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ADMINISTER HEALTH CLOUD

Administering Health Cloud means configuring the data flows and user interfaces that make the Health Cloud features available to your users. Care coordinators, caregivers, and patients depend on you to deliver the data and tools to help them take charge of their health activities.

How Health Cloud Uses Data
Most of the Health Cloud objects, APIs, and features are part of the Salesforce platform. In addition, we deliver Health Cloud features in managed packages and unmanaged add-on packages to help you accelerate implementation of features like Utilization Management. You can map clinical data from a source electronic health records (EHR) system to Health Cloud objects and fields that hold patient and engagement data.

Set Up Health Cloud
Complete these steps to have a basic working Health Cloud console that care coordinators and managers can use to manage their patients or members and provide excellent care. When you’re done, consider customizing your Health Cloud app to make your users even more efficient.

Use the Health Cloud - Admin App
The Health Cloud - Admin app includes a set of tabs where you can customize Health Cloud features to support the ways your organization works with patients or members.

Give Your Users the Health Cloud Lightning Experience Console
If you’ve been supporting Health Cloud use via the Salesforce Classic interface, you delight your users by switching to the Lightning Experience. Use the Lightning Experience Migration Assistant as your control center for tackling the transition. From Setup in Salesforce Classic, click Get Started in the Migration Assistant tile at the top of the menu.

Customize the Health Cloud Console
Health Cloud is a managed package, installed on top of Salesforce Enterprise Edition, Performance, or Unlimited editions. While not every component or attribute in a managed package is customizable, you can edit the key components and attributes that you’ll need to make your instance of Health Cloud fit your users’ needs.

Customize the Health Cloud Apps
You can change some of the properties of the Health Cloud Apps in your organization. For example, you can add the Knowledge widget so that care coordinators can see articles and protocols from the console footer. You can also do things like add your company’s logo, change the color of page elements, and enable keyboard shortcuts in the Health Cloud console.

Support Health Cloud Reporting
Set up your reporting environment, use the report builder to create a basic report, and organize your reports to make it easy to find information. You can also find great dashboard apps on the Salesforce AppExchange and add them to the console.

Enable Users to Import Leads as Patients
Your company can use existing Salesforce Lead records to create the Patient records that are used in Health Cloud.

Build Patient or Member Experience Cloud Sites
The private Experience Cloud site is the heart of collaborative patient care. Experience sites give care coordinators, physicians, patients, and caregivers an easy way to interact with each other whenever and wherever they are. You can set up a private site for your patient or member using Experience Builder with the Customer Service template.
Let Care Coordinators Create Concurrent Care Plans
When multiple care plans are enabled in your org, care coordinators can create one or more care plans per person allowing more focused, manageable care components.

Manage Provider Relationships
You can never know too much about the health care providers who are delivering services to your patients or insurance plan members. When you track your relationship with each provider in your own verified provider directory, you can make it easy for users to find and engage with the right provider at the right time.

Set Up Intelligent Document Automation
Simplify the document management process, reduce manual data entry, and get patients the right care and services faster by managing patient and member forms all in one place, from intake through processing. You can route forms automatically to the right queue for faster review and processing in a digital, HIPAA-compliant workspace.

Intelligent Form Reader
Intelligent Form Reader provides optical character recognition for data extraction. The information extracted from a document can be used to create or update record fields, or to verify data that’s already in the org.

Provide Easy Access to Protocols and Articles
Salesforce Knowledge lets you easily create and manage content and make it available to other healthcare professionals, as well as patients, members, and the care team.

Enable Care Teams to Track Gaps
Health Cloud helps care providers prioritize efficiently by surfacing gaps in a person’s care where the care team can make a difference. To close a care gap, you tie it to a support process.

Manage Life Events
The Life Events component shows life events for a patient account record page. You can create life event types, activate or deactivate them, and make them unique. You also can hide sensitive life event types, change the default icons that represent the life event types, and choose the details your users see when they hover over a life event.

Provide Assessments for Gathering Information
Improve the quality of care by gathering information that helps to manage your patients or members more efficiently. Whether it’s a pre-surgery assessment or a member feedback survey, you have the information you need at your fingertips.

Support and Manage Care Requests
Give your users the tools to collaborate seamlessly on submitting, assigning, and processing care requests. Utilization management makes it easier for payer organizations to gather member and clinical data from providers, streamline care request reviews, and evaluate reviews for medical necessity. Health care providers can quickly submit care requests with fewer phone calls and faxes for preauthorizations.

Support Emergency Response Management and Contact Tracing
Help your health department serve its constituents and communities when faced with a health emergency. Quickly triage and evaluate patients, provide ongoing engagement and monitoring, and protect communities from widespread impacts with contact tracing.

Life Sciences Program Management
Maximize the impact of your life sciences programs with enrollment and management tools to help drive adherence and improve outcomes. Use the life sciences program management data model to define programs and manage relationships and activities within them. Then configure an Experience Cloud component that you can deploy to show which programs a person is enrolled in.
Remote Monitoring Patients
Remote Monitoring allows care coordinators to create a reliable and personalized connection with patients to motivate them on their healthcare journey. Care Coordinators can personalize care metric targets for each patient, making it easy to correlate care metrics and identify healthcare gaps. Charts that show biometric data and health metrics such as heart rate, blood glucose levels, or weight, help care coordinators track patient health with minimal effort. When a patient’s biometric data is out of range, care coordinators can proactively engage with patients.

Connect to External Claims Data
The claims data model makes externally sourced insurance claims data available in Health Cloud, so users can quickly and efficiently answer queries from providers and members without using multiple screens or applications.

Automate Key User Tasks with Flows
You can make it easier for call center workers to complete some common tasks by setting up flows they can launch from the Health Cloud console. You can clone the templates and then customize them according to your business processes to help your call center reps handle service requests from patients and members.

Enable Users to Add Members to Campaigns
Campaigns are a cost-effective way for care coordinators to increase rates of engagement and adherence to care plans. You can enable your users to set up Marketing Cloud campaigns and assign patients to them from inside Health Cloud.

Set Up Social Determinants to Assist High-Risk Patients and Members
Give your users a holistic understanding of your patients and members and help them provide more personalized care and support with social determinants of health. Social workers and case managers capture critical social and environmental factors like homelessness and low income as barriers and related social determinants. Then, they create intervention tasks to address barriers and help mitigate avoidable adverse health events for patients and members.

Support and Manage Referral Management
Health Cloud referral management lets your users monitor referrals from submission to closure. Give them the tools to prioritize the best referrals, ensure timely referral processing, and track the referral to the final confirmation back to the referring physician.

Deploy Analytics for Healthcare
Use actionable insights from Analytics for Healthcare apps to drive intelligent patient engagement, improve care effectiveness, and manage patient risk.

Manage Device Sales
Medical Device manufacturers can manage their volume and price agreements at the product level with their customers using sales agreements. They can also manage account and product specific forecasts.

Set Up Intelligent Sales
Maximize productivity for your sales teams by giving them the tools required to efficiently plan and execute their sales visits. You can also give your teams valuable insight into field inventory, with visits-based product availability projections. If someone has a product shortfall, they can request a product transfer from a nearby inventory.

Support Health Cloud for Mobile Users
Field Service enables care team members to carry Health Cloud with them. Users can complete tasks and interactively update records while they deliver services outside your facility, such as mobile nursing and home health care.

Display Detailed Error Messages to Users
Expedite debugging for you and your users with detailed error messages that provide insight into field-level security restrictions.

Administer Health Cloud
How Health Cloud Uses Data

Most of the Health Cloud objects, APIs, and features are part of the Salesforce platform. In addition, we deliver Health Cloud features in managed packages and unmanaged add-on packages to help you accelerate implementation of features like Utilization Management. You can map clinical data from a source electronic health records (EHR) system to Health Cloud objects and fields that hold patient and engagement data.

The Health Cloud Data Model
Health Cloud supports the standard Salesforce data model. Patients or members and other participants are represented as Person accounts.

Types of People in Health Cloud
A Health Cloud patient or member is associated with a patient or member record, an individual or person account record, or a candidate patient record.

Supporting Health Cloud for Care Providers
Clinical data that comes from EHR or other clinical systems is critical to the planning, execution, and management of coordinated care plans for patients. Clinical data can be integrated with Salesforce using several standard APIs, to map messages from EHR systems into Health Cloud objects and fields.

Supporting Health Cloud for Insurance
The health insurance data model provides objects for managing the ways care is paid for. It represents information about participants such as employment, insurance coverage, and dependents. You can manage details of the benefits provided by plans to members and treatment preauthorization requests made by members or providers.

Supporting Health Cloud for Utilization Management
Utilization Management (UM) is a health insurance plan’s process of interfacing with plan members and contracted medical providers to interpret, administer, and explain the medical policies of the health plan. Health Cloud provides objects you can use to review and evaluate medical care services, communicate about clinical policies, and help health plan members ensure they receive the right care in the right setting at the right time.

Types of People in Health Cloud
A Health Cloud patient or member is associated with a patient or member record, an individual or person account record, or a candidate patient record.

Patient or Member
A patient or member is a person account (account and contact) that has a care plan (case) ID in the account’s Care Plan lookup field. The person must be part of a care team (case team) in the role of patient or member. This relationship can be made to the contact record of the person or the site user record, if they’re enabled for sites. Usually, a patient also has an EHR Patient record that points to their account record.

Lead
You can turn existing Salesforce leads into patients using Health Cloud’s custom fields on the Lead object. These additional fields capture important patient information, like a person’s medical record number and the name of the patient’s care coordinator.
Candidate Patient

A candidate patient is simply a row of data on the Candidate Patient object. Candidate patients can be converted into patients using the conversion process in the Health Cloud console. The process creates the records and relationships for the patient, so that the patient is available in the console.

Note: As a best practice, we recommend that customers use the Leads object and its associated patient conversion in place of the Candidate Patients object. If you’re using Candidate Patients, we recommend changing your processes to use Leads. That way, you can benefit from ongoing enhancements to Leads that aren’t planned to be extended to Candidate Patients.

SEE ALSO:

Salesforce Help: Enable Person Accounts

Supporting Health Cloud for Care Providers

Clinical data that comes from EHR or other clinical systems is critical to the planning, execution, and management of coordinated care plans for patients. Clinical data can be integrated with Salesforce using several standard APIs, to map messages from EHR systems into Health Cloud objects and fields.

The Health Cloud clinical data model is similar to the Fast Healthcare Interoperability Resources (FHIR) specification. The data model supports easier and more straightforward clinical data integration from other source systems. When devising an implementation strategy, you or your integration partner map messages from the electronic health records system to the correct Health Cloud object. Data is replicated into the clinical data model with read-only access. Data that originates in the EHR or other clinical systems is view-only, so the source system remains the system of record.

Health Cloud uses the following standard and custom objects to manage patient data.

Account

In Health Cloud, the account record for a patient is a person account, not an account representing a business or an organization. Contacts and accounts that represent caregivers or external healthcare providers are associated with the account through the patient care plan (case record).

Note: Some organizations use the Individual data model, which consists of an account record and a contact record that are linked by an individual ID. Person accounts are the recommended approach.

Contact

In the Salesforce data model, contacts are the people associated with the patient, such as family members and specialists who are outside of your organization. A contact must be related to an account. When you set up and use Salesforce Experience Cloud, the Contact object supports communication within the private patient site. Care team members are added as either external contacts without site access or as Salesforce users and contacts, which gives them access to the patient site.

User

Health Cloud includes internal Salesforce users and Experience Cloud users. Each user type has different access to records and functions. Internal users have access to patient data, when granted. Experience Cloud users don’t have access to patient data.

Case Team Member

A patient care team member is part of the team that works on tasks in the patient’s care plan. In Health Cloud, care team members can be family members and healthcare providers from outside of your organization. They can also be internal Salesforce users, like the primary care physician. When Digital Experiences is enabled, care team members with access to the site use Case Feed to collaborate around the patient and the care plan. Care team members who are only contacts can’t log in to Salesforce, so they don’t have access to Chatter in the case feed or to the patient care plan.
**Case Team Role**

The Case Team Role object represents a role for a member of the patient care team, such as Caregiver or Physiotherapist. Care coordinators assign roles when they add a member to the private patient site. The case team role also controls access to the case and the care plan, and controls visibility of the user in the site.

**Case**

In Health Cloud, the care plan is associated with the case record. The case permission controls access to the elements of the care plan, to the care team (Case Team), and to the communication within the patient’s Experience site. All care team members are associated with the patient’s contact record through the Case object.

**Problems**

Each care plan has a list of clinical or non-clinical health issues that must be addressed. The conditions, problems, concerns, and diagnoses that are managed and mitigated by this plan are represented in the Care Plan Problem custom object.

**Goals**

 Represents the intended objectives of carrying out a care plan.

**Task**

 Represents an activity, such as making a phone call, completing a survey, attending a medical appointment, or other to-do items. Tasks can be directly related to a goal on the care plan, or they can be unrelated to a specific problem or goal.

**EHR Clinical Data Objects**

The custom objects that hold patient data that comes from the EHR system of record. For example, EhrCondition__c represents detailed information about conditions, problems, and diagnoses recognized by a clinician.

SEE ALSO:

- Salesforce Help: Patient Care with Health Cloud
- Developer Guide: Care Management Objects

**Supporting Health Cloud for Insurance**

The health insurance data model provides objects for managing the ways care is paid for. It represents information about participants such as employment, insurance coverage, and dependents. You can manage details of the benefits provided by plans to members and treatment preauthorization requests made by members or providers.

The health insurance data model includes standard objects and record types on standard objects. You can use these objects to model your organization’s work flows as you manage health insurance data.

**CarePreauth**

 Represents the details of preauthorizations for care under a member’s plan.

**CarePreauthItem**

 Represents the details of items included in a preauthorization for care under a member’s plan.

**CoverageBenefit**

 Represents the benefits provided to a covered member by a purchaser’s plan.

**CoverageBenefitItem**

 Represents the benefits items provided to a covered member by a purchaser’s plan.

**Member**

 A member is a person who is the primary subscriber, a dependent, or anyone else who is covered under the insurance plan.

**MemberPlan**

 Represents details about the insurance coverage for a member or subscriber.
Payer

A payer is a health insurance company that helps cover the cost of member care.

PlanBenefit

Represents the standard benefits available under a plan that the purchaser offers to their members.

PlanBenefitItem

Represents the details of a benefit available under a purchaser’s plan that is offered to their members.

Purchaser

A purchaser is the organization (an employer) that is providing medical insurance plans for their members (employees).

Purchaser Group

A purchaser group is a subset of the purchaser. For example, your company can have individual employee groups in different regions of the country. Each purchaser group can have separate options for insurance plans.

Purchaser Group Member Association

An association that records the members who belong to a purchaser group.

PurchaserPlan

Represents the payer plan that a purchaser makes available to its members and members’ dependents.

PurchaserPlanAssn

Represents a junction object that associates the purchaser to the plans they offer to members.

Purchaser Payer Association

An association that records the purchasers who purchase plans from payers.

SEE ALSO:

Developer Guide: Insurance Objects

Supporting Health Cloud for Utilization Management

Utilization Management (UM) is a health insurance plan’s process of interfacing with plan members and contracted medical providers to interpret, administer, and explain the medical policies of the health plan. Health Cloud provides objects you can use to review and evaluate medical care services, communicate about clinical policies, and help health plan members ensure they receive the right care in the right setting at the right time.

The utilization management data model includes standard objects and record types on standard objects. You can use these standard objects to model your organization’s work flows as you manage utilization data.

Care Request

Represents the general details of a care-related request including member information, admission date, decision reason, and so on. A single request can contain multiple diagnoses, services, or drugs. Care requests include prior authorization requests for drugs and services, admission notifications, concurrent review of admissions, appeals, complaints, and grievances.

Care Diagnosis

Represents the details of a diagnosis including code type, name, and description. One or more care diagnoses can be associated with a care request.

Care Request Item

Represents the details of a care service request, including name, modifiers, and the effective date. One or more care service requests can be associated with a care request.
Care Request Drug
Represents the details of a requested drug including name, strength, frequency, and instructions for administration. One or more drug requests can be associated with a care request.

Care Request Configuration
Represents the details for a record type such as service request, drug request, or admission request. One or more record types can be associated with a care request.

SEE ALSO:
Developer Guide: Utilization Management Objects

Set Up Health Cloud

Complete these steps to have a basic working Health Cloud console that care coordinators and managers can use to manage their patients or members and provide excellent care. When you're done, consider customizing your Health Cloud app to make your users even more efficient.

Note: Salesforce Experience Cloud provides the collaboration support for Health Cloud. Some of the collaborative features are available only when you enable Experience Cloud and create a site.

1. Install Health Cloud Packages
   Install the Health Cloud managed package in your org so that you can begin implementing Health Cloud for your users. After that’s done, you can install the optional unmanaged packages that extend Health Cloud with extra features.

2. Customize the Name of Your Health Cloud Organization
   The Lightning components used by Health Cloud require My Domain. With My Domain, you specify a customer-specific name to include in your Salesforce org URLs and register it with Salesforce domain registries worldwide. You can also customize your login page and better manage user login and authentication.

3. Choose How to Represent Health Cloud Members and Patients
   Members of Health Cloud orgs can be represented with person accounts or with the individual data model.

4. Transforming the Individual Data Model to Person Accounts in Health Cloud
   Determine whether transforming the individual data model to person accounts in Health Cloud is right for your company.

5. Add Health Cloud Users
   You can add internal Salesforce users one at a time or in batches of up to 10 users.

6. Configure Health Cloud Profiles
   Adjust users’ profiles to give them access to the Health Cloud fields and records. Assign your users standard Salesforce profiles. If you need custom profiles to extend visibility and access to certain objects, use a standard profile, clone it, and edit it to meet your organization’s needs.

7. Assign Health Cloud Permission Set Licenses
   Permission set licenses enable users to access features beyond those that are included in their basic user licenses. To enable users to work in Health Cloud, assign them the necessary Health Cloud permission set licenses.

8. Assign or Unassign the Health Cloud Permission Set License to Many Users
   You can streamline administration by using Data Loader and a spreadsheet to assign permission set licenses in bulk.
9. **Review and Assign Health Cloud Permission Sets**
   Health Cloud provides permission sets that give users access to specific Health Cloud features. A permission set is a collection of settings and permissions that give users access to various tools and functions. The settings and permissions in permission sets are also found in profiles, but permission sets extend users’ functional access without changing their profiles.

10. **Set Field Access**
    Field permissions specify the access level for each field in an object. Whether you use profiles or permission sets to control access to data in Health Cloud, make sure that users have access to these standard fields.

11. **Protect Your Health Data with Salesforce Shield**
    Salesforce Shield is a set of security tools you can use to comply with regulations on storing sensitive protected health information. With Platform Encryption and Event Monitoring, you can monitor usage, prevent malicious activity, and protect data at rest while allowing full functionality.

12. **Control Access to Patient or Member Lists**
    Use sharing settings to control access to patient or member lists.

13. **Create Roles for Care Team Members**
    Care team member roles define the access that members have to information in the care plan.

14. **Use Custom Metadata Settings to Configure Health Cloud**
    You can add or replace fields in many of the components of Health Cloud using custom metadata.

15. **Customize Health Cloud Labels**
    If you want to change the delivered labels to suit your org, here’s a quick and easy way to that.

**Install Health Cloud Packages**

Install the Health Cloud managed package in your org so that you can begin implementing Health Cloud for your users. After that’s done, you can install the optional unmanaged packages that extend Health Cloud with extra features.

1. **Verify that contacts can relate to multiple accounts.**
   a. In Setup, go to **Account Settings**.
   b. In the Contacts to Multiple Accounts Setting section of the page, check that **Allow users to relate a contact to multiple accounts** is selected.
This selection ensures that person accounts, which the Health Cloud data model requires, are available in your org.

2. Verify that Chatter is enabled. To verify this, find Chatter Settings in Setup, and verify that Enable is selected.

**Important:** Chatter must be enabled for Health Cloud to work. Health Cloud uses Chatter to support communication among users.

3. Verify that data protection details are available in records. To verify this, find Data Protection and Privacy in Setup, and verify that Make data protection details available in records is selected.

**Important:** Data protection details must be available in records for Health Cloud to work.

4. Select the Health Cloud package you want to install.

**Note:** The Health Cloud managed package must be installed before you install and configure the Health Cloud unmanaged packages.

**Health Cloud**

This managed package delivers the core features of Health Cloud.

You can find the package download URL in the Terms and Conditions section of your contract.

**Health Cloud Care Request Extensions**

This unmanaged package contains an app with the record types, page layouts, and other metadata to support utilization management.


**Field Service Flows for Health Cloud**

This unmanaged package enables care team members to access Health Cloud data on mobile devices using Field Service. Verify that Field Service is up and running in your org before installing the package.

Einstein Analytics for Health Cloud: Risk Stratification
This unmanaged package enables administrators to use the Einstein Analytics for Health Cloud: Risk Stratification dashboard to identify patient risk levels.

Health Cloud Claims
This unmanaged package delivers business processes for claims management.

Health Cloud App Template for Patients
This unmanaged package enables you to create a patient or member site and release it as an app.

Health Cloud Reports for Patient Referral Management
This unmanaged package contains reports and a dashboard that monitor patient or member referrals in your org.

Health Cloud Unmanaged Package Extension
This unmanaged package delivers the process that lets care coordinators convert Lead records into Patient records.

Health Cloud Flow Templates for Payers
This unmanaged package contains sample flows you can use to record an appeal, change a person’s primary care provider, or request a new insurance card. You can adapt the sample flows to support other common functions.

Emergency Response Management
This unmanaged package contains the metadata, record types, page layouts, site templates, and other items to enable the Emergency Response Management suite of features. This unmanaged packaged installation is required only if you use the appointment scheduling flow with Lightning Scheduler. This installation requires a Lightning Scheduler license.
Install it from http://industries.force.com/healthcloudextensionerm

5. Paste the URL for the package into your browser navigation bar, and press Enter.
6. Enter your Salesforce password.
7. Select Install.
   If it takes a while, you can select Done and move on to something else while installation finishes. Check your email for confirmation that installation was successful.
8. To verify that the package was installed, go to Installed Packages in Setup, and look for the name of the package.

Important: Don’t delete any part of the managed package after installing it. Doing so can block automatic upgrades to future releases.
Note: The custom objects, components, classes, and triggers delivered in Health Cloud packages are one API version behind the core Salesforce API. Health Cloud standard objects have the same API version as core Salesforce. So, if your org’s API version is 43, the Health Cloud custom objects are API version 42, and the standard Health Cloud objects are API version 43.

SEE ALSO:
- Enable Field Service
- Set Up Einstein Analytics for Health Cloud
- Enable Users to Import Leads as Patients

Customize the Name of Your Health Cloud Organization

The Lightning components used by Health Cloud require My Domain. With My Domain, you specify a customer-specific name to include in your Salesforce org URLs and register it with Salesforce domain registries worldwide. You can also customize your login page and better manage user login and authentication.

1. Set Up My Domain. Choose or change your My Domain name, then update your org to use your new URLs.

   Note: Production orgs created in Winter ’21 and later have a My Domain by default. If you don’t like your org’s My Domain name, you can change it.

2. Configure My Domain Settings. Determine the user experience when logging into your Salesforce org via your My Domain. Manage user logins and authentication methods and customize your login page with your brand.

Choose How to Represent Health Cloud Members and Patients

Members of Health Cloud orgs can be represented with person accounts or with the individual data model.

Person Accounts

Person accounts store information about individual people by combining certain account and contact fields into a single record.

Person accounts are accounts that can also be used as contacts in many situations. However, there are key areas in which person accounts differ from business accounts and contacts, or have unique considerations. In Health Cloud, once you enable person accounts, you can no longer use the individual data model to manage the patients or members. Patient or member records that you bring into Health Cloud are converted to the person account record type. Person account record types can’t be changed back to an individual record type.

The Individual Data Model

In the individual model, every patient, member, caregiver, or other role is represented by an account and a contact record, that use the individual record type. (The account has a primary contact lookup field.) When a patient is created in the system, both an account and a contact record are created and linked through the Individual ID field.
The Account object supports transactions through the Case object to manage the care plan, its tasks, and the care team that supports the person. The Contact object supports communication between the person, the coordinator, and the care team when Experience Cloud site is enabled.

All patient or member-specific information, including their medical records, is tied to the account record. Because the contact record doesn’t contain clinical information, a patient or member can collaborate with the external care team without them seeing their medical records. Together, the account and contact records comprise the information that supports the patient or member. The records are connected to the care plan, EHR data, and the members of the entire care team.

**Enable Person Accounts**
Once you have person accounts enabled in your org, you can begin using them in Health Cloud.

**Create a Page Layout for Person Accounts**
Create a page layout to hold the fields your org uses for patients or members. Person accounts have their own page layouts that can include account and contact fields, account custom links, and account and contact related lists.

**Customize the Health Cloud App for Person Accounts (Salesforce Classic Only)**
If you’re using Salesforce Classic, make a small change to page layout you’ve created for person accounts and you’re ready to go.

**Map Person Accounts in Health Cloud**
Configure a default mapping record using the label Person Accounts to create patients or members in Health Cloud.

SEE ALSO:
* Salesforce Help: Enable Person Accounts

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Enable Person Accounts
Once you have person accounts enabled in your org, you can begin using them in Health Cloud.

1. Ask your Salesforce representative to make person accounts available in your organization.
2. From Setup, enter Custom Settings in the Quick Find box, then select Custom Settings.
3. In the list of custom settings, click Manage next to the Use Person Accounts custom settings.
4. Click Edit next to Use Person Account.
5. Select Enable.
   
   After person accounts are enabled, assign them to profiles.

Create a Page Layout for Person Accounts
Create a page layout to hold the fields your org uses for patients or members. Person accounts have their own page layouts that can include account and contact fields, account custom links, and account and contact related lists.

1. From Setup, enter Person Account in the Quick Find box, then select Page Layouts.
2. Click New.
3. Optionally, choose an existing page layout to clone.
4. Type a name for the new layout.
5. Click Save.
6. Modify the layout.
   
   Make sure to add the following fields to the layout.
Assign the new layout to user profiles.

Customize the Health Cloud App for Person Accounts (Salesforce Classic Only)

If you’re using Salesforce Classic, make a small change to page layout you’ve created for person accounts and you’re ready to go.

1. From Setup, enter Account in the Quick Find box, then select Page Layouts.
2. Click Edit next to page layout you created for person accounts in your org.
3. Click Custom Console Components and select the PatientProfile_Page component Visualforce page for the left sidebar.
4. Save your work.

Map Person Accounts in Health Cloud

Configure a default mapping record using the label Person Accounts to create patients or members in Health Cloud.

1. From Setup, enter Custom Metadata in the Quick Find box, then select Custom Metadata Types.
2. In the list of custom metadata types, click Manage Records next to the Individual Record Type Mapper custom settings.
3. Click New.
4. Enter Person Account as the label for the mapping record.
   You must have at least one mapping record using this label. This mapping is used by Health Cloud to create patient or member records.
5. For Individual Record Type Name, enter a name for the record type. This field is for internal use only. The name can be the same as the label.
6. In the Account Record Type field, enter the name of a valid person account record type that you want to use in this mapping.
7. In the Record Type Namespace (Account) field, enter the namespace for your org.
8. Leave the Contact Record Type field blank.
   Person accounts don’t use the contact record type.
9. Leave the Record Type Namespace (Contact) field blank.
10. Save your work.

Transforming the Individual Data Model to Person Accounts in Health Cloud

Determine whether transforming the individual data model to person accounts in Health Cloud is right for your company.

Review your technical architecture and the customizations that you’ve made to the following to ensure compatibility with person accounts.

- Triggers, flows, and workflow rules
Before switching from the individual data model to person accounts, be aware of the following.

- **Sharing**—When you enable person accounts you have two options for org-wide sharing defaults. You can choose whether to control accounts by the parent on contact or make them private on account and contact.
- **Business processes**—If your org includes business accounts, contacts, and person accounts, consider whether you write separate business processes or workflows.
- **Integration**—Integrations between Salesforce and third-party systems via the API use the Account object to access person accounts. You can query and update the Contact object via the API, but person accounts are created with the Account object.
- **AppExchange packages**—Many applications designed for the Account and Contact objects work with person accounts. Check whether your third-party applications support person accounts.

**Prepare to Move from the Individual Data Model to Person Accounts**

Before transforming your individual data model to person accounts in Health Cloud, enable person accounts and configure your records types.

**Transform Individual Records to Person Account Records**

Person accounts store information about individual people by combining certain account and contact fields into one record. These steps show you how to transfer information in individual records into person account records in Health Cloud.

**Prepare to Move from the Individual Data Model to Person Accounts**

Before transforming your individual data model to person accounts in Health Cloud, enable person accounts and configure your records types.

⚠️ **Note:** Perform these steps in a sandbox org. Transforming the individual data model to person accounts in your production org is irreversible.

1. Contact support to set up person accounts in your org.
2. Back up your data.
3. To enable person accounts in Health Cloud, select the **Use Person Accounts** custom setting.
4. Configure your Person Account record types in the Individual Record Type Mapper.
5. Validate and modify your data to meet these requirements.
   - You can convert only individual accounts with a single direct account contact relationship to a person account. For each person account, confirm that the account record has only one contact record.
   - The account and contact must have the same record owner.
   - The account and contact must use the same currency value (if applicable).
   - Both the Parent Account field on the account and the contact’s Reports To field must be blank.
   - The account can’t be the parent account of any other account records.
   - No other contact records can report to the contact.
6. When converting, the contact name is mapped to a person account. If you’ve used a middle name, salutation, or suffix, they are included in the name of your person account.

You’re now ready to export the individuals that you want to transform to person accounts.
Transform Individual Records to Person Account Records

Person accounts store information about individual people by combining certain account and contact fields into one record. These steps show you how to transfer information in individual records into person account records in Health Cloud.

1. Using Data Loader, export the IDs of all individual accounts to a CSV file. For example, you can use this query: `Select Id from Account where recordtype.name = '%Individual%'`

   **Note:** If you have multiple record types that you want to retain, export accounts by their record type and perform the following steps for each record type. Export only the IDs of these accounts to a CSV file.

2. In the exported CSV file, add a column and title it `PersonRecordTypeId`.

3. Add the Person Account Record Type IDs for all records in the new `PersonRecordTypeId` column.
   a. From Setup, open Object Manager and click Person Account.
   b. Open Record Types and click the Person Account record type.
   c. In your browser address bar, copy the ID and paste it into the CSV file. Repeat for all records.

4. Using Data Loader, update the account records.

   **Note:** To prevent duplication, do not use the insert operation. Use only the update operation.
   - Map Id to Id.
   - Map PersonRecordTypeId to RecordTypeId.
   - Update accounts using Data Loader. These individuals are now converted to person accounts.

   When the transformation is complete, validate that the records converted correctly.
   - Export all records and ensure that they have successfully converted to person accounts.
   - Open a converted record, and view all tabs (such as Relationships) to confirm that your data and relationships are unchanged.

Add Health Cloud Users

You can add internal Salesforce users one at a time or in batches of up to 10 users.

1. From Setup, enter Users in the Quick Find box, then select Users.

2. Click New User to add a single user or click Multiple Users to add up to 10 users at a time.

3. If multiple user license types are available in your organization, select the user license to associate with the users you plan to create.
   The user license determines the available profiles.

4. Specify the information for each user, including Role and Profile.
   Users who need access to the Health Cloud console must have Service Cloud User enabled. If you’re using Salesforce Knowledge articles to manage protocols, enable Knowledge User for every user needing access to articles.
5. To email a login name and temporary password to each new user, select **Generate new password and notify user immediately**.

6. To specify more details for the users that you’ve created, edit individual users as needed.

## Configure Health Cloud Profiles

Adjust users’ profiles to give them access to the Health Cloud fields and records. Assign your users standard Salesforce profiles. If you need custom profiles to extend visibility and access to certain objects, use a standard profile, clone it, and edit it to meet your organization’s needs.

**Note:** To be able to set up the Health Cloud console, you must make these additions to the System Administrator profile as well.

1. In Setup, find **Profiles** and select a profile to configure.

2. Add or enable the following items for the profile.

   a. **Page Layouts**
      - Account (Individual record type): Patient layout
      - Case (Care Plan record type): Care Plan layout
      - Contact (Individual record type): Patient layout
      - Lead (Patient record type): Patient layout
      - Task (Care Plan Task record type): Health Task layout

   b. **Record Types**
      - Account: Business, Household, Individual (Default)
      - Cases: CarePlan
      - Contacts: Business, Individual (Default)
      - Lead: Patient
      - Tasks: Care Plan Task
3. Click Save.

SEE ALSO:
Salesforce Help: Assign Record Types to Profiles in the Original Profile User Interface
Salesforce Help: Enable and Disable the Translation Workbench

Assign Health Cloud Permission Set Licenses

Permission set licenses enable users to access features beyond those that are included in their basic user licenses. To enable users to work in Health Cloud, assign them the necessary Health Cloud permission set licenses.

Tip: To see what permission set licenses are available, go to Company Settings in Setup and click Company Information. (The permission sets available to you depend in part on which features are included in your Salesforce contract.)

1. In Setup, use the Quick Find box to find Users and select the users who are getting Health Cloud permission set licenses.

Tip: If you're working with more than a few users, consider creating a Permission Set Group.

2. Assign the required permission set licenses to all your Health Cloud users. In the Permission Set License Assignments related list, click Edit Assignments and select Enabled for these permission set licenses:

Health Cloud
This permission set license provides access to the standard version of Health Cloud. Users with this license have access to the standard Salesforce objects and Health Cloud custom objects.

Health Cloud Platform
This permission set license provides access to Health Cloud-related standard objects.

Health Cloud for Experience Cloud Site
This permission set license provides access to Health Cloud objects and features for site users. It's required for the emergency response management features.

Note: Don’t assign a Health Cloud permission set to Health Cloud site users. Doing so can prevent automatic upgrades to future releases. If you do have a user with an Experience Cloud site profile who also has a Health Cloud permission set, remove the user from the profile or remove the permission set from the user.

3. Assign the required permission sets to all your Health Cloud users. In the Permission Set Assignments related list, click Edit Assignments and select Enabled for these permission sets:

Health Cloud Standard
This permission set provides access to basic Health Cloud features, including the Health Cloud console.

Health Cloud Permission Set License
This permission set provides other features not covered under the Health Cloud Standard permission set.

Note: This permission set is called “Health Cloud Permission Set License” because it works in tandem with the Health Cloud permission set license. Despite the name, it is actually a permission set and not a permission set license.

4. Assign other Health Cloud permission sets as needed.
Health Cloud Foundation
Assigns read access to additional Health Cloud platform capabilities, including the Provider Management data model. Clone this permission set to give users other kinds of access. For the included objects, see The Health Cloud Foundation Permission Set on page 23.

