

MediConnect — Phase 3: Data Modeling & Relationships

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Table of Contents

1. **Standard & Custom Objects**
2. **Fields**
3. **Record Types**
4. **Page Layouts**
5. **Compact Layouts**
6. **Schema Builder**
7. **Relationships**
 - Lookup Relationships
 - Master-Detail Relationships
 - Hierarchical Relationship
 - Junction Objects
8. **Testing**
9. **External Objects (Optional)**

1. Standard & Custom Objects

Content:

In this phase, we extended the MediConnect data model using both **Standard** and **Custom Objects**.

- **Standard Objects:** User, Patient (customized), etc.
- **Custom Objects:** Appointment, Billing, Medical Case, Doctor-Patient Assignment (junction object).

This provides flexibility to model hospital workflows.

2. Fields

Content:

Each object was enriched with **custom fields** to support MediConnect requirements.

- Appointment: Status, Type (In-person/Video).
- Billing: Amount, Insurance Provider, Policy Number, Coordinator, Notes.

- Doctor-Patient Assignment: links to Patient & Doctor.

SETUP > OBJECT MANAGER

Appointment

Appointment Custom Field
Patient
[Back to Appointment](#)

[Validation Rules](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Patient	Object Name	Appointment
Field Name	Patient	Data Type	Lookup
API Name	Patient__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Neha Doddi , 9/15/2025, 9:01 AM	Modified By	Neha Doddi , 9/24/2025, 2:07 AM

Lookup Options

Related To	Patient	Child Relationship Name	Appointments
Related List Label	Appointments		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

SETUP > OBJECT MANAGER

Billing

Fields & Relationships
15 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
Amount	Amount__c	Currency(6, 2)		<input type="checkbox"/>
Billing Name	Name	Text(80)		<input checked="" type="checkbox"/>
Billing Type	Billing_Type__c	Picklist		<input type="checkbox"/>
Coordinator	Coordinator__c	Lookup(User)		<input checked="" type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
Doctor	Doctor__c	Lookup(User)		<input checked="" type="checkbox"/>
Insurance Provider	Insurance_Provider__c	Text(100)		<input type="checkbox"/>
Invoice ID	Invoice_ID__c	Auto Number		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Notes	Notes__c	Long Text Area(2000)		<input type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Patient	Patient__c	Lookup(Patient)		<input checked="" type="checkbox"/>
Policy Number	Policy_Number__c	Text(50)		<input type="checkbox"/>
Record Type	RecordTypeId	Record Type		<input checked="" type="checkbox"/>
Status	Status__c	Picklist		<input type="checkbox"/>

3. Record Types

Content:

Record Types were introduced to support multiple business processes:

- **Appointments:** In-Person Appointment, Video Consultation Appointment.
- **Billing:** Insurance Billing, Self-Pay Billing.

Record Types allow different picklist values, page layouts, and processes per type.

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Record Types

2 Items, Sorted by Record Type Label

Q, Quick Find

New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
In-Person Appointment		✓	Neha Doddi, 9/24/2025, 10:38 AM
Video Consultation Appointment		✓	Neha Doddi, 9/24/2025, 11:16 AM

SETUP > OBJECT MANAGER

Billing

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Record Types

2 Items, Sorted by Record Type Label

Q, Quick Find

New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Insurance Billing		✓	Neha Doddi, 9/24/2025, 9:10 PM
Self-Pay Billing		✓	Neha Doddi, 9/24/2025, 9:13 PM

4. Page Layouts

Content:

Separate Page Layouts were designed for each Record Type to customize the UI.

- Appointment: Video vs In-person.
- Billing: Insurance vs Self-Pay.
- Coordinator-specific fields like *Notes* and *Coordinator* added.

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Page Layouts

3 Items, Sorted by Page Layout Name

Q, Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Appointment Layout	Neha Doddi, 9/15/2025, 8:34 AM	Neha Doddi, 9/24/2025, 2:03 AM
In-Person Appointment Layout	Neha Doddi, 9/24/2025, 10:58 AM	Neha Doddi, 9/24/2025, 10:58 AM
Video Consultation Layout	Neha Doddi, 9/24/2025, 10:22 AM	Neha Doddi, 9/24/2025, 11:33 AM

SETUP > OBJECT MANAGER

Billing

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Page Layouts

3 Items, Sorted by Page Layout Name

Q, Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Billing - Insurance Layout	Neha Doddi, 9/24/2025, 9:14 PM	Neha Doddi, 9/24/2025, 9:19 PM
Billing - SelfPay Layout	Neha Doddi, 9/24/2025, 9:19 PM	Neha Doddi, 9/24/2025, 9:23 PM
Billing Layout	Neha Doddi, 9/19/2025, 2:51 AM	Neha Doddi, 9/24/2025, 8:59 PM

5. Compact Layouts

Content:

Compact Layouts were configured to highlight key fields in mobile and Lightning record highlights.

