

Project HealthConnect 360

Phase 9: Reporting, Dashboards & Security Review

A Unified Patient Relationship & Clinic Management System

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SALESFORCE EDITIONS

Utilized Salesforce Developer Edition for HealthConnect 360 development.

Offers free, unlimited access for building and testing features.

Includes robust reporting, dashboard, and security tools.

Perfect for prototyping and educational purposes.

REPORT TYPES

Created a custom Patient Records Report Report Type for patient data analysis.

Based on the Accounts object with fields like Account Name, Phone, and Billing State/Province.

Deployed for all users to enhance reporting flexibility.

Serves as a foundation for tailored patient data reports.

The screenshot displays the 'Custom Report Types' setup page in Salesforce. The page title is 'Patient Records Report'. Below the title, there are buttons for 'Preview Layout', 'Edit Layout', 'Clone', 'Delete', and 'Close'. A note states: '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'.

The main content area is divided into three sections:

- Details:** Contains metadata for the report type.

Display Label	Patient Records Report
API Name	Patient_Records_Report
Description	Custom report type for viewing and analyzing patient (Account) data in HealthConnect 360.
Created By	Harsh Raj Mishra, 26/09/2025, 03:38 pm
Store in Category	other
Deployment Status	Deployed
Modified By	Harsh Raj Mishra, 26/09/2025, 03:38 pm
- Object Relationships:** Shows a diagram of the relationship between the report type and the source object. It features a circle labeled 'A' (Accounts) with a downward arrow pointing to a table icon labeled 'A'.
- Fields:** A table showing the source object and the included fields.

Source Object	Included Fields
Accounts	64

TABULAR REPORT CREATION

Developed Patient_List_Report using the Patient Records Report custom type.

Displays all 18 patient records (e.g., Amit Sharma) with key fields.

Verified accuracy against the "All Accounts" view.

Provides a critical tool for patient data management.

HealthConnect 360

Home

Appointments

Accounts

Reports

Report: Patient Records Report

Patient_List_Report

Enable Field Editing

Q

Add Chart

▼

↺

Edit

Total Records

21

Account Name	Phone	Billing Address	Billing City	Billing State/Province (text only)	Medical History
1 Anil Sharma	+91 9876543210	123 Clinic Road, Jabalpur, Madhya Pradesh 482001 India	Jabalpur	Madhya Pradesh	on antidepressants
2 Priya Gupta	+91 8765432109	456 Hospital Lane, Jabalpur, Madhya Pradesh 482002 India	Jabalpur	Madhya Pradesh	-
3 Aashra Sharma	+91 9876543210	city, Jabalpur, Madhya Pradesh 482002 India	Jabalpur	Madhya Pradesh	to many
4 Ravi Kumar	+91 7654321098	789 Medical Street, Jabalpur, Madhya Pradesh 482003 India	Jabalpur	Madhya Pradesh	Allergies: Dust; Blood Type: B+
5 Neha Patel	+91 6543210987	101 Health Avenue, Jabalpur, Madhya Pradesh 482004 India	Jabalpur	Madhya Pradesh	Allergies: Pollen; Blood Type: AB+
6 Suresh Yadav	+91 5432109876	202 Care Lane, Jabalpur, Madhya Pradesh 482005 India	Jabalpur	Madhya Pradesh	Allergies: None; Blood Type: O-
7 Shalini Mishra	+91 7596976670	99 Hospital Road, Jabalpur, Madhya Pradesh 482040 India	Jabalpur	Madhya Pradesh	Allergies: Lactose; Blood Type: B-
8 Hemant Jain	+91 6078500524	973 Hospital Road, Jabalpur, Madhya Pradesh 482011 India	Jabalpur	Madhya Pradesh	Allergies: Lactose; Blood Type: O+
9 Manish Rawat	+91 7624764191	906 Health Nagar, Jabalpur, Madhya Pradesh 482049 India	Jabalpur	Madhya Pradesh	Allergies: Dust; Blood Type: A-
10 Deepak Agarwal	+91 9912096405	456 Wellness Path, Jabalpur, Madhya Pradesh 482042 India	Jabalpur	Madhya Pradesh	Allergies: Penicillin; Blood Type: O-
11 Geeta Mehta	+91 815567160	166 Health Nagar, Jabalpur, Madhya Pradesh 482010 India	Jabalpur	Madhya Pradesh	Allergies: Gluten; Blood Type: AB-
12 Ramesh Agarwal	+91 9863559338	423 Hospital Road, Jabalpur, Madhya Pradesh 482045 India	Jabalpur	Madhya Pradesh	Allergies: Lactose; Blood Type: O+
13 Vikram Bhatt	+91 9344010590	483 Clinic Street, Jabalpur, Madhya Pradesh 482045 India	Jabalpur	Madhya Pradesh	Allergies: Pollen; Blood Type: B+
14 Anu Mishra	+91 7019476548	576 Care Road, Jabalpur, Madhya Pradesh 482042 India	Jabalpur	Madhya Pradesh	Allergies: Gluten; Blood Type: O+
15 Anu Shukla	+91 7516575993	77 Care Road, Jabalpur, Madhya Pradesh 482038 India	Jabalpur	Madhya Pradesh	Allergies: Dust; Blood Type: AB-
16 Geeta Bhatt	+91 6495727528	245 Wellness Path, Jabalpur, Madhya Pradesh 482038 India	Jabalpur	Madhya Pradesh	Allergies: Dust; Blood Type: A+
17 Meena Verma	+91 7842406894	910 Clinic Street, Jabalpur, Madhya Pradesh 482002 India	Jabalpur	Madhya Pradesh	Allergies: Penicillin; Blood Type: AB+
18 Nitin Chauhan	+91 8728116129	811 Wellness Path, Jabalpur, Madhya Pradesh 482048 India	Jabalpur	Madhya Pradesh	Allergies: Pollen; Blood Type: B-
19 Vikram Rawat	+91 8032034440	766 Care Road, Jabalpur, Madhya Pradesh 482048 India	Jabalpur	Madhya Pradesh	Allergies: None; Blood Type: A-
20 Alok Agarwal	+91 6958438730	897 Wellness Path, Jabalpur, Madhya Pradesh 482019 India	Jabalpur	Madhya Pradesh	Allergies: Lactose; Blood Type: A+
21 Hemant Jain	+91 6225417704	757 Wellness Path, Jabalpur, Madhya Pradesh 482047 India	Jabalpur	Madhya Pradesh	Allergies: Lactose; Blood Type: A-