Health Cloud Member Services
Assigns the Health Cloud Platform permission set license. Grants read-access to Health Insurance and Utilization Management records. Clone this to create your own permission set to provide write access. For the included objects, see The Health Cloud Member Services Permission Set on page 24.

Health Cloud Social Determinants
Grants read access to Health Cloud Social Determinants records. Clone this to create your own permission set to provide write access. For the included objects, see The Health Cloud Social Determinants Permission Set on page 25.

Health Cloud Utilization Management
Assigns the Health Cloud Platform permission set license. Grants read access to health insurance records and create, read, and update access to utilization management records. Clone this to create your own permission set to provide other kinds of access. For the included objects, see The Health Cloud Utilization Management Permission Set on page 26.

Analytics Platform
Provides admins access to Einstein Analytics for Health Cloud functionality. Clone this to create your own permission set to provide other kinds of access.

Health Cloud ERM
Permissions for Health Cloud Emergency Response Management.

5. Click Save.

To remove a permission set license from a user, remove the assigned permission set that requires the license, then remove the assigned permission set license.

Important: The Health Cloud permission set license is not the same thing as the permission set called "Health Cloud Permission Set License." Removing the permission set called "Health Cloud Permission Set License" from a user prevents the user from seeing the Health Cloud user interface components, but does not take away the user’s access to Health Cloud custom objects, custom tabs, and custom settings. To fully prevent the user from accessing Health Cloud custom objects, tabs, and settings, you must also remove the Health Cloud permission set license.

SEE ALSO:
Salesforce Help: Assign a Permission Set License to a User

Assign or Unassign the Health Cloud Permission Set License to Many Users

You can streamline administration by using Data Loader and a spreadsheet to assign permission set licenses in bulk. Permission set licenses and permission sets have different purposes. Permission set licenses extend the functionality of a user license, and permission sets extend a user’s functional access without changing a user’s profile. When you assign a permission set, you are also assigning the associated permission set license.

- You must have administrator permissions and access to the Company Profile panel of your org.
- Salesforce Data Loader must be installed to obtain the internal IDs of users as well as the internal ID of the Health Cloud permission set. For more information, see Data Loader documentation.
- You need a spreadsheet application that handles CSV files, such as Microsoft Excel or Google Sheets.
Bulk-Assign Permission Set Licenses
To bulk-assign the Health Cloud permission set and permission set license for multiple users, you’ll need the unique ID of the permission set and the unique ID of each user.

Bulk-Unassign the Health Cloud Permission Set License
To unassign a permission set and permission set license for multiple users, you’ll need the users’ internal IDs, the ID of the permission set, and the ID of the permission set license.

Bulk-Assign Permission Set Licenses
To bulk-assign the Health Cloud permission set and permission set license for multiple users, you’ll need the unique ID of the permission set and the unique ID of each user.

1. Check to see how many licenses are assigned. In Setup, go to **Company Profile > Company Information**, and click **Permission Set Licenses**.
   Under Permission Set Licenses, check that you have enough Health Cloud licenses for all the users you want to assign.

2. In Data Loader, click **Export**, log in, and grant access to the company org.

3. Click **Show all Salesforce objects** and select the **User** object.

4. Enter a unique name for the new CSV file (for example, **User_Extract.csv**), browse to where you want to download the generated file, and click **Next**.

5. Select **Id**, **LastName**, and **FirstName**, then click **Finish**.
   **Tip:** To locate only active users, set **IsActive** to **true**.

6. Confirm that the downloaded CSV file has three columns: User ID, Last Name, and First Name. You only need the ID, but the last and first names make it easier to identify the user.

7. Back in the Data Loader Export tab, click **Show all Salesforce objects** and select **Permission Set**.
   a. Give the target a unique file name (for example, **PermSet_extract.csv**), and click **Next**.
   b. In the panel of query fields, enter this SQL query in the text box: `Select Id, Name, Label FROM PermissionSet WHERE Name = 'HealthCloudPermissionSetLicense'`.
   c. Click **Finish** and then **Yes** to confirm that you want to proceed.
   A single record is created and downloaded.

8. In the downloaded file, copy the unique ID for the Health Cloud permission set.
   a. Open a new CSV spreadsheet and enter headings to the first two columns: **PERMISSIONSETID** and **ASSIGNEEID**.
   b. Copy the user IDs from the **User_Extract.csv** file, and paste them into the spreadsheet’s **ASSIGNEEID** column.
   c. Open the **PermSet_extract.csv** file. It has a single row of data. Copy the first field, which is the internal ID for the Health Cloud Permission Set License, and paste it into the spreadsheet’s **PERMISSIONSETID** column for each user.
   d. Save the spreadsheet with a name like **PermSetAssignments.csv**.

9. Back in Data Loader, on the Upsert tab, click **Show all Salesforce objects** and select the object **Permission Set Assignment**. Browse to the **PermSetAssignments.csv** file and click **Next**, and click **OK**.
   Confirm that the Id field is shown as matching the PermissionSetAssignment. Click **Next**.

10. Select the CSV field to map to the Id field of the permission set, and click **Create Map**.
    a. From the list of fields, drag **AssigneeId** to the **ASSIGNEEID** row in the mapping table.
b. Drag **PermissionSetId** to the PERMISSIONSETID row, then click **OK** and then **Next**.

Tip: You can save this mapping for later use.

c. Choose where to save the success and error files, and click **Finish**.

11. Under Company Information in Setup, check the Permission Set Licenses and Permission Sets tables to verify that the licenses and permission sets have been assigned.

**Bulk-Unassign the Health Cloud Permission Set License**

To unassign a permission set and permission set license for multiple users, you'll need the users' internal IDs, the ID of the permission set, and the ID of the permission set license.

1. In Data Loader, from the Export tab, log in and grant access to the company org.
2. Click **Show all Salesforce objects**, and select the **User** object.
3. Enter a unique name for the new CSV file (such as `User_Extract.csv`), and browse to where you want to download the generated file. Click **Next**.
4. Select **Id**, **LastName**, and **FirstName**.
5. Click **Finish**, then click **Yes**.
6. Confirm that the downloaded file has three columns: the user's unique ID, last name, and first name.
7. Back in the Data Loader Export tab, get the permission set ID.
   a. Click **Show all Salesforce objects** and select **Permission Set**.
   b. Give the target a unique file name (for example `PermSet_extract.csv`) and click **Next**.
   c. In the panel of query fields, enter the following explicit query into the text box:
   ```sql
   Select Id, Name, Label FROM PermissionSet WHERE Name = 'HealthCloudPermissionSetLicense'.
   ```
   d. Click **Finish**, then **Yes** to confirm and start the export.

A single record is created.

8. Open the downloaded file and copy the ID for the Health Cloud permission set.

9. Back in the Data Loader Export tab, get the unique internal ID for the permission set license.
   a. Click **Show all Salesforce objects** and select **Permission Set License**.
   b. Give the target a unique file name (such as `PermSetLicense_extract.csv`) and click **Next**.
   c. In the panel of query fields, enter this SQL query:
   ```sql
   Select Id, DeveloperName, MasterLabel FROM PermissionSetLicense WHERE MasterLabel = 'HealthCloudPermissionSetLicense'.
   ```
   Click **Finish** and then **Yes**.

This query creates a single record.

10. In the downloaded file, copy the ID for the Health Cloud permission set license.

11. Create a list of users currently assigned to the permission set by querying for the permission set ID.
   a. In the Data Loader Export tab, click **Show all Salesforce objects** and select **Permission Set Assignment**.
   b. Give the target a unique file name (such as `PermSetAssignment_extract.csv`) and click **Next**.
   c. In the panel of query fields, enter this SQL query:
   ```sql
   Select Id, PermissionSetId, AssigneeId FROM PermissionSetAssignment WHERE PermissionSetId = 'YOUR_UNIQUE_PERMSET_ID'.
   ```
   Use your permission set ID in place of `YOUR_UNIQUE_PERMSET_ID`.

   A single record is created.

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d. Click Finish and then Yes to confirm and start the export.

12. Open the downloaded CSV file and identify which user IDs you want to unassign the permission set. Delete all the rows from the permission set assignment file for those users you want to keep the permission set.

The file should only contain rows of assigned users you want to unassign from the Health Cloud permission set.

13. Back in Data Loader, click the Delete tab.
   a. Click Show all Salesforce objects and select Permission Set Assignment.
   b. Choose your prepared permission set assignment CSV file (PermSetAssignment_extract.csv) and click Next.
   c. Click OK to verify the correct number of rows to be deleted.
   d. The next panel shows the three fields in the CSV file, and asks you to select the CSV fields to be mapped. Click Create Map, and in the next panel select Auto-Match Fields to Columns. The ID field is mapped to Id. Click OK, then Next.

You can save this mapping for use in future bulk unassigns.

   e. Specify where you would like to save the success and error files, then click Finish, then Yes.

   f. Confirm the Recycle Bin information, and click Yes to start the job.

14. Verify that the users have been unassigned from the Health Cloud permission set.

15. Create the list of users currently assigned to the permission set license by querying for the permission set license ID. Return to the Data Loader and Export tab.
   a. Click Show all Salesforce objects and select Permission Set License Assignment. Give the target a unique file name (for example, PermSetLicenseAssignment_extract.csv) and click Next.
   b. In the panel of query fields, enter this query into the text box: Select Id, PermissionSetLicenseId, AssigneeId FROM PermissionSetLicenseAssign WHERE PermissionSetLicenseId = ‘YOUR_UNIQUE_PERMSET_LICENSE_ID’. Enter permission set license ID you got in place of YOUR_UNIQUE_PERMSET_LICENSE_ID in the query string.
   c. Click Finish and then Yes to confirm and start the export.

16. In the downloaded CSV file, identify which user IDs you want to unassign from the permission set license. Delete all the rows for any users you want to keep the permission set license.
   a. Back in Data Loader, click Delete, then click Show all Salesforce objects and select Permission Set License Assignment.

   Choose your prepared permission set license assignment file (PermSetLicenseAssignment_extract.csv) and click Next.

   b. Verify that the number of rows to be deleted is correct and click OK.

   c. To select the CSV fields to be mapped, click Create Map, and in the next panel select Auto-Match Fields to Columns. Click OK, then Next.

   You can save this mapping to use in future bulk unassigns.

   The ID field is mapped to Id.

   d. Specify where to save the success and error files, then click Finish, then Yes to proceed.

   e. In the pop-up warning about the Recycle Bin, click Yes to start the job.

17. Verify that the correct number of licenses have been recovered. Go to Company Profile | Company Information, click Permission Set Licenses, and check the number of licenses for the Health Cloud permission set.
Review and Assign Health Cloud Permission Sets

Health Cloud provides permission sets that give users access to specific Health Cloud features. A permission set is a collection of settings and permissions that give users access to various tools and functions. The settings and permissions in permission sets are also found in profiles, but permission sets extend users’ functional access without changing their profiles.

The Health Cloud Foundation Permission Set
The Health Cloud Foundation permission set assigns read access to additional Health Cloud platform capabilities, including the Provider Management data model.

The Health Cloud Member Services Permission Set
The Health Cloud Member Services permission set assigns the Health Cloud permission set license and grants access to Health Insurance and Utilization Management records.

The Health Cloud Social Determinants Permission Set
The Health Cloud Social Determinants permission set assigns the Health Cloud permission set license and provides access to Health Cloud Social Determinants records.

The Health Cloud Utilization Management Permission Set
The Health Cloud Utilization Management permission set assigns the Health Cloud Platform permission set license. It grants read access to health insurance records and create, read, and update access to utilization management records.

The Health Cloud Foundation Permission Set
The Health Cloud Foundation permission set assigns read access to additional Health Cloud platform capabilities, including the Provider Management data model.

The Health Cloud Foundations permission set gives users Read access to data in these objects:

- Accounts
- Accreditations
- Awards
- Board Certifications
- Business Licenses
- Care Provider Adverse Actions
- Care Provider Facility Specialties
- Care Specialties
- Care Taxonomies
- Cases
- Contacts
- Healthcare Facility Networks
- Healthcare Payer Networks
- Healthcare Practitioner Facilities
- Healthcare Provider NPIs
- Healthcare Providers
- Healthcare Provider Specialties
- Healthcare Provider Taxonomies
The Health Cloud Member Services Permission Set

The Health Cloud Member Services permission set assigns the Health Cloud permission set license and grants access to Health Insurance and Utilization Management records.

The Health Cloud Member Services permission set gives users access to data in these objects.

<table>
<thead>
<tr>
<th>Object</th>
<th>Access Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>Read</td>
</tr>
<tr>
<td>Care Barrier Determinants</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Barrier Types</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Barriers</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Determinant Types</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Determinants</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Diagnoses</td>
<td>Read</td>
</tr>
<tr>
<td>Care Intervention Types</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Preauth Items</td>
<td>Read</td>
</tr>
<tr>
<td>Care Preauths</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Campaigns</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Eligibility Rules</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Enrollee Products</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Enrollees</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Enrollment Cards</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Goals</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Products</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Providers</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Team Members</td>
<td>Read</td>
</tr>
<tr>
<td>Care Programs</td>
<td>Read</td>
</tr>
<tr>
<td>Care Request Drugs</td>
<td>Read</td>
</tr>
<tr>
<td>Care Request Extensions</td>
<td>Read</td>
</tr>
<tr>
<td>Care Request Items</td>
<td>Read</td>
</tr>
</tbody>
</table>
The Health Cloud Social Determinants Permission Set

The Health Cloud Social Determinants permission set assigns the Health Cloud permission set license and provides access to Health Cloud Social Determinants records.

The Health Cloud Social Determinants permission set gives users access to data in these objects.
## The Health Cloud Utilization Management Permission Set

The Health Cloud Utilization Management permission set assigns the Health Cloud Platform permission set license. It grants read access to health insurance records and create, read, and update access to utilization management records.

The Health Cloud Utilization Management permission set gives users access to data in these objects.

<table>
<thead>
<tr>
<th>Object</th>
<th>Access Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>Read</td>
</tr>
<tr>
<td>Care Barrier Determinants</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Barrier Types</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Barriers</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Determinant Types</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Determinants</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Diagnoses</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Care Intervention Types</td>
<td>Read, Create, Edit, Delete</td>
</tr>
<tr>
<td>Care Preauth Items</td>
<td>Read</td>
</tr>
<tr>
<td>Object</td>
<td>Access Type</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Care Preauths</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Campaigns</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Eligibility Rules</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Enrollee Products</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Enrollees</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Enrollment Cards</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Goals</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Products</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Providers</td>
<td>Read</td>
</tr>
<tr>
<td>Care Program Team Members</td>
<td>Read</td>
</tr>
<tr>
<td>Care Programs</td>
<td>Read</td>
</tr>
<tr>
<td>Care Request Drugs</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Care Request Extensions</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Care Request Items</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Care Requests</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Cases</td>
<td>Read</td>
</tr>
<tr>
<td>Contacts</td>
<td>Read</td>
</tr>
<tr>
<td>Coverage Benefit Items</td>
<td>Read</td>
</tr>
<tr>
<td>Coverage Benefits</td>
<td>Read</td>
</tr>
<tr>
<td>Enrollment Eligibility Criteria</td>
<td>Read</td>
</tr>
<tr>
<td>Healthcare Diagnoses</td>
<td>Read</td>
</tr>
<tr>
<td>Healthcare Procedures</td>
<td>Read</td>
</tr>
<tr>
<td>Locations</td>
<td>Read</td>
</tr>
<tr>
<td>Member Plans</td>
<td>Read</td>
</tr>
<tr>
<td>Operating Hours</td>
<td>Read</td>
</tr>
<tr>
<td>Plan Benefit Items</td>
<td>Read</td>
</tr>
<tr>
<td>Plan Benefits</td>
<td>Read</td>
</tr>
<tr>
<td>Purchaser Plan Associations</td>
<td>Read</td>
</tr>
<tr>
<td>Purchaser Plans</td>
<td>Read</td>
</tr>
</tbody>
</table>
Set Field Access

Field permissions specify the access level for each field in an object. Whether you use profiles or permission sets to control access to data in Health Cloud, make sure that users have access to these standard fields.

1. Ensure that the following fields have Edit permission:

<table>
<thead>
<tr>
<th>Object</th>
<th>Field Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>• Account Name</td>
</tr>
<tr>
<td></td>
<td>• Account Owner</td>
</tr>
<tr>
<td></td>
<td>• Care Plan</td>
</tr>
<tr>
<td></td>
<td>• Individual ID</td>
</tr>
<tr>
<td></td>
<td>• Primary Contact</td>
</tr>
<tr>
<td></td>
<td>• Source System</td>
</tr>
<tr>
<td></td>
<td>• Source System ID</td>
</tr>
<tr>
<td>AccountContactRelation</td>
<td>• End Date</td>
</tr>
<tr>
<td></td>
<td>• Is Active</td>
</tr>
<tr>
<td></td>
<td>• Roles</td>
</tr>
<tr>
<td></td>
<td>• Start Date</td>
</tr>
<tr>
<td>Asset</td>
<td>• Account Name</td>
</tr>
<tr>
<td>Cases</td>
<td>• Case Origin</td>
</tr>
<tr>
<td></td>
<td>• Contact Name</td>
</tr>
<tr>
<td></td>
<td>• Description</td>
</tr>
<tr>
<td></td>
<td>• Priority</td>
</tr>
<tr>
<td></td>
<td>• Status</td>
</tr>
<tr>
<td></td>
<td>• Subject</td>
</tr>
<tr>
<td></td>
<td>• Type</td>
</tr>
<tr>
<td>Contacts</td>
<td>• Birthdate</td>
</tr>
<tr>
<td></td>
<td>• Mailing Address</td>
</tr>
<tr>
<td></td>
<td>• Name</td>
</tr>
<tr>
<td></td>
<td>• Phone</td>
</tr>
<tr>
<td></td>
<td>• Source System ID</td>
</tr>
<tr>
<td>Tasks</td>
<td>• Comments</td>
</tr>
<tr>
<td></td>
<td>• Due Date</td>
</tr>
</tbody>
</table>

**Note:** The Birth Date field is a custom formula field that reformats the date retrieved from Birthdate. Access is defined in the Health Cloud permission sets.
### Anyone who adds external users who are contacts to a care team needs Edit access to the following fields on the User object.

<table>
<thead>
<tr>
<th>Object</th>
<th>Field Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>• Alias&lt;br&gt;• Email&lt;br&gt;• Last Name&lt;br&gt;• Nickname&lt;br&gt;• Profile&lt;br&gt;• Username&lt;br&gt;• User License</td>
</tr>
</tbody>
</table>

2. For all users who register devices and create shipping requests, ensure that in the Asset object, the field-level security for the **Unique Identifier** field is set to **Visible**.

3. Click **Save**.

### Protect Your Health Data with Salesforce Shield

Salesforce Shield is a set of security tools you can use to comply with regulations on storing sensitive protected health information. With Platform Encryption and Event Monitoring, you can monitor usage, prevent malicious activity, and protect data at rest while allowing full functionality.

#### Platform Encryption

Platform Encryption allows you to natively encrypt your most sensitive data at rest, allowing you to address HIPAA requirements for storing sensitive protected health information. Encryption helps you protect PII, PHI, sensitive, confidential, or proprietary data. It enables you to meet both external and internal data compliance policies while keeping critical app functionality—like search, workflow, and
validation rules. You keep full control over encryption keys and can set encrypted data permissions to protect sensitive data from unauthorized users.

**Event Monitoring**

Event Monitoring gives you access to detailed performance, security, and usage data on all your Salesforce apps. Every interaction is tracked and accessible via API, so you can view it in the data visualization app of your choice. See who is accessing critical business data when, and from where they’re getting access. Understand user adoption across your apps. Troubleshoot and optimize performance to improve end-user experience. Event Monitoring data can be easily imported into any data visualization or application monitoring tool like Analytics, Splunk, or New Relic. To get started, check out our Event Monitoring Trailhead module.

SEE ALSO:

*Salesforce Help: Platform Encryption*

**Control Access to Patient or Member Lists**

Use sharing settings to control access to patient or member lists.

By default, any patient or member list created in your org is available to all users with access to the Health Cloud console. Field-level and object-level security can also restrict access to an entire patient or member list or to columns in the list.

- Users with profile or permission sets that restrict access to an object can’t create a list using that object. The object doesn’t appear in the list of records, as a results column, or as a category when creating the list.
- If a user’s field-level security restricts access to a field that’s selected on the Add Filters tab, that list isn’t available for that user.
- When a user’s field-level security restricts access to a field used as a display column, the column doesn’t appear in the list.

To restrict access to patient or member lists, you can use standard Salesforce sharing settings on the list. For example, you can grant access to all care coordinators in a certain department or who share a specific role.

1. To apply sharing settings to a list, select the Filter Criteria tab from the Health Cloud - Admin app.
2. On the Filter Criteria Home page, select *All* in the View field and then select the name of the filter criterion for the list you’re working with.
3. In the Filter Criterion Detail area of the page, select *Sharing*.
   
   **Note:** The Sharing button is available when your sharing model is either Private or Public Read Only for a type of record or related record.

4. Grant access to other users, groups, or roles.

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Org-Wide Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Access</td>
<td>The user can view, edit, and delete the list.</td>
</tr>
<tr>
<td>Read/Write</td>
<td>Anyone with access to the Health Cloud console can use and edit the list.</td>
</tr>
<tr>
<td>Private</td>
<td>Only the user who created the list view can view, edit, or delete the patient or member list.</td>
</tr>
<tr>
<td>Public Read Only</td>
<td>Anyone with access to the Health Cloud console can use the list.</td>
</tr>
</tbody>
</table>
Create Roles for Care Team Members

Care team member roles define the access that members have to information in the care plan.

**Note:** Salesforce Experience Cloud provides the collaboration support for Health Cloud. Some of the collaborative features are available only when you enable Experience Cloud and create a site.

Every member has a unique role to play in caring for the patient, such as primary care physician, caregiver, or case manager. Roles determine access to patient information, like read only or read/write access. You create a list of roles that care coordinators select from when assigning roles to new care team members. The patient role is automatically assigned during the patient conversion process in Health Cloud and the care coordinator can be assigned during that process, as well.

**Note:** Salesforce offers a user role hierarchy that you can use together with sharing settings to determine the levels of access users have to your organization’s data. Roles within the hierarchy affect access on key components like records and reports. Unlike standard Salesforce roles, the access you provide with care team roles applies only to Case records. When an internal user who is a member of the care team already has a standard Salesforce role, they retain access that comes with their standard role.

When you set up roles for care team membership, you can include internal users who are already in your organization, and external contacts. (Contacts are the people associated with the patient such as family members or specialists outside of your organization.) For each contact, you can store various kinds of information, such as phone numbers, addresses, titles, and roles. In addition, if you’ve set up Communities, you can make the contact an Experience Cloud site user and add them to the patient Experience Cloud site. That way, they can see the care plan and collaborate in the feed, if given access.

At a minimum, create a role called Care Coordinator and a role entitled Patient. These roles are used by Health Cloud during patient conversion, and appear as labels throughout the app. To customize the role labels, clone the Careplan Role Care Coordinator or Careplan Role Patient metadata types in Health Cloud Settings, and rename them. For example, you can change Care Coordinator to Care Manager, if your organization uses that name for the role.
1. From Setup, enter Case Team Roles in the Quick Find box, then select Case Team Roles.

2. Click New.

3. Enter a name for the role.
   Remember that you must create a role called Care Coordinator and a role called Patient. These roles are used by Health Cloud during patient conversion, and appear as labels throughout the app.

4. From the Case Access picklist, select the role’s level of access to cases. Access levels are:

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read/Write</td>
<td>User can view and edit the record and add associated records, notes, and attachments to it.</td>
</tr>
<tr>
<td>Read Only</td>
<td>User can view the record and add associated records to it. The user can’t edit the record or add notes or attachments.</td>
</tr>
<tr>
<td>Private</td>
<td>User can’t access the record.</td>
</tr>
</tbody>
</table>

5. Click Save. Alternatively, click Save & New to save the role and begin creating another role.

6. Select Visible in Customer Portal so that care team members with this role are visible to Experience Cloud site members.
   The care team member roles are now available to assign to different care team members.

SEE ALSO:
  Salesforce Help: Create Case Team Roles
  Customize Care Team Roles

Use Custom Metadata Settings to Configure Health Cloud

You can add or replace fields in many of the components of Health Cloud using custom metadata.

**Care Plan Record Type**
  Used to create and manage different types of care plans.

**Group Record Type Mapper**
  Used to configure a custom household or Group record type.
  See GroupRecordTypeMapper in the Health Cloud Object Reference Guide for more information.

**HcHelpTray**
  Reserved for internal use.

**Health Cloud Settings**
  A generic dictionary for Health Cloud specific app configuration key value pairs.
  See Manage Health Cloud Settings for more information.

**Individual Record Type Mapper**
  Used to configure a custom Individual record type.
  See IndividualRecordTypeMapper
Risk Score Age Band Continued Enrollee
Lookup table of age groups for people who have been enrolled in Medicare for more than a year. For example, people who are between 35–44 years old and others who are between 60–64 are in two different age bands. This information is used in risk calculation scoring.

Risk Score Age Band New Enrollee
Lookup table of age groups for people who are newly enrolled in Medicare. For example, people who are between 35–44 years old and others who are between 60–64 are in two different age bands. This information is used in risk calculation scoring groups.

Risk Score HCCCode
Lookup table for Hierarchical Condition Category (HCC) codes and risk scores.

Risk Score Disease Interaction
Lookup table with disease interaction scores. This information is used in risk calculation scoring.

Risk Score Medicaid Interactions
Lookup table with disease interaction scores for people who are enrolled in both Medicare and Medicaid. This information is used in risk calculation scoring.

To change the settings, deactivate the setting in Health Cloud Settings. Then, clone the setting record keeping the Setting Name, make your changes, and then make that record active.

1. From Setup, enter Custom metadata in the Quick Find box, then select Custom Metadata Types.
2. Click Manage Records next to Health Cloud Settings.
3. Click Edit in the row for the setting you want to override or change.
4. Deselect the Active checkbox, and then click Save.
5. Click the name of the setting you want to override.
6. Click Clone, create a settings record using the exact text found in the Setting Name field of the cloned record, and make the record active.

Manage Health Cloud Settings
Health Cloud Settings contains various keys or value pairs of configuration settings for Health Cloud. You can disable the delivered settings if you don’t need them, or override them with new settings that fit your business needs.

Configure Custom Record Types for Individuals or Groups
Health Cloud gives you the flexibility to configure custom individual and household (group) record types. For example, custom record types let you add doctors as a type of individual or hospitals as a group record type. You can easily configure a custom record type based on the default individual or group record type provided by Health Cloud.

SEE ALSO:
Customize Care Team Roles

Manage Health Cloud Settings
Health Cloud Settings contains various keys or value pairs of configuration settings for Health Cloud. You can disable the delivered settings if you don’t need them, or override them with new settings that fit your business needs.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Controls</th>
</tr>
</thead>
<tbody>
<tr>
<td>Careplan_Role_CareCoordinator</td>
<td>Label for Care Coordinator that appears throughout the app.</td>
</tr>
<tr>
<td>Setting</td>
<td>Controls</td>
</tr>
<tr>
<td>------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Careplan_Role_Patient</td>
<td>Label for Patient that appears throughout the app.</td>
</tr>
<tr>
<td>ConfigureCareTeamInNewCarePlan</td>
<td>Adds the care team section in the new care plan flow in Lightning Experience.</td>
</tr>
<tr>
<td>HcFeatureDriver</td>
<td>Defines whether a contact or account record appears for a patient or member in the Details tab of the console.</td>
</tr>
<tr>
<td>HcHelpTray</td>
<td>Reserved for internal use.</td>
</tr>
<tr>
<td>HcFieldSet_AddMember</td>
<td>Adds an external care team member.</td>
</tr>
<tr>
<td>HcFieldSet_CandidatePatientListView</td>
<td>Fields that appear on the list view for candidate patients.</td>
</tr>
<tr>
<td>HcFieldSet_GoalDefaultFieldSet</td>
<td>Fields that appear as part of care plan goals.</td>
</tr>
<tr>
<td>HcFieldSet_ProblemDefaultFieldSet</td>
<td>Fields that appear as part of care plan problems.</td>
</tr>
<tr>
<td>HcFieldSet_TaskListDefaultFieldSet</td>
<td>Columns that appear in the patient or member task list.</td>
</tr>
<tr>
<td>PatientCreateFlow_default</td>
<td>Patient creation job flow.</td>
</tr>
<tr>
<td>PatientCreateMappingGroup_default</td>
<td>Patient creation data mapping.</td>
</tr>
</tbody>
</table>

1. From Setup, enter Custom Metadata in the Quick Find box, then select Custom Metadata Types.
2. Click Health Cloud Setting, then click Manage Health Cloud Settings.
3. Click the name of the setting you want to disable or override, and click Edit.
4. Clear the Active checkbox and then click Save.
   If you just want to disable a setting, you can stop here. But if you want to override a setting with a new setting, continue to the next step.
5. Navigate back to the Health Cloud Settings page, and click New.
6. Fill out the information for your custom setting.
   Make sure to use the same Setting Name as the default setting that you are overriding. For example, Careplan_Role_Patient, if you are creating your own label for patients, or Careplan_Role_Care_Coordinator, if you're creating your own label for care coordinators.
7. To make the settings available, select the Active checkbox.

Configure Custom Record Types for Individuals or Groups

Health Cloud gives you the flexibility to configure custom individual and household (group) record types. For example, custom record types let you add doctors as a type of individual or hospitals as a group record type. You can easily configure a custom record type based on the default individual or group record type provided by Health Cloud.

To configure a custom individual record type, create a custom account record type using the Account (Patient) Layout and then create a custom contact record type using the Contact (Patient) Layout.

To configure a custom household or group record type, you must first create a custom account record type using the Account (Household) Layout.
1. From Setup, enter custom in the Quick Find box, then select Custom Metadata Types.
2. To configure an individual record type, click Individual Record Type Mapper. To configure a household or group record type, click Group Record Type Mapper.
3. Depending on your record type, click either Manage Individual Record Type Mappers or Manage Group Record Type Mappers.
4. Click New.
5. Complete the following information for the record type mapper.
   a. Enter the Label for your custom record type mapper.
      The Individual Record Type Mapper Name is filled automatically based on this label. Keep it the same as the label.
   b. For Account Record Type, enter your custom account record type name.
      This name is the same as your custom record type.
   c. Enter the account namespace for your custom record type’s org.
   d. For Contact Record Type, enter your custom contact record type name.
   e. Enter the contact namespace for your custom record type’s org.
   f. Enter the Lead Record Type to be used when converting Lead records.
      Leave this field blank to use the Master record type. If a master record type isn’t found, all available record types are converted to an Individual record type.
   g. Enter the lead namespace for your custom record type’s org.
6. Save your changes.

Customize Health Cloud Labels

If you want to change the delivered labels to suit your org, here’s a quick and easy way to that. Health Cloud has a broad range of use cases and it’s important that it reflects the appropriate terminology for each case, like that of payer. Health Cloud is delivered with a default label of patient; however, it’s adaptable and you can modify the terminology to best suit your org. The custom labels delivered with the Health Cloud package can’t be edited, but you can override them by creating a translated version of the label.

1. From Setup, enter Custom Labels in the Quick Find box, then select Custom Labels.
2. Select the name of the custom label to open. Here are a few examples of commonly customized labels.
   • Header_Patient_Navigation
   • Header_Patient_Info
   • Patient_card_Header
3. Click the New Local Translation/Overrides button.
4. Select English as the language and enter the new label.
   Change patient to member (or whichever label is most useful for your org).

Complete these steps for each label and you’re all set!
Use the Health Cloud - Admin App

The Health Cloud - Admin app includes a set of tabs where you can customize Health Cloud features to support the ways your organization works with patients or members.

To use the Health Cloud - Admin app, switch to Salesforce Classic and use the app picker to select Health Cloud - Admin.

Cross Object Relationships
Cross-object relationships control which objects and fields appear in the filter selection options when creating patient or member lists.

EHR Custom Objects
These tables (EHR Patients, EHR Encounters, and so on) contain data from the source record system related to things like prescriptions, conditions, patients, and immunizations.

Patient Card Configurations
Edit the patient card view and add or remove information from EHR or other records.

Timeline View Configurations
Add or remove healthcare events from the timeline so that care coordinators have the information they need and can effectively manage patients or members.

Give Your Users the Health Cloud Lightning Experience Console

If you’ve been supporting Health Cloud use via the Salesforce Classic interface, you delight your users by switching to the Lightning Experience. Use the Lightning Experience Migration Assistant as your control center for tackling the transition. From Setup in Salesforce Classic, click Get Started in the Migration Assistant tile at the top of the menu.

When you enable the Health Cloud Lightning Experience Console, your users can access the console using the App Launcher. To turn on the Console, add the app to your org and assign users. Users with Health Cloud Standard or Health Cloud Admin permission sets can access the Health Cloud - Lightning Console app. You need the Health Cloud Admin permission set to access the Health Cloud - Lightning Admin app.

Note: The Health Cloud console in Salesforce Classic is still here, and it’s easy for Lightning Experience users to move between the old and the new. So even if Lightning Experience isn’t a perfect fit yet, you and your users can try it on for size without losing out.
Enable Lightning Experience

- Enable Lightning Experience using the Lightning Experience Migration Assistant.
- Define Your My Domain Subdomain Name.
- Switch to Lightning Experience.

Create the Health Cloud - Lightning Console App

- Use the App Manager to create a Lightning console app and name it Health Cloud - Lightning Console.
- Set the app’s primary color, give it a logo, and add a description.
- Add items to your app’s utility bar, select the items you want to appear in the app, and assign it to user profiles.

Create the Patient Console Record Flexipage

- In the Lightning App Builder, create a Lightning record page named Patient Console and select the Account object.
- Select the three-column page template.
- Drag the Patient Detail for Health Cloud component into the left column.
- Customize the other two columns by dragging other components onto the page.
- Save your work and select the Activate button.
- Select the following org and app defaults.
  - Org and App Defaults: Don’t set this flexipage as the org or app default page.
  - Selected Record Types: All individual record types that you’ve configured using the Individual Record Type Mapper.
  - Selected Profiles: Any profiles that need access to the page.

Create Optional Flexipages

The Patient Console record flexipage is a required component for the Health Cloud console. Other flexipages are optional and can be created and added as needed. Follow the steps to create the Patient Console flexipage and use the information listed in this table for each flexipage you want to add.

