Patient Management

Project document

**Cloud based Patient Medical Records and Appointments Management**

**Use Case**

A newly built hospital is planning to maintain an easy patient management system and have decided to use salesforce, as a salesforce developer they have approached you to help them build the management system.

**Schema**

**A picture containing diagram

Description automatically generated**

**Solution**

Please follow the below tasks to complete the solution for Patient management.

Install the following app for ALTOKK Patient Management

[https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5g000000cFWX](javascript:srcUp('https%3A%2F%2Flogin.salesforce.com%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04t5g000000cFWX%26isdtp%3Dp1');)

1. Create users for CEO, Supervisor (System admin), Doctors and Non-medical Staff.

Note: You can create only 2 users in the developer edition. You can create multiple users by deactivating existing users.

1. Doctors should be able to Create and Modify Contact, Appointment, Tests and Medical History. They should not have access to Payments.
2. Doctors should not be able to see the appointments(records) made by other doctors in the application.
3. Supervisors should be able to only view Contact, Appointment, Tests, Payments and Medical History.
4. Non-Medical Staff should be able to create and modify Contacts, Appointments, Payments. And only view permissions on Tests and Medical history.
5. The CEO should have complete access to create, modify and delete all objects. (Contact, Appointment, Tests, Payments, Medical History).
6. Supervisor needs read access on every Contact, Appointment, Tests, Payments and Medical History record that exists in the app.
7. Non-Medical Staff should be able to read and modify the records on Contacts, Appointments, Payments created by other users in the app.
8. Doctors of a specific specialization (Gynaecologist, cardiologist, Paediatrician, etc) should be able to view the appointment records belongs to other doctors of the same group. They should not be able to see the appointments records of the doctors from the other groups.
9. Calculate the total fees including tax on Payment's object. (Use the “Tests fee” and “tax” fields from the Payments object)
10. Create or Update Medical history record when an appointment record is created or updated and also update the fee details from payments object in the same. (Use flows along with other appropriate options)
11. Populate the Account owner depending upon Opportunity “Amount”. This should happen only when the most recently created Opportunity of a given Account is marked as “Closed Won”  
    ·       Amount > 50000, then update Account owner = Supervisor(user)  
    ·       Amount >25000 and < 50000, then update Account owner = with Non-Medical Staff(user)
12. Non-medical staff should be able to view list of upcoming appointments for the selected doctor(drop-down) on the home page.
13. Non-medical staff should be able to create a new appointment with all the required fields from the home page.
14. Make sure to write test Classes for all the appropriate class with minimum of 85% code coverage.
15. Send reminder emails to patients one day before the date of appointment with relevant details
16. Every 6 months patients who were inactive for the last 2years should be deleted.

Note: All best practices should be followed and will be evaluated.