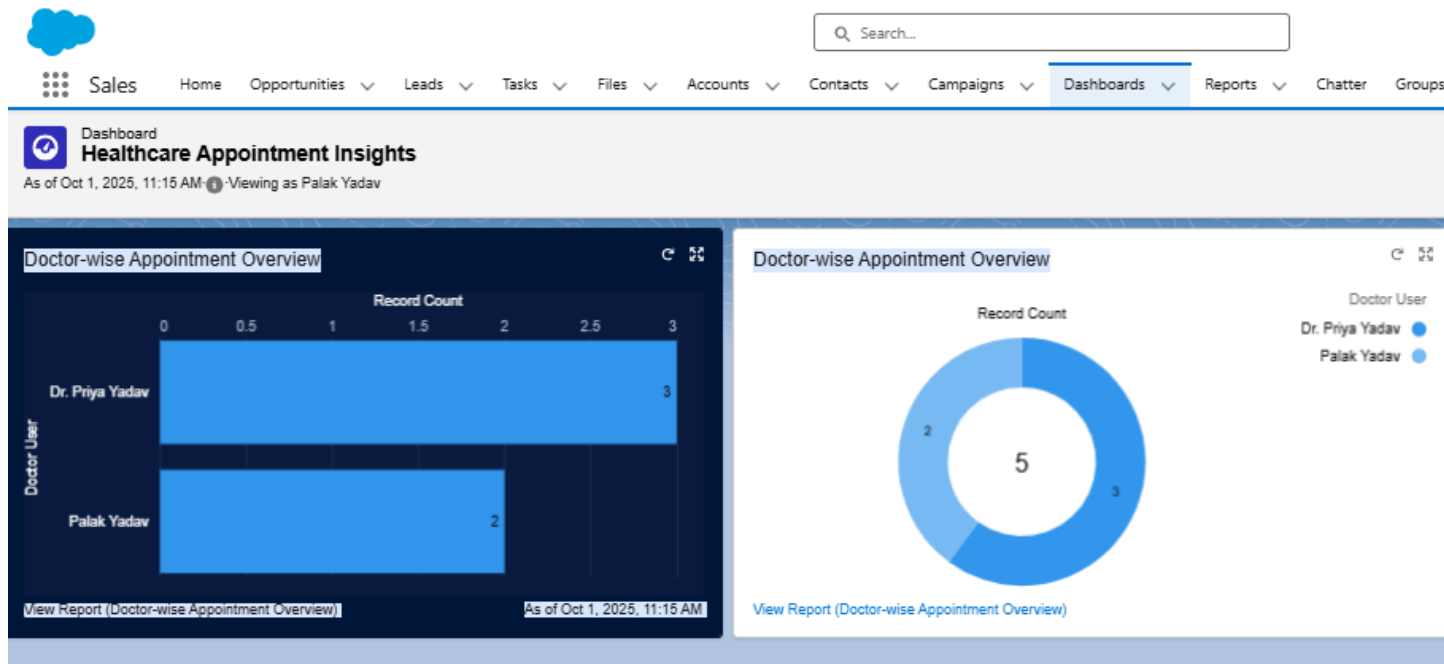
A

☐ Dashboards

Built dashboards to visualize appointment trends, doctor activity, and patient engagement:

- Used bar charts, donut charts, and record count widgets
- Dashboard: **“Healthcare Appointment Insights”** includes:
 - Doctor-wise appointment overview
 - Visit type distribution

- Tabular list of new patients



☐ Sharing Settings

Configured object-level and record-level sharing:

- Appointment__c, Patient__c set to **Private**
- Manual sharing enabled for sensitive records
- Profiles and permission sets used to control access

Ensures healthcare data is only visible to authorized users.

SETUP Sharing Settings			
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
appointment	Private	Private	✓
appointment object	Public Read Only	Private	✓
AppointmentSchedule	Public Read/Write	Private	✓
CustomNotifTypeId	Public Read/Write	Private	✓
Doctor	Public Read/Write	Private	✓
Insurance	Public Read/Write	Private	✓
Medical Note	Controlled by Parent	Controlled by Parent	
Medical Note date	Public Read/Write	Private	✓
medical records object	Private	Private	✓
NotificationType	Public Read/Write	Private	✓
Nurse	Public Read/Write	Private	✓
patient	Private	Private	✓

☐ Field Level Security

Restricted sensitive fields such as `Diagnosis__c`,
`Insurance_ID__c`, and `Appointment_Status__c`:

- Only doctors and admins can view/edit
- Support staff have read-only or no access
- Field-level security applied via profiles and permission sets

Supports HIPAA-style compliance and data protection.