<table>
<thead>
<tr>
<th>Flexipage</th>
<th>Label</th>
<th>Page Layout</th>
<th>Component Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patients</td>
<td>Patients</td>
<td>One Column</td>
<td>Patient List View for Health Cloud</td>
</tr>
<tr>
<td>Candidate Patients</td>
<td>Candidate Patients</td>
<td>One Column</td>
<td>Candidate Patient List View for Health Cloud</td>
</tr>
<tr>
<td>Today</td>
<td>Today</td>
<td>Main Column and Right Sidebar (for Chatter)</td>
<td>Today View for Health Cloud</td>
</tr>
</tbody>
</table>
Create Health Cloud Lightning Admin App
Create the Lightning app that lets you and your admins set up and customize the console.

- Use the App Manager to create a Lightning app and name it Health Cloud Lightning Admin.
- Set the app’s primary color, give it a logo, and add a description.
- Select the **Standard Navigation** option.
- Add items to your app’s utility bar and select the items you want to appear in the app. This should include all EHR objects and other items, as required. Assign it to user profiles and save your work.

Customize the Health Cloud Console
Health Cloud is a managed package, installed on top of Salesforce Enterprise Edition, Performance, or Unlimited editions. While not every component or attribute in a managed package is customizable, you can edit the key components and attributes that you’ll need to make your instance of Health Cloud fit your users' needs.

**Display Information About a Patient or Member**
You can provide care coordinators and managers with the basic information they need about a patient or member by configuring components in the console. Arrange the Highlights Panel, Patient Card, Patient Info, and Patient Navigation components to fit the way your care coordinators work.

**Customize Problems and Goals**
You can customize problems and goals in Lightning Experience by editing the corresponding page layouts. In Salesforce Classic, use field sets to change the delivered pages. With field sets, you can add custom fields or change the order of existing fields on the pages used to create problems and goals.

**Customize Tasks**
Customize the fields on the New Task page so that the field values reflect the kinds of tasks care coordinators most often assign, and use rating terminology specific to your organization.

**Customize the Create External Member Fields**
You can customize the fields that appear on the modal that care coordinators use to create an external care team member.

**Refine the Householding Map for Care Coordinators**
The householding map brings together patients or members, care plans, caregivers, households, businesses, and other individuals in one view. You can change the roles and relationships that appear in the map.

**Allow Domains for Health Cloud Console**
You can let Health Cloud console users access domains outside of Salesforce. For example, you can add `www.example.com` to a console’s allowlist so that console users can access that domain.

**Customize the Timeline View**
Add or remove healthcare events from the timeline view to provide care coordinators and patients with a chronological view of healthcare events.

**Customize Care Team Roles**
The roles that people have in the healthcare world are incredibly varied. So we’ve given you the flexibility to change the standard Health Cloud roles to ones that reflect how your organization works.

**Show Data Sources with Custom Icons**
You can supply your own icons to help users interpret information at a glance.
Translate Health Cloud Labels
The custom labels that are delivered with Health Cloud package can’t be edited, but you can override them by creating a translated version of the label.

Import Diagnosis and Procedure Codes
Use Data Loader to import industry-standard medical diagnosis and procedure codes and make them available to users in Health Cloud for pre-authorization requests.

Display Information About a Patient or Member
You can provide care coordinators and managers with the basic information they need about a patient or member by configuring components in the console. Arrange the Highlights Panel, Patient Card, Patient Info, and Patient Navigation components to fit the way your care coordinators work.

Display Medical Data About a Patient
The Patient Card helps care coordinators track the patient’s condition by showing data from medical record fields. You can add fields from the source record system so that care coordinators have the information they need to manage patients.

Create a Custom Formula Field for the Patient or Member Card
You can customize the information that appears on the patient card by adding a custom filter field to a specified object.

Display a Patient’s Contact Information
The Highlights panel contains the patient’s contact information, including their Medical Record Number. It also names the care coordinator or other internal person who’s responsible for tracking this patient. You can add Quick Actions to the Highlights panel so that care coordinators can conveniently do things like hand off the patient to another coordinator or add the patient to a care program.

Help Users Navigate Patient Information
Make it quick and easy for care coordinators to navigate to the information they need. You can also specify which subtabs open and in what order when a patient record opens in the console.

Display Basic Patient or Member Information
The Patient Info component shows essential information identifying the person, and a thumbnail photo when one is available.

Display a Patient’s Life Events
Add the Person Life Event component to your custom Account record page to give care team members an at-a-glance view of their patient’s life events to help them identify a care plan tailored to the patient’s condition and life events.

Customize the Patient Details Tab
The Patient Details tab shows records that are associated with the Account record. If you prefer to show the Contact record on the tab, change the settings for HcFeatureDriver in the Custom Metadata Types in Health Cloud Settings.

Customize the Candidate Patient List View
You can customize the fields that appear on the list view that care coordinators use to convert candidate patients to patients in Health Cloud.

Customize Patient or Member Lists
Cross-object relationships control which objects and fields appear in the filter selection options when creating patient or member lists.
Display Medical Data About a Patient

The Patient Card helps care coordinators track the patient’s condition by showing data from medical record fields. You can add fields from the source record system so that care coordinators have the information they need to manage patients.

Each field displays up to 200 characters, after which users can click Show More to expand the section and view the remaining text. You can add any number of fields to the patient card, but we recommend no more than 15-20 fields for best results. You can add fields from objects that come from the custom EHR tables and other objects, as well. Be sure that the objects that you’re adding to the patient card are related to the Account object.

Watch a Demo:  Add Essential Information to the Patient Card

Health Cloud delivers the patient card with the basic fields that care coordinators commonly use. You can customize the patient card and add fields from the source record system so that care coordinators have the information necessary to make informed decisions and provide excellent patient care.

Tip: Check the Schema Builder in your org if you’re not sure an object is related to the Account object.

1. From the Health Cloud - Admin Home page, select the Patient Card Configurations tab, and click New.
2. Enter the following:

   **Patient Card Configuration Name**
   Name of the patient card item you’re creating. This name appears only on setup pages.

   **Object Name**
   Name of the object that contains the field to show on the patient card. Use the exact spelling of the object name to ensure correct results.

   **Field Name**
   Name of the field in that object that contains the information to display on the patient card.

   **Friendly Name**
   Text that appears as a field label on the patient card.

   **Note:** The text in this field isn’t available for localization using the Translation Workbench. To have this text appear in another language, clone the configuration record and enter the text using the language you want to display. Then, set the Language field of the new record to that language. The system displays the label text that matches the user’s language setting.

   **Sort Order**
   Indicates the vertical order in which this field appears on the patient card.

   **Note:** If you clone a configuration record so that you can localize the label, then also modify the sort order. Since you can’t have two records with the same assigned sort order, create a different version number for the new record. For example, if the English record has 3 in the Sort Order field, then assign the Spanish version 3.1.

   **Sort By**
   Enter the name of the field used to define the order in which the results appear. For example, if you have several medication names returned, you can sort them by the date prescribed. That way, the most recent prescriptions appear first in the field.

   **Override Filter Field**
   If you’re creating your own filter field or adding a field to the patient card, enter the name of your filter field.

   When creating your own filter field to use instead of HealthCloudGA__IsVisibleOnPatientCard__c, enter the name of your filter field. Make sure that the new filter field is either a Boolean or a formula field that returns a checkbox-type value.

   **Note:** If you’re adding a standard Salesforce field (like Case), this field is required.
Ascending
Select to display results in ascending order. This field works with the Sort By field.

Active
Select to activate this field and have it appear on the patient card.

Limit
Enter the maximum number of results that can appear in the field.

Language
The setting that specifies the language of the text in the Friendly Name field.

Language Code
The code that specifies the language of the text in the Friendly Name field.

Patient Account Lookup
Name of the lookup to display on the patient card when multiple lookups to Account exist. The default for this field is Account__c.

Note: To use delivered Account lookups for standard objects like Contact or Task, you must append Id to the lookup field name. For example, to configure a lookup from Contact to Account, use Account.Id in this field. Similarly, for a lookup from Task to What, use What.Id.

Note: If you don’t see the Language and Language Code fields on the list view, add the fields to the page layout and to the patient account lookup. Then, refresh the page by selecting All and clicking Go!

Create a Custom Formula Field for the Patient or Member Card
You can customize the information that appears on the patient card by adding a custom filter field to a specified object.

By default, the patient card shows fields that provide basic medical and contact information for that person. To add other items or change the information that displays from the delivered fields, create a custom formula field on the object you want to display. For example, to display medical device information, create a custom field on the EHR_Devices object with a formula that returns the information you want to display.

1. From Setup, enter Object in the Quick Find box, then select Objects.
2. Select the name of the custom object that holds the information you want to display on the patient card.
3. In the Custom Fields & Relationships section of the page, click New.
4. Select Formula as the data type and click Next.
5. Enter a field label that identifies the custom field.
6. Select Checkbox for the return type and click Next.
7. Create a formula that returns the results that you want to display on the patient card. For more information about the Advanced Formula tab, see Build a Formula Field.

Example: The following table shows the objects and fields that you can use to add information on the patient card. When there are multiple entries returned for an item, each value is separated by a vertical bar.

<table>
<thead>
<tr>
<th>Display Name</th>
<th>Description</th>
<th>Object</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent/Guardian/Guarantor</td>
<td>Name of person responsible for</td>
<td>EHR Related Person</td>
<td>IsVisibleOnPatientCard</td>
</tr>
<tr>
<td></td>
<td>the patient or member.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language</td>
<td>Preferred language</td>
<td>EHR Patient</td>
<td>IsVisibleOnPatientCard</td>
</tr>
</tbody>
</table>
### Display a Patient’s Contact Information

The Highlights panel contains the patient’s contact information, including their Medical Record Number. It also names the care coordinator or other internal person who’s responsible for tracking this patient. You can add Quick Actions to the Highlights panel so that care coordinators can conveniently do things like hand off the patient to another coordinator or add the patient to a care program.

**SEE ALSO:**

*Salesforce Help: Building Formulas*
Help Users Navigate Patient Information

Make it quick and easy for care coordinators to navigate to the information they need. You can also specify which subtabs open and in what order when a patient record opens in the console.

The Patient Navigation component lets care coordinators jump to the pages they need without leaving the patient console. You can customize the items that appear in the tab navigation list on the patient card. You can add a new navigation item to one of the default menu categories, or you can add a category with new child navigation options to what you already have.

You can also configure the tab navigation menu to open standard and custom pages or URLs as either primary or secondary tabs. Clicking an item in the menu opens a new tab or subtab related to that patient’s records.

Customize the items that appear in the tab navigation list using custom settings. You can add a navigation item to a default menu category, or a category with new child navigation options to what you already have. For example, create your own Visualforce page and add it to the navigation list or add a URL to another frequently used page.

The Subtab Sort Order field sets the order that the related subtabs appear in the console. You can also specify which tabs appear when the patient record opens in the console.

**Note:** All navigation menu elements appear in alphabetical order. Categories are listed in alphabetical order, as are the subcategories beneath them.

1. From Setup, enter Custom Settings in the Quick Find box, then select Custom Settings.
2. In the list of custom settings, click Manage next to the CardView Dropdown custom settings.
3. Click New and complete the following fields:
### Field Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category Label</td>
<td>Enter the name of the custom label for the parent category that contains child menu navigation items, for example Tab_Timeline. The category name is just a heading and isn't a clickable navigation link. You can use a localized category name in this field. When a value exists for this field, the Category Name field isn't used.</td>
</tr>
<tr>
<td>Category Name</td>
<td>Name of the parent category that contains child menu navigation items. The category name is just a heading and isn't a clickable navigation link.</td>
</tr>
<tr>
<td>Default Subtab</td>
<td>When selected, the related subtab appears by default in the Health Cloud console.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the parent category that contains child menu navigation items. The category name is just a heading and isn't a clickable navigation link.</td>
</tr>
<tr>
<td>Page Type</td>
<td>Content type of the new page. Specify <strong>VFPage</strong> or <strong>URL</strong>. <strong>Note</strong>: Make sure to add external URLs to the console's allowlist so that console users can access that domain.</td>
</tr>
<tr>
<td>Subcategory Name</td>
<td>Name of the child category in the menu list. This text is the clickable link that opens the page or tab.</td>
</tr>
<tr>
<td>Subcategory Label</td>
<td>Customized label for the name of the child category in the menu list. This text is the clickable link that opens the page or tab. Use a custom label to create a localized category name in this field. When a value exists for this field, the Subcategory Name field isn't used.</td>
</tr>
<tr>
<td>Subtab Sort Order</td>
<td>Indicates the order in which this tab appears in the console when it's been selected as a default tab. <strong>Note</strong>: If you add a configuration record to the menu, then modify the sort order. Since you can't have two records with the same assigned sort order, create a different version number for the new record.</td>
</tr>
<tr>
<td>Tab Type</td>
<td>Specify the type of tab to use for this page: <strong>Primary</strong> or <strong>Subtab</strong>. A primary tab is the main item to work on. A subtab is related to an item on a primary tab.</td>
</tr>
<tr>
<td>URL</td>
<td>URL to access the page.</td>
</tr>
<tr>
<td>URL Parameter</td>
<td>(Optional) Add more URL parameters to the existing Visualforce page or URL to open the new tab. <strong>URL parameter format key=value,key2=value</strong></td>
</tr>
</tbody>
</table>

4. Click **Save**.

**Example**: The following example shows how to add a subtab entitled **All Medical Records** to a category named **Medical Records**:

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>All Medical Data.</td>
</tr>
</tbody>
</table>
Administer Health Cloud

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category Name</td>
<td>Medical Record</td>
</tr>
<tr>
<td>URL Parameter</td>
<td>Not necessary</td>
</tr>
<tr>
<td>Tab Type</td>
<td>Subtab</td>
</tr>
<tr>
<td>Subcategory Name</td>
<td>All Medical Records</td>
</tr>
<tr>
<td>Page Type</td>
<td>VFpage</td>
</tr>
</tbody>
</table>

Note: Make sure to add external URLs to the console’s allowlist so that console users can access that domain.

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL</td>
<td>/apex/&lt;VF page name&gt;</td>
</tr>
<tr>
<td>Category Label</td>
<td>To use a localized or customized version of the Category Name field, enter it here. When there is a value in this field, it’s used instead of the value in Category Name.</td>
</tr>
<tr>
<td>Default Subtab</td>
<td>Enabled so that the subtab shows by default when the page loads.</td>
</tr>
<tr>
<td>Sort Order</td>
<td>3.0</td>
</tr>
<tr>
<td></td>
<td>This category displays in the third position on the menu.</td>
</tr>
<tr>
<td>Subcategory Label</td>
<td>To use a localized or customized version of the Subcategory Name field, enter it here. When there is a value in this field, it’s used instead of the value in Subcategory Name.</td>
</tr>
</tbody>
</table>

Display Basic Patient or Member Information

The Patient Info component shows essential information identifying the person, and a thumbnail photo when one is available.

![Patient Info](image)

The information displayed for each person comes from their contact record and from Chatter.

<table>
<thead>
<tr>
<th>Information</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thumbnail photo</td>
<td>Chatter profile photo</td>
</tr>
<tr>
<td>Patient or member name</td>
<td>Contact record</td>
</tr>
<tr>
<td>Information</td>
<td>Source</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>Date of birth and age</td>
<td>Formula field based on fields from the contact record</td>
</tr>
<tr>
<td>Gender</td>
<td>Gender custom field on Contact record</td>
</tr>
</tbody>
</table>

Display a Patient’s Life Events

Add the Person Life Event component to your custom Account record page to give care team members an at-a-glance view of their patient’s life events to help them identify a care plan tailored to the patient’s condition and life events.

1. From Setup, in the Quick Find box, enter **App Builder**, and then select **Lightning App Builder**.
2. In the Lightning Pages list, click **Edit** next to your Account record page.
3. Drag the **Life Events or Business Milestones** component to the account summary.

4. Save your changes.

Customize the Patient Details Tab

The Patient Details tab shows records that are associated with the Account record. If you prefer to show the Contact record on the tab, change the settings for HcFeatureDriver in the Custom Metadata Types in Health Cloud Settings.

When you change the default settings or if you use a custom page layout, you must also modify the associated page layout. For example, to modify the Account layout, follow these steps.

1. From Setup, enter **Account** in the Quick Find box, then select **Accounts**.
2. Select **Edit** next to Patient Layout.
3. Select the **Custom Console Components** link at the top of the page.
4. In the Primary Tab Components section, add the following information to the Left Sidebar section.
Customize the Candidate Patient List View

You can customize the fields that appear on the list view that care coordinators use to convert candidate patients to patients in Health Cloud.

Use field sets to add new fields or change the order of existing fields used in the candidate patient list view.

1. From Setup, enter Objects in the Quick Find box, then select Objects.
2. On the Custom Object page, select the Candidate Patient custom object.
3. Scroll to the Field Sets section and click Edit next to the Candidate Patient List View.
4. Drag and drop the fields you want to display on the Candidate Patients list view.

   Note: The following fields must be included in the field set and should not be deleted:
   - Record ID (Id)
   - Name (Name__c)
   - Patient Account (AccountId__c)
   - Patient Account Name (AccountId__r.Name)
   - Patient Account Primary Contact (AccountId__r.PrimaryContact__c)

5. Click Save.

Customize Patient or Member Lists

Cross-object relationships control which objects and fields appear in the filter selection options when creating patient or member lists. Health Cloud delivers a basic set of filters that you can use when you define a list. To add other custom records to the list filter options, create relationships that link records with each other. When your users view records, they can also see related data. You can define different types of relationships by creating custom relationship fields between objects. For example, to add fields related to immunizations to the list filters, you create a relationship between Account and EhrImmunization__c.

Before creating relationships, determine which fields you want to expose in the filter and which object exposes those fields. Relationships between objects in Health Cloud determine sharing, required fields in page layouts, and which fields are available when you create a patient or member list.

Note: The Account object must be one of the two objects in your cross-object relationship.

To see a list of Health Cloud objects and fields, see the Health Cloud Object Reference Guide.
1. To create the relationship that adds a custom object to the list filter criteria, select the **Cross Object Relationships** tab.

2. Specify the details of the relationship:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cross Object Relationship Name</td>
<td>Name that describes the relationship.</td>
</tr>
<tr>
<td>From Object</td>
<td>Name of the parent object. This field is a required field, and in Health Cloud the object must be <strong>Accounts</strong>.</td>
</tr>
<tr>
<td>To Object</td>
<td>Name of the child object to include as an option in list filter criteria.</td>
</tr>
<tr>
<td>Relationship</td>
<td>Optionally, the name of the custom relationship.</td>
</tr>
<tr>
<td>Reverse Relationship</td>
<td>Optionally, the name of the object that is the originating or &quot;from&quot; object.</td>
</tr>
</tbody>
</table>

The following table shows some of the cross object relationships that are pre-configured with Health Cloud. You can use this table as a reference to create other cross-object relationships and make more records and fields available when creating lists.

<table>
<thead>
<tr>
<th>Cross Object Relationship Name</th>
<th>From Object</th>
<th>To Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>AccountToCondition</td>
<td>Account</td>
<td>EhrCondition__c</td>
</tr>
<tr>
<td>AccountToContact</td>
<td>Account</td>
<td>Contact</td>
</tr>
<tr>
<td>AccountToEhrMedicationPrescriptions</td>
<td>Account</td>
<td>EhrMedicationPrescription__c</td>
</tr>
<tr>
<td>AccountTo Encounter</td>
<td>Account</td>
<td>EhrEncounter__c</td>
</tr>
<tr>
<td>AccountToObservation</td>
<td>Account</td>
<td>EhrObservation__c</td>
</tr>
</tbody>
</table>

### Customize Problems and Goals

You can customize problems and goals in Lightning Experience by editing the corresponding page layouts. In Salesforce Classic, use field sets to change the delivered pages. With field sets, you can add custom fields or change the order of existing fields on the pages used to create problems and goals.

**Note:** The delivered problem and goal pages use a packaged field set, which lets you choose the fields and the order of appearance on these pages. The delivered pages aren't available for edit through the page layout editor.

Customize the fields that show up on the pages care coordinators use to create problems and goals for the care plan. Problems and Goals are both custom objects, and you can add custom groupings of fields by using Salesforce field sets. A field set is a grouping of fields you create and then add to an object.

After you create the field sets, you add them to the default field set for that object in the Custom Labels page. For example, to add fields to the Problems page, you modify the defaultFieldSet for Problems.

**EDITIONS**

Health Cloud is available in Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions
1. From Setup, enter **Object** in the **Quick Find** box, then select **Objects**, and select either the Problem custom object or the Goal custom object.

2. From the management settings for the appropriate object, go to Field Sets, and then click **New**.

3. Enter a **Field Set Label**.

4. Optionally, enter a name for your field set.

5. In the **Where is this used?** area, provide a brief description of which pages use the field set, and for what purpose. This information helps a subscriber understand where and how an installed field set is being used, so that they can populate it with their own fields.

6. Save your changes.

7. To add fields to the field set, drag the fields from the object palette and drop them into the **Available for the Field Set** or the **In the Field Set** container. The fields in the **In the Field Set** container are visible by default.

   **Note:** In the field set, you can span to fields that reference multiple objects. When you span a field into a field set that references multiple objects, the only field you can span into is the **Name** object.

   You can drag and drop a field from one container to the other. The vertical order of the **In the Field Set** list indicates the order of how the fields render on pages.

8. To remove a field from the field set, drag the element back to the object palette, or click the **icon next to the element.**

9. To make a field required, double-click the element or click the wrench icon (🔧) next to it and select the **Required** checkbox.

   **Note:** Indicates that the field is required and must have a value to save the record.

---

**Customize Tasks**

Customize the fields on the New Task page so that the field values reflect the kinds of tasks care coordinators most often assign, and use rating terminology specific to your organization.

You can add to or change the values for the following picklists on the New Task page:

- Status
- Priority
- Task Type

**Add Custom Task Types**

Custom task types help your care coordinators create tasks that are specific to the type of care that they deliver. For example, for an outpatient orthopedic surgery center, task types could include **Pre-Op Lab Work** or **Weekly PT**.

**Add or Edit Task Priority Values**

You can change the values that appear in the **Priority** field that shows the importance of a task.

**Add or Edit Task Status Values**

You can change the values that appear in the **Status** field that shows the progress or measures the completion of a task.

**Customize the Task List View in the Console and Experience Cloud site**

Use field sets to customize task columns that appear in the Health Cloud console list view and for fields that display in patient or member sites.
Add Custom Task Types

Custom task types help your care coordinators create tasks that are specific to the type of care that they deliver. For example, for an outpatient orthopedic surgery center, task types could include Pre-Op Lab Work or Weekly PT.

Plan carefully when you create task types so that there aren’t too many choices in the picklist.

1. From Setup, enter Activity Custom Fields in the Quick Find box.
2. Click Task Type.
3. In the Picklist Values section, click New.
4. Add one or more picklist values in the text box. Put each value on its own line
5. Select Care Plan Task so that the new values are associated with the Task Type picklist.
6. Click Save.
7. To change the order in which the values display in the picklist, click Reorder.
8. To specify a default value for the picklist, select the Default checkbox for that task type.

Add or Edit Task Priority Values

You can change the values that appear in the Priority field that shows the importance of a task.

1. From Setup, enter Task in the Quick Find box and select Task Fields.
2. In the Task Standard Fields list, click Priority.
3. To add a value to the list, click New.
4. Add one or more picklist values in the text box. Put each value on its own line
5. Select Care Plan Task so that the new values are associated with the care plan.
6. Click Save.
7. To change the order in which the values display in the picklist, click Reorder.
8. To specify a default value for the picklist, select the Default checkbox for that priority.
9. Select the value that represents the highest priority for the task.
Add or Edit Task Status Values

You can change the values that appear in the Status field that shows the progress or measures the completion of a task.

1. From Setup, enter Task in the Quick Find box and select Task Fields.
2. In the Task Standard Fields list, click Status.
3. To add a value to the list, click New.
4. Add one or more picklist values in the text box. Put each value on its own line.
5. Select Care Plan Task so that the new values are associated with the care plan.
6. Click Save.
7. To change the order in which the values display in the picklist, click Reorder.
8. To specify a default value for the picklist, select the Default checkbox for that status.
9. To select a value that closes the task, select the Closed checkbox for that status.

Customize the Task List View in the Console and Experience Cloud site

Use field sets to customize task columns that appear in the Health Cloud console list view and for fields that display in patient or member sites.

A field set is a grouping of fields you create and then add to an object. Health Cloud delivers two field sets that control what information appears in the task lists. The HcCarePlanTaskFields field set controls which fields appear on tasks listed in the patient or member site. The HC Task List field set controls the columns in the list view in the Care Plan tab of the console. Since these field sets are part of the Health Cloud managed package, you have limited editing options. You can change the order of fields in the field set or remove fields. To add fields, you must create a different field set and use it in place of the delivered field set.

1. From Setup, enter Task in the Quick Find box, then select Task Field Sets.
2. Select New.
3. Enter a Field Set Label. This label is the name presented to subscribers who install the field through a managed package.
4. Enter a name for your field set.
5. In the Where is this used? area, provide a brief description of which pages use the field set, and for what purpose. This information helps a subscriber understand where and how an installed field set is being used, so that they can use their own fields.
6. Click Save.
7. To add fields to the field set, drag the fields from the object palette and drop them into the Available for the Field Set or the In the Field Set container. The fields in the In the Field Set container are visible by default. In the field set, you can span to fields that reference multiple objects. When you span a field into a field set that references multiple objects, you can only span to the Name object.

You can drag a field from one container and drop it on the other. The vertical order of the In the Field Set list indicates the order of how the fields render on pages.

Note: A maximum of five fields are displayed in the Experience Cloud Task List, regardless of how many fields you add to the field set.

8. To remove a field from the field set, drag the element back to the object palette, or click the icon next to the element.
9. To make a field required, double-click the element or click the wrench icon ( ) next to it and select the Required checkbox.

Note: Indicates that the field is required and must have a value to save the record.
10. Save your work.

SEE ALSO:
- Manage Health Cloud Settings

Customize the Create External Member Fields
You can customize the fields that appear on the modal that care coordinators use to create an external care team member. Use field sets to add new fields or change the order of existing fields used to create external care team members.

1. From Setup, enter Accounts in the Quick Find box, then select Field Sets.
2. Select Edit next to the New External Member field set.
3. Drag and drop the fields you want to display on the New External member modal.
   
   **Note:** You can only add fields from Account and the related primary contact. Fields from other related objects will be ignored.
4. Click Save.

Refine the Householding Map for Care Coordinators
The householding map brings together patients or members, care plans, caregivers, households, businesses, and other individuals in one view. You can change the roles and relationships that appear in the map.

**Note:** If you don’t see the Household option in the patient card navigation menu, add it using the CardView Dropdown custom setting. Use permission sets or profiles to grant users access to the contact role and account role record types for the Reciprocal Role object.

How Are Patient or Member Relationships Modeled?
Health Cloud uses a household model to represent patients and members and their relationships with the people who participate in their care. A household is an account with the Household record type. The household is related to the contact part of the individual using the Account Contact Relationship standard object.

Configure Reciprocal Roles
Within a relationship, a reciprocal role is the role of one entity relative to another entity. For example, husband and wife, or caregiver and patient. We’ve provided commonly used reciprocal role records. You can edit them to specify more granular roles for extended families, specific types of caregivers, or various professional affiliations.

Update Roles for Account Contact Relationships
You can create more roles to represent the types of people or companies that care coordinators can add to the Household tab.

Speed up Account-Contact Relationship Calculations
The Use Standard Triggers metadata type for Account-Contact Relationship speeds up relationship calculations for Accounts and Contacts.
How Are Patient or Member Relationships Modeled?

Health Cloud uses a household model to represent patients and members and their relationships with the people who participate in their care. A household is an account with the Household record type. The household is related to the contact part of the individual using the Account Contact Relationship standard object.

You can relate the patient or member to relationship groups that include care plans and external contacts and accounts. Custom objects represent relationships with other caregivers and healthcare business entities.

<table>
<thead>
<tr>
<th>Object</th>
<th>Standard or Custom</th>
<th>Represents</th>
<th>Record Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Standard</td>
<td>• Business</td>
<td>• Business</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Individual</td>
<td>• Individual</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Institution</td>
<td>• Institution</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Group</td>
<td>• Household</td>
</tr>
<tr>
<td>Account Contact Relationship</td>
<td>Standard</td>
<td>The membership in a relationship group and the relationship between a person and an account.</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The membership in a relationship group lets you roll up a member’s information to the group.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For a business account to be a member of a relationship group, the business must first be related to a person in the group.</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** The Use Standard Triggers metadata type for Account-Contact Relationships can speed up relationship calculations for
<table>
<thead>
<tr>
<th>Object</th>
<th>Standard or Custom</th>
<th>Represents</th>
<th>Record Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact-Contact Relationship</td>
<td>Custom</td>
<td>The relationship between two contacts.</td>
<td>N/A</td>
</tr>
<tr>
<td>Reciprocal Role</td>
<td>Custom</td>
<td>The complementary role implied by the relationship of an individual to another individual or entity. For example, Parent is the reciprocal role for Child.</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Configure Reciprocal Roles**

Within a relationship, a reciprocal role is the role of one entity relative to another entity. For example, husband and wife, or caregiver and patient. We’ve provided commonly used reciprocal role records. You can edit them to specify more granular roles for extended families, specific types of caregivers, or various professional affiliations.

**Note:** A user must have access to the Contact Role record type to add or edit reciprocal roles. You can grant access in the Record Type Settings section of the Reciprocal Role object. When you grant console users access to the record type, they can create reciprocal roles when they’re adding a related contact.

1. In Salesforce Classic, go to the Reciprocal Roles tab. In Lightning Experience, from the App Launcher, find and open **Reciprocal Roles**.
   You can also add reciprocal roles in the Create Contact-Contact Relationship modal on the Household tab. In the Related Role, select **New Reciprocal Role**.

2. Click **New**.

3. Select the **Contact Role** record type, and click **Continue**.

4. Enter the name of the role. For example, **Parent**.

5. Enter the name of the reciprocal role. For example, **Child**.

6. Save your work.

**Note:** When a guest user provides information that triggers the creation of a contact-to-contact-relationship record, the inverse contact-to-contact relationship is not created, even if the `createinverse` flag is on. To avoid getting an error when that happens, go to **Setup > Custom Settings > Industries Application Config** and create a new record for the guest user profile with **Create Inverse** unchecked.
Update Roles for Account Contact Relationships

You can create more roles to represent the types of people or companies that care coordinators can add to the Household tab.

1. From Setup, go to the Object Manager.
2. Enter Account Contact Relationship in the Quick Find box. Select Fields & Relationships under Account Contact Relationships.
3. Select Roles.
4. Add or remove roles as needed.
5. Save your changes.

Note: The Use Standard Triggers metadata type for Account-Contact Relationships can speed up relationship calculations for Accounts and Contacts. To see these fields update faster, go to the Custom Metadata Types page in Setup and click Use Standard Trigger. Then click Edit next to EventTrigger, and on the Event Trigger page, turn on the Active checkbox and save your changes.

Speed up Account-Contact Relationship Calculations

The Use Standard Triggers metadata type for Account-Contact Relationship speeds up relationship calculations for Accounts and Contacts. On the Custom Metadata Types page in Setup, click Use Standard Trigger. Then click Edit next to EventTrigger, and on the Event Trigger page, turn on the Active checkbox and save your changes.

Allow Domains for Health Cloud Console

You can let Health Cloud console users access domains outside of Salesforce. For example, you can add www.example.com to a console’s allowlist so that console users can access that domain.

1. From Setup, enter Apps in the Quick Find box, then select Apps.
2. Select a console app.
3. Click Edit.
4. In Allowed Domains, type the domains you want users to access, and separate multiple domains by commas.

Note:
- Don’t include http:// or https://, because those prefixes are part of a URL, not a domain.
- If your CTI phone is running on a server with a non-standard port, make sure to include the port number in your domain. For example, if your server is called myserver and your port number is 8500, include myserver:8500 in your allowlist.

5. Click Save.
Customize the Timeline View

Add or remove healthcare events from the timeline view to provide care coordinators and patients with a chronological view of healthcare events.

On the Timeline View Configurations tab, add different events to the timeline by exposing fields on custom or standard objects. Then, select icons to represent the data on timeline. Use filters to narrow down which events appear on the timeline and then specify which timeline the configuration applies to. So you can show only tasks with medium to high priority instead of including tasks that are assigned lower priorities. Or include medications on the timeline in the Health Cloud console and exclude them from the timeline that the patient sees in the site. You can target a timeline configuration record to appear only in the Health Cloud console, only the Timeline for Health Cloud Empower, or in both. We’ve already added a filter on tasks that appears in both the console and the site. Users can decide to show or hide tasks based on whether they are open or closed.

In your organization-wide sharing defaults, set the Timeline View Configuration and Filter Criterion objects to Public Read/Write in the Default External Access column. Use permission sets and profiles to give access to the fields you want to expose in the timeline.

**Note:** Be sure that the objects that you’re adding to the timeline are related to the Account object. Tasks can be related to the patient account or to a case related to the patient account. Events must be related to the patient account.

1. From the Health Cloud - Admin Home page, select the Timeline View Configurations tab, and click New.
2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timeline View Configuration Name</td>
<td>Name of the timeline event. This name appears only on setup pages.</td>
</tr>
<tr>
<td>Object Category</td>
<td>Name of the category of objects that this event is related to. Use this field to create a group of events. This name appears in the Select All Events menu in the console timeline and the filter dropdown in the site timeline. By default, all pre-configured objects are either Engagement Data or Medical Data.</td>
</tr>
<tr>
<td>Friendly Name</td>
<td>Label that appears in the timeline for the event.</td>
</tr>
<tr>
<td>Note: The text in this field isn’t available for localization using the Translation Workbench. To have this text appear in another language, clone the configuration record and enter the text using the language you want to display. Then, set the Language field of the new record to that language. The system displays the label text that matches the user’s language setting.</td>
<td></td>
</tr>
<tr>
<td>Object Name</td>
<td>Name of the object that contains the field that is shown in the timeline. To ensure correct results, use the exact spelling of the object—for example, EhrMedicationPrescription__c.</td>
</tr>
<tr>
<td>Detail Field</td>
<td>Name of the field that holds the text you want to display as an event on the timeline. For example, to display the name of a task, use the Subject field on the Task object. The text from the Subject field shows on the timeline along with the icon that you select for that type of</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Field</td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Position Field</td>
<td>Date field that the system uses to position the event chronologically on the correct date on the timeline.</td>
</tr>
<tr>
<td>Graphical Icon</td>
<td>Name of the image file that represents the event on the timeline. Upload the image file to the Health Cloud Assets folder in the Documents tab.</td>
</tr>
<tr>
<td>Sort Order</td>
<td>Indicates the vertical order that the events appear when the timeline has more than one event on the same date. If you clone a configuration record so that you can localize the label, then also modify the sort order. Since you can’t have two records with the same assigned sort order, create a different version number for the new record. For example, if the English record has 3 in the Sort Order field, then assign the Spanish version 3.1.</td>
</tr>
<tr>
<td>Active</td>
<td>Select to activate this field and have it appear on the timeline.</td>
</tr>
<tr>
<td>Patient Account Lookup</td>
<td>Name of the lookup to display on the timeline when multiple lookups to Account exist. The default for this field is Account__c.</td>
</tr>
<tr>
<td>Language</td>
<td>The setting that specifies the language of the text in the Friendly Name field.</td>
</tr>
<tr>
<td>Language Code</td>
<td>The code that specifies the language of the text in the Friendly Name field.</td>
</tr>
<tr>
<td>Hover Field Name</td>
<td>Enter up to seven comma-separated field names from the object you want to display. The values from this field appear as hover text for an event on the timeline. For example, you can display...</td>
</tr>
</tbody>
</table>
### Field | Description
--- | ---
| | fields like the due date, performer name, status, and the related problem for tasks. Make sure to use the API field name and not the field label. Valid field types are:
- Date
- Combobox
- Number
- Picklist
- Text

*Note:* This field isn’t used in the Timeline for Health Cloud Empower component.

