Healthcare Appointment & Case Management System

Phase 2: Org Setup & Configuration

In Phase 2 of the Healthcare Appointment & Case Management System, we focus on Salesforce Org Setup and Configuration. This phase ensures that the system is ready for user onboarding, secure access, and scalable configurations. The healthcare context requires accurate profiles, roles, and sharing settings to maintain patient confidentiality and streamline doctor-patient interactions.

Salesforce Edition Selection

For this healthcare project, Salesforce Enterprise Edition is ideal as it supports advanced automation, Service Cloud features, and role-based access control, which are crucial for hospital-level operations.

Company Profile Setup

We configure the company profile to reflect the healthcare provider's details, time zone, locale, and default currency (e.g., INR). This ensures consistency across patient appointments and billing records.

Business Hours & Holidays

Business hours are set to hospital working times (e.g., 9 AM – 8 PM). Emergency departments may run 24/7. Holidays are defined to avoid scheduling conflicts for outpatient visits.

Fiscal Year Settings

Configured to align with the hospital's financial year (April–March). This supports accurate revenue and patient billing cycle tracking.

User Setup & Licenses

Users include doctors, nurses, receptionists, and administrators. Licenses are allocated based on roles. For example, doctors get Service Cloud licenses, while receptionists may use Salesforce Platform licenses.

Profiles

Profiles define baseline permissions. For instance, - Doctor Profile: Access to patient records, appointments, and case updates. - Receptionist Profile: Limited to scheduling and updating appointments. - Admin Profile: Full access for configuration and monitoring.

Roles

Roles follow a hospital hierarchy. Example: Hospital Admin $\rightarrow$ Department Head $\rightarrow$ Doctor $\rightarrow$ Receptionist. This ensures data visibility follows a top-down approach.

Permission Sets

Used for special access needs. For instance, a doctor may receive an additional permission set to access reports beyond their department.

Organization-Wide Defaults (OWD)

OWD for patient records is set to **Private** to ensure confidentiality. Appointment objects may be set to **Controlled by Parent** to align with patient access.

Sharing Rules

Sharing rules allow specific departments (e.g., cardiology) to share appointment records among assigned doctors while maintaining patient privacy.

Login Access Policies

Policies are configured to allow secure troubleshooting. For example, IT support staff may request temporary login access to resolve issues.

Dev Org Setup

A Salesforce Developer Org is created for development and testing of healthcare workflows before deployment to production.

Sandbox Usage

Sandboxes (Developer, Partial Copy) are used for testing patient data flows, appointment booking, and automation without impacting live hospital operations.

Deployment Basics

Change Sets and Salesforce CLI (SFDX) are used to deploy configurations from sandbox to production. This ensures that tested healthcare features move seamlessly to the live environment.