To Do List

List View

My Appointments

Invoice Preview

History

DASHBOARD CREATION

Constructed Patient Overview Dashboard to visualize patient distribution.

Aimed to include a chart but faced compatibility issues with the Tabular Report.

Adjusted to focus on report integration; chart setup deferred.

Supports enhanced clinic reporting and oversight.

[illegible]

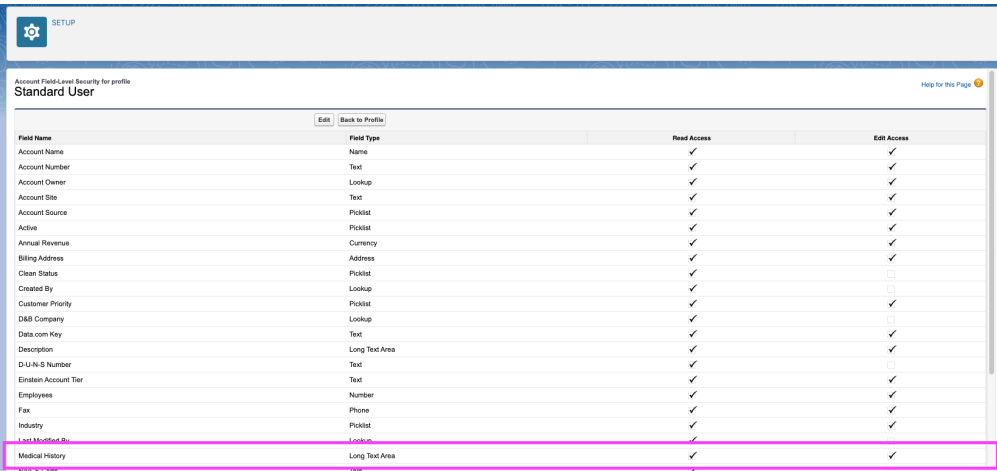
FIELD LEVEL SECURITY

Configured Standard User profile for doctors and receptionists.

Granted Read and Edit access to the Medical History field for updates.

Ensured settings apply to all relevant user roles.

Protects sensitive patient data with controlled access.



Q Profiles

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

SETUP

Account Field-Level Security for profile
Standard User

Edit Back to Profile

Field Name	Field Type	Read Access	Edit Access
Account Name	Name	✓	✓
Account Number	Text	✓	✓
Account Owner	Lookup	✓	✓
Account Site	Text	✓	✓
Account Source	Picklist	✓	✓
Active	Picklist	✓	✓
Annual Revenue	Currency	✓	✓
Billing Address	Address	✓	✓
Clean Status	Picklist	✓	✓
Created By	Lookup	✓	✓
Customer Priority	Picklist	✓	✓
D&B Company	Lookup	✓	✓
Data.com Key	Text	✓	✓
Description	Long Text Area	✓	✓
D-U-N-S Number	Text	✓	✓
Einstein Account Tier	Text	✓	✓
Employees	Number	✓	✓
Fax	Phone	✓	✓
Industry	Picklist	✓	✓
Last Modified By	Lookup	✓	✓
Medical History	Long Text Area	✓	✓
NAICS Code	Text	✓	✓

BUSINESS ALIGNMENT

Enables receptionists and doctors to manage patient records effectively.

Allows management to utilize reports and dashboards for oversight.

Aligns with Phases 1-8 goals for secure, data-driven care.

Boosts operational efficiency across the clinic.

DEPLOYMENT BASICS

Employed point-and-click methods for report and dashboard setup.

Applied security changes directly in the Developer Edition.

Ensures rapid and straightforward implementation.

SUMMARY

Successfully created a custom Report Type and Tabular Report.

Built a foundational dashboard structure.

Implemented Field Level Security for Medical History.

Achieved core Phase 9 objectives for reporting and security.

NEXT STEPS

Plan to revisit dashboard chart creation in a future phase.

Prepare for Phase 10 or project demonstration.

Consider finalizing additional security measures if required.