### Show on Load
Select to have this event appear by default on the timeline when the page first loads.

All timeline configurations that have the Active checkbox selected are available to appear on the timeline when they’re selected using the events filter. But only those configuration records with the Show on Load setting selected appear on the timeline by default.

### Filter Criterion
The name of the collection of filters that apply to this configuration. To create the filter logic for this specific configuration setting, use the Timeline Filter component at the bottom of the tab.

### Configuration Target
Select the timelines in which to display these fields. You can create one configuration record for patient sites and one for the Health Cloud console. To show the same fields in both the Health Cloud console and the Timeline for Health Cloud Empower component, select them both.

*Note:* If you don’t see a field on the tab, add it to the Timeline View Configuration object’s page layout. You may also have to add it to the patient account lookup. Also be sure to configure visibility for each field according to your organization’s needs.

3. Click **Save**.

When you create a configuration record, the Timeline Filter doesn’t appear until you’ve saved the configuration.

4. To add filters, click **Add Row** in the Timeline Filter component.

5. In the first row, click inside the first lookup and type the name of the record to use as a filter. The field displays a dynamic list of matching records when you start typing in the lookup field.

6. In the second lookup field, type the name of the field in that record to display.

   For example, select a priority level for tasks that you want to appear in the timeline.

7. Choose a filter operator.
The operator in a filter is like the verb in a sentence. Use an operator to specify the action you want the filter to take.

8. Enter a value to either match or exclude.

The values that appear in this field are dependent of the type of field you select. For example, if you select High Priority for tasks, a checkbox field with the value True appears.

Note: There are some filter criteria limitations to consider.

- None is not a value available in picklists.
- If you select an ID field as a criterion, make sure that you enter a valid ID. ID values are not validated.
- If you select a Date field as a criterion, make sure that you don’t leave its value blank or null.

9. Add more rows, if necessary.

10. If you have multiple filter rows, you can fine-tune your criteria further. Enter a logical expression in the Filter Logic text box that applies filter logic operators to your filters.

- You can apply the filter logic operators AND and OR. For example, the expression (1 AND 2) OR 3 finds records that match both Filter 1 and Filter 2, or Filter 3. Filter rows that you don’t specify in the expression are ignored.
- If you leave the Filter logic text box empty, the default operator AND is applied to all your filter rows.

11. Click Next.

12. Enter the name for the list.

13. Click Save.

Example: For example, to display tasks in both the console and the site, use the Task object.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timeline View Configuration Name</td>
<td>Tasks</td>
</tr>
<tr>
<td>Active</td>
<td>Selected</td>
</tr>
<tr>
<td>Object Category</td>
<td>Engagement Data</td>
</tr>
<tr>
<td>Friendly Name</td>
<td>Tasks</td>
</tr>
<tr>
<td>Object Name</td>
<td>Task</td>
</tr>
<tr>
<td>Filter Criterion</td>
<td></td>
</tr>
<tr>
<td>Detail Field</td>
<td>Subject</td>
</tr>
<tr>
<td>Position Field</td>
<td>ActivityDate</td>
</tr>
<tr>
<td>Graphical Icon</td>
<td>timeline_icon_check.png</td>
</tr>
<tr>
<td>Sort Order</td>
<td>3</td>
</tr>
<tr>
<td>Show On Load</td>
<td>Selected</td>
</tr>
<tr>
<td>Patient Account Lookup</td>
<td>WhatId</td>
</tr>
<tr>
<td>Hover Field Name</td>
<td>Subject, ActivityDate</td>
</tr>
<tr>
<td>Configuration Target</td>
<td>Health Cloud Console App; Timeline For Health Cloud Empower</td>
</tr>
</tbody>
</table>
Note: For custom lookups on activities to account, the following limitations are applicable on task records fetched for the patient timeline for non-admin users:

- The patient timeline displays a maximum of 500 records.
- The records appear in descending order of the activity date and the last modified date.
- The patient timeline does not display archived records.

SEE ALSO:
Show Data Sources with Custom Icons

Customize Care Team Roles

The roles that people have in the healthcare world are incredibly varied. So we’ve given you the flexibility to change the standard Health Cloud roles to ones that reflect how your organization works.

What if your organization is an extended care facility and calls the people you manage residents rather than patients? Or instead of care coordinators, you have case managers who interact with patients or members. It’s easy to change the text that appears throughout the app.

From Setup, enter Custom metadata in the Quick Find box, then select Custom Metadata Types, then select Health Cloud Settings. Clone the Careplan Role Care Coordinator setting or the Careplan Role Patient setting. Modify the Setting Value field to reflect your customized role name. Then, deactivate the original setting and make the new record active.

Note: When you change the role settings, make sure to also update the corresponding roles in the Assigned To picklist for the Care Plan Template Task object. When you change role names, existing tasks retain the original role names in the Assigned to field. You can edit these tasks to change to the new name.

Show Data Sources with Custom Icons

You can supply your own icons to help users interpret information at a glance.

Note: For images to display with the best results in the timeline, they must be within the recommended file and frame size. The recommended file size is up to 1 MB. Salesforce scales the image to roughly 48 x 48 pixels, so smaller images, and images with an aspect ratio of 1:1 (square) provide the best results.

Icons can help frequent users understand information without having to look it up. For example, when you show information from custom objects or fields in the timeline, you can include an icon that lets care coordinators understand the type of event that’s represented. For another example, you might want to make it easier to identify the source of a record in the Care Gaps list by having the logo of the originating company automatically attached to it.

1. From the Health Cloud - Admin Home page in Salesforce Classic, select the Documents tab, and click New.
2. Give your file a unique name, upload it, and save it.
3. Enter a unique name to be used by the API.
4. Select Externally Available Image. Health Cloud components can’t display the image if this isn’t selected.

5. Select the Health Cloud Assets folder for the file.

6. Enter a description and keywords to use later as search criteria.

7. Click Save.

8. Specify where you want the icon to appear.
   For example, suppose you want to make the icon identify a source system for Care Gaps.
   a. Switch back to Health Cloud Setup, enter Custom Metadata Types in the Quick Find box, then click Custom Metadata Types.
   b. Select Manage Records for Source System Logo Mapping and add a new record.
   c. Give it a label and name: for the Source System Name, use the name that will be used for Source System in the Care Gap records; for Logo Document Name, use the name that you gave to the Document record.

   Note: These names are case sensitive.

SEE ALSO:
Customize the Timeline View
Enable Care Teams to Track Gaps

Translate Health Cloud Labels

The custom labels that are delivered with Health Cloud package can’t be edited, but you can override them by creating a translated version of the label.

To override custom labels, you must enable the Translation Workbench and add English as a supported language.

1. From Setup, enter Custom Labels in the Quick Find box, then select Custom Labels.
2. Select the name of the custom label to open.
3. In the Translations related list, click New to override the existing label by creating a new translation.
4. Select the language you are translating into.
5. Enter the Translation Text. This text overrides the value specified in the label’s Value field.

   Localize Labels in Multilingual Orgs
   If you have a multilingual org, use the Translation Workbench to localize the labels in the Health Cloud console. Specify languages you want to translate, create translations for customizations you’ve made, and override the labels in Health Cloud.
Localize Labels in Multilingual Orgs

If you have a multilingual org, use the Translation Workbench to localize the labels in the Health Cloud console. Specify languages you want to translate, create translations for customizations you’ve made, and override the labels in Health Cloud.

Note: Labels that appear in the timeline, patient card, or card view menu can’t be translated using the Translation Workbench. Instead, you add new custom labels for the values in the language that replace the delivered English values.

Custom labels are custom text values that can be accessed from Apex classes, Visualforce pages, or Lightning components. The values can be translated into any language Salesforce supports. Custom labels enable developers to create multilingual applications by automatically presenting information (for example, help text or error messages) in a user’s native language.

1. To access custom labels, from Setup, enter Custom Labels in the Quick Find box, then select Custom Labels.
2. Create a view that shows the labels that you want to localize.

This example shows a view with custom labels that include the word Patient.

3. Select the name of the custom label you want to translate.
4. In the Translations related list, click New to enter a new translation or Edit next to the language to change a translation. If you click Delete, Salesforce confirms that you want to delete, then removes the translation from the custom label.
5. Select the Language you are translating into.
6. Enter the Translation Text. This text overrides the value specified in the label’s Value field when a user’s default language is the translation language.
7. Click **Save**.

SEE ALSO:
- Salesforce Help: Create and Edit Custom Label Translations
- Display Medical Data About a Patient
- Customize the Timeline View
- Help Users Navigate Patient Information

## Import Diagnosis and Procedure Codes

Use Data Loader to import industry-standard medical diagnosis and procedure codes and make them available to users in Health Cloud for pre-authorization requests.

Data Loader is a client application for the bulk import or export of data. Use it to insert, update, delete, or export Salesforce records.

When importing data, Data Loader reads, extracts, and loads data from comma-separated values (CSV) files or from a database connection. When exporting data, it outputs CSV files.

To import industry-standard code sets, create a CSV file for each of the target objects. Use the HealthCareDiagnosis object for diagnosis codes and the HealthCareProcedure object for procedure codes. Make sure to include these fields in the CSV file for each object.

- **Code**: Industry standard procedure code such as CPT or HCPCS.
- **CodeDescription**: Description of the procedure or diagnosis code.
- **Name**: The name of the code that displays in search and lookup fields. Salesforce recommends using the code along with the description to populate this field. For example, use `<Code>:<Description>` or `<Code>-<Description>` such as 95115: Allergy injection.

Check Considerations for Installing Data Loader for system requirements and other prerequisites to using Data Loader.

SEE ALSO:
- Data Loader
- Insert, Update, or Delete Data Using Data Loader
Customize the Health Cloud Apps

You can change some of the properties of the Health Cloud Apps in your organization. For example, you can add the Knowledge widget so that care coordinators can see articles and protocols from the console footer. You can also do things like add your company’s logo, change the color of page elements, and enable keyboard shortcuts in the Health Cloud console.

**Note:** Make sure to assign the Health Cloud - Admin app to the user profile of the Health Cloud admin.

1. From Setup, enter **Apps** in the Quick Find box, then select **Apps**.
2. Click **Edit** next to the app you want to modify.
   - Select **Health Cloud - Admin**, **Health Cloud - Worklist**, or **Health Cloud - Console**.
   **Note:** The only modification that the Health Cloud - Admin app requires is to select the tabs you want to display as an admin.
   - The Today page is to be used in the Health Cloud - Console app only. Adding it to the Health Cloud - Worklist app causes the Today page to display incorrectly.
3. Specify a label for the app. The label can have a maximum of 40 characters, including spaces. This label is the app’s name in the app menu.
4. Optionally, specify a custom logo for the app. Click **Insert an image** and choose an image file from the document library.
   - Consider these requirements when choosing a custom app logo for a Classic app from the document library:
     - The image must be in GIF or JPEG format and less than 20 KB.
     - If the image is larger than 300 pixels wide by 55 pixels high, then it is scaled to fit.
     - For the best on-screen display, we recommend that you use an image with a transparent background.
     - The **Externally Available** checkbox must be selected on the document’s properties so that users can view the image.
5. Optionally, to change the color of the app’s page elements, enter the hex code beginning with #.
6. Ensure that **Patients**, **Candidate Patients**, and **Today** are selected as navigation tabs and that they’re configured to display as primary tabs in the **Choose How Records Display** selection.
If you create your own custom apps, like a Dashboards tab, select it to display in the Health Cloud app and configure how it displays in the console. Also, if you’re using the Einstein Analytics for Health Cloud: Risk Scoring App, add the related tabs to the Health Cloud app. That way, each user profile can see the tabs by default.

7. Optionally, select how the list is placed in the console.
8. In Choose Console Components, add Knowledge One to Selected Items.
   When the Knowledge One widget is enabled, care coordinators can access articles and protocols from the console footer.
9. In Align Custom Console Component, choose whether the component appears in the footer’s right or left side.
10. To let care coordinators perform actions using key combinations instead of the mouse, click the Customize Keyboard Shortcuts.
11. Make sure that Save User Sessions, Enable Multi-Monitor Components, Pin Tabs, and Responsive Lists are all selected.
12. Select the Visible option for every profile that needs access to the app.
13. Select the Default box to set the app as that profile’s default app.
14. Click Save.

Support Health Cloud Reporting

Set up your reporting environment, use the report builder to create a basic report, and organize your reports to make it easy to find information. You can also find great dashboard apps on the Salesforce AppExchange and add them to the console.

You can start with a standard report and customize it to your needs. Users can report on any data they have read or read/write access to.

For a fun and engaging learning experience, check out the Reports & Dashboards module in the Trailhead Admin Beginner trail.

Provide Dashboards
People love the summarized views they get with dashboards, and you can help care coordinators optimize their workload with dashboards. A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components.

Provide Referral Management Reports
Enable users to analyze their patient or member referrals with a pre-built dashboard containing reports on important aspects of their referral management.

Provide Dashboards
People love the summarized views they get with dashboards, and you can help care coordinators optimize their workload with dashboards. A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components.

To save you time, there are many apps available on the AppExchange that you can download and customize. This sample dashboard was created using Salesforce Labs Service & Support Dashboards.
Once you create your dashboard, remember to add it to the console so that care coordinators can use the tab switcher to access the dashboard. From Setup, enter **Apps** in the **Quick Find** box, then select **Apps**. Select the Health Cloud app you want to customize and then add it as a navigation tab item.

**Provide Referral Management Reports**

Enable users to analyze their patient or member referrals with a pre-built dashboard containing reports on important aspects of their referral management.

1. Install the optional extension package that delivers sample reports and a dashboard for analyzing referrals. Paste this URL for the package into your browser navigation bar: [http://industries.force.com/HealthCloudReferralManagementReports](http://industries.force.com/HealthCloudReferralManagementReports) and press **Enter**.

2. Enter your Salesforce password and click **Install**. Installation can take a while. You can click **Done** now and check your email later for confirmation that installation was successful.

3. To verify installation of the unmanaged package in Setup, find **Installed Packages** and look for **Referral Management**.

4. Let users know they can find and edit the reports from the referral management app or from the Reports tab.

**Enable Users to Import Leads as Patients**

Your company can use existing Salesforce Lead records to create the Patient records that are used in Health Cloud.
As a best practice, we recommend that you use the Leads object and its associated patient conversion in place of the Candidate Patients object. If you’re using Candidate Patients, consider changing your processes to use Leads. That way, you can benefit from ongoing enhancements to Leads that aren’t planned to be extended to Candidate Patients.

You can install the HealthCloudExtensions unmanaged package to install the conversion process or you can create your own conversion process. Either way, make sure to add the Convert to Patient button to the Leads list view so that care coordinators can convert lead records to patient records. We also recommend removing the Convert button from the standard Lead Detail section of the Lead page layout.

Map Your Custom Lead Fields
Get the most out of records created from leads when you map your custom lead fields to the fields of the patient record. If you have your own custom fields on leads, you can map them to fields in the other records and make them available in Health Cloud.

Manage the Conversion of Lead Record Types
When you convert lead records, use the Individual Record Type Mapper to specify which record types are converted to patients and which are converted to other record types.

Customize the Leads List View for Patient Conversion
Add the Convert to Patient button to the Leads list view so that care coordinators can convert lead records to patients in Health Cloud.

Use Process Builder to Convert Leads to Patients
Enable care coordinators to convert leads to patient records within Health Cloud by setting up a simple conversion process in Process Builder.

SEE ALSO:
Install Health Cloud Packages

Map Your Custom Lead Fields
Get the most out of records created from leads when you map your custom lead fields to the fields of the patient record. If you have your own custom fields on leads, you can map them to fields in the other records and make them available in Health Cloud.

Health Cloud automatically handles the default mappings for delivered custom fields on Lead records. Those field mappings support duplicate record checking during conversion.

When you update existing accounts or contacts during lead conversion, the values of mapped lead fields do not overwrite the values of the mapped account and contact fields. For more details, see Considerations for Converting Leads in the Salesforce Help.

1. From the object management settings for leads, go to the fields section, then click Map Lead Fields.
2. For each custom lead field, choose the field into which you want the information inserted when you convert a lead.
3. Save your work.

Important: Altering the settings for the following delivered fields can cause unexpected results during the conversion process.

- Birth Date
- Care Coordinator Contact
- Care Coordinator User
- Created from Lead
- Current Generator(s)
- IsMarkedForPatientConversion
Manage the Conversion of Lead Record Types

When you convert lead records, use the Individual Record Type Mapper to specify which record types are converted to patients and which are converted to other record types.

During lead conversion, Health Cloud automatically maps all lead record types to the Individual account record type and the Individual contact record type. But if your company has lead record types that are used for other purposes, you can ensure that those leads convert to your specified record types.

For example, a company uses two Lead record types: Patient, and Unaffiliated Provider. They want to convert Patient Lead record types to Individual (Patients) account type records, and Unaffiliated Provider record types to another record type. Using the Individual Record Type Mapper, they create two mapping records. The Patient mapping record specifies IndustriesIndividual as the Account and Contact record types and the Lead1 mapping specifies IndustriesUnaffiliatedProvider for Account and Contact record types.

The default Individual Record Type Mapper record only allows editing of the Lead Record Type and Record Type Namespace (Lead) fields. To create a mapping record for additional record type, clone an existing record and make your changes.

Note: If you don’t see the Lead Record Type and Record Type Namespace (Lead) fields on the page, add them to the Individual Record Type Mapper page layout.

1. From Setup, enter custom in the Quick Find box, then select Custom Metadata Types.
2. Click Manage Records next to Individual Record Type Mapper.
3. Click Edit next to Individual.
4. Complete the Lead Record Type and Record Type Namespace (Lead) fields with the record type you’re mapping to.
   
   Note: Leave this field blank to use any record type. All available record types are converted to an Individual record type unless there is another mapping specified.

SEE ALSO:
Configure Custom Record Types for Individuals or Groups

Customize the Leads List View for Patient Conversion

Add the Convert to Patient button to the Leads list view so that care coordinators can convert lead records to patients in Health Cloud.

1. From Setup, enter Leads in the Quick Find box, then select Search Layouts.
2. Select Edit next to Leads List View.
3. Accept the default settings in the Standard Buttons section.
4. In the Custom Buttons section, select and click the right arrow to add the Convert to Patient button.
5. Click Save.

Use Process Builder to Convert Leads to Patients

Enable care coordinators to convert leads to patient records within Health Cloud by setting up a simple conversion process in Process Builder.

1. From Setup, enter Process Builder in the Quick Find box, select Process Builder, and then click New.

You can also modify an existing active process by cloning a new inactive copy of it. The copy can be a new process or a new version of the current process.

2. Fill out these fields that define your process.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Name</td>
<td>The name for your process, such as Lead to Patient. This name appears in the process management page, so consider naming your process so that you can differentiate it from other processes.</td>
</tr>
<tr>
<td>API Name</td>
<td>The name that’s used by the API and managed packages. This name must be unique across all processes and flows. The name must begin with a letter and use only alphanumeric characters and underscores. It can’t include spaces, end with an underscore, or have two consecutive underscores. After it's saved, API Name can’t be changed for the process.</td>
</tr>
<tr>
<td>Description</td>
<td>Optional. A description for your process. The description also appears in the process management page. It’s intended to help you differentiate between processes, such as to understand what a process does.</td>
</tr>
<tr>
<td>The process starts when</td>
<td>Select the option to start this process when a record changes.</td>
</tr>
</tbody>
</table>

3. Click Save.
4. In the new process, associate the process with an object, and specify when to start the process.
   a. Click Add Object and type Lead, then select the Lead object.
   b. In the Start the process field, select when a record is created or edited.
5. Click Save.
6. Next, define the criteria that must be true before the process can execute the associated actions.
a. Click Add Criteria.

b. Type Not Converted in the Criteria Name field.

c. Select Conditions are met as the criteria to for executing the action.

d. Set the following conditions:

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Converted</td>
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<td>Boolean</td>
<td>False</td>
</tr>
<tr>
<td>IsMarkedForPatientConversion</td>
<td>Equals</td>
<td>Boolean</td>
<td>True</td>
</tr>
</tbody>
</table>

e. For Conditions, select All of the conditions are met (AND).

f. Click Save.

7. Next, define the actions that are executed when the criteria are met.

a. Click Add Action.

b. Select Apex in the Action Type field.

c. In the Action Name field, type Lead to Individual.

d. Select the Lead to Individual Conversion apex class.

e. In the Set Apex Variables field, select the following options.

<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>leadIds</td>
<td>Field Reference</td>
<td>Lead ID</td>
</tr>
</tbody>
</table>

f. Click Save.
Repeat the previous steps and create another Apex action type named *Create Care Plan* and associate it with the Create Care Plan and Care Team Apex class.

In the Set Apex Variables field, select the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>leadIds</td>
<td>Field Reference</td>
<td>Lead ID</td>
</tr>
</tbody>
</table>

Click Save.

Click **Activate** to begin using the process. Salesforce doesn’t start using a process to evaluate records as they’re created or edited until you activate it.

---

**Build Patient or Member Experience Cloud Sites**

The private Experience Cloud site is the heart of collaborative patient care. Experience sites give care coordinators, physicians, patients, and caregivers an easy way to interact with each other whenever and wherever they are. You can set up a private site for your patient or member using Experience Builder with the Customer Service template.

**How Patient Experience Sites Work**

Use the Health Cloud Empower Lightning components and the Customer Service template for a quick roll-out of a patient Experience site, with easy customization using Experience Builder. Lightning Components help you build a patient Experience site in no time at all.

**Enable Salesforce Digital Experiences**

If you’re extending the Health Cloud console with Experience Cloud sites, the first step to set up a site is to enable digital experiences.
Which Objects are Available for Experience Cloud Users?
An Experience Cloud license determines the baseline feature access available to an Experience Cloud user. Each Experience Cloud license makes create, read, edit, or delete permissions available to Experience Cloud site users for specific data objects. Assign user permissions for these objects through a profile, permission set, or both.

Experience Cloud User System Permissions
Health Cloud provides special system permissions that give Experience Cloud site users access to specific Health Cloud features.

Experience Cloud Setup Checklist
Building an Experience Cloud site is the result of research, mapping goals, and defining your audience. At the same time, you must have all your ducks in a row so the actual implementation process is seamless. You know your org best, but use this general checklist to help you organize what you need for your Experience site.

Enable Task Assignment for Site Users Created from Contacts
Make sure that care team members created outside of the Health Cloud console can be selected for task assignment.

Use Health Cloud Empower Lightning Components
Health Cloud Empower Lightning components make it quick and easy to set up private patient or member sites.

Release Your Patient or Member Experience Cloud Site as an App
With Salesforce Mobile Publisher, you can create your own dedicated, branded app that helps individuals stick with goals and get faster access to treatment. You can convert an existing Experience site to a mobile app, or you can create one using a handy template provided by Health Cloud.

How Patient Experience Sites Work
Use the Health Cloud Empower Lightning components and the Customer Service template for a quick roll-out of a patient Experience site, with easy customization using Experience Builder. Lightning Components help you build a patient Experience site in no time at all. Experience Cloud site templates let you build self-service sites that give customers the same visual and functional experience on tablets, mobile devices, or desktops. Experience Builder makes it super easy to customize your Experience Cloud site. Simply edit a few components, add images to extend your branding, and you’re ready to go—without any coding!
These components let you create a patient Experience site:

- The Care Plan Selector for Health Cloud Empower component (1) lets Experience site users select a patient’s care plan. Only users who are members of the care team with access to the care plan can see it in the picklist.
- The Care Plan Tasks for Health Cloud Empower component (2) lets Health Cloud Experience site users see and filter their tasks associated with a care plan.
- Care Team for Health Cloud Empower component (3) lets you add fields from the User and Contact objects to display basic information about the patient and the care team members, and you can change the order in which the fields appear. Access to the Care Team for Health Cloud Empower component is available only to members of a patient’s care team.

And if you want a more custom experience, you can create custom pages, add components to pages, use other custom Lightning components, and expose more Salesforce objects. Refer to the Salesforce Help to get your Experience site launched in no time at all.

**Note:** The Health Cloud Empower Lightning components are only available after you’ve installed the Health Cloud managed package.
Enable Salesforce Digital Experiences

If you’re extending the Health Cloud console with Experience Cloud sites, the first step to set up a site is to enable digital experiences.

**Note:** Salesforce Experience Cloud provides the collaboration support for Health Cloud. Some of the collaborative features are available only when you enable Experience Cloud and create a site.

Experience Cloud sites let care coordinators, patients, insurance plan members, and care teams collaborate in a private site. Although all Health Cloud users share site, access to information is restricted through the security that surrounds each individual care plan. So a patient or member can only see information or communication related to his or her specific care plan.

**Note:** Once you enable digital experiences, you can’t turn it off.

1. From Setup, enter *Digital Experiences* in the Quick Find box, then select *Digital Experiences > Settings*.
2. Select *Enable Digital Experiences*.
3. If enhanced domains are enabled in your org, your Experience Cloud domain is shown. It includes your *My Domain* name in the format `MyDomainName.my.site.com` for production orgs.
4. If enhanced domains aren’t enabled in your org, enter a unique value for your domain name. Click *Check Availability* and make sure it’s not being used by someone else. Your digital experiences domain format is `ExperienceCloudSitesSubdomainName.force.com` for production orgs.

It’s a good idea to use something recognizable to your users, such as your company name. Although the domain name is the same for all communities, you create a unique URL for each Experience Cloud site during the creation process.

**Note:** Keep in mind that you can’t change the domain name after you save it. Call Salesforce support for help with changing it.
5. Click **Save**, and make sure that you click **OK** on the confirmation message page to enable the Experience Cloud site.

Which Objects are Available for Experience Cloud Users?

An Experience Cloud license determines the baseline feature access available to an Experience Cloud user. Each Experience Cloud license makes create, read, edit, or delete permissions available to Experience Cloud site users for specific data objects. Assign user permissions for these objects through a profile, permission set, or both.

This page lists the object access you can grant to Experience Cloud users under each of these licenses: Customer Community, Customer Community Plus, Partner Community, and External Apps.

**Note:** This table lists all objects provided by all Industries products. Not all of these objects are available with your specific Health Cloud license.

Each license has a "login" version that provides identical access levels. If you experience any difficulties with a login license, contact your Salesforce representative.

As a best practice, always clone the standard profile associated with a community license, and change object permissions as needed. If you want to limit the number of cloned profiles, use permission sets to assign object permissions.

Objects in **bold** are automatically available to users when the license is provisioned. All other objects must be assigned in a profile or permission set.

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<th>EDITIONS</th>
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### Administer Health Cloud

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Experience Cloud User System Permissions

Health Cloud provides special system permissions that give Experience Cloud site users access to specific Health Cloud features. You can enable user permissions in permission sets and custom profiles. In permission sets and the enhanced profile user interface, these permissions—and their descriptions—are listed in the App Permissions or System Permissions pages. In the original profile user interface, user permissions are listed under Administrative Permissions and General User Permissions. Based on your business needs, specify access to data that each type of user needs for each object and for fields and records within the object.

**Access Life Events or Business Milestones Component**
Grants access to the Life Events or Business Milestones Lightning component.

**Manage Health Cloud**
Allows a user to create, edit, and delete Health Cloud data.

**Manage Health Cloud Financial Data**
Gives users access to Health Cloud financial data.

**Manage Health Cloud Utilization Management**
Allows a user to create, edit, and delete Health Cloud Utilization Management data.

Experience Cloud Setup Checklist

Building an Experience Cloud site is the result of research, mapping goals, and defining your audience. At the same time, you must have all your ducks in a row so the actual implementation process is seamless. You know your org best, but use this general checklist to help you organize what you need for your Experience site.

**Note:** External care team members require at least a Customer Community Plus license to become Experience site members and collaborate around a person’s care plan.

Before You Begin

*Gather your branding assets.*

- [ ] High-resolution image of your company logo
Configure the internal Salesforce org:

☐ Enable Salesforce Digital Experiences. Choose a unique URL that works for your business, because you can't change it after it's been set.

☐ Install the Health Cloud patient Experience template from http://industries.force.com/healthcloudextensionpatientapp

☐ Set up email templates for any communication between the Experience site and its members (welcome email, resetting password email, etc.).

☐ Enable the global header for the system administrator profile, and any other profiles accessing your Experience site from the internal org.

☐ Enable any other features you plan to use in the site, such as Salesforce Knowledge.

☐ Create a Health Cloud Admin profile and add the Patient Card Configuration tab to the profile.

Set Up Health Cloud Profiles and Permissions for Experience Cloud Site Users

Create an Experience Cloud user profile

☐ Create a Health Cloud Experience Cloud user profile. To update the profile from Setup, enter Profile in the Quick Find box, then select Profiles. Clone the existing Customer Community Plus User profile and modify it, as needed.

☐ Apply system permissions to the custom profile so site users can access Health Cloud features.

☐ Specify object-level permissions. For example, add Read access to Accounts, Contacts, Cases, Documents, Problems, and Goals.

☐ Update field-level security. Grant access to fields that your Experience site users need to use. For example, update field-level security to make fields visible for the Problem and Goal objects.

Create Experience Cloud users

☐ Create users. When you create site users manually, assign a community user profile to them and clear the Salesforce checkbox.

☐ Configure sharing settings for cases. To update the setting from Setup, enter Sharing in the Quick Find box, then select Sharing Settings. Make sure that you select Enable External Sharing Model and set external case sharing to Private. That way, users can collaborate only with the care teams they are members of. Care plan access is restricted by membership in the site, as well.

☐ Update the CommunityProfileName custom setting with the value Health Cloud – Community. This value is the name of your Experience profile. From Setup, enter Custom in the Quick Find box, then select Custom Settings. Click Manage next to CommunityProfileName, and then click New to add the name and the value for the site.

Perform General Configuration Steps in Setup

Perform the following setup tasks from the Digital Experience node in Setup.

☐ Select a template. Under All Sites, click New. If you're creating an app for communicating with patients or members, choose the Health Cloud Consumer App template. For other purposes, select the Customer Service template. In either case, users get the same visual and functional experience whether they use a tablet, a mobile device, or their desktop.
Enable the global header. The global header lets users switch between their Experience site and the internal organization. Users must be assigned the "View Global Header" permission either by selecting it on standard profiles, creating custom profiles, or by creating a permission set.

Customize Experience Cloud site properties. From the Site Management page, select Administration > Members to customize the properties of the site.

Enable private messages. From the Site Management page, select Administration > Preferences, select Users can send and receive private messages. Remember that both the sender and receiver of private messages must have a profile that is associated with the site.

Perform Configuration Steps in Experience Builder

Perform the following setup tasks using Experience Builder.

From Setup, enter All Communities in the Quick Find box, then select All Communities. Click Manage to work with an existing community.

Brand your Experience Cloud site. Add your logo and use Experience Builder’s enhanced Branding Editor to efficiently apply color and style to your site.

Edit site pages and components. Remove unwanted default pages from the Customer Service template and create more pages, as needed. To allow access the new pages you create, be sure to update the navigation menu.

Update component properties. Review and update the properties for the User Profile Header, the Search Publisher, and any other components that you use.

Configure page layouts. Configure page layouts in the Page Editor for objects using the Record Information component.

Preview, test, and publish your Experience Cloud site. Look at your site in a desktop browser window and on mobile devices. When you’re happy with your changes, click Publish in the toolbar.

SEE ALSO:
Salesforce Help: Set Up and Manage Salesforce Communities

Enable Task Assignment for Site Users Created from Contacts

Make sure that care team members created outside of the Health Cloud console can be selected for task assignment.

When you create care team members from within the Health Cloud console, they are created as users with site access. When you create a user in the Salesforce Classic Contact page, you can also grant that person site access by enabling them as a customer user. You can add customer users to the care team and they have access to the patient or member’s site. They can’t be assigned tasks using care plan templates until you manually update their user type.

1. Open the person’s Detail page, select the case that’s associated with the care plan.

2. In the Case Team related list, find users who have Contact: as a prefix to their name.

These contacts have a user record, but you must update their user type to assign them tasks from the care plan template.

3. Click Update Case Team Members.

4. Next to the user’s name, use the picklist to change their assignment from Contact to Customer Portal User.
Use Health Cloud Empower Lightning Components

Health Cloud Empower Lightning components make it quick and easy to set up private patient or member sites.

Care Plan Selector for Health Cloud Empower
The Care Plan Selector for Health Cloud Empower component is a picklist that lets an Experience Cloud user select an individual’s care plan.

Care Programs for Health Cloud Empower
The Care Programs component displays the programs a user is enrolled in. If your organization has adopted the Life Sciences Program Management data model, you can use this to provide personalized information to users by various channels, such as an Experience Cloud site or a mobile health app.

Care Team for Health Cloud Empower
The Care Team for Health Cloud Empower component lets your users access a patient’s care team in a private patient Experience Cloud site.

Care Plan Tasks for Health Cloud Empower
The Care Plan Tasks for Health Cloud Empower component lets Experience Cloud users see tasks associated with a care plan. Members can choose to see either their incomplete or complete tasks.

Timeline for Health Cloud Empower
The Timeline for Health Cloud Empower component lets patients who are logged in to the site see their past, current, and future healthcare events.

Customize Fields in Health Cloud Empower Lightning Components
Use field sets to customize the fields that appear for everyone represented in the care team in the Health Cloud Empower Lightning components.

SEE ALSO:
Empower Components

Care Plan Selector for Health Cloud Empower

The Care Plan Selector for Health Cloud Empower component is a picklist that lets an Experience Cloud user select an individual’s care plan.

