Phase 3: Project HealthConnect 360

A Unified Patient Relationship & Clinic Management System

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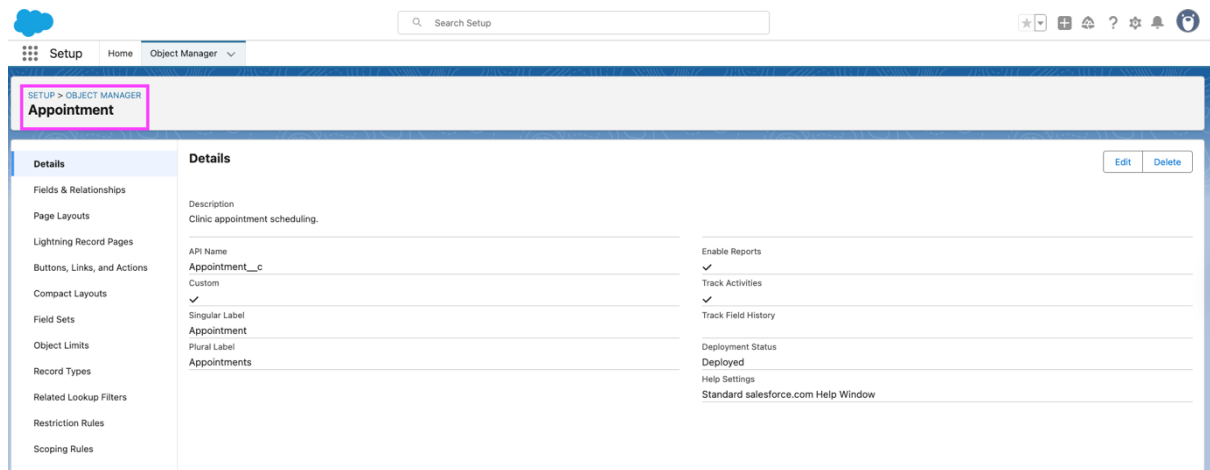## Phase 3: Data Modeling & Relationships

Salesforce Editions

We continued using Salesforce Developer Edition for HealthConnect 360. This free edition provides unlimited access to build and test custom objects, relationships, and layouts, ideal for our mid-level prototype. It supports all features needed for data modeling without restrictions.

Data Model Setup

The data model was designed to manage patient records and appointments. Key objects include:

- **Accounts**: Standard object for Patients, storing demographics and medical history.
- **Appointment**: Custom object for scheduling, linked to Accounts via a Lookup relationship. This setup aligns with Phase 1's goal of a 360-view and smart scheduling.

Standard & Custom Objects

- **Accounts**: Configured with sample patients (Amit Sharma, Priya Gupta) using Indian names and Jabalpur addresses.
- **Appointment**: Created with Auto Number (APP-{0000}, starting at 1) for unique IDs, supporting clinic operations.

Fields

Added essential fields:

- **Accounts**:
  - Medical History (Text Area, 32000 characters) for patient health details.
- **Appointment**:
  - Patient (Lookup to Account) for linking.
  - Appointment Time (Date/Time) for scheduling.
  - Status (Picklist: Scheduled, Confirmed, Checked In, Completed, No Show, default Scheduled) for workflow tracking.

Record Types

Implemented on Appointment to differentiate workflows:

- **Initial Consultation**: Default for new patient visits.
- **Follow-up**: For return visits. Assigned to Standard User profile, enhancing Phase 4 automation flexibility.

Page Layouts

Customized layouts for usability:

- **Account Layout**: Moved Medical History to "Additional Information" or "Patient Health" section.
- **Appointment Layout**: Included Patient, Appointment Time, Status, and added Record Type (if visible). This ensures fields are accessible for clinic staff.

Relationships

Used **Lookup** relationship from Appointment to Account, allowing flexible linking without cascade delete. Verified by creating and deleting test appointments (e.g., APP-0002 linked to Priya Gupta), confirming Account integrity.

Business Alignment

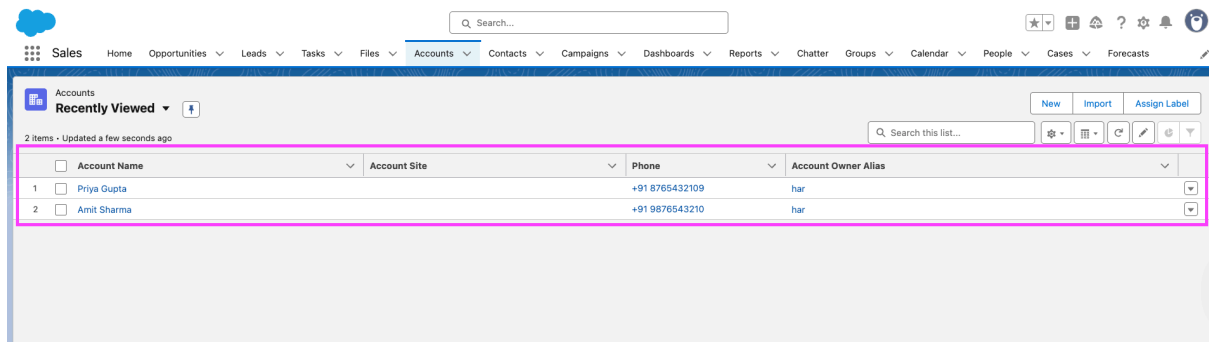This phase supports Phase 1 goals:

- Receptionists can schedule appointments with patient links.
- Doctors can view medical history via Accounts.
- Management can oversee appointment statuses. The Lookup ensures data safety, aligning with clinic needs.

Deployment Basics

All changes made via point-and-click in Developer Edition. No sandbox used; configurations are ready for future Change Sets in production.

Verification

- Patients (Amit Sharma, Priya Gupta) saved with Medical History editable.
- Appointments (e.g., APP-0002, APP-0003) created with correct fields and relationships.
- Screenshots taken for each step.