

Phase 3: Project HealthConnect 360

A Unified Patient Relationship & Clinic Management System

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Phase 3: Data Modeling & Relationships

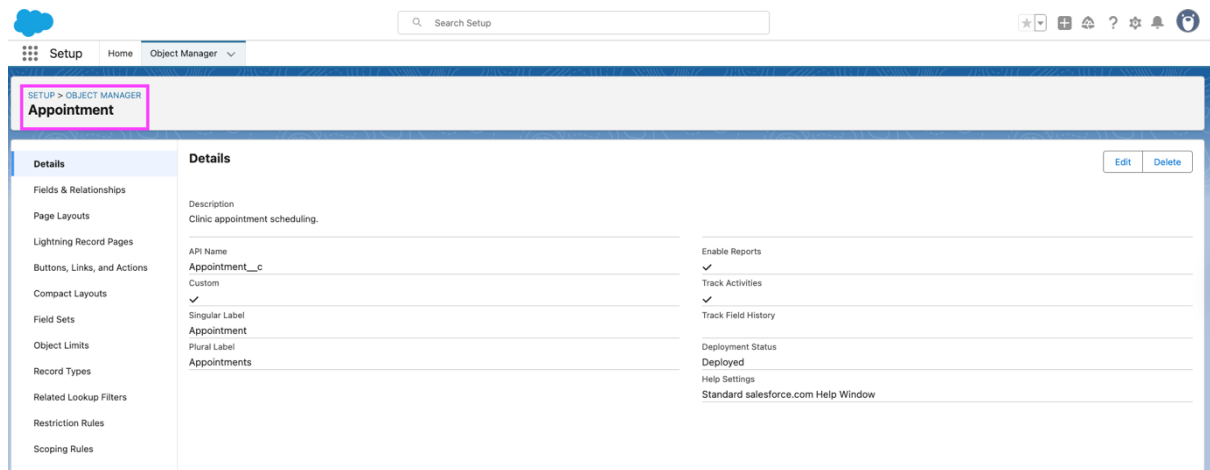
Salesforce Editions

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.

SETUP > OBJECT MANAGER

Appointment

Details Fields & Relationships 7 items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment ID	Name	Auto Number		✓
Appointment Time	Appointment_Time__c	Date/Time		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Patient	Patient__c	Lookup(Account)		✓
Status	Status__c	Picklist		

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.

Edit APP-0003

* = Required Information

Appointment ID
APP-0003

Owner
Harsh Raj Mishra

Patient
Amit Sharma

Record Type
Follow-up

Appointment Time
Date: 9/25/2025 Time: 3:00 PM

Status
Scheduled

Created By
Harsh Raj Mishra, 9/23/2025, 5:02 AM

Last Modified By
Harsh Raj Mishra, 9/23/2025, 5:02 AM

Cancel Save & New Save

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.

The screenshot shows the 'Appointment APP-0001' page. It features a 'Details' tab on the left, a 'Related' tab, and an 'Activity' section on the right. The 'Details' tab is highlighted with a pink box. The 'Details' section contains fields for Appointment ID (APP-0001), Patient (Amit Sharma), Appointment Time (9/24/2025, 10:00 AM), Status (Scheduled), and Created By (Harsh Raj Mishra, 9/23/2025, 4:19 AM). The 'Related' section shows the Owner (Harsh Raj Mishra) and Last Modified By (Harsh Raj Mishra, 9/23/2025, 4:19 AM). The 'Activity' section on the right shows filters for All time, All activities, and All types, with a 'Refresh' button and a 'View All' link. Below the filters, it states 'Upcoming & Overdue' and 'No activities to show. Get started by sending an email, scheduling a task, and more. No past activity. Past meetings and tasks marked as done show up here.'

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.

The screenshot shows the 'Appointments' list view in a CRM system. A green confirmation message is displayed at the top: 'Appointment "APP-0002" was deleted. Undo'. The message is highlighted with a pink box. Below the message, the 'Appointments' table is visible, showing columns for Appointment ID and a list of appointments. The first two appointments are APP-0001 and APP-0003. The table is titled 'Recently Viewed' and shows 2 items. The 'Appointments' tab is selected in the top navigation bar.

Business Alignment

This phase supports Phase 1 goals:

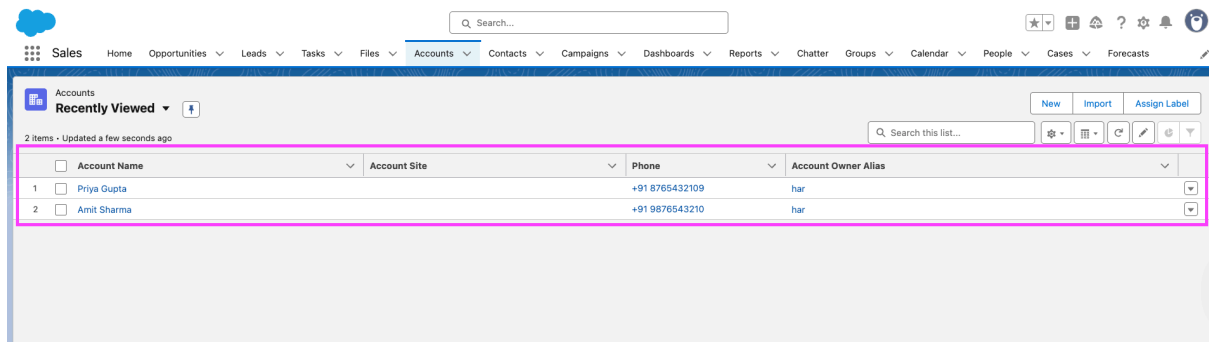
- Receptionists can schedule appointments with patient links.
- Doctors can view medical history via Accounts.
- Management can oversee appointment statuses. The Lookup ensures data safety, aligning with clinic needs.

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.



The screenshot shows the Salesforce interface with the 'Accounts' tab selected. The 'Recently Viewed' list displays two accounts. The table below represents the data shown in the screenshot.

	Account Name	Account Site	Phone	Account Owner Alias
1	Priya Gupta		+91 8765432109	har
2	Amit Sharma		+91 9876543210	har