A user must be part of the care team to view its associated care plan in the picklist. If the user doesn’t belong to any care teams, then the picklist doesn’t appear at all. If the logged in user belongs to only one care team, the associated care plan is selected automatically. When a user is a member of multiple care teams, every care plan they belong to appears in the picklist.

Note: When someone is assigned to the care team using their contact record instead of their user record, that care plan doesn’t appear in the picklist.

The label for the Phone field of the contact record doesn’t appear in the Experience Cloud site for the care team list or the care plan selector. Instead, the label appears as Business Phone. However, the value for the field comes from the Phone field and not the Business Phone field.

1. Select the Care Plan Selector for Health Cloud Empower component in the page you’re configuring.
2. In the property editor, configure properties for the component:
Placeholder Text for Picklist
Enter the text that displays in the picklist before anything is selected. The default text is *Select a name and care plan...* Placeholder text can't be translated using the Translation Workbench.

Show birthdate
Select to add the individual's birthdate to the picklist in addition to their name and their care plan name.

Show all care plans
Lets a user see all the care plans that they belong to. This option is only available if you’ve enabled multiple care plans in your org. If someone only has one care plan, this option doesn’t appear in the picklist.

Include birth year
Shows the patient or member’s year of birth in the picklist.

Show birth month as text
Shows the person’s birth month as Jan or Feb instead of 01 or 02.

**Example:** Sample Care Plan Selector for Health Cloud Empower component:

![Sample Care Plan Selector](image)

SEE ALSO:
- Developer Guide: Care Plan Selector for Health Cloud Empower Component

Care Programs for Health Cloud Empower
The Care Programs component displays the programs a user is enrolled in. If your organization has adopted the Life Sciences Program Management data model, you can use this to provide personalized information to users by various channels, such as an Experience Cloud site or a mobile health app.

1. On the record page that you’re configuring, select the **Care Programs** component.
2. In the property editor, configure the component’s properties.

**Title Source**
Specify the label you want to use. You can create a new custom label or use one that already exists.

**Tip:** The custom label doesn’t have to come from Health Cloud. To pull the custom label from a different package, prefix the label name with the namespace of that package.
Care Team for Health Cloud Empower

The Care Team for Health Cloud Empower component lets your users access a patient’s care team in a private patient Experience Cloud site.

Important: Legal Disclaimer for Care Team for Health Cloud Component

Admins can configure the Care Team for Health Cloud Empower component to display patient contact information to users of Health Cloud and Salesforce Communities. Ensure that only authorized users have access to this contact information and that all communications with patients are conducted in compliance with HIPAA regulations.

Access to the Care Team for Health Cloud Empower component is available only to members of a patient’s care team. The component lists all members of the care team that the user is also a member of. When you enable multiple care plans and show all care plans in the Care Plan Selector component, then members from all care teams appear in the component. Members’ name, role, and photo are shown by default. Use field sets from the User and Contact objects to add other information to the list or to change the order in which the fields appear. You can also include the care plan owner as a member of the care team and customize the label that describes their role.

Note: The label for the Phone field of the patient’s contact record doesn’t appear in the Experience Cloud site for the care team list or the care plan selector. Instead, the label appears as Business Phone. However, the value for the field comes from the Phone field and not the Business Phone field.

Use the Care Plan Selector for Health Cloud Empower or another component with similar functionality to access the Care Team for Health Cloud Empower component.

1. On the page that you’re configuring, select the Care Team for Health Cloud Empower component.

2. In the property editor, configure the component’s properties.

Patient Field Set Name

Enter the name of the field set that contains the fields that you want to display for the patient. The default is HcPatientInfoFields. Since this field set is part of the Health Cloud managed package, you can’t edit it. If you want to display different information, add a different field set and enter its name in this field instead.
Team Member Field Set Name
Enter the name of the field set that contains the fields that you want to display for the team members. The default is HcTeamMemberInfoFields. Since this field set is part of the Health Cloud managed package, you can’t edit it. If you want to display different information, add a different field set and enter its name in this field instead.

Show Labels
Select to show the field’s label.

Include care plan owner in list
Shows the care plan owner in the list of care team members when that person is an internal user.

Note: Queues aren’t supported as care plan owners in Health Cloud.

Care Plan Owner Role Name
Enter the label text for the name of the care plan owner role. For example, if a nurse practitioner creates and owns the care plan, you can show Nurse Practitioner as the role instead of the default.

Example: Sample Care Team List component:

![Care Team List component example](image)

SEE ALSO:
- Developer Guide: Care Team for Health Cloud Empower Component
- Customize Fields in Health Cloud Empower Lightning Components

Care Plan Tasks for Health Cloud Empower
The Care Plan Tasks for Health Cloud Empower component lets Experience Cloud users see tasks associated with a care plan. Members can choose to see either their incomplete or complete tasks.

1. Select the **Care Plan Tasks for Health Cloud Empower** component in the page you’re configuring.
2. In the property editor, configure properties for the component:

   **Field Set Name**
   Enter the name of the field set that contains the fields you want to display for tasks. The default is HcCarePlanTaskFields. Since this field set is part of the Health Cloud managed package, you have limited editing options. You can change the order of fields in the field set or remove fields. To add fields, you must create a different field set and use it in place of the delivered field set.

   **Show labels**
   Select to show labels for the fields that appear in the task list.
Show all tasks
This setting is currently unavailable. Enabling it doesn’t do anything.

Example: Sample Care Plan Tasks for Health Cloud Empower component:

SEE ALSO:
Customize Fields in Health Cloud Empower Lightning Components
Developer Guide: Care Plan Tasks for Health Cloud Empower Component

Timeline for Health Cloud Empower

The Timeline for Health Cloud Empower component lets patients who are logged in to the site to see their past, current, and future healthcare events.

Use the Timeline View Configurations tab to create filters that specify the precise fields that appear in the timeline from a particular record. Make sure to select Timeline for Health Cloud Empower in the Configuration Target field.

Health Cloud respects your org’s sharing and field-level security settings for data that is displayed in the timeline component. Ensure that security settings for the Timeline View Configuration, Filter Column, Filter Condition, and Filter Criteria objects are configured appropriately for your users.

1. Select the Timeline for Health Cloud Empower component in the page you’re configuring.

2. In the property editor, configure properties for the component:

   **Empty State Text**
   Text instructing users to select a care plan to view timeline events. Default text is *Select a care plan to view timeline events.*

   **Show Past Activity**
   Select to show past activity in the timeline.

   **Show Future Activity**
   Select to show future activity in the timeline.

   **Page Reload Size**
   The number of events loaded initially for each category of tasks and when a user selects Show More. The default is 50 events.
   The filter element on the page is controlled by the types of events you define in the Timeline View Configurations tab.

   The Past, Today, and Future tabs of the Timeline can each show up to 500 events.
Customize Fields in Health Cloud Empower Lightning Components

Use field sets to customize the fields that appear for everyone represented in the care team in the Health Cloud Empower Lightning components.

A field set is a grouping of fields you create and then add to an object. Since these field sets are part of the Health Cloud managed package, you have limited editing options. You can change the order of fields in the field set or remove fields. To add fields, you must create a different field set and use it in place of the delivered field set. The following table shows field sets and their related components that are delivered with Health Cloud.

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Related Object</th>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HcPatientInfoFields</td>
<td>User</td>
<td>Care Team for Health Cloud Empower</td>
<td>Controls which fields appear for the person who is the center of the site.</td>
</tr>
<tr>
<td>HcTeamMemberInfoFields</td>
<td>User</td>
<td>Care Team for Health Cloud Empower</td>
<td>Controls which fields appear in the site for team members who are not the patient or member.</td>
</tr>
<tr>
<td>HcCarePlanTaskFields</td>
<td>Activities</td>
<td>Care Plan Tasks for Health Cloud Empower</td>
<td>Controls which fields appear for tasks in the site.</td>
</tr>
</tbody>
</table>

1. From the management settings for the related object, go to Field Sets.
2. Select the field set that you want to change and select New. You can also clone the field set and edit the cloned field set.
3. Enter a Field Set Label. This label is the name presented to subscribers who install the field through a managed package.
4. Optionally, enter a name for your field set.
5. In the Where is this used? area, provide a brief description of which pages use the field set, and for what purpose.
6. Click Save.
7. To add fields to the field set, drag the fields from the object palette and drop them into the Available for the Field Set or the In the Field Set container. The fields in the In the Field Set container are visible by default.
Note: In the field set, you can span to fields that reference multiple objects. When you span a field into a field set that references multiple objects, you can only span to the Name object.

You can drag and drop a field from one container to the other. The vertical order of the In the Field Set list indicates the order of how the fields render on pages.

8. To remove a field from the field set, drag the element back to the object palette, or click the icon next to the element.

9. To make a field required, double-click the element or click the wrench icon (🔧) next to it and select the Required checkbox.

   Note: Indicates that the field is required and must have a value to save the record.

10. Save your work.

SEE ALSO:
   - Developer Guide: Create Custom Health Care Empower Components

Release Your Patient or Member Experience Cloud Site as an App

With Salesforce Mobile Publisher, you can create your own dedicated, branded app that helps individuals stick with goals and get faster access to treatment. You can convert an existing Experience site to a mobile app, or you can create one using a handy template provided by Health Cloud.

1. Make sure that your care coordinators have access to associated goals when they work with care plans.
   If your care plan interface doesn’t have a tab representing the Goals custom object, create one.


3. Set up a new patient or member Experience Cloud site especially for mobile use.

   Tip: You can use an existing Experience Cloud site, but our special template makes it easy and quick to create a fresh Experience Cloud site that’s optimized for mobile.

   a. In Setup, find Digital Experiences and select All Sites.

   b. Click New and select the Health Cloud Consumer Bolt template.
      A Bolt template is a pre-built Experience Cloud site that you can customize to fit your own organization’s requirements.

   c. Click Get Started and follow the wizard.
4. Create your mobile app using the Mobile Publisher instructions.

Your users can now download and install the app from the App Store or Google Play.

SEE ALSO:
- Install Health Cloud Packages
- Customize Problems and Goals
- Salesforce Help: Create a Community App

Let Care Coordinators Create Concurrent Care Plans

When multiple care plans are enabled in your org, care coordinators can create one or more care plans per person allowing more focused, manageable care components.
When enabled, all care plans for an individual appear in a condensed view within the console, allowing easy access to the underlying problems, goals, and tasks. The patient card menu (1) provides easy access to manage any open care plan associated with the person. In the All Care Plans view, care coordinators can see and manage every detail of an individual care plan (2). It’s easy to expand a care plan and see its details or open a care plan and work on it in its own tab (3).

Initially, only the individual’s primary care plan appears in the All Care Plans view. (You can determine the primary care plan by viewing the value in the Care Plan field on their Account record.) As care plans are added for the person, they appear in the order in which they were created with the newest care plan appearing first. Create custom care plan record types to give care coordinators flexibility in tracking and managing their patients or members by using different types of care plans.

A primary care plan is created for every patient or member during the conversion process and added to their account. The Care Plan field on Account is automatically populated at the time of initial conversion, but you can add a different care plan in the future. You can set up a different process for updating that field, and create workflows for managing multiple open and closed care plans.

**Permissions Required for Care Plans**

Care plans are built using multiple objects. So, your users who aren't admins require various permissions before they can create care plans.

**Remove the Care Team from Care Plan Creation**

When you create care plans in Lightning Experience, you create a case for the care plan, add care team members, and apply care plan templates in a single flow. But if you prefer to use your custom triggers to add care teams, you can remove the care team section from the New Care Plan page.

**Enable Care Coordinators to Create Concurrent Care Plans**

Give care coordinators the ability to create one or more care plans per patient and organize a patient’s care into focused, manageable components. Before care coordinators can create multiple care plans, you must enable the option in your org.

**Create Multiple Care Plan Record Types**

Create custom care plan record types to give care coordinators the flexibility to use different types of care plans for the people they manage.
Create a Care Plan Template
You can use care plan templates in Salesforce by creating a care plan template and then adding template problems, template goals, and template tasks to this template.

Import Care Plan Templates
Use Data Loader to import existing care plan templates into Salesforce and make them available to care coordinators.

Enable Users to Apply Care Plan Templates Faster
Give your users the ability to apply care plan templates to existing care plans faster. Place the custom Apply Care Plan Templates button on the layout for the Care Plans page.

Permissions Required for Care Plans
Care plans are built using multiple objects. So, your users who aren’t admins require various permissions before they can create care plans.

Assign these permissions to users who create care plans.

- Edit access on these objects:
  - Case
  - Problem
  - Goal
  - Task

- Read access on these objects:
  - Care Plan Template
  - Care Plan Template Problem
  - Care Plan Template Goal
  - Care Plan Template Task

- Run Flows
- View Roles and Role Hierarchies

Remove the Care Team from Care Plan Creation
When you create care plans in Lightning Experience, you create a case for the care plan, add care team members, and apply care plan templates in a single flow. But if you prefer to use your custom triggers to add care teams, you can remove the care team section from the New Care Plan page.

To automatically add care teams when a care plan is created, set up custom triggers in your Salesforce org.

1. From Setup, in the Quick Find box, enter Custom Metadata and select Custom Metadata Types.
2. Click Health Cloud Setting, and then click Manage Health Cloud Settings.
3. Click ConfigureCareTeamInNewCarePlan and click Edit.
4. Clear the Active checkbox, and then click Save.

After you remove the care team section from the care plan creation flow, tasks in new care plan are assigned as follows:

- If your custom trigger adds a user who has the care coordinator role to the care team, all tasks are assigned to that user.
- If your custom trigger adds multiple users who have the care coordinator role to the care team, all tasks are assigned to the first care coordinator.
If your custom trigger doesn’t add any care coordinators, the care coordinator role is assigned to the user it adds. All tasks are then assigned to that user.

Enable Care Coordinators to Create Concurrent Care Plans

Give care coordinators the ability to create one or more care plans per patient and organize a patient's care into focused, manageable components. Before care coordinators can create multiple care plans, you must enable the option in your org.

Note: This option is enabled by default in new orgs. You can disable the setting to allow only a single care plan per patient.

1. From Setup, enter Custom Settings in the Quick Find box, then select Custom Settings.
2. In the list of custom settings, click Manage next to the Health Cloud Feature Toggles custom settings.
3. Click Edit next to Multiple Care Plans.
4. Select the Enabled checkbox.
5. Click Save.

Create Multiple Care Plan Record Types

Create custom care plan record types to give care coordinators the flexibility to use different types of care plans for the people they manage.

Health Cloud comes with a default care plan that’s ready to use. But care coordinators can manage people that have vastly different needs and concerns. Using custom metadata, you can create many types of care plans that care coordinators can apply to their patients or members and provide customized care.

Note: Make sure to use record types that are associated with a care plan record when creating custom care plans. Record types based on standard case records aren’t supported for care plans.

To use multiple care plan record types, orgs with cloned permission sets must add Read and Edit permissions to the Care_Plan_Record_Type_Name and Care_Plan_Record_Type_Namespace fields on the Lead object. Users without permissions on these fields can access the default care plan record type only.

1. From Setup, enter custom in the Quick Find box, then select Custom Metadata Types.
2. Click Manage Records next to Care Plan Record Type.
3. Click New.
4. Complete the following fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>The name of care plan record type.</td>
</tr>
<tr>
<td>Care Plan Record Type Name</td>
<td>The unique name used by the API and managed packages.</td>
</tr>
<tr>
<td>Record Type Namespace</td>
<td>(Optional). If your org has a namespace, enter it here.</td>
</tr>
<tr>
<td>Case Record Type Name</td>
<td>The name of the type of case associated with the care plan record type.</td>
</tr>
<tr>
<td>Active</td>
<td>Select this field so that the care plan record type is available in Health Cloud.</td>
</tr>
<tr>
<td>Default</td>
<td>Select to make this record a default record type. You can have more than one active default care plan record type. When there are multiple care plan record types, their first letters are</td>
</tr>
</tbody>
</table>
You can use the Lead to Patient API to convert leads to patients. Specify a care plan record type name and namespace in the Lead custom fields that matches an active record type name and namespace. If there the fields don’t match or the current user doesn’t have access to that record type, the default record type is used.

Create a Care Plan Template

You can use care plan templates in Salesforce by creating a care plan template and then adding template problems, template goals, and template tasks to this template.

To create a care plan template along with its associated problems, goals, and tasks, use the Care Plan Templates tab. Make sure to add the profiles of any users who create templates and add the tab to the Health Cloud custom apps. You can include any additional fields you need to the Care Plan Template object’s page layout.

1. From the Health Cloud - Admin Home page, select the Care Plan Templates tab, and click New.
2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Care Plan Template Name</td>
<td>Name of the care plan template.</td>
</tr>
<tr>
<td>Description</td>
<td>Provide a brief description of the template and its intended use.</td>
</tr>
<tr>
<td>Active</td>
<td>Select to activate this care plan template and make it available to apply to a patient or member.</td>
</tr>
<tr>
<td>Cloned From</td>
<td>Name of the original template that this template was cloned or copied from.</td>
</tr>
<tr>
<td>Category</td>
<td>The category of treatment plan the care plan template belongs to.</td>
</tr>
</tbody>
</table>

3. Click Save. The Care Plan Template you created opens in a new tab.
4. In the related list, create the template problems, template goals, and template tasks you want in your care plan template.

Note: After you create a care plan template, make sure you create and add template problems, template goals, or template tasks to it. You’ll get a validation error if you try to use a blank care plan template to create a care plan. If you want to create a blank care plan, use the Start a Blank Care Plan button in the care plan creation flow instead.
Create a Care Plan Template Problem
You can create a care plan template problem to use in your care plan template.

Create a Care Plan Template Goal
You can create a care plan template goal to use in your care plan template or template problem.

Create a Care Plan Template Task
You can create a care plan template task to use in your care plan template, template problem, or template goal.

Create a Care Plan Template Problem
You can create a care plan template problem to use in your care plan template.

To create a care plan template problem, use the Care Plan Template Problems tab. Make sure to add the profiles of any users who create template problems and add the tab to the Health Cloud custom apps. You can include any additional fields you need to the Care Plan Template Problem object’s page layout.

Or you can create a template problem for a specific template, directly from that template’s related list.

1. From the Health Cloud - Admin Home page, select the Care Plan Template Problems tab, and click New.

Or, if you’re creating a template problem for a specific template directly, go to that template’s related list and click New for Care Plan Template Problems.

2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Care Plan Problem Name</td>
<td>Name of the problem for the care plan template.</td>
</tr>
<tr>
<td>Care Plan Template</td>
<td>Name of the care plan template this problem is related to.</td>
</tr>
<tr>
<td>Description</td>
<td>Provide a brief description of the problem that is being addressed.</td>
</tr>
<tr>
<td>Active</td>
<td>Select to activate this care plan problem and make it available to apply to a patient or member.</td>
</tr>
<tr>
<td>Sort Order</td>
<td>Indicates the vertical order in which this problem appears on the care plan template.</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority of the care plan problem such as low, normal, or high.</td>
</tr>
<tr>
<td>Category</td>
<td>Indicates the category of ailments the template problem belongs to.</td>
</tr>
</tbody>
</table>

3. Click Save. The new template problem opens in a new tab.
Create a Care Plan Template Goal

You can create a care plan template goal to use in your care plan template or template problem.

To create a care plan template goal, use the Care Plan Template Goals tab. Make sure to add the profiles of any users who create template goals and add the tab to the Health Cloud custom apps. You can include any additional fields you need to the Care Plan Template Goal object’s page layout.

You can also create a template goal for a specific template or template problem, directly from that record’s related list.

1. From the Health Cloud - Admin Home page, select the Care Plan Template Goals tab, and click New.
   Or, if you’re creating a template goal for a specific template or template problem directly, go to that record’s related list. And then click New for Care Plan Template Goals.

2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Care Plan Template Goal Name</td>
<td>Name of the goal associated with the care plan template.</td>
</tr>
<tr>
<td>Description</td>
<td>Provide a brief description of the template and its intended use.</td>
</tr>
<tr>
<td>Active</td>
<td>Select to activate this care plan goal and make it available to apply to a patient or member.</td>
</tr>
<tr>
<td>Sort Order</td>
<td>Indicates the vertical order in which this goal appears within the list of goals.</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority of the care plan goal such as low, normal, or high.</td>
</tr>
<tr>
<td>Care Plan Template</td>
<td>Name of the care plan template this goal is related to.</td>
</tr>
<tr>
<td>Template Problem</td>
<td>Name of the template problem this goal is related to.</td>
</tr>
<tr>
<td>Category</td>
<td>Indicates the category of goals the template goal belongs to.</td>
</tr>
</tbody>
</table>

3. Click Save. The new template goal opens in a new tab.
Create a Care Plan Template Task

You can create a care plan template task to use in your care plan template, template problem, or template goal.

To create a care plan template task, use the Care Plan Template Tasks tab. Make sure to add the profiles of any users who create template tasks and add the tab to the Health Cloud custom apps. You can include any additional fields you need to the Care Plan Template Task object’s page layout.

You can also create a template task for a specific template, template problem, or template goal directly from that record’s related list.

1. From the Health Cloud - Admin Home page, select the Care Plan Template Tasks tab, and click New.

Or, if you’re creating a template task for a specific template, template problem, or template goal directly, go to that record’s related list. And then click New for Care Plan Template Tasks.

2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Care Plan Template Task Name</td>
<td>Name of the task associated with care plan template.</td>
</tr>
<tr>
<td>Subject</td>
<td>The subject or name of the task.</td>
</tr>
<tr>
<td>Active</td>
<td>Select to activate this care plan task and make it available to apply to a patient or member.</td>
</tr>
<tr>
<td>Assigned To</td>
<td>Name of the person who’s assigned to the task.</td>
</tr>
<tr>
<td>Care Plan Template Problem</td>
<td>Name of the template problem that this task is related to. Don’t select values for Care Plan Template, Care Plan Template Problem, and Care Plan Template Goal lookups in the same template task. If you do, you’ll get a validation error. Use only one of these lookups. Also, you’ll get another validation error if you don’t use any of these lookups.</td>
</tr>
<tr>
<td>Care Plan Template Goal</td>
<td>Name of the template goal that this task is related to. Don’t select values for Care Plan Template, Care Plan Template Problem, and Care Plan Template Goal lookups in the same template task. If you do, you’ll get a validation error. Use only one of these lookups. Also, you’ll get another validation error if you don’t use any of these lookups.</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority of the care plan task such as low, normal, or high.</td>
</tr>
</tbody>
</table>
3. Click **Save**. The new template task opens in a new tab.

### Import Care Plan Templates

Use Data Loader to import existing care plan templates into Salesforce and make them available to care coordinators.

Data Loader is a client application for the bulk import or export of data. Use it to insert, update, delete, or export Salesforce records.

When importing data, Data Loader reads, extracts, and loads data from comma-separated values (CSV) files or from a database connection. When exporting data, it outputs CSV files.

To import existing care plan templates, create a CSV file for each of the target objects in a care plan template: care plan template, care plan problems, care plan goals, and care plan tasks. Each of the child CSV files must include the record type ID of the parent object. Make sure to include all required fields in the CSV file for each object. For a list of the fields you must include, see [Create a Care Plan Template](#).

Import the CSV files in the following sequence.

1. Care plan template
2. Care plan problems
3. Care plan goals
4. Care plan tasks

Check [Considerations for Installing Data Loader](#) for system requirements and other prerequisites to using Data Loader.

1. From Setup, enter **Data Loader** in the Quick Find box, then select **Data Loader**.
2. Download and configure Data Loader for the correct version of your operating system.
3. Open the Data Loader and click **Insert**.
4. Enter your Salesforce username and password. Click **Log in**. After your login completes successfully, click **Next**. (Until you log out or close the program, you are not asked to log in again.)
5. Select name of the object to receive the imported data. If the object name does not display in the default list, check **Show all objects** to see a complete list of the objects that you can access.
6. Click **Browse...** and select the CSV file that contains the template information that you’re importing.
7. Click **Next**.
   After the object and CSV file are initialized, click **OK**.

8. Define how the columns in your CSV file map to Salesforce fields. Click **Choose an Existing Map** to select an existing field mapping, or click **Create or Edit a Map** to create a map or modify an existing map. For more details and an example of usage, see Define Data Loader Field Mappings.

9. Click **Next**.

10. For every operation, the Data Loader generates two unique CSV log files; one file name starts with "success," while the other starts with "error." Click **Browse...** and specify a directory for these files.

11. To perform the operation, click **Finish**, and then click **Yes** to confirm.

12. As the operation proceeds, a progress information window reports the status of the data movement.

13. After the operation completes, a confirmation window summarizes your results. To view the success file, click **View Successes**, and click **View Errors** to open your errors file, or click **OK** to close.

---

Enable Users to Apply Care Plan Templates Faster

Give your users the ability to apply care plan templates to existing care plans faster. Place the custom **Apply Care Plan Templates** button on the layout for the Care Plans page.

1. From Setup, select **Object Manager**.

2. Enter **Case** in the **Quick Find** box and select **Case**.

3. Select **Case Page Layout**, and then **CarePlan Layout**.

4. Click **Mobile & Lightning Actions** and drag the **Apply Care Plan Template** button (1) into the Salesforce Mobile and Lightning Experience Actions area (2).

   **Note:** If you want to see the new button directly on the page header, you must place it at the top-left corner of the Salesforce Mobile and Lightning Experience Actions area.

5. Click **Save**.
Manage Provider Relationships

You can never know too much about the health care providers who are delivering services to your patients or insurance plan members. When you track your relationship with each provider in your own verified provider directory, you can make it easy for users to find and engage with the right provider at the right time.

In an insurance organization, you want to engage physicians to improve outcomes and reduce the cost of care. In a provider organization, you want to connect to partner providers to make sure your patients are getting all the care they need, and to drive referrals to your own services. In a Life Sciences organization, you need to work closely with physicians to identify and deliver the devices, medications and services they need.

Create Provider Relationship Cards
Set up provider relationship cards to quickly and efficiently show users what they need to know about providers, all in one place. The data is taken from different objects, but users don’t have to go to those objects via related lists.

Support Provider Search
Users can search for health care providers by specialty, location, and other factors. Data in the Provider data model about providers and facilities is mirrored in a special object called Care Provider Searchable Field. To speed up search results, provider search queries this object instead of the multiple objects where the data is stored.

Associate a Healthcare Professional with a Care Program Provider
To let the care team identify the primary healthcare professional associated with a care program provider, associate a healthcare professional with a care program provider. This association also allows the care team to look up all healthcare professionals for care program providers.

Create Provider Relationship Cards
Set up provider relationship cards to quickly and efficiently show users what they need to know about providers, all in one place. The data is taken from different objects, but users don’t have to go to those objects via related lists.

Consider the information your users look for on each provider’s card, then use the card setup wizard to connect the various objects that contain that information. For example, create a card for each practitioner at a given health center (from the PractitionerFacility object), with their contact information (HealthCareProvider object) and specialty (HealthcareFacilitySpecialty object). And you can add whether that provider is available under the user’s insurance plan (PlanBenefit).

For example, you might set it up so that on a hospital’s record page, your call center agent sees a card for each physician working at that hospital. Or, on a doctor’s record page, the network management team can see a card for each hospital, urgent care center, or other organization where that doctor works.

Set Up Data for Provider Cards
To make provider data available to users, you must store data in the provider objects. You can use Composite API requests to do this.

Create Provider Cards for a Facility
Design cards to show your users information about providers and the facilities where they work. For an example, let’s imagine that a network specialist is preparing to contact the head of care services for the Dumbo Clinic. The specialist needs to know at a glance which practitioners are practicing at the Dumbo clinic.
Create Relationship Cards for a Practitioner

Design cards to show your users information about providers and the facilities where they work. For an example, let’s imagine that a physician engagement specialist is preparing to contact Dr. Charlie Adams and would like to have all the information about Dr. Adams at her fingertips. This includes the doctor's contact information, all the accounts he has a relationship with (employer, hospital affiliations, practice locations, billing company, etc.), details of his relationship to those accounts, and some key information about the accounts themselves.

Set Up Data for Provider Cards

To make provider data available to users, you must store data in the provider objects. You can use Composite API requests to do this.

You can create objects individually by using the Lightning Platform SOAP API or REST API. Or you can use the Composite resource in the REST API to create and link multiple records with a single API call. This lets you create 200 records per call.

Let’s say we want to add healthcare provider Dr. Scott Kaplan to your records. This example shows how to use a single API call to create Account, Contact, HealthcareProvider, PersonEducation, HealthcareProviderNpi, HealthcarePractitionerFacility, HealthcareProviderSpeciality, HealthcareFacilityNetwork, and HealthcareProviderTaxonomy records with Dr. Scott Kaplan’s data. It also shows how to use a composite request to link records using Dr. Kaplan’s contactId as the practitionerId.

Execute this example using a composite request:

curl https://yourInstance.salesforce.com/services/data/v47.0/composite/ -H "Authorization: Bearer token" -H "Content-Type: application/json" -d "@composite.json"

Note: For this example, we assume that there are two Specialty records with SpecialtyCode Neurology and Cardiology, a PayerNetwork record with code United Healthcare, and a Taxonomy record with TaxonomyCode Critical Care. Setting allOrNone to True rolls back your request if a single record creation fails.

Example: Example request body of the composite.json file.

```json
{
  "allOrNone" : true,
  "compositeRequest" : [ 
    {
      "method" : "POST",
      "url" : "/services/data/v47.0/sobjects/Account",
      "referenceId" : "scottKaplanAccount",
      "body" : { "Name" : "Dr. Scott Kaplan" }
    },
    {
      "method" : "POST",
      "url" : "/services/data/v47.0/sobjects/Contact",
      "referenceId" : "scottKaplanContact",
      "body" : {
        "FirstName" : "Scott",
        "LastName" : "Kaplan",
        "AccountId" : "@{scottKaplanAccount.id}
      }
    },
    {
      "method" : "POST",
      "url" : "/services/data/v47.0/sobjects/HealthcareProvider",
      "referenceId" : "scottKaplanProvider",
      "body" : {
        "Name" : "Dr. Scott Kaplan",
        "ProviderId" : "#{scottKaplanProvider.id}
      }
    }
  ]
}
```
"body" : { "Name" : "Dr. Scott Kaplan",
            "PractitionerId" : "@{scottKaplanContact.id}" }},
{
  "method" : "POST",
  "url" : "/services/data/v47.0/sobjects/PersonEducation",
  "referenceId" : "scottKaplanPersonEducation",
  "body" : {
    "Name" : "Dr. Scott Kaplan",
    "ContactId" : "@{scottKaplanContact.id}" }
},
{
  "method" : "POST",
  "url" : "/services/data/v47.0/sobjects/HealthcareProviderNpi",
  "referenceId" : "scottKaplanNpi",
  "body" : {
    "Name" : "Dr. Scott Kaplan",
    "Npi" : "1558444601",
    "PractitionerId" : "@{scottKaplanContact.id}",
    "NpiType" : "Individual"
  }
},
{
  "method" : "POST",
  "url" : "/services/data/v47.0/sobjects/HealthcarePractitionerFacility",
  "referenceId" : "scottKaplanPractitionerFacility",
  "body" : {
    "Name" : "Palo Alto Medical Foundation",
    "PractitionerId" : "@{scottKaplanContact.id}" }
},
{
  "method" : "POST",
  "url" : "/services/data/v47.0/sobjects/HealthcareProviderSpecialty",
  "referenceId" : "hcProviderSpecialtyRef1",
  "body" : {
    "Name" : "Cardiology",
    "Specialty" : {
      "SpecialtyCode" : "Cardiology"
    },
    "PractitionerId" : "@{scottKaplanContact.id}" }
},
{
  "method" : "POST",
  "url" : "/services/data/v47.0/sobjects/HealthcareProviderSpecialty",
  "referenceId" : "scottKaplanSpeciality2",
  "body" : {
    "Name" : "Neurology",
    "Specialty" : {
      "SpecialtyCode" : "Neurology"
    }
  }
}
Here's a sample response:

```json
{
  "compositeResponse": [
    {
      "body": {
        "id": "001RM000004MkdJYAS",
        "success": true,
        "errors": []
      },
      "httpHeaders": {
        "Location": "/services/data/v47.0/objects/Account/001RM000004MkdJYAS"
      },
      "httpStatusCode": 201,
      "referenceId": "scottKaplanAccount"
    },
    {
      "body": {
        "id": "003RM000006Ev2AYAS",
        "success": true,
        "errors": []
      },
      "httpHeaders": {
        "Location": "/services/data/v47.0/objects/Contact/003RM000006Ev2AYAS"
      }
    }
  ]
}
```
In this example, Account ID 001RM000004MkdJYAS and Contact ID 0bYRM0000004CAG2A2 were created on execution. The same Contact ID is used as the PractitionerId where applicable.

Create Provider Cards for a Facility

Design cards to show your users information about providers and the facilities where they work. For an example, let’s imagine that a network specialist is preparing to contact the head of care services for the Dumbo Clinic. The specialist needs to know at a glance which practitioners are practicing at the Dumbo clinic.

The Dumbo Clinic provides hernia repair surgery. It employs Dr. Charlie Adams and is part of the Makana Health System insurance network. We want to display a card for Dr. Adams and for each of the other practitioners who work at Dumbo.

This card type will live on the account record page for the Dumbo clinic. An account represents a hospital, an insurance network, or some other kind of employer. The cards will most likely have this kind of information:

- Physician’s NPI
- Physician’s primary address
- Physician’s primary phone number
- Physician’s board certification, licenses, awards, and degrees
- Physician’s specialties and subspecialties
- Primary Account

1. In Setup, go to Provider Relationship Cards and click New.
2. Choose the Account record page for the facility you’re working on. This is where your users will see the provider cards you are creating. Click Setup > Edit Page.

3. Select the object that contains the basic information you’ll need on the card.
   In this case, it will be the Contact object. (We’ll also be pulling information from other objects.)

4. Specify how the Contact object, where the basic information is coming from, is related to the Account object, which is where the user will see the card.
   You’ll probably want to show some further information that’s not in the Contact object. For example, users need to know about a doctor’s specialties, such as pediatrics, and credentials, such as board certification.
   - If the Account object, where the card is displayed, has a lookup field to the Contact object, which contains most of the information, specify a Direct relationship.
   - If you’re pulling in the information through a junction object that connects the base object to the page where the card is displayed, specify Indirect. For example, Healthcare Practitioner Facility is a junction object that matches practitioners with the places where they work.

5. Select the objects you want to pull information from, and specify how they’re related to Account.

6. Select the fields that contain the information you want to show on your card.
   You’ll want some fields that are in the object the card is based on. For example, the doctor’s contact details are part of his Contact record. Some of your fields belong to child objects related to Contact. Some of your fields come from objects related via a junction object.