□ Session Settings

Configured session controls for security:

- Timeout set to **15 minutes**
- IP Lock enabled
- Clickjack and XSS protection activated
- Secure caching applied to login and setup pages

Balances usability with healthcare-grade security.

The screenshot shows the 'Session Settings' configuration page. At the top, there is a 'SETUP' button and the title 'Session Settings'. Below the title, a subtitle reads: 'Set the session security and session expiration timeout for your organization.' The page is divided into several sections:

- Session Timeout:** Contains a 'Timeout Value' dropdown set to '15 minutes'. Below it are two checkboxes: 'Disable session timeout warning popup' (unchecked) and 'Force logout on session timeout' (checked).
- Session Settings:** Contains several checkboxes: 'Lock sessions to the IP address from which they originated' (checked), 'Lock sessions to the domain in which they were first used' (checked), 'Terminate all of a user's sessions when an admin resets that user's password' (unchecked), 'Force relogin after Login-As-User' (checked), 'Require HttpOnly attribute' (unchecked), 'Use POST requests for cross-domain sessions' (unchecked), 'Enforce login IP ranges on every request' (unchecked), and 'When embedding a Lightning application in a third-party site, use a session token instead of a session cookie' (unchecked).
- Extended use of IE11 with Lightning Experience:** Contains a message: '**EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED**' and a paragraph: 'AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES PLEASE SWITCH TO A SUPPORTED BROWSER.'
- Caching:** Contains checkboxes: 'Enable caching and autocomplete on login page' (checked), 'Enable secure and persistent browser caching to improve performance' (checked), 'Enable user switching' (checked), and 'Remember me until logout' (unchecked).

□ **Login IP Ranges**

Defined IP ranges for clinic and hospital networks:

- Applied to doctor and admin profiles
- Optional enforcement for future rollout
- Helps restrict access to trusted locations

□ **Audit Trail**

Used **Setup Audit Trail** to track configuration changes:

- Captures changes to Flows, Reports, Dashboards, and Permissions
- Validated recent updates for Phase 9 features
- Supports accountability and audit-readiness



SETUP

View Setup Audit Trail

View Setup Audit Trail

The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file).

View Setup Audit Trail

Date	User	Source Namespace Prefix	Action	Section
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: Read and View All has been enabled for all objects	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: general user permission View Login Forensics Events was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: general user permission View Real-Time Event Monitoring Data was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: general user permission View Event Log Files was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: administrative permission Edit My Dashboards was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: administrative permission View Reports in Public Folders was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: administrative permission Manage Dashboards in Public Folders was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: administrative permission View Dashboards in Public Folders was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: administrative permission Create Dashboard Folders was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: administrative permission Create and Customize Dashboards was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: administrative permission Manage Dynamic Dashboards was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: administrative permission Manage Custom Report Types was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:23 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: administrative permission View All Data was changed from disabled to enabled	Manage Users
10/1/2025, 11:08:22 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed profile Doctor profile: AppointmentBookedEvent object permissions were changed from No Access to Read	Manage Users
10/1/2025, 7:30:33 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed appointment page layout appointment Layout	Custom Objects
10/1/2025, 7:30:33 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed appointment page layout Telehealth	Custom Objects
10/1/2025, 7:30:33 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed appointment page layout In-Person	Custom Objects
10/1/2025, 7:30:33 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed appointment page layout Emergency	Custom Objects
10/1/2025, 7:30:33 AM PDT	ppalakyvadav2004101@qgentforce.com		Changed appointment page layout Appointment date	Custom Objects
10/1/2025, 7:30:33 AM PDT	ppalakyvadav2004101@qgentforce.com		Created custom lookup relationship patient (patient) on appointments	Custom Objects

[Download setup audit trail for last six months \(Excel .csv file\)](#)