- Appointment Compact Layout: Patient, Doctor, Status, Type.
- Billing Compact Layout: Billing Name, Amount, Status, Patient.

Billing Compact Layout

Billing Compact Layout

[« Back to Billing](#)

Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

Label	Billing Compact Layout	Object Name	Billing
API Name	Billing_Compact_Layout		
Included Fields	Invoice ID Patient Amount Billing Type Status		
Created By	Neha Doddi, 9/24/2025, 10:02 PM	Modified By	Neha Doddi, 9/24/2025, 10:02 PM

EditCloneDeleteCompact Layout Assignment

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Appointment Compact Layout

Appointment Compact Layout

[« Back to Appointment](#)

Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

Label	Appointment Compact Layout	Object Name	Appointment
API Name	Appointment_Compact_Layout		
Included Fields	Appointment Name Patient Appointment Date Appointment Time Doctor Record Type		
Created By	Neha Doddi, 9/24/2025, 9:59 PM	Modified By	Neha Doddi, 9/25/2025, 6:59 AM

EditCloneDeleteCompact Layout Assignment

6. Schema Builder

Content:

Schema Builder was used to visualize objects and their relationships. This provides a graphical overview of how Patient, Appointment, Billing, and Medical Case are connected.



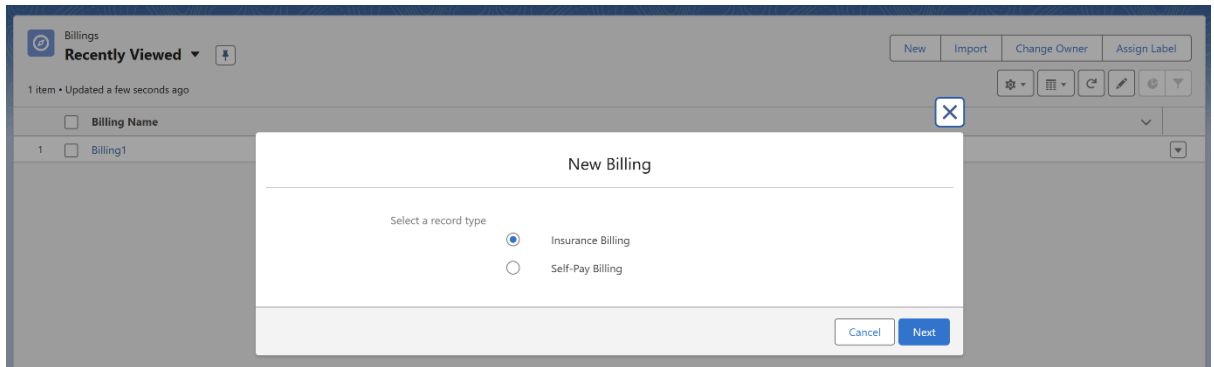
7. Relationships

Content:

- **Lookup Relationships:** Appointment → Patient, Billing → Patient.
- **Master-Detail Relationships:** Billing → Appointment (if enforced), Doctor-Patient Assignment links.
- **Hierarchical Relationship:** (Optional, for User object if implemented).
- **Junction Object:** Doctor-Patient Assignment enables many-to-many between Doctor and Patient.

SETUP > OBJECT MANAGER					
Doctor-Patient Assignment					
Details	Fields & Relationships 5 Items, Sorted by Field Label				
Fields & Relationships	<div>Quick Find</div> <div>NewDeleted FieldsField DependenciesSet History Tracking</div>				
Page Layouts	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Doctor	Doctor__c	Lookup(User)		✓
Compact Layouts	Doctor-Patient Assignment Name	Name	Text(80)		✓
Field Sets	Last Modified By	LastModifiedById	Lookup(User)		
Object Limits	Patient	Patient__c	Master-Detail(Patient)		✓

- **Purpose:** verify Status picklist shows only allowed values for each RT.



Expected: Insurance shows only Insurance-related statuses; Self-Pay shows its own set.

- **Purpose:** test validation requiring Policy Number for Insurance Billing.

New Billing: Insurance Billing

* = Required Information

Information

* Billing Name ↶
billing4

Amount

* Patient ↶
★ Ravi ✕

Doctor
 🔍

Coordinator
 🔍

Status

Insurance Provider

Invoice ID 🚫

🚫 We hit a snag.

Review the following fields

- [Policy Number](#)

Expected: Validation error message appears (your validation rule blocks save).