7. In Setup, go to the Lightning Application Builder and select Account.

8. Drop the Relationship Card component from the left panel onto the Account record page.

9. In the Configuration panel on the right, specify a heading for the tab.
   The default heading is “Relationship,” but you may want something more specific, such as “Health Care Providers.”

10. Save the page.

Create Relationship Cards for a Practitioner

Design cards to show your users information about providers and the facilities where they work. For an example, let’s imagine that physician engagement specialist is preparing to contact Dr. Charlie Adams and would like to have all the information about Dr. Adams at her fingertips. This includes the doctor’s contact information, all the accounts he has a relationship with (employer, hospital affiliations, practice Locations, billing company etc), details of his relationship to those accounts, and some key information about the accounts themselves.

This card lives on the Contact record page. A contact represents an individual practitioner. You should give it these fields:

- Facility Name
- Facility Address
- Facility Phone number
- Services or Specialties provided by the Facility
- Facility NPI
- Facility Plan Type

For example, Dr. Charlie Adams is an Attending/Admitting physician at NY Memorial hospital, practices at Dumbo Clinic, is employed by Makana Health System (Primary Account), and has his billing done by Hanna Billing Company (Account Contact relationship).

1. In Setup, go to Provider Relationship Cards and click New.
2. Select the object that contains the basic information you’ll need on the card. In this case, it will be the Account object. (We’ll also be pulling in information from other objects.)

3. Specify how the Account object, where the basic information is coming from, is related to the Contact object, which is where the user will see the card.

In the simplest case, all the information you need is in the Contact object and you don’t need information from anywhere else. You can select Self and you’re done. It’s more likely, however, that you’ll want to show some further information that’s not in the Contact object. For example, users need to know about a doctor’s specialties, such as pediatrics, and credentials, such as board certification.

- If the Contact object has a lookup field to the Account object, which contains most of the information, select Direct.
- If you’re pulling in the information through a junction object that connects the base object to the page where the card is displayed, select Indirect. For example, Healthcare Practitioner Facility is a junction object that matches practitioners with the places where they work.

4. Select the fields that contain the information you want to show on your card.

- You’ll want some fields that are in the object the card is based on. For example, the Dumbo Clinis’s phone number is part of its Account record.
- Some of your fields belong to child objects related to Account. For example, the doctor’s specialty and credentials will come from the Care Provider Specialty object.
- Some of your fields come from objects related via a junction object.

5. In the Lightning App Builder, choose Contact.

The practitioner’s Contact record is where your users will see the provider cards you are creating.

6. Drop the Relationship Card component from the left panel onto the record page.

7. In the Configuration panel on the right, specify a heading for the component.

The default heading is “Relationship,” but you may want something more specific, such as “Health Care Facility.”

8. Save the page.

**Support Provider Search**

Users can search for health care providers by specialty, location, and other factors. Data in the Provider data model about providers and facilities is mirrored in a special object called Care Provider Searchable Field. To speed up search results, provider search queries this object instead of the multiple objects where the data is stored.

1. **Set Up Data for Provider Search**

   To deliver search results, the provider search component needs some minimal data about facilities, the practitioners who work there, and the relationships between them. That data is stored in the Account, Contact, and Healthcare Provider objects. After getting the basic data in place, we’ll fill in more detailed data using other parts of the Provider Data Model.

2. **Make More Data Available for Provider Search**

   The CareProviderSearchableField object stores data from the Provider data model and Salesforce standard objects so that it can all be searched in one place. You can choose the provider data that you want to make available for search and add it to this special Provider Search object, so that your users can search by terms that work for them.

3. **Enable Provider Search for Users**

   Design a Lightning user interface where users can easily search for providers.
4. **Let Site Users Search for Providers**
   Make provider relationship cards available to end users via your site. For example, Makana Health Insurance might want to enable its plan members to get information about the practitioners and facilities in its network.

5. **Make Providers Available for Appointment Scheduling**
   When you set up physicians, healthcare facilities, and associated data in both the provider data model and the Lightning Scheduler data model, users can make appointments with providers they find through provider search.

### Set Up Data for Provider Search

To deliver search results, the provider search component needs some minimal data about facilities, the practitioners who work there, and the relationships between them. That data is stored in the Account, Contact, and Healthcare Provider objects. After getting the basic data in place, we’ll fill in more detailed data using other parts of the Provider Data Model.

The Provider data model uses four objects to store the essential data about health care practitioners and facilities. For each facility and practitioner, create the records that contain the basic information to be returned in search results.

**Note:** We’re assuming here that you’re manually defining a few facilities and practitioners to get provider search up and running. For a real-world implementation, you’ll want to import the data using Data Loader or the Composite API.

- To make provider search available in your org, find Provider Search Settings in Setup and move the Enable Provider Search slider to the On position.
- To define a facility, such as a hospital, clinic, private practice, lab, or other organization, create a Healthcare Provider record and specify the facility in the Account field.
- To define a practitioner, such as a doctor, chiropractor, or therapist, create a Healthcare Provider record and point to the practitioner’s Contact record in the Contact field (leaving the Account field empty).
  
  **Note:** For a solo practitioner, such as a family doctor in private practice, you’ll need an Account record for the practice, a Contact for the practitioner, and a single Healthcare Practitioner Facility record that connects the practitioner to the facility.

- To add more information about the healthcare organization or the practitioner, use the Healthcare Practitioner object.
- To define a relationship between a practitioner and a facility, such as a doctor working at one or more hospitals, create a Healthcare Practitioner Facility record specifying both the facility’s Account record and the practitioner’s Contact record. You can create any number of Healthcare Practitioner Facility records matching practitioners with facilities.
- Make sure these fields are populated, at minimum:

```
<table>
<thead>
<tr>
<th>Source Field</th>
<th>Target Field in CareProviderSearchableField</th>
<th>Required for Practitioner</th>
<th>Required for Facility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account.Name</td>
<td>FacilityName</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Account.ShippingAddress</td>
<td>Address</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Account.Phone</td>
<td>FacilityPhone</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Contact.FirstName</td>
<td>ProviderName</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Contact.LastName</td>
<td>ProviderName</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>HealthcareProvider.Account</td>
<td>(Lookup to Account object)</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>HealthcareProvider.Practitioner</td>
<td>(Lookup to Contact object)</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>HealthcarePractitionerFacility.Account</td>
<td>(Lookup to Account object)</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>
```
Required for Facility
Required for Practitioner
Target Field in CareProviderSearchableField
Source Field (Lookup to Contact object) HealthcarePractitionerFacility.Practitioner

Search data is updated every six hours. After the update runs, you should be able to run a simple search.

- To verify that your provider data is available for users to search, find Provider Search Sync Logs in the app launcher.

The providers you have set up for search are listed. If a provider’s data didn’t successfully sync to the Care Provider Searchable Fields object, review the message for a start on figuring out why.

Make More Data Available for Provider Search

The CareProviderSearchableField object stores data from the Provider data model and Salesforce standard objects so that it can all be searched in one place. You can choose the provider data that you want to make available for search and add it to this special Provider Search object, so that your users can search by terms that work for them.

1. In Setup, search for Care Provider Search Config and create a configuration record that maps a custom field to a field in the Care Provider Searchable Field object.

For example, create a record like this to make a field in the Healthcare Provider object available for search.

<table>
<thead>
<tr>
<th>Name</th>
<th>Provider</th>
<th>Facility</th>
<th>Sync Status</th>
<th>Message</th>
<th>Last !</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Kaiser Downtown</td>
<td>Kaiser Downtown</td>
<td>Success</td>
<td>A record for this provider was created.</td>
<td>4/21</td>
</tr>
<tr>
<td>2</td>
<td>Kaiser JapanTown</td>
<td>Kaiser JapanTown</td>
<td>Success</td>
<td>A record for this provider was created.</td>
<td>4/21</td>
</tr>
<tr>
<td>3</td>
<td>Monica Geller</td>
<td>Monica Geller UCSF</td>
<td>Success</td>
<td>A record for this provider was created.</td>
<td>4/21</td>
</tr>
<tr>
<td>4</td>
<td>UCSF Mission Bay</td>
<td>UCSF Mission Bay</td>
<td>Success</td>
<td>A record for this provider was created.</td>
<td>4/21</td>
</tr>
</tbody>
</table>

2. Edit the Provider Search component and select the field that’s mapped to your custom field so that it shows up in the user’s search interface.
These are the fields you can use to make data available for provider search.

<table>
<thead>
<tr>
<th>Source Field</th>
<th>Target Field in CareProviderSearchableField</th>
<th>For Practitioners</th>
<th>For Facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account.Name</td>
<td>FacilityName</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Account.Name</td>
<td>ProviderName</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Account.OperatingHours</td>
<td>OperatingHours</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>HealthcarePractitionerFacility.OperatingHours</td>
<td>OperatingHours</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Account.Phone</td>
<td>FacilityPhone</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Account.PhotoUrl</td>
<td>PhotoUrl</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>BoardCertification.CertificationType</td>
<td>CertificationType</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>BoardCertification.HealthcareProvider</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CareProviderFacilitySpecialty.Account</td>
<td>Specialty</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Specialty.SpecialtyType</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact.Name</td>
<td>ProviderName</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Contact.PhotoUrl</td>
<td>PhotoUrl</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>HealthcareFacilityNetwork.Account</td>
<td>PlanType</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>HealthcareFacilityNetwork.PractitionerFacility</td>
<td>PlanType</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>HealthcareFacilityNetwork.Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PayerNetwork.Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IsAcceptingNewPatients</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PanelStatus = Open indicates Accepting New Patient = true
Account must be provided. If PractitionerFacility is also provided, facility is assumed.

PanelStatus = Open indicates Accepting New Patient = true
PractitionerFacility must be provided.

SpecialtyCareProviderFacilitySpecialty.SpecialtyCareSpecialty.SpecialtyType must also be specified.
### Enable Provider Search for Users

Design a Lightning user interface where users can easily search for providers.

1. **Make sure users have Read access to these fields:**

<table>
<thead>
<tr>
<th>Field in Care Provider Searchable Field</th>
<th>Corresponding Field in Source Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>FacilityName</td>
<td>Account.Name</td>
</tr>
<tr>
<td>ProviderName</td>
<td>Contact.Name</td>
</tr>
<tr>
<td>Specialty</td>
<td>CareSpecialty.SpecialtyType</td>
</tr>
<tr>
<td>SubSpecialty</td>
<td>CareTaxonomy.TaxonomyType</td>
</tr>
<tr>
<td>PlanType</td>
<td>HealthcarePayerNetwork.NetworkType</td>
</tr>
<tr>
<td>IsAcceptingNewPatients</td>
<td>HealthcareFacilityNetwork.PanelStatus</td>
</tr>
<tr>
<td>ProviderType</td>
<td>HealthcareProvider.ProviderType</td>
</tr>
<tr>
<td>GenderRestriction</td>
<td>HealthcareFacilityNetwork.GenderRestriction</td>
</tr>
<tr>
<td>NationalProviderIdentifier</td>
<td>HealthcareProviderNpi.Npi</td>
</tr>
</tbody>
</table>

2. **In Setup, find Provider Search. On the Provider Search Settings page, switch the toggle to Enabled.**

3. **In Lightning App Builder, make the provider search component available to Health Cloud console users.**

   Choose from these methods:
   - Drop the Provider Search component on the Account record page.
   - Drop the component on the Home page of your Health Cloud app.
• Create a new app that just contains the provider search component.

  Note: In a standalone app, users can’t filter by eligibility according to insurance plan.

4. Check that the maps and location service is turned on.
   This should already be true for Enterprise Edition. If it isn’t, contact your Salesforce account representative.

5. Check that the Data integration rule for geocoding of Care Provider Searchable fields is enabled.

6. Design the cards that will contain your search results.
   The basic fields are provided for you. In most cases, you won’t need more than that.

7. If you’d rather let users see all the fields at once, clear the Hide Advanced Search checkbox.
   By default, users can choose whether they want to see advanced search fields beyond the basics.

8. Click in the Search Fields panel, and then click Add Field to Search Results in the right column.
   Move your selected fields up or down to match the best order for your users.

9. Change the field labels to match your organization’s usage.

10. Save and activate your component.

11. In the app launcher, search for your new app and try it out.

  Tip: If you have a phone app set up, you may be able to let users make phone calls directly from the provider search result card.

  Note: If you don’t see search results immediately after setting up provider search, try again later. The provider search Lightning component synchronizes with the provider data every six hours.

Let Site Users Search for Providers

Make provider relationship cards available to end users via your site. For example, Makana Health Insurance might want to enable its plan members to get information about the practitioners and facilities in its network.

1. Give the site user profile Read access to the CareProviderSearchableField object.

2. Use the Experience Builder to add the component to your site.

Make Providers Available for Appointment Scheduling

When you set up physicians, healthcare facilities, and associated data in both the provider data model and the Lightning Scheduler data model, users can make appointments with providers they find through provider search.

  Note: Only practitioners (physicians) and healthcare locations that can be scheduled need to be set up in the Lightning Scheduler data model. For example, you may be able to schedule a facility such as a room, but you can’t schedule a hospital.

1. In the Lightning Scheduler setup app, enter each physician as a Contact, a user (either CRM or Experience Cloud), and a Service Resource.
   The user record connects the Contact and the Service Resource.

2. Set up each healthcare facility as an Account, with a Location (connected via Associated Location) and a Service Territory.
3. Advise your users to include work type in their search parameters if they want to find providers according to their availability.

SEE ALSO:
- Set Up Data for Provider Cards
- Salesforce Help: Data Loader
- Health Cloud Developer Guide: Provider Data Model
- Salesforce Developer Guide: Composite API

**Associate a Healthcare Professional with a Care Program Provider**

To let the care team identify the primary healthcare professional associated with a care program provider, associate a healthcare professional with a care program provider. This association also allows the care team to look up all healthcare professionals for care program providers.

1. In the App Launcher, select **Care Program Healthcare Providers** and then click **New**.
2. Add a name for the association between a care program provider and healthcare provider (healthcare professional).
3. Choose a care program provider.
4. Choose a healthcare provider.

![New Care Program Healthcare Provider](image)

**Note:** To assign this healthcare provider as the primary provider, select **Primary Provider**.

5. Save your changes.
Set Up Intelligent Document Automation

Simplify the document management process, reduce manual data entry, and get patients the right care and services faster by managing patient and member forms all in one place, from intake through processing. You can route forms automatically to the right queue for faster review and processing in a digital, HIPAA-compliant workspace.

For information about setting up Intelligent Document Automation for your users, see Document Automation on page 119.

Intelligent Form Reader

Intelligent Form Reader provides optical character recognition for data extraction. The information extracted from a document can be used to create or update record fields, or to verify data that’s already in the org.

For setup and configuration instructions, see Intelligent Form Reader.

To use Intelligent Form Reader, your organization must have an Amazon Textract license. Check with your Salesforce representative to see if this is the case.

What kind of form are you getting data from?

Select the form type you want Intelligent Form Reader to scan. We provide six form types. To add more form types, create a new document type and tell us what kind of form it is.

Where are you storing the form data?

Associate a form type with an object. Then map the fields in the form to the equivalent fields in the target object. Health Cloud extracts the information from a form and updates the mapped fields in Salesforce. Verify the values in the form against the information in the affected record. For example, check a person’s birthdate in Salesforce against the birthdate in their scanned passport.

Provide Easy Access to Protocols and Articles

Salesforce Knowledge lets you easily create and manage content and make it available to other healthcare professionals, as well as patients, members, and the care team.
An article can contain the protocols you use to manage conditions or can hold educational materials you send to patients and members. When you set up Salesforce Knowledge, you give your care coordinators access to your organization’s library of articles and protocols. After you set up Salesforce Knowledge in your organization, users with Knowledge licenses can write, edit, publish, and archive articles using the Articles Management tab. They can also find and view published articles using the Articles tab.

By setting up the Knowledge One widget, you give care coordinators the ability to search, send, and create articles, all without leaving the Health Cloud console. Make sure that you’ve added Knowledge One to all the profiles that have access to the console.

Using the Knowledge One widget, articles can be accessed from the console footer, care coordinators can:

- Search for and find relevant articles or protocols.
- Attach a published article to a care plan in one click.
- Email an article as a PDF, if shared on a public channel.
- Create and manage articles, when the user has permission and the correct license.

Enable Knowledge Users
Before you can set up all the great features of Salesforce Knowledge, make sure that you’re a Salesforce Knowledge user.

Create Article Types
Articles types are the first step in creating the articles used to display protocols. An article type defines the structure and the types of content an author can add to an article or a protocol.

Enable Salesforce Knowledge
Before you can set up Knowledge, you must enable it in the organization.
Enable Knowledge Users

Before you can set up all the great features of Salesforce Knowledge, make sure that you’re a Salesforce Knowledge user.

1. At the top of any Salesforce page, click the down arrow next to your name.
2. From My Settings, select Personal Settings, enter Advanced User Details in the Quick Find box, then select Advanced User Details.
3. Click Edit.
4. Select Knowledge User.
5. Click Save.

Create Article Types

Articles types are the first step in creating the articles used to display protocols. An article type defines the structure and the types of content an author can add to an article or a protocol.

Health Cloud uses the power of Salesforce Knowledge to let you author and manage the article types that you use for protocols or educational articles.

Note: You can’t enable Salesforce Knowledge until at least one article type is created.

When creating the article that contains a protocol, the author begins by selecting an article type. Article types, such as protocols, FAQs, and tutorials, provide the format and structure to control how an article displays for each audience, known as a channel. For each article type, you can create custom fields, customize the layout by adding or removing sections and fields, and choose a template for each channel. You can also create workflow rules and approval processes to help your organization track and manage article creation and publication.

1. From Setup, enter Article Types in the Quick Find box, then select Knowledge Article Types.
2. Click New Article Type or edit an existing article type.
3. Enter the information for the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>A name used to refer to the article type in any user interface pages.</td>
</tr>
<tr>
<td>Plural Label</td>
<td>The plural name of the object. If you create a tab for this object, this name is used for the tab.</td>
</tr>
</tbody>
</table>
If it is appropriate for your organization's default language, specify the gender of the label. This field appears if the organization-wide default language expects gender. Your personal language preference setting does not affect whether the field appears. For example, if the organization's default language is English and your personal language is French, you are not prompted for gender when creating an article type.

If it is appropriate for your organization's default language, check if your label must be preceded by "an" instead of "a".

(Read only) A unique name used to refer to the article type when using the API. The Object Name field can contain only underscores and alphanumeric characters. It must be unique, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.

An optional description of the article type. A meaningful description helps you remember the differences between your article types when you are viewing them in a list.

(Optional) Select this option to track the full history of an article and its versions. The system records and displays field updates, publishing workflow events, and language versions for the master article and any translations.

Indicates whether the article type is visible outside Setup. **In Development** means that article managers can't choose this article type when creating articles. Only select **Deployed** after you are done creating the article type.

4. Click **Save**.

5. In the Fields section of the Article Type definition, click **New**.

6. On the New Custom Field page, select **Text Area (Rich)**.

   The Rich Text Area field lets authors enter formatted text, add images, videos, and links. The fields hold up to 131,072 characters on separate lines.

7. Click **Next**.

8. Enter a field label. The field name is populated based on the field label you enter. Ensure that the custom field name is not identical to any standard field name for that object.

9. Enter any field attributes, such as **Description**, and click **Next** to continue.

10. Set the **field-level security** to determine whether the field is visible and editable or read only for specific profiles, and click **Next**.
    Field-level security allows you to control which fields are visible in different channels.

11. Ensure that the field **Yes, add this custom field to the layout** is selected so that the rich text field is included in the page layout.

12. Click **Save** to finish or **Save & New** to create more custom fields.
13. Optionally, rearrange your custom fields on the article-type layout.

Note: Don’t forget to grant article type permissions for each user profile needing access to protocols and articles.

Enable Salesforce Knowledge

Before you can set up Knowledge, you must enable it in the organization.

1. From Setup, enter Knowledge in the Quick Find box, then select Knowledge Settings.

2. Confirm that you understand the impact of enabling Salesforce Knowledge and click Enable Salesforce Knowledge and click OK in the dialog box.

3. Click Edit to select your general settings.
   a. Select Allow users to create and edit articles from the Articles tab to enable care coordinators and internal users to edit articles without going to the Article Management tab.
   b. Select Activate Validation Status field to add a Validation Status field to all articles.
      This way, users can attach approved articles to questions instead of ones that haven’t gone through an approval process.
   c. Select Allow users to add external multimedia content to HTML in the standard editor to allow iframe elements in the standard editor to embed multimedia content from Dailymotion, Vimeo, and YouTube.

4. Select Internal App and Customer to show article summaries to customers and internal site members in the article list view.

5. Accept the default settings for Knowledge One options.

6. Choose the Default Knowledge Base Language. This is the language your authors will use to write most of the articles. We recommend that your default knowledge base language and your organization’s language be the same.

   Note: Current multi-language users can still use Experience Cloud site. The Salesforce Help provides more details on multi-language organizations.

7. Select Single Language.

8. Optionally, select Allow users to create an article from a case to let users create a draft article that is attached to the case.

9. Select the option to let users with correct privileges use the standard editor when they create articles. This lets them add links, formatting, and videos to articles.

10. Select a default article type.

11. Optionally, select the options to use profiles to create PDF files on cases and for users to share articles with public URLs.

12. Optionally, select the option to Allow agents to create an article from a reply.
    This lets users turn a particularly helpful answer into an article.
    a. Select the default article type.
    b. Select an internal user to assign the article to so that it can be evaluated for accuracy.

13. Skip the steps to set up Chatter Questions and Knowledge Statistics.
14. Click **Save**.
   
   For more information on setting up Salesforce Knowledge, see the *Salesforce Knowledge Implementation Guide* or search the Salesforce Help.

### Enable Care Teams to Track Gaps

Health Cloud helps care providers prioritize efficiently by surfacing gaps in a person’s care where the care team can make a difference. To close a care gap, you tie it to a support process.

Care coordinators can use this capacity to improve outcomes. Population health analysts can use care gaps to see which people have the highest likelihood of improvement after a particular intervention. To start using Care Gaps, add it to the Patient Card dropdown in Custom Settings. You can also add the Care Gaps component to a Case page in Lightning App Builder. Multiple source systems can create Care Gap records in Health Cloud.

1. From **Setup** enter *custom settings* in the Quick Find box and select **Custom Settings**.
2. To add Care Gaps to the Card View dropdown menu, next to **Card View Dropdown**, click **Manage**, then **New**.
3. Create a Care Gaps item in the dropdown menu by entering the following into the fields shown:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name for the entry, such as <em>Care Gaps</em>.</td>
</tr>
<tr>
<td>Category Label</td>
<td>Enter the name of the custom label for the parent category that contains the child menu navigation items, such as <em>Engagement</em>.</td>
</tr>
<tr>
<td>Category Name</td>
<td>Name of the parent category that contains child menu navigation items, such as <em>Engagement</em>.</td>
</tr>
<tr>
<td>Default Subtab</td>
<td>When selected, the related subtab appears by default in the Health Cloud console.</td>
</tr>
<tr>
<td>Tab Type</td>
<td>Specify the type of tab to use for this page: Primary or Subtab. A primary tab is the main item to work on. A subtab is related to an item on a primary tab.</td>
</tr>
<tr>
<td>Subcategory Name</td>
<td>Name of the child category in the menu list, such as <em>Care Gaps</em>.</td>
</tr>
<tr>
<td>Page Type</td>
<td>Specify the page type as <em>VFpage</em>.</td>
</tr>
<tr>
<td>URL</td>
<td>Enter this URL to access the page /apex/HealthCloudGA__HcCareGapsPage.</td>
</tr>
<tr>
<td>Subcategory Label</td>
<td>Customized label for the name of the child category in the menu list, such as <em>Tab_Care_Gaps</em>. This text is the clickable link that opens the page or tab. Use a custom label to create a localized category name in this field. When a value exists for this field, the Subcategory Name field isn’t used.</td>
</tr>
<tr>
<td>Subtab Sort Order</td>
<td>Indicates the order in which this tab appears in the console when it’s been selected as a default tab.</td>
</tr>
</tbody>
</table>

4. Save your settings.

5. Add Care Gaps record type to the user profile. From the **Users** > **Profiles** menu item, select the appropriate user profile (for example, Health Cloud).

6. Under **Record Type Settings**, click **Edit** under the Cases record type and add the *Care Gaps* record type.

   If your org uses the Profile overview page, then select **Object Settings**, then **Cases**, and click **Edit**.

7. Assign the Care Gap record type and page layout to the profile.
8. Save your settings.

Return to the Health Cloud console and verify that the Care Gaps option appears in the Card View dropdown menu.

SEE ALSO:

Show Data Sources with Custom Icons

Manage Life Events

The Life Events component shows life events for a patient account record page. You can create life event types, activate or deactivate them, and make them unique. You also can hide sensitive life event types, change the default icons that represent the life event types, and choose the details your users see when they hover over a life event.

Create Event Types
If the default event types don’t address your needs, you can create additional event types, such as job loss, divorce, or chronic stress.

Deactivate or Activate Event Types
You can deactivate event types that aren’t relevant.

Capture Once-in-a-Lifetime Events with Unique Event Types
Some events occur only once in a lifetime, such as a birth. To prevent users from accidentally creating more than one event of such an event type, mark the event type unique.

Personalize Life Events with Custom Icons
You can change the default icon associated with a life event type. Upload an SVG file to replace the icon.

Choose the Life Event Details to Show on Hover
When you hover over a life event, an expanded lookup card displays the key fields from the event record. You can customize the associated compact layout and choose the fields that you want to show in the expanded lookup card.

Hide Sensitive Life Event Types
At times, mentioning a life event is inappropriate because the patient hasn’t yet experienced or isn’t likely to experience that life event. When you hide a life event type, it doesn’t appear on the component until you add a life event of that type for the patient.

Create Event Types
If the default event types don’t address your needs, you can create additional event types, such as job loss, divorce, or chronic stress.

1. From Setup, open Object Manager.
2. In the Quick Find box, enter Person Life Event, and then select Person Life Event.
3. Click Fields & Relationships, and then select Event Type.
4. Under Event Type Picklist Values, click New, and then add the new event types.
5. Save your changes.

Deactivate or Activate Event Types
You can deactivate event types that aren’t relevant.

1. From Setup, open Object Manager.
2. In the Quick Find box, enter Person Life Event, and then select Person Life Event.
3. Click Fields & Relationships, and then select Event Type.
4. Under Event Type Picklist Values, click Deactivate next to the value that you want to deactivate. To activate an inactive event type, under Inactive Values, click Activate next to the value.
5. Save your changes.

Capture Once-in-a-Lifetime Events with Unique Event Types

Some events occur only once in a lifetime, such as a birth. To prevent users from accidentally creating more than one event of such an event type, mark the event type unique.

1. From Setup, open Object Manager.
2. In the Quick Find box, enter Person Life Event, and then select Person Life Event.
3. Click Fields & Relationships, and then select Event Type.
4. Under Event Type Picklist Values, next to the value that you want to mark unique, click Edit, and select Unique.
5. Save your changes.

Personalize Life Events with Custom Icons

You can change the default icon associated with a life event type. Upload an SVG file to replace the icon.

1. From Setup, in the Quick Find box, enter Icons, and then select Icons.
2. Select Life Events and Business Milestones.
3. For the icon that you want to change, click , and select Change Icon.
4. Click Upload Files, and select the SVG file for the icon. The SVG file must be a single path SVG file.
5. Click Save.

Choose the Life Event Details to Show on Hover

When you hover over a life event, an expanded lookup card displays the key fields from the event record. You can customize the associated compact layout and choose the fields that you want to show in the expanded lookup card.

1. From Setup, open Object Manager and search for Person Life Event.
2. Click Person Life Event, and select Compact Layouts.
3. Create a layout by clicking New or clone the System Default layout and edit it.
   
   Note: To clone the System Default layout, click System Default and click Clone.
4. Enter a label for the compact layout, and add the fields to include.
5. Sort the fields in the order that you want them displayed by clicking Up or Down.
   
   Tip: Put the object’s Name field first to provide users context when they hover over a life event.
6. Save the layout.
7. Click Compact Layout Assignment, and then click Edit Assignment.
8. From the Primary Compact Layout list, select your compact layout.
9. Save your changes.

Hide Sensitive Life Event Types

At times, mentioning a life event is inappropriate because the patient hasn’t yet experienced or isn’t likely to experience that life event. When you hide a life event type, it doesn’t appear on the component until you add a life event of that type for the patient.

1. In Lightning App Builder, open a page that contains the Life Events component. For example, open the Patient Console.
2. Click anywhere on the Life Events component to select it.
3. In the Properties pane, click Select under Hide Event Types.
4. Drag the event types that you want to hide from Available to Selected, and then click OK.

5. Save the page.

Provide Assessments for Gathering Information

Improve the quality of care by gathering information that helps to manage your patients or members more efficiently. Whether it’s a pre-surgery assessment or a member feedback survey, you have the information you need at your fingertips.

Health Cloud Assessments let you create easy-to-use forms for collecting feedback and data from your patients and members. You can customize questions and answers in a simple editor. You can add various types of questions to gather the exact data you need.

For each patient or member, the Available tab lists the assessments that are available to send to that person. With a click, the email invitation is on its way. When the assessment participant clicks the assessment link within the email, they can log into the site and complete the questions.
To see responses, open the assessment from the Patient Assessments tab. The Patient Assessments tab lists all the surveys that have been sent to that person. You can see the date the assessment was sent, whether it’s been completed, its status, and the version you’re viewing.

1. **Enable Assessments**
   Enable your care coordinators to create assessments and send them to patients and other care team members.

2. **Set Survey Permissions**
   To enable users to use assessments, add access to the survey-related objects to the relevant permission sets and site members.

3. **Set Up Survey Invitations**
   An invitation to participate in an assessment is sent to the user as a link in an email. To create that email, you’ll need an email template.

4. **Create Email Invitations for Assessments**
   Create a Survey Email Branding configuration to customize the email that patients or members receive when care coordinators invite them to take a survey or assessment.

5. **Update Sharing Settings for Assessments**
   Authorize participants to participate in assessments when they are invited to do so.

SEE ALSO:
Salesforce Surveys

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**Enable Assessments**

Enable your care coordinators to create assessments and send them to patients and other care team members.

1. **Configure Health Cloud to support assessments.**
   a. From Setup, use the Quick Find box to find **Survey Settings**.
   b. Move the slider to **Enabled**.
   c. Select a default site.

   A user must be a member of one or more sites to participate in assessments.

2. **Give your users access to assessments via a subtab in the patient record.**
   a. Use the Quick Find box to find **Custom Settings**.
   b. Click **Manage** next to **Card View Dropdown**.
   c. Click **New** to create a new item in your Patient Card view.

   Configure it like this:

   **Name**
   Name of the parent category that contains child menu navigation items. Enter a name, such as **Assessments**.

   **Category Name**
   If you have a lot of subtabs, enter a parent category name to help users find this child menu item. The category name is just a heading and isn’t a clickable navigation link. "Engagement" is a good start.

   **URL Parameter**
   Leave blank.

   **Tab Type**
   Enter **Subtab**.
**Subcategory Name**
Enter a name for the clickable link that opens the page or tab. You’ll probably want this to be the same value you chose for the Name field.

**Page Type**
Enter VFPage.

**URL**
Enter /apex/HealthCloudGA__HcAssessmentPage.

**Category Label**
Choose a label. You’ll probably want this to be the same value you chose for Category Name.

**Default Subtab**
Select if you want this item to be on all the dropdowns you create in Health Cloud.

**Subcategory Label**
Choose a label, preceded by Tab_. You’ll probably want this to be the same value you chose for Subcategory Name. For example: Tab_Assessment

**Subtab Sort Order**
Enter a numerical value to indicate how high on the list this item should appear. Higher numbers appear lower on the list.

---

**Set Survey Permissions**
To enable users to use assessments, add access to the survey-related objects to the relevant permission sets and site members.

1. To find the list of delivered permission sets, enter **Permission Sets** in the Quick Find box, then select **Permission Sets**.

2. In Object Settings, give the admin permission set the ability to create and distribute assessments.

   **Surveys**
   Read

   **Survey Invitations**
   Read, Create, Edit, Delete

   **Survey Responses**
   No Access

---

**Set Up Survey Invitations**
An invitation to participate in an assessment is sent to the user as a link in an email. To create that email, you’ll need an email template.

1. To find the list of delivered permission sets, enter **Permission Sets** in the Quick Find box, then select **Permission Sets**.

2. In Object Settings, give the admin permission set the ability to create and distribute assessments.

   **Surveys**
   Read

   **Survey Invitations**
   Read, Create, Edit, Delete
Survey Responses
No Access

3. Now give end users the ability to read and respond to surveys. In the Patient tab, click Care Plans > Care team > Add member to community

4. On the Contact page, under Change Record Type, click Enable Customer User. Select Customer Community Plus for the profile. Assign these permissions:

   **Surveys**
   - Read

   **Survey Invitations**
   - Read

   **Survey Responses**
   - Create, Read, Update

Create Email Invitations for Assessments

Create a Survey Email Branding configuration to customize the email that patients or members receive when care coordinators invite them to take a survey or assessment.

1. Create a comma-separated template file containing the basic metadata for your outgoing invitation. Include these fields. (You can copy and paste this data into a spreadsheet app if that helps.)

<table>
<thead>
<tr>
<th>DeveloperName</th>
<th>MasterLabel</th>
<th>FromEmailAddress</th>
<th>Subject</th>
<th>Body</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td>Example</td>
<td><a href="mailto:example@example.com">example@example.com</a></td>
<td>Questions for you</td>
<td>Please answer these important questions!</td>
</tr>
</tbody>
</table>

2. If you want images in your email, add two more columns to your CSV file.

   **FooterImageId**
   - ID of a content asset for the bottom of your email

   **HeaderImageId**
   - ID of a content asset for the top of your email

   **Note:** Use the file selector in Experience Builder to upload your image files as content assets. Each content asset has an ID, which works as a link to that asset.

3. Use Data Loader to upload the CSV file and map the columns to the Health Cloud fields.

SEE ALSO:

Create Asset Files

Update Sharing Settings for Assessments

Authorize participants to participate in assessments when they are invited to do so.

1. From Setup, use the Quick Find box to find Sharing Settings.

2. Configure the sharing settings for surveys and survey invitations.
3. If the person isn’t already a member of your Health Cloud site, add them.

External users can only view Health Cloud assessments from within a site.

a. To add the person to the site, open their care plan and select the Care Team tab and select Add Care Team Member.

b. Enter the person’s name and role and select Add Member to Community.

c. On the Contact page’s action menu, select View Customer User. Ensure that the profile is Customer Community Plus User.

Assign these permissions:

**Surveys**
- Read

**Survey Invitations**
- Read

**Survey Responses**
- Create, Read, Update

---

### Support and Manage Care Requests

Give your users the tools to collaborate seamlessly on submitting, assigning, and processing care requests. Utilization management makes it easier for payer organizations to gather member and clinical data from providers, streamline care request reviews, and evaluate reviews for medical necessity. Health care providers can quickly submit care requests with fewer phone calls and faxes for preauthorizations.

Health Cloud provides standard objects to support these business processes:

- Prescription drug preauthorization requests
- Service preauthorization requests
- Admissions
- Concurrent (continued stay) reviews
- Appeals
- Complaints and grievances

Use the Health Cloud Care Request Extensions unmanaged package to get care requests and processes up and running in no time. The package contains:

- The Utilization Management Lightning app
- A configured Case Lightning record page for care requests
- Record types for service requests, admissions, appeals, complaints, concurrent reviews, drug requests, and grievances
- Page layouts

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**Editions**

Available in Lightning Experience only. The supporting objects are available in both Lightning Experience and Salesforce Classic.

Available in: Enterprise, Performance, and Unlimited Editions.
A Support process

Utilization Management Setup Checklist
We’ve put together a handy checklist to guide you through setting up care requests in your org.

Configure and Customize Care Requests
Create and customize requests for care such as a prescription drug, an admission, or a service.

Get a Head Start on Enabling Care Requests with the Care Request Lightning Page
We’ve given you the Care Request Lightning page to make your day as an admin a little easier. The Care Request page is a custom layout that gives you a basic framework for a care request record page. You can customize the page by adding or removing the components that your users need. You can also create different record pages with features that are relevant to specific users and assign the customized page to their user profiles.

Utilization Management Setup Checklist
We’ve put together a handy checklist to guide you through setting up care requests in your org.

Prepare to Set Up Utilization Management
Before you get started, install and configure Health Cloud.

- Install the Health Cloud Care Request Extensions unmanaged package.
- Assign the Health Cloud Permission Set License and the Health Cloud Platform permission set license to yourself and your users.
- Create care request configurations for the requests you need in your org, such as a prescription drug, an admission, or a service.
- Create a view for the Care Request Configurations page so that in the future you can see the list of care request configuration records.

Set Up Care Requests
Use Object Manager to configure the settings on the Case fields, record types, and page layouts that support care requests.

- Modify the CareRequest page layouts and customize the content of the different care request record pages for your users. For example, internal users typically use different or more fields than Experience Cloud users.
- Edit the page layout assignments and define which page layouts users see. A user’s profile along with the record type determine which page layout the user sees.
- Assign record types to profiles. Determine which record types are used when users create, edit, or view records.
- Add your care request status values to the Status field picklist on the Case object. For example, Approved or Clinical Review.
- Add case type values to the Type field picklist on the Case object. For example, New Request or Modification Request.
- Rename the tabs and Name field labels for the types of care requests that you’re using. For example, you can change the default name of the Care Diagnosis tab to Diagnosis. We suggest the following changes to the labels for Name in each object.
  - CareDiagnosis: Diagnosis Code
  - CareRequestDrug: Drug Name
  - CareRequestItem: Service Code
• **Grant users access** to the records and fields that they need using permission sets or profiles.

**Note:** Users who create and manage care requests must have at least Read access to the Case object.

## Set Up Support and Approval Processes

Automate your care request workflows and use queues to speed up the approval process.

- **Select the case Status picklist values** that appear in the Path component. The package includes a Care Request support process that you can edit. If you prefer, you can create your own process. The support process can include some or all of the picklist values available for the case Status field.
- **Set up an approval process** for requests that need approval and specify the sequence of required steps to approve a care request.
- Optionally, use Process Builder to **automate your business processes**, such as creating tasks to notify members and providers when requests are approved or denied.
- **Set up queues** to prioritize, distribute, and assign care requests to teams who share workloads. Queue members can jump in to take ownership of any record in a queue. Make queued work available to internal users by enabling the list view in the Lightning console.

## Make Care Requests Available to Users

Use the Lightning App Builder and Experience Builder to give internal and Experience Cloud users access to utilization management.

- **Use Lightning App Builder to configure the Care Request Lightning page** on page 134 for your users to track and manage care requests. Using the Care Request Lightning page that’s included in the package makes setup a snap. It’s based on the Case Lightning record page and has everything you need to get started. You can also create your own Home page and include components like Today’s Tasks, Items to Approve, and Chatter. If you decide to create your own Lightning record page to manage care requests, be sure to base it on the Case object.
- Add Care Request Details components to the Lightning record page so that users can view and manage existing care requests. Add one component for each section of a request your users need information about like diagnoses, service codes, and drugs.
- Add the Create Care Request component to the relevant record page so that internal users can create care requests with the click of a button. Drop the required number of Create Care Request components on the page. Then configure each component for every type of request that you’re setting up for internal users. The name of this button appears as the name of the record type on the Case and Care Request objects.
- In Experience Builder, add the Create Care Request Component to an Experience Cloud page to let users create care requests from a site. Drop the required number of care request components on the page and name and configure them individually for each type of request Experience Cloud users need. The name of this button appears as the name of the record type on the Case and Care Request objects. To let Experience Cloud users see the status of care requests, add a List View component to the site page.

**Note:** The following Experience Cloud licenses don’t provide access to cases and aren’t supported with utilization management.

- AuthenticatedWebsite
- BronzePartner
- ExternalIdentityLogin
- Partner
- SilverPartner
- StandardPartner
Configure and Customize Care Requests

Create and customize requests for care such as a prescription drug, an admission, or a service.

Before you start configuring care requests, make sure that you’ve defined a record type for each type of care request your company uses. Make sure to associate the record type to both the Case and Care Request objects. To get set up faster, install the Health Cloud Care Request Extensions unmanaged package. It contains an app with the record types, page layouts, and other metadata to support utilization management.

1. From Setup, enter care request settings in the Quick Find box, then select Care Request Settings.
2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>Name of the care request as it appears in user interface.</td>
</tr>
<tr>
<td>Name</td>
<td>The unique name used by the API and managed packages.</td>
</tr>
<tr>
<td>Care Request Record Type</td>
<td>The record type for the care request. To ensure correct results, use the exact spelling of the API name of the record type you’re using.</td>
</tr>
<tr>
<td>Default record type</td>
<td>Record type that is used as the default.</td>
</tr>
<tr>
<td>Care Request Type</td>
<td>Type of care request. For example, an appeal, a service request, or an admission.</td>
</tr>
<tr>
<td>Care Request Records</td>
<td>The list of available objects used to configure the care request. The possible values are: CareDiagnosis, CareRequestDrug, and CareRequestItem.</td>
</tr>
<tr>
<td>Active</td>
<td>Select to activate this configuration and make it available to users.</td>
</tr>
</tbody>
</table>

3. Click Save.

Get a Head Start on Enabling Care Requests with the Care Request Lightning Page

We’ve given you the Care Request Lightning page to make your day as an admin a little easier. The Care Request page is a custom layout that gives you a basic framework for a care request record page. You can customize the page by adding or removing the components that your users need. You can also create different record pages with features that are relevant to specific users and assign the customized page to their user profiles.

The page is based on the Case Lightning page and already includes these components:

- Highlights panel (1) displays important Case record fields along with quick actions.
- Path (2) shows the various stages of a care request process based on values in the case Status field.
- Chatter (3) gives users a way to view posts, comments, and questions.
Tabs (4) contains the Care Request Details component, the Activities component, the Record Details for Case component, and the Related Lists component.

Support Emergency Response Management and Contact Tracing

Help your health department serve its constituents and communities when faced with a health emergency. Quickly triage and evaluate patients, provide ongoing engagement and monitoring, and protect communities from widespread impacts with contact tracing.

Community Triage and Evaluate

In the Health Emergency Experience Cloud, people can take action to help themselves during a health emergency.
Patients can see the emergency care programs they’re enrolled in (1) and search for health care providers by specialty, location, and other factors (2). A click of a button gives them the location of the closest emergency services (3) and access to vital information to stay healthy and safe (4). A pre-defined chatbot dialog guides individuals through a self-assessment based on Centers for Disease Control guidelines with the option to schedule an appointment for follow-up.

Patient Engagement and Care

During a health emergency, efficiency in getting individuals assessed, enrolled in a care program, and monitored is crucial.

Using the Emergency Response Management Console, create a consistent intake experience using guided workflows and pre-built assessments that can quickly adapt as protocols or guidelines change.

Empower care teams to remotely monitor and quickly connect patients to the right care. Capture patient symptoms and outcomes on an ongoing basis with surveys.
Create actionable and comprehensive care and social services plans, personalized to each patient. Add information about individuals the patient has been in contact with (1) and track incidents and milestones to gain insight into the patient’s condition (2). Understand the social and environmental factors that define extra services a patient needs (3), and keep tabs on the care program the patient is enrolled in (4). You can check the patient’s symptoms and progress as measured through the daily assessments that are sent to patients enrolled in the emergency care program.

Contact Tracing Graph: Assess potential risk to communities using a comprehensive view of impacted individuals and relationships, by tracing people, places, and events.

Contact Tracing and Intake Experience Cloud Site

Contact Tracing Graph: Assess potential risk to communities using a comprehensive view of impacted individuals and relationships, by tracing people, places, and events.
Contact Tracing and Intake: Quickly triage and evaluate patients, provide ongoing engagement and monitoring, and protect communities from widespread impacts with contact tracing. Assess potential exposure to communities and conduct ongoing monitoring of confirmed patients. Accelerate intake processes, capturing all relevant attributes for comprehensive contact tracing. Pre-defined Experience Cloud template for contact tracers to do contact tracing and communication. Predefined task queues and process flows to efficiently collect contact information.

**Contact Tracing for Employees**

With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees.

**Contact Tracing for Public Health**

With contact tracing, public health organizations can use data to track the spread of disease, gather details from exposed people, and recommend care plans and services. Set up the objects, metadata type, and queue for contract tracing.

SEE ALSO:

*Salesforce Help: Emergency Response Management for Public Health*

**Contact Tracing for Employees**

With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees.

Tracing and contacting people who were possibly exposed to an infected person is one of the most efficient ways to fight widespread community infection. Tracers pick up tasks to evaluate employees, gather details about potentially exposed contacts, and enroll employees in care programs. You have the employee’s status, a map of exposed contacts, and information on the person’s condition consolidated in one place.
The employee evaluation flow gathers crucial information about a person’s condition, so that you can enroll affected employees into a care program and monitor their health.

The Contact Tracing Graph gives you a comprehensive view of employees and external contacts so that you can trace infection by people, places, or events. Follow-up, assessment, and triage can happen without having to leave the console.

Salesforce recommends that you make contact tracing functionality available only to users who are trained on privacy best practices. We recommend that you share contact tracing data only on a need-to-know basis.

SEE ALSO:
Salesforce Help: Contact Tracing for Employees

Contact Tracing for Public Health

With contact tracing, public health organizations can use data to track the spread of disease, gather details from exposed people, and recommend care plans and services. Set up the objects, metadata type, and queue for contract tracing.

Tracing and contacting people who possibly were exposed to an infected person is one of the most efficient ways of fighting widespread community infection. You can see the exposed contacts for each person right from the patient record. Salesforce recommends making contact tracing...
functionality available only to users who are trained on privacy best practices. We recommend that you share contact tracing data only on a need-to-know basis.

SEE ALSO: Salesforce Help: Contact Tracing for Public Health

Life Sciences Program Management

Maximize the impact of your life sciences programs with enrollment and management tools to help drive adherence and improve outcomes. Use the life sciences program management data model to define programs and manage relationships and activities within them. Then configure an Experience Cloud component that you can deploy to show which programs a person is enrolled in.

Map External Program Enrollment Fields to Health Cloud
To use the API to create program enrollment records, create mappings from source system fields to Salesforce target entities and attributes.

Manage Care Program Enrollment Flows
Give your users a streamlined, guided care program enrollment process. With Flow Builder, you can clone and configure the Program Enrollment flow and take advantage of the rich care program management data model. Upload your company’s consent forms, associate them with a care program, and capture the consent of program participants.

Register Devices or Create Shipping Requests
Help patients stay on course with their care metric targets by registering healthcare devices or creating a shipping request to deliver devices to them. Care Coordinators can then track biometric data from these devices, identify healthcare gaps, and engage with patients for follow-ups.

Map External Program Enrollment Fields to Health Cloud
To use the API to create program enrollment records, create mappings from source system fields to Salesforce target entities and attributes.

1. From Setup, enter care system field mapping in the Quick Find box, then select Care System Field Mapping.
2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>The label for this care system field mapping.</td>
</tr>
<tr>
<td>Name</td>
<td>The unique name used by the API and managed packages.</td>
</tr>
<tr>
<td>Source System</td>
<td>Name of the system from which the record was sourced.</td>
</tr>
<tr>
<td>Target Object</td>
<td>Name of the parent entity for the external ID.</td>
</tr>
<tr>
<td>External ID Field</td>
<td>The ID of the field in the external system.</td>
</tr>
<tr>
<td>Active</td>
<td>Select to activate this configuration and make it available to users.</td>
</tr>
<tr>
<td>Role</td>
<td>The role the entity field represents.</td>
</tr>
</tbody>
</table>
3. Click **Save**.

SEE ALSO:
- Care Programs for Health Cloud Empower

**Manage Care Program Enrollment Flows**

Give your users a streamlined, guided care program enrollment process. With Flow Builder, you can clone and configure the Program Enrollment flow and take advantage of the rich care program management data model. Upload your company's consent forms, associate them with a care program, and capture the consent of program participants.

**Configure User Permissions and Sharing Rules**

Set up organization-wide default sharing settings and grant specific access to the objects that make up a care program. Create and clone permission set to give users the correct access to forms and other data.

**Create User Records for Care Program Site Participants**

Create user records that include permission for participants to log in to a site in order to review and consent to the related forms. Person accounts store information about individual people by combining certain account and contact fields into one record, and is the recommended record for care plan participants.

**Create a Care Program**

To create a care program, define the program and the relationships and activities within it.

**Create a Campaign**

To define a care program campaign, create the campaign.

**Add a Care Program Campaign**

To create a care program campaign, associate a campaign with a care program.

**Create a Care Program Goal**

Create a Care Program Goal, and associate it with a care program.

**Configure the Program Enrollment Flow**

Use Flow Builder to automate your care program enrollment process. We’ve delivered an enrollment flow that lets your users select a program, add related products and providers, and capture the participant’s consent.

**Upload Care Program Consent Documents**

Upload and organize the consent documents that are associated with a care program. Each document that is stored in the document library resides in a folder. The folder’s attributes determine the accessibility of the folder and the documents within it.

**Add Consent Documents to a Care Program**

Add consent documents to a care program by defining the relationship in the Data Use Purpose tab or by copying existing consent documents for a new care program.

**Add the Enroll in Program Quick Action to a Record**

Health Cloud orgs that were created before Winter’20 must add the Enroll in Program quick action to the Person Account or Account page layout. Newer orgs that use the delivered flow and page layout without making any changes don’t require this step.

**Create an Experience Cloud Site and Set Up Member Access**

Care program participants who are members of a site can log in and review and consent to forms related to their care program.
Grant Site Members Access to Consent Documents

Make sure that site members can view and consent to documents when they log in to the site and open their care program card. You can also manage Files membership through a public group or by adding a single user. Use the ContentWorkspaceMember object to manage library membership using the API.

Configure User Permissions and Sharing Rules

Set up organization-wide default sharing settings and grant specific access to the objects that make up a care program. Create and clone permission set to give users the correct access to forms and other data.

1. Set org-wide sharing for the following entities to be Private, Public Read Only, or Public Read/Write, as necessary.
   - Authorization Form
   - Authorization Form Consent
   - Authorization Form Data Use
   - Authorization Form Text
   - Care Program
   - Care Program Enrollee Product
   - Care Program Enrollment Card
   - Care Program Product
   - Care Program Provider
   - Data Use Purpose

2. Create a permission set that gives access to the objects used to manage consent forms.
   - Authorization Form: Read
   - Authorization Form Consent: Read, Create, Edit
   - Authorization Form Data Use: Read
   - Authorization Form Text: Read
   - Data Use Purpose: Read

3. Clone the Health Cloud Foundation permission set and configure Read access for these objects.
   - Care Program
   - Care Program Enrollee
   - Care Program Enrollee Product
   - Care Program Enrollment Card
   - Care Program Product
   - Care Program Provider

4. For care coordinators or anyone who enrolls participants in programs, clone the Standard User profile and add the Run Flows permission to it.

5. To allow care coordinators to enroll patients in the same care program more than once, from Setup, enter Program Enrollee Settings in the Quick Find box. Enable the Multiple Enrollments in the Same Care Program setting.

   **Note:** After you enable this setting, you cannot disable it.
6. For participants using a site, clone the Customer Community Plus User profile or a similar profile that includes View Content permission. Grant the View Content in Portal permission to the profile.

Create User Records for Care Program Site Participants

Create user records that include permission for participants to log in to a site in order to review and consent to the related forms. Person accounts store information about individual people by combining certain account and contact fields into one record, and is the recommended record for care plan participants.

Make sure to enable Experience Cloud in your org.

1. On the person account record, select Enable Customer User.
   This option opens a new user record in your Salesforce org with some details prepopulated from the contact record.

2. Edit the user record for this external user and assign the Customer Community Plus license and the cloned Customer Community Plus profile.

3. Click Save.

4. Select Permission Sets and add the cloned Health Cloud Foundation permission set and the permission set you created to manage access to consent forms.

   Note: Make sure to add the user to the library associated with the care program consent forms.

Create a Care Program

To create a care program, define the program and the relationships and activities within it.

1. From the App Launcher, go to Care Programs, click New and enter the name, start date, and other important details about the program.

2. From the App Launcher, go to Care Program Products, click New and enter the name, the related care program, and other details about products associated with the program.

3. From the App Launcher, go to Care Program Provider, click New and enter the provider’s name, account, and related care plan product.

4. Optionally, configure the following records based on how your company uses care programs.
   - Care Program Eligibility Rules: Define the criteria for participation in a care program by associating a care program with an enrollment eligibility criteria record.
   - Care Program Enrollee: Create records for participants enrolled in a care program.
   - Care Program Enrollee Product: Create records that associate care program enrollees with care program products, care program providers, or both.
   - Care Program Enrollment Card: Create a care program membership card that includes the enrollee’s name and a membership card number.
   - Care Program Team Member: Create records for people who deliver services under a program, such as a program manager or care coordinator.

Create a Campaign

To define a care program campaign, create the campaign.

1. In App Launcher, enter Campaigns, and select Campaigns.
2. Enter a campaign name.
3. Select the checkbox for Active.
4. Choose a value for the type of campaign.
5. Choose the status of the campaign.
6. Select a **Start Date** and an **End Date**.
7. Save your work.

**Add a Care Program Campaign**

To create a care program campaign, associate a campaign with a care program.

1. On the Care Program Campaigns tab, click **New**.
2. Choose a care program.
3. Choose a campaign.
   - To create a campaign, click **New Campaign**.
4. Save your work.

**Create a Care Program Goal**

Create a Care Program Goal, and associate it with a care program.

To create goals as part of a care program, define the care program goals.

1. On the Care Program Goals tab, click **New**.
2. Enter the goal name. For example, Reduce Sugar Intake.
3. Select a care program.
   - To create a care program, click **New Care Program**.
4. Select a **Start Date** and an **End Date**.
5. Choose the status of the care program goal.
6. Save your work.

**Configure the Program Enrollment Flow**

Use Flow Builder to automate your care program enrollment process. We’ve delivered an enrollment flow that lets your users select a program, add related products and providers, and capture the participant’s consent.

If your enrollment process requires that consent happen apart from enrollment, remove the Enrollment Consent Forms component from the Program Enrollment flow. Create a separate flow that uses the enrollee record and then add the Consent Form List View component to the flow.

**Note:** The Enrollment Consent Forms component is supported only when it’s used with the ProgramManagement object. The Microsoft Edge browser isn’t supported for electronic signature capture during consent. Patient enrollment and the review and acceptance of consent documents not requiring a signature are supported in Microsoft Edge.

1. From Setup, enter **Flows** in the Quick Find box, select **Flows**, and then click **New Flow**.
2. Select the Program Enrollment flow type, and click **Create**.
3. The elements for a basic enrollment and consent flow appear in the builder.
Drag any additional elements you want to use onto the canvas.

4. Select each of the flow elements and configure the screen properties.
5. Save your flow.

Upload Care Program Consent Documents

Upload and organize the consent documents that are associated with a care program. Each document that is stored in the document library resides in a folder. The folder’s attributes determine the accessibility of the folder and the documents within it.

**Note:** Files larger than 25 MB, unknown file types, password-protected files, and copy-protected PDFs can’t be previewed. Some Microsoft Office 2007 features don’t display correctly in previews. If a file can be previewed, but a preview doesn’t exist, contact your Salesforce admin who can try to regenerate the preview.

1. From the App Launcher, go to Files.
2. Select Libraries and click New Library to create a library for consent documents.
3. Add a name and a description for the library.
4. Click Add Files and select the consent form you want to add to the library.
   You can upload from your desktop or select a form that’s already been uploaded to the Files tab.

Add Consent Documents to a Care Program

Add consent documents to a care program by defining the relationship in the Data Use Purpose tab or by copying existing consent documents for a new care program.

**Associate New Consent Documents with a Care Program**

To associate new consent documents with a care program, define the relationship in the Data Use Purpose tab. Data Use Purpose is a container for the forms that go with a care program. For example, in a knee post-arthroscopy care program, there can be several forms to consent to. A participant must consent to a physical therapy consent for treatment, or equipment rental, or a home health visit.

**Copy Existing Consent Documents for a New Care Program**

To copy existing consent documents for a new care program instead of creating documents from scratch, clone the documents from a Data Use Purpose record. Data Use Purpose is a container for the forms that go with a care program. For example, in a knee post-arthroscopy care program, there can be several forms to consent to. A participant must consent to a physical therapy consent for treatment, or equipment rental, or a home health visit.

**Associate New Consent Documents with a Care Program**

To associate new consent documents with a care program, define the relationship in the Data Use Purpose tab. Data Use Purpose is a container for the forms that go with a care program. For example, in a knee post-arthroscopy care program, there can be several forms to consent to. A participant must consent to a physical therapy consent for treatment, or equipment rental, or a home health visit.

1. From the App Launcher, go to Data Use Purpose and select New.
2. Enter a name for the data use purpose, such as Pre-Arthroscopy Program Consent Forms.
3. Select the name of the care program from the Purpose field.

**Note:** The Legal Basis field and the checkbox that lets users opt out of the consent process aren’t used for care programs.
4. Next, navigate to the Authorization Form tab to provide information about each consent form.

5. Enter the name, revision number, and effective dates of the consent form.

6. If the program requires that the participant consents to the form, select Signature Required.

7. Navigate to the Authorization Form Text tab to manage the text associated with the consent form.
   You can create multiple text versions for the same consent form to support different languages, regions, and situations. You can also include a summary to describe the form's purpose and display to customers when asking for their consent.

8. Enter the name of the text for the consent form. For example, Consent for Treatment (Spanish).
   You can also include a summary to describe the form's purpose and display to customers when asking for their consent.

9. Select the associated authorization form and select the uploaded consent form in the Content Document field.

10. Select the locale for the content document.
    
    Note: Make sure that the value in the Locale field matches the language of the org or the site in which the form is viewed. The consent form doesn't appear when the Locale field is incorrect. Create an authorization form text record for each language supported in your org.

11. Navigate to Authorization Form Data Use tab, and click New to connect the consent form with the care program.

12. Enter the name of the form in the Authorization Form field the name of the care program in the Data Use Purpose field.

Copy Existing Consent Documents for a New Care Program

To copy existing consent documents for a new care program instead of creating documents from scratch, clone the documents from a Data Use Purpose record. Data Use Purpose is a container for the forms that go with a care program. For example, in a knee post-arthroscopy care program, there can be several forms to consent to. A participant must consent to a physical therapy consent for treatment, or equipment rental, or a home health visit.

1. From the App Launcher, go to Data Use Purpose and then click the record that contains the existing consent documents.

2. Click the Clone arrow, and then click Clone with Related.

3. Select the objects you want to clone and click Next.

4. Give this data use purpose a descriptive name, such as Pre-Arthroscopy Program Consent Forms Clone.

5. In the Purpose field, select the care program to clone the consent forms to, and then click Save.

Add the Enroll in Program Quick Action to a Record

Health Cloud orgs that were created before Winter '20 must add the Enroll in Program quick action to the Person Account or Account page layout. Newer orgs that use the delivered flow and page layout without making any changes don't require this step.

1. From Setup, select Object Manager.

2. Select Person Account, Page Layout, and Person Account Layouts.

3. Click Mobile & Lightning Actions.

4. Drag the Enroll in Program action into the Salesforce Mobile and Lightning Experience Actions section, and place the action where you want it to appear.

   Note: Under Quick Actions, there is an Enroll in Program action, but it isn't supported in the Lightning app. Make sure to use the Enroll in Program action found in the Mobile & Lightning Actions section.
Create an Experience Cloud Site and Set Up Member Access

Care program participants who are members of a site can log in and review and consent to forms related to their care program.

1. Open Experience Workspaces.
2. Click Administration > Members.
3. Select the profile you create when you cloned the Customer Community Plus profile.
4. Click Add.
5. Drag the Care Programs for Health Cloud Empower component from the Components panel onto an editable area of the page.
6. Edit the properties of the component, as necessary.
7. Create a custom detail page for Care Program Enrollee.
8. Drag a Consent Form List View component onto an editable area of the page.
9. Publish and activate the site.

Grant Site Members Access to Consent Documents

Make sure that site members can view and consent to documents when they log in to the site and open their care program card. You can also manage Files membership through a public group or by adding a single user. Use the ContentWorkspaceMember object to manage library membership using the API.

1. From the App Launcher, go to Files, and open the library that contains the consent forms.
2. Click Manage Members.
3. Add a site member and configure the access level to the consent forms.

Register Devices or Create Shipping Requests

Help patients stay on course with their care metric targets by registering healthcare devices or creating a shipping request to deliver devices to them. Care Coordinators can then track biometric data from these devices, identify healthcare gaps, and engage with patients for follow-ups.

Configure Tab Visibility

You can configure which tabs to show on the Register Device and Create Shipping Request screen to give your users a streamlined experience.

1. From Setup, in the Quick Find box, enter Flows, and then select Flows.
2. In the list of flows, click Register Device and Create Shipping Request.
3. In Flow Builder, double-click Register Device and Create Shipping Request.
4. In the Edit Screen window, click Register Device and Create Shipping Request.
5. Configure which tabs to show.
   - To display both the Register Devices and the Create Shipping Requests tabs, on the right pane, in the Tab Settings field, enter All.
   - To display the Register Devices tab only, on the right pane, in the Tab Settings field, enter Register.
   - To display the Create Shipping Requests tab only, on the right pane, in the Tab Settings field, enter Ship.
6. Click Done.
Register a Device for a Patient

1. On the patient’s account page, click **Register Device and Create Shipping Request**.
2. Select the products that represent the device types to register and then click **Next**.
3. Register one or more devices for the patient.

4. Save your changes.

Create a Shipping Request

1. On the patient’s account page, click **Register Device and Create Shipping Request**.
2. Select the products that represent the device types to ship to the patient and then click **Next**.
3. Add the shipping information for the devices that you want to ship to the patient.
   a. Click the **Create Shipping Request** tab.
   b. Click **Edit** next to **Quantity**.
   c. Add the shipping information for the device and click **Save Shipping Info**.
4. Save your changes.

Remote Monitoring Patients

Remote Monitoring allows care coordinators to create a reliable and personalized connection with patients to motivate them on their healthcare journey. Care Coordinators can personalize care metric targets for each patient, making it easy to correlate care metrics and identify healthcare gaps. Charts that show biometric data and health metrics such as heart rate, blood glucose levels, or weight, help care coordinators track patient health with minimal effort. When a patient’s biometric data is out of range, care coordinators can proactively engage with patients.
Remote Monitoring brings multiple benefits to different verticals in the healthcare industry, including:

- **For the healthcare consumer:** Build trust with providers with more value-based, personalized interactions addressing root causes.
- **For the care coordinator**
  - Build trust with patients through more personalized, informed, and evidence-based interactions.
  - Employ auto-created tasks, care gaps, or cases when patient biometric data is out of range.
  - Spend more time giving useful information to patients than collecting data to identify problems.
  - Improve operational efficiency with fewer care coordinator calls.
- **For the Provider and Payer business**
  - Reduce preventable readmissions and emergency department services.
  - Shift responsibilities to non-clinical providers to free up clinician time.
  - Reduce risk in misdiagnosis or not catching social determinants of health in time.
  - Reduce overall spending on chronic disease.
- **For the Medical Device business:** Enable easier integration with providers and payers.

Set Up Remote Monitoring

Create code sets, units of measure, and care metric targets to set up remote monitoring. Let care coordinators remotely monitor health metrics by displaying care observations and remote monitoring charts on the patient’s account page.

Map External Fields to Health Cloud for Remote Monitoring

To use APIs to create care observations from external systems, you can map source system fields to Health Cloud target objects and fields.

Register Devices or Create Shipping Requests

Help patients stay on course with their care metric targets by registering healthcare devices or creating a shipping request to deliver devices to them. Care Coordinators can then track biometric data from these devices, identify healthcare gaps, and engage with patients for follow-ups.

Set Up Remote Monitoring

Create code sets, units of measure, and care metric targets to set up remote monitoring. Let care coordinators remotely monitor health metrics by displaying care observations and remote monitoring charts on the patient’s account page.

1. Create code sets for industry-standard healthcare metrics. For example, you can have a code set named distance for measuring steps, miles, or kilometers walked.
   a. In the App Launcher, select Code Sets.
   b. Click New.
   c. Add information for the code set.
d. Save your changes.

2. Create units of measure for standard measurements. For example, miles and kilometers are units of measure for distance while kilos and pounds are units of measure for weight.
   a. In the App Launcher, select **Units of Measure**.
   b. Click **New**.
   c. Add information for the unit of measure.
d. Save your changes.

3. Create care metric targets. Care metric targets represent expected care metrics at the org level and patient level. Any patient-level care metric target takes precedence over org-level. Care coordinators can also create multiple targets with sequential time ranges for the same metric to set realistic targets for patients, such as a weight loss program.

   a. In the App Launcher, select **Care Metric Targets**.
   
   b. Click **New**.
   
   c. Add information for this care metric target.
d. Save your changes.

4. **(Optional)** To use APIs to create care observations from external systems, map source system fields to Health Cloud target objects and fields. See Map External Fields to Health Cloud for Remote Monitoring on page 154.

   - **Note:** Each record sent to Salesforce must have an external ID or a patient ID.

5. Display care observations as a related list on the patient’s account page. Care observations help care coordinators track patients’ real-time biometric data.

   a. From Setup, open **Object Manager**.

   b. In the Quick Find box, enter **Account**, then click **Account**.

   c. Click **Page Layouts** and then select the layout for the patient account page where you want to display the care observations.

   d. On the palette, select **Related Lists**.

   e. Drag **Care Observations** from the palette to the Related Lists section and click **Save**. If you’re prompted to overwrite user’s related list customizations, click **Yes**.

6. Display remote monitoring charts on the patient’s account page. Charts that show biometric data and health metrics such as heart rate, blood glucose levels, or weight, help care coordinators track patient health. When a patient’s biometric data is out of range, care coordinators can proactively engage with patients.

   a. Make sure your users have Read access to these fields in the Care Observation Standard Fields and Care Metric Standard Fields objects, so they can see the charts.

   - **CareObservationStandardFields**
     - **Id**
b. From Setup, in the Quick Find box, enter App Builder, and then select Lightning App Builder.

c. In the Lightning Pages list, click Edit next to your Account record page.

d. Drag the Remote Monitoring Charts component to the location where you want to display the charts.

e. Save your changes.

Map External Fields to Health Cloud for Remote Monitoring

To use APIs to create care observations from external systems, you can map source system fields to Health Cloud target objects and fields.

1. From Setup, enter care system field mapping in the Quick Find box, then select Care System Field Mapping.

2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>The label for this care system field mapping.</td>
</tr>
</tbody>
</table>
### Field | Description
--- | ---
Name | The unique name used by the API and managed packages.
Source System | Name of the system from which the record was sourced.
Target Object | Name of the parent entity for the external ID.
External ID Field | The ID of the field in the external system.
Active | Select to activate this configuration and make it available to users.
Namespace Prefix | The namespace prefix associated with this care system field mapping. Each Developer Edition organization that creates a managed package has a unique namespace prefix. You can refer to a component in a managed package by using the namespacePrefix__componentName notation. The namespace prefix can have one of the following values:
- **In Developer Edition organizations**, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field’s value is the namespace prefix of the Developer Edition organization of the package developer.
- **In organizations that are not Developer Edition organizations**, NamespacePrefix is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.
Role | The role the field represents.

3. Save your changes.

### Register Devices or Create Shipping Requests
Help patients stay on course with their care metric targets by registering healthcare devices or creating a shipping request to deliver devices to them. Care Coordinators can then track biometric data from these devices, identify healthcare gaps, and engage with patients for follow-ups.

### Configure Tab Visibility
You can configure which tabs to show on the Register Device and Create Shipping Request screen to give your users a streamlined experience.

1. From Setup, in the Quick Find box, enter **Flows**, and then select **Flows**.
2. In the list of flows, click **Register Device and Create Shipping Request**.
3. In Flow Builder, double-click the double-click the **Register Device and Create Shipping Request** screen element.
4. In the Edit Screen window, click **Register Device and Create Shipping Request**.
5. Configure which tabs to show.
• To display both the **Register Devices** and the **Create Shipping Requests** tabs, on the right pane, in the Tab Settings field, enter *All*.

• To display the Register Devices tab only, on the right pane, in the Tab Settings field, enter *Register*.

• To display the Create Shipping Requests tab only, on the right pane, in the Tab Settings field, enter *Ship*.

6. Click **Done**.

**Register a Device for a Patient**

1. On the patient’s account page, click **Register Device and Create Shipping Request**.

2. Select the products that represent the device types to register and then click **Next**.

3. Register one or more devices for the patient.

4. Save your changes.

**Create a Shipping Request**

1. On the patient’s account page, click **Register Device and Create Shipping Request**.

2. Select the products that represent the device types to ship to the patient and then click **Next**.

3. Add the shipping information for the devices that you want to ship to the patient.
   a. Click the **Create Shipping Request** tab.
   b. Click **Edit** next to **Quantity**.
   c. Add the shipping information for the device and click **Save Shipping Info**.
4. Save your changes.

Connect to External Claims Data

The claims data model makes externally sourced insurance claims data available in Health Cloud, so users can quickly and efficiently answer queries from providers and members without using multiple screens or applications.

To avoid the need to import and synchronize potentially large numbers of claim records into Salesforce, the Claims data model uses External Objects, which allows Salesforce to connect to the claims source system only as needed, via OData callouts.

The Claims data model is provided as part of an unmanaged package that includes the Claims external objects as well as supporting tabs, page layouts, and list views.

Note: To install the Claims package, you’ll need the Health Cloud Managed Package installed, the Health Cloud permission set assigned, and an active Salesforce Connect license.

1. Install the Claims Data Model
   The Health Cloud claims functionality is delivered as an unmanaged package containing a set of external objects that you’ll customize to fit your organization’s specific requirements.

2. Connect to Claims Data
   Set up the connection to your source system so that Health Cloud can pull your organization’s claims data into Salesforce external objects.

3. Map Claims Data to Your Source System
   Customize your external objects so that the right claims data from your source system shows up in Health Cloud.
4. **Display Claims Data**
   Add tabs to the console to display the data your users need to see.

SEE ALSO:
   - Overview of External Objects

**Install the Claims Data Model**

The Health Cloud claims functionality is delivered as an unmanaged package containing a set of external objects that you’ll customize to fit your organization’s specific requirements.

Before installing the Claims package, make sure your organization has a Salesforce Connect license and that you’ve installed and configured Health Cloud. You also need the Health Cloud Platform permission set license.

1. **Paste the URL for the Claims package into your browser navigation bar and press Enter.**
   The URL for this package is http://industries.force.com/healthcloudextensionclaims.

2. **Select Install for All Users and then click Install.**
   Installation may take a while. You can click Done now and check your email later for confirmation that installation was successful.

3. **Verify installation of the unmanaged package.**
   a. In Setup, use Quick Find to find Installed Packages.
   Look for Health Cloud Claims Extension.

SEE ALSO:
   - Install Health Cloud Packages

**Connect to Claims Data**

Set up the connection to your source system so that Health Cloud can pull your organization’s claims data into Salesforce external objects.

When you installed the Claims data model, Health Cloud set up an external data connection for you with the typical settings selected. Update those settings to work with your situation. Health Cloud also creates external data objects for you to connect to your external data source.

1. **In Setup, search for External Objects and verify that the Claims objects are installed.**
   You should see five external objects, each one pre-configured to use an external data source called “Claims Data Source.”

   **Claim Header**
   Contains summary information about the claim, such as the payment amount, specified medications, and billing data.

   **Claim Line**
   Represents a line item in a claim record.
**Claim Diagnosis**
- Represents the clinical diagnosis for which the service, equipment, or medication was provided.

**Claim Diagnosis Procedure**
- Represents a clinical procedure for which a provider is submitting a claim.

**Claim Provider**
- Represents information about a provider of a service, equipment or medication.

2. In Setup, find **External Data Sources** and edit **Claims Data Source**. Replace the example URL and authentication information with the correct information for your claims source system and save.

![External Data Sources]

**Important**: Do not click **Validate and Sync**.

SEE ALSO:
- Developer Guide: Apex Connectors
- Add an External Data Source

**Map Claims Data to Your Source System**

Customize your external objects so that the right claims data from your source system shows up in Health Cloud.
1. In Setup, find **External Objects** and click into one of the Claims objects.

2. Click **Edit** by each External Object and make sure it is mapped to the correct external table.

3. Click the name of each external Claims object (not its Edit link) and edit each of its custom fields to map to the correct external column in the source system.

4. Add any additional custom fields you need, mapping them to fields in your source system.

**Display Claims Data**

Add tabs to the console to display the data your users need to see.

- **Note:** Make sure your organization has enough custom tabs available. Ask your Salesforce representative to confirm that **Max Custom Tabs** is set to 5 or greater.

1. In **Setup**, go to **Tabs** and find the Claims tabs.

2. Add a Claims tab to the Health Cloud console custom app and save it.

3. Repeat these steps for each of the Claims data objects.
To check that the data is visible, go to the Health Cloud console and look for the new tab.

SEE ALSO:
Install a Package

Automate Key User Tasks with Flows

You can make it easier for call center workers to complete some common tasks by setting up flows they can launch from the Health Cloud console. You can clone the templates and then customize them according to your business processes to help your call center reps handle service requests from patients and members.

Note: To install the flows, you’ll need the Health Cloud Managed Package installed and the Health Cloud permission set assigned.

This package provides three sample flows.

**New Appeal**
Creates a care request to reconsider a denial of care.

**Update Primary Care Physician**
Changes the member’s primary care provider.

**New Card Request**
Handles a member’s request for a new insurance card.

1. **Install the Flows Package**
   This optional extension package delivers three flows you can customize to help call center workers perform common tasks.

2. **Create a Service Case Record Type**
   You’ll need to add a health-specific record type to your service case object to store the data that your flow will generate.

3. **Create a Quick Action to Launch the Flow**
   Add a Quick Action to your interface so that users can launch your flow.

4. **Launch the Flow from the Health Cloud Console**
   Display the action as a button on the Patient Highlights panel so your users can get to it quickly.

**Install the Flows Package**
This optional extension package delivers three flows you can customize to help call center workers perform common tasks.

1. Paste the URL for the package into your browser navigation bar: [http://industries.force.com/healthcloudflow](http://industries.force.com/healthcloudflow) and press Enter.

2. Enter your Salesforce password and click Install.
   Installation may take a while. You can click Done now and check your email later for confirmation that installation was successful.

3. To verify installation of the unmanaged package, use Quick Find to find Installed Packages and look for Health Cloud Flow.

The package installs a set of flows, which you can inspect under Setup > Process Automation > Flows.

**Create a Service Case Record Type**
You’ll need to add a health-specific record type to your service case object to store the data that your flow will generate.
1. In Setup, go to Object Manager and select Case.
2. Click Record Types and click New.
3. For Record Type Label, enter Service Case.
4. For Record Type Name, provide a phrase that describes the kind of data you are collecting, such as Appeal.
5. For Service Process, select Healthcare.
6. Provide a description of the record type and select Active to put it to work.

Create a Quick Action to Launch the Flow

Add a Quick Action to your interface so that users can launch your flow.
1. In Setup, go to the Object Manager and select Accounts.
   a. For Action Type, select Flow.
   b. For Name, provide a short summary of what the Flow does. For example, Start an Appeal.
   c. For Label, provide the label the user will see, such as Appeal a Ruling.
3. Click Save.

Launch the Flow from the Health Cloud Console

Display the action as a button on the Patient Highlights panel so your users can get to it quickly.
1. In Setup, go to the Object Manager and select Account, then select Page Layouts.
2. Under Patient Layout, click Mobile and Lightning Actions.
3. Select the flow you created and drag it to the Mobile and Lightning Experience Actions section.
4. Click Save under Patient Layout.
A button now appears in the Patient Highlights component. The user can click it to start the associated flow.

Enable Users to Add Members to Campaigns

Campaigns are a cost-effective way for care coordinators to increase rates of engagement and adherence to care plans. You can enable your users to set up Marketing Cloud campaigns and assign patients to them from inside Health Cloud.

Note: Campaigns are available only in Lightning Experience.

1. Make sure your users have access to the Marketing Cloud features.
   Campaigns leverage the power of Salesforce Marketing Cloud. To create a campaign or add members to a campaign, a user must have access to the Marketing Cloud features.
   a. In Setup, find the Users page.
   b. Click Edit next to any user who will be creating campaigns or adding members to campaigns.
   c. Select Marketing User and save.
Note: If you launched your Health Cloud org with the Winter ’19 release or later, you can skip this step.

a. From the Health Cloud - Lightning Admin Home page, select the Timeline View Configurations tab and click Campaigns in the Timeline View Configuration Name column.

b. Select the Active checkbox and save.

c. Go back to the Health Cloud - Lightning Admin Home page, select the Patient Card Configurations tab, and do the same thing there.

Now the name of any campaign the patient has been added to appears on the patient’s timeline and on their patient card.

Set Up Social Determinants to Assist High-Risk Patients and Members

Give your users a holistic understanding of your patients and members and help them provide more personalized care and support with social determinants of health. Social workers and case managers capture critical social and environmental factors like homelessness and low income as barriers and related social determinants. Then, they create intervention tasks to address barriers and help mitigate avoidable adverse health events for patients and members.

Set Up Social Determinants
Before you get started, install and configure Health Cloud.

Care Determinants Component
Drop the Care Determinant component onto a case or account record page. The Care Determinants Lightning component lets you associate barriers with an object and configure how barriers appear in the app.

Create Intervention Types
Intervention types are the standard, defined list of available referrals, programs, or other interventions maintained in your organization, including the related codes and code types.

Set Up Social Determinants
Before you get started, install and configure Health Cloud.

- Assign the Health Cloud Platform Permission Set License and the Health Cloud Social Determinants permission set to yourself and your users.
- Configure the objects and fields used in social determinants.
  Make sure to grant access to the objects by setting them to public access. If you don’t want users creating barrier types or determinant types, restrict them to read-only access to those objects.
  Optionally, in Care Barrier Type and Care Intervention Type, remove the date and time fields from the search layout. This ensures that only the barrier type name appears in the search box.
- Populate the picklist values in the following objects: Care Determinant Type, Care Barrier Type, and Care Intervention Type. If your company uses custom values for the Status and Priority fields, you can add or change them, as well.
- Create a record type named SocialDeterminant for the Task object and make it active. This record type drives the Task page layout that is used in the Care Determinants component.
- Create a Lightning record page. In the App Builder, add the Care Determinants component onto a case record page or an account record page.
Add a custom lookup field on the Activity object that looks up to the Care Intervention Type object. Set the field-level security for all profiles that use this field.

Create a library of care determinant types, care barrier types, and care intervention types for your users. Make sure to modify user permissions so that users have access to these types.

SEE ALSO:
- Salesforce Help: Care Determinants Component
- Salesforce Help: Assign a Permission Set License to a User
- Salesforce Help: Create a Barrier Type
- Salesforce Help: Create a Determinant Type
- Salesforce Help: Create Intervention Types
- Trailhead: Control Access to Objects
- Salesforce Help: Create Record Types

Care Determinants Component

Drop the Care Determinant component onto a case or account record page. The Care Determinants Lightning component lets you associate barriers with an object and configure how barriers appear in the app.

1. On the record page that you’re configuring, select the Care Determinants component.
2. In the property editor, configure the component’s properties.
   - **Lookup Context**
     - Select the object that this component is related to. When you select Account, the lookup is to the account that’s associated with the barrier. When you select Case, the lookup is to the case that’s associated with the barrier.
   - **Barrier Header Label**
     - Enter the label text for the barrier component.
   - **Determinant Help Text**
     - Optionally, replace the delivered field-level help text that users see when hovering over the Info icon next to the social determinant field.
   - **Show barrier publisher**
     - Select the field if you want users to create barriers. If the checkbox isn’t selected, only existing barriers appear without the option to add new ones.
   - **Hide addressed barriers**
     - Select the field to show only unaddressed or open barriers in the component.
**Create Intervention Types**

Intervention types are the standard, defined list of available referrals, programs, or other interventions maintained in your organization, including the related codes and code types.

1. On the Intervention Types tab, click **New**.
2. Enter the name of the intervention such as *Meals on wheels*.
3. To make the intervention type available to use, select **Active**.
4. Enter a medical code type for the intervention type, such as *SNOMED CT* or *CPT*.
5. Enter the code associated with the medical code type associated with the intervention type.
6. Enter a name for the intervention type such as *Referral* or *Counseling/Education*.
7. Click **Save**.
Support and Manage Referral Management

Health Cloud referral management lets your users monitor referrals from submission to closure. Give them the tools to prioritize the best referrals, ensure timely referral processing, and track the referral to the final confirmation back to the referring physician.

Set Up Referral Management
Before you get started, install and configure Health Cloud.

Create an Approval Process
Use an approval process to automate the way referrals are approved.

Calculate Referral Scores
Calculate referral scores with a batch Apex job.

Create a Trigger to Maintain Lead Visibility
Add a trigger that grants sharing access to the person who created the lead even when they are no longer the lead’s owner. Granting sharing access enables the lead’s creator to track the referral after it’s converted to an opportunity.

Set Up Referral Management
Before you get started, install and configure Health Cloud.

• Assign the Health Cloud Platform Permission Set License to yourself and your users.
• Set up queues and assignment rules for incoming leads. That way, referrals are submitted to the correct referral coordinator or group for management.
• Create a support process for both leads and opportunities.
• Create a batch job that enables referrer scoring.
• Set up security and sharing for the Opportunity object to control which users can see the referral. Set up user profiles by granting access to the Patient Referral record types and page layouts on both Lead and Opportunity.
• Create a trigger that gives sharing access to the person who created the referral after it’s been converted to an opportunity. Adding access to closed leads ensures that they remain visible to submitters and lets them monitor the status of their referrals.
• If your company uses custom values for the picklist fields, you can add or change them, as well.
• Set up an approval process for referrals that need approval and specify the sequence of required steps to approve a referral.
• Optionally, use Process Builder to automate your business processes, such as creating tasks to notify members and providers about the status of a referral.
• Update any existing profiles with the appropriate permissions for the fields in the Lead and Opportunity objects that are used for referrals. When you add the page layouts for leads and opportunities, referrers can monitor the status of the people they have referred.
• Add the referral page layouts for leads and opportunities to any pages used to submit and manage referrals.
• Optionally, set up a partner Experience Cloud site for referring physicians outside the organization to use to submit referrals.
• To enable reporting, download and install the Health Cloud Reports for Patient Referral Management unmanaged package from the AppExchange. You can create a dashboard for referral coordinators to track important metrics related to referrals.

Create an Approval Process
Use an approval process to automate the way referrals are approved.
Before starting this step, create email templates for referral assignment notification and referral update notification emails. For details on how to create email templates, see the Email Templates in Lightning Experience.

1. From Setup, enter Approval Processes in the Quick Find box, and then select Approval Processes.
2. For Manage Approval Processes For, select Lead.
4. For Name, enter Referral Approval Process.
5. Accept the unique name.
6. For Approval Assignment Email Template, enter the name of the referral assignment notification email template you created.
7. For Select Approve, select Automatically assign to queue.
8. Select a referral approval queue.
9. Save your changes.
11. Under Final Approval Actions:
   a. Click Add New | Email Alert.
   b. For Description, enter Approval Alert Email.
   c. Accept the unique name.
   d. For Email Template, enter the name of the referral update notification email template you created.
   e. In Recipient Type search select User, and then click Find.
   f. Add the recipients.
   g. Save your changes.
   h. Click Add New | Field Update to change the owner to Referral Approvals queue.
   i. For Name, enter Approved Referral Owner.
   j. Accept the unique name.
   k. Choose the field to update.
   l. Save your changes.
12. Under Final Rejection Actions:
    a. Click Add New | Field Update.
    b. For Name, enter Rejection Action.
    c. Accept the unique name.
    d. For Field To Update, choose Lead Status.
    e. For Picklist Options, select A specific value and choose Closed - Not Converted.
    f. Save your changes.

Calculate Referral Scores

Calculate referral scores with a batch Apex job.

Referral scores are based on the Total Referrals and Converted Referrals fields on the referring practitioner’s contact record. The calculated score appears in the Referrer Score field.
Use the scheduled job class name: HcReferrerScoreScheduledJob. To invoke Apex classes to run at specific times, first implement the Schedulable interface for the class. Then, schedule an instance of the class to run at a specific time using the System.schedule method.

**Example:** To run the HcCMSRiskScoringScheduledJob class once, select **Debug | Open Execute Anonymous Window**. Enter the following text in the Enter Apex Code window in Developer Console.

```apex
// scheduled job sample
int batchSize = 200;
SchedulableContext sc = null;
HcReferrerScoreScheduledJob scheduledJob = new HcReferrerScoreScheduledJob(batchSize);
scheduledJob.execute(sc);
```

SEE ALSO:
- **Trailhead: Schedule Jobs Using the Apex Scheduler**

### Create a Trigger to Maintain Lead Visibility

Add a trigger that grants sharing access to the person who created the lead even when they are no longer the lead’s owner. Granting sharing access enables the lead’s creator to track the referral after it’s converted to an opportunity.

**Note:** To access the LeadShare and OpportunityShare objects, sharing for the Lead and Opportunity objects must be set to Private or Public Read Only.

1. From Setup, select **Customize** and then click Lead.
2. Click **Triggers** and then click **New**.
3. To define your trigger, enter Apex code similar to this sample code.

```apex
trigger ReferralShare on Lead (after update) {
    for(Lead lead : Trigger.new){
        try{
            Lead oldLead = Trigger.oldMap.get(lead.Id);
            // find the Group that the Lead creator is part of
            Group grp = [SELECT Id FROM Group WHERE Type='RoleAndSubordinates'
                            AND RelatedId in (select UserRoleId from User where Id= :lead.CreatedById)];
            // Lead trigger sharing example - if the owner changed and the owner is
            // different than the creator,
            // share the Lead with the Group of the user that created the Lead
            if (lead.CreatedById!=lead.OwnerId && lead.OwnerId!=oldLead.OwnerId){
                // create a new LeadShare record for the creator's Group
                LeadShare leadShare = new LeadShare(LeadId=lead.Id, UserOrGroupId=grp.Id,
                                                        LeadAccessLevel='Read', RowCause='Manual');
                Database.SaveResult save = Database.insert(leadShare,false);
                if (save.isSuccess()){
                    System.debug(LoggingLevel.ERROR, 'SAVE RESULT SUCCESS');
                }
                else {
                    for(Database.Error err : save.getErrors()){ System.debug(LoggingLevel.ERROR, 'SAVE RESULT ERROR: ' +
                                                                                     err.getMessage());
                                }
                }
            }
        }
    }
}
```
// Opportunity sharing example - on Lead conversion, add an Opportunity sharing record for the Group of
// the user that created the Lead
if (lead.IsConverted)
    // create a new OpportunityShare record for the creator's Group
    OpportunityShare opptyShare = new
    OpportunityShare(OpportunityId=lead.ConvertedOpportunityId, UserOrGroupId=grp.Id,
    OpportunityAccessLevel='Read', RowCause='Manual');
    Database.SaveResult save = Database.insert(opptyShare,false);
    if (save.isSuccess())
        System.debug(LoggingLevel.ERROR, 'SAVE RESULT SUCCESS');
    else {
        for(Database.Error err : save.getErrors()){
            System.debug(LoggingLevel.ERROR, 'SAVE RESULT ERROR: ' +
            err.getMessage());
        }
    }
} catch(Exception ex){
    System.debug(LoggingLevel.ERROR, 'EXCEPTION: ' + ex.getMessage());
}
Set Up Your Org for Analytics for Healthcare and Create the App

Analytics for Healthcare lets care coordinators, utilization managers, and referral managers gain critical insights and visualize key metrics about their patient populations.

Note: Analytics for Healthcare is only for Salesforce Health Cloud users. It requires that you have the Health Analytics Plus add-on license and that you've deployed the Health Cloud data model.

Create an app from the Analytics for Healthcare template to give payers and providers actionable insights to drive intelligent patient engagement. Care coordinators can use the app’s visualizations of key Health Cloud metrics to improve care effectiveness and efficiency.

The app helps care coordinators identify patients who aren’t adhering to their care plans and take steps to prevent avoidable admissions. And coordinators can segment patients by age, risk, and barriers to identify at-risk individuals to help improve their health outcomes.

App dashboards also provide insight into the care request authorization process to help payers decrease cycle time and improve approvals and net promoter score (NPS). Dashboards for provider referral coordinators help uncover referral sources, identify under-performing sources, and improve patient conversions.

App creation is easy. Analytics for Healthcare runs a compatibility check against your Salesforce org to ensure that it includes all the data to create the app’s datasets and dashboards. If your org doesn’t have the required data, error messages tell you what you must add before creating the app.

After the compatibility check determines that your org is ready, you have two options:

- Quickly create the app using standard, default settings determined by Analytics for Healthcare during the compatibility check.
- Use the custom settings to choose only the use cases you and others on your team want to view data for.

After you create the app, use its prebuilt dashboards to explore Health Cloud data from any device that supports Tableau CRM.

See Analytics for Healthcare Gives Agents and Managers a Complete Customer Intelligence to learn more about Healthcare Analytics dashboards.

Tip: Follow the steps in the order shown to deploy Analytics for Healthcare. If you haven't used Tableau CRM before, learn about it from Explore Data and Take Action with Tableau CRM.

Note: Salesforce Health Cloud includes access to the Tableau CRM for Manufacturing app. Analytics for Manufacturing lets demand planners and account managers at medical device manufacturers visualize all aspects of their business. Insights based on your data help you grow the business and simplify sales operations. Use its dashboard visualizations to stay on top of your sales agreements, orders, and contracts. And identify products that sell the most and the least, and analyze the impact of volume on pricing and revenue. See Deploy Tableau CRM for Manufacturing.

Note: Salesforce Health Cloud includes access to a subset of the Analytics for Emergency Response Management app. Identify the hotspots in which requests for emergency intakes are increasing so that you can allocate resources quickly. Track intake individuals needing attention and identify patient statuses. See Track Emergency Intakes with Analytics for Emergency Response Management to learn about Emergency Response Management Health Cloud dashboards.

1. **Enable Tableau CRM**
   Before creating an app from the Analytics for Healthcare template, enable Tableau CRM in your Salesforce org.

2. **Assign Analytics for Healthcare Administrator Permissions**
   Assign permissions to enable administrators to create an app from the Analytics for Healthcare template and manage it.

3. **Assign Analytics for Healthcare User Permissions**
   Assign permissions to enable users to view the Analytics for Healthcare app.
4. Get Your Org Ready to Create the Analytics for Healthcare App  
   Your Salesforce org and its data must meet specific requirements before you can create Analytics for Healthcare.

5. Set Field-Level Security to Enable Creation of the Analytics for Healthcare App  
   Before creating the Analytics for Healthcare app, make sure the Analytics Integration User has access to all fields used in the app.

6. Create and Share an App from the Analytics for Healthcare Template  
   Follow these steps to create and share an app from the Analytics for Healthcare template.

7. Schedule the Data Sync and Dataflow for Analytics for Healthcare  
   When you create Analytics for Healthcare, the creation process includes a data sync and a dataflow that imports the latest data to Tableau CRM. Schedule the sync and dataflow to run every day to ensure that your app uses up-to-date data.

8. Embed Analytics for Healthcare Dashboards in Lightning Pages  
   Analytics for Healthcare includes dashboards intended for embedding and access in Lightning Experience pages.

9. Understand Analytics for Healthcare Limitations  
   Analytics for Healthcare provides access to Tableau CRM capabilities and features.

Enable Tableau CRM

Before creating an app from the Analytics for Healthcare template, enable Tableau CRM in your Salesforce org.

1. From Setup, enter Getting Started in the Quick Find box, and then select Getting Started.

2. Click Enable Einstein Analytics button in the upper right corner.

   Note: If you see a blue Launch Analytics button in the upper right corner, Tableau CRM is already enabled. Go to the next topic.

Assign Analytics for Healthcare Administrator Permissions

Assign permissions to enable administrators to create an app from the Analytics for Healthcare template and manage it.

1. From Setup, enter Users in the Quick Find box, and then select Users.

2. Click the user name with the System Administrator profile.

3. Click Permission Set Assignments, and then click Edit Assignments.

4. Select both the Einstein Analytics Plus Admin and HealthCare Analytics Admin permission sets.

5. Click Add, then click Save.

6. Repeat these steps for all users who need to create and manage the Health Analytics app.

Assign Analytics for Healthcare User Permissions

Assign permissions to enable users to view the Analytics for Healthcare app.

1. From Setup, enter Users in the Quick Find box, and then select Users.

2. Click the name of a user who requires access to the app.

3. Click Permission Set Assignments, and then click Edit Assignments.

4. Select both the Einstein Analytics Plus User and HealthCare Analytics User permission sets.

5. Click Add, then click Save.

6. Repeat these steps for all users who need to view the Healthcare Analytics app.
Warning: Users with the Einstein Analytics Plus User permission set and Editor or Manager access to Tableau CRM apps can create, edit, and delete app assets.

Get Your Org Ready to Create the Analytics for Healthcare App

Your Salesforce org and its data must meet specific requirements before you can create Analytics for Healthcare.

Org Setup Requirements

Make sure to set up your org as follows before creating Analytics for Healthcare.

- Install the Health Cloud managed package.
- To be sure Utilization Analytics dashboards work correctly, install and set up Utilization Management. See Utilization Management Setup Checklist on page 132.
- To be sure Referral Analytics dashboards work correctly, install and set up Referral Management. See Set Up Referral Management on page 166.
- Enable the Intelligent Sales preferences. See Enable Intelligent Sales.
- Set Salesforce field-level security to enable the Analytics Integration User to see all fields used in the app. See Set Field-Level Security to Enable Creation of the Analytics for Healthcare App.
- Give the Analytics Integration User the necessary permission sets.
  1. From Setup, enter Users in the Quick Find box, and then select Users.
  2. Click the Integration User.
  3. Click Permission Set Assignments, and then click Edit Assignments.
  5. Click Add, then click Save.

Data Requirements

You must have at least one record in each of the following objects to successfully create an app from the Analytics for Healthcare template:

- Account
- Address
- AssessmentTask
- AssessmentTaskOrder
- CareBarrier
- CareBarrierDeterminant
- CareBarrierType
- CareDeterminant
- CareDeterminantType
- CareRequest
- Case
- Contact
- Event
Administer Health Cloud

Set Up Your Org for Analytics for Healthcare and Create the App

- HealthCloudGA__CarePlanGoal__c
- HealthCloudGA__CarePlanProblem__c
- HealthCloudGA__CarePlanTemplate__c
- HealthCloudGA__ProgramPatientAffiliation__c
- HealthCloudGA__ProgramPatientSummary__c
- Lead
- Location
- MemberPlan
- Opportunity
- OpportunityHistory
- Order
- OrderItem
- Pricebook2
- PricebookEntry
- Product2
- ProductFulfillmentLocation
- ProductItem
- ProductRequest
- ProductRequired
- ProductTransfer
- PurchaserPlan
- RecordType
- ServiceResource
- Task
- User
- UserRole
- Visit
- VisitedParty
- Visitor

During app creation, Tableau CRM checks your org’s data to be sure it meets minimum requirements. If it doesn’t, you see a message describing what must be fixed.

**Note:** In Analytics for Healthcare, data about patients comes from the Opportunity object, and data about referrals comes from Lead.

**Set Field-Level Security to Enable Creation of the Analytics for Healthcare App**

Before creating the Analytics for Healthcare app, make sure the Analytics Integration User has access to all fields used in the app.

If users don’t have proper field-level security permissions when they run a dataflow, the dataflow can fail. Here’s how to set Salesforce field-level security to enable the Analytics Integration User to see all fields used in the app.
Set Lightning Experience Field-Level Security
1. In Setup, enter object in the Quick Find box, and click Enter.
2. Select Object Manager.
3. Enter the name of the object whose field-level security you need to edit in the Quick Find box, and click Enter.
4. Select the object you need to edit, then select Fields & Relationships.
5. Select the field you need to edit, then select Set Field-Level Security.
6. Look for the Analytics Cloud Integration User, check the box(es) for the required fields under Visible, and click Save.
7. Repeat steps 5 and 6 for all fields you want to use.
8. Refresh your browser cache.

Set Salesforce Classic Field-Level Security
1. In Setup, enter the name of the object whose field-level security you need to edit in the Quick Find box and click Enter.
2. Click the name of the object.
3. The next window shows all the fields for the object. Go to the one(s) where you need to edit field-level security
4. Look for the Analytics Cloud Integration User, check the box(es) for the required fields under Visible, and click Save.
5. Repeat steps 2 through 5 for all objects with fields you want to use.
6. Refresh your browser cache.
You can now create Analytics for Healthcare.

Create and Share an App from the Analytics for Healthcare Template
Follow these steps to create and share an app from the Analytics for Healthcare template.
1. Navigate to Analytics Studio.
2. Click Create, then select App.
3. Select Analytics for Healthcare, then click Continue.
4. Have a brief look at the app preview page, then click Continue.
5. If the wizard asks if you want to create a new app or use settings from an existing app, make a selection, and click Continue.
6. Tableau CRM performs a compatibility check of your Salesforce org’s data. If it uncovers any issues, you see error messages with instructions about how to address them. Fix the issues, and try app creation again. If the check completes successfully, click Looks good, next.
7. Choose between using preselected standard settings or custom settings to set up your app. To set up app quickly based on standard settings determined by the org compatibility check, select Basic. To select custom settings to reflect the use cases you and others on your team want to view data for, select Custom
8. If you choose Basic, click Looks good, next, and skip step 9 and go to step 10.
9. If you chose Custom, click Looks good, next. The wizard asks you to choose Salesforce objects to add to Analytics for Healthcare.
Any objects that aren’t available in your org are grayed out.
• Care Plan Analytics: When selected, the app includes dashboards for Care Plan insights.
• Utilization Analytics: When selected, the app includes dashboards for Care Request insights.
• Referral Analytics: When selected, the app includes dashboards for Patient Referral insights.
• **Patient Insights**: When selected, the app includes dashboards for Patient Population insights.

• **Visit Analytics**: When selected, the app includes dashboards for upcoming Surgical Visits insights.

  Click *Looks good, next*.

10. Add the record types used to determine person and individual accounts in your org. Select one or more record types, then click *Looks good, next*.

11. Give your app a name that you and users in your org can easily remember, and click *Create*.

  ![](image)

  **Note**: We recommend using *Analytics for Healthcare* in your app name to make it easier to find.

---

View the status of app creation on the next page. The process takes a minute or two. After it’s complete, refresh your browser to see your app.

![](image)

**Note**: If you see an error saying the Analytics Integration User doesn’t have access to selected fields, see the previous topic to give the Integration User the required access.

Now that you created the app, share it with users in your organization. You can share it only with users assigned the Healthcare Analytics admin or user permission sets.

1. Open your app if it’s not already open. If you’ve navigated away from Tableau CRM Studio, go back to it, select *All Items*, find your app, and click it.

2. Click the Share icon at upper right.

3. In the next screen, use the search field under *Invite others:* to find other users in your org.

4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

  ![](image)

  **Important**: Users with the “Use Analytics Templated Apps” permission and Editor or Manager access to the app can create, edit, and delete assets in the app.

5. Click *Add*, then click *Save*.

---

**Schedule the Data Sync and Dataflow for Analytics for Healthcare**

When you create Analytics for Healthcare, the creation process includes a data sync and a dataflow that imports the latest data to Tableau CRM. Schedule the sync and dataflow to run every day to ensure that your app uses up-to-date data.

1. In Tableau CRM Studio, click the wheel icon at upper right and select *Data Manager*. Or, click the *Data Manager* link in the left-hand column.

2. First, schedule the sync. Select the *Connect* tab on the left.

  ![](image)

  **Note**: If you can’t see the Connect tab, you need to enable data sync in your org. See *Enable Data Sync and Connections*.

3. Click the arrow to the far right of *SFDC_LOCAL*, which is the name of the connection your app uses. From the menu that appears, select *Schedule*.
4. Set a time for running the data sync. It’s best to select a time outside normal working hours so the sync and dataflow don’t interrupt business activities. Then click **Save**.

5. Next, schedule the dataflow. Select the **Dataflows & Recipes** tab on the left.

6. Look for the name of your app, and click the triangle to the far right.

7. Select **Schedule**, then check the box next to **Event-based**. You see a message telling you that the dataflow runs after the data sync—exactly what you want.

8. Click **Save**.

The sync and dataflow for your app now runs every day at the time you set.

---

**Embed Analytics for Healthcare Dashboards in Lightning Pages**

Analytics for Healthcare includes dashboards intended for embedding and access in Lightning Experience pages.

For general instructions, see [Embed Tableau CRM Dashboards in Lightning Pages](https://help.salesforce.com/articleView?id=embed_lightningPages.htm&type=5) in Salesforce Help. Here are examples using dashboards from the Analytics for Healthcare app, including the code for the filter attribute set in Step 4 of [Embed Tableau CRM Dashboards in Lightning Pages](https://help.salesforce.com/articleView?id=embed_lightningPages.htm&type=5).

### Care

Embed in the Account (Patient/Member) page layout. Set the Filter attribute with the following:

```json
{
    "datasets":{
        "HLS_Care_Request":{
            "fields":{
                "MemberId"
            },
            "filter":{
                "operator":"in",
                "values":{
                    "$Id"
                }
            }
        },
        "HLS_Care_Plan":{
            "fields":{
                "AccountId"
            },
            "filter":{
                "operator":"in",
                "values":{
                    "$Id"
                }
            }
        }
    }
}
```
Converted Patient. Embed in the Opportunity (New Patient) page layout. Set the Filter attribute with the following:

```json
{
  "datasets":{
    "HLS_Patient":{
      "fields":{
        "ConvertedOpportunityId"
      }
    }
  }
}
```
Understand Analytics for Healthcare Limitations

Analytics for Healthcare provides access to Tableau CRM capabilities and features.
Analytics for Healthcare gives you the same access to Tableau CRM capabilities as the Einstein Analytics Growth and Plus licenses. Consult this chart to see any limitations.

<table>
<thead>
<tr>
<th>Capability</th>
<th>Einstein Analytics Growth or Plus; Analytics for Healthcare</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data sources</td>
<td>Salesforce and external data</td>
</tr>
<tr>
<td>Object support</td>
<td>Standard and custom objects</td>
</tr>
<tr>
<td>Data volume</td>
<td>• Einstein Analytics Plus: 10 billion rows</td>
</tr>
<tr>
<td></td>
<td>• Einstein Analytics Growth: 100 million rows</td>
</tr>
<tr>
<td>Can customize existing dashboards?</td>
<td>Yes</td>
</tr>
<tr>
<td>Can create dashboards?</td>
<td>Yes</td>
</tr>
<tr>
<td>Can customize existing datasets?</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Manage Patient Risk with Analytics for Health Cloud: Risk Stratification

Analytics for Health Cloud: Risk Stratification lets your company identify high-risk patients. You can use this information to proactively manage those patients and provide preventive care to reduce over-consumption of expensive healthcare resources.

The Analytics for Health Cloud: Risk Stratification app includes embedded dashboards that connect with the Health Cloud risk scoring tables. The dashboards display the calculated risk scores based on the CMS-Hierarchical Condition Category (HCC) risk adjustment model.

You can install the package that contains the app after you install and implement the core Health Cloud package. To use the Analytics for Health Cloud: Risk Stratification App, add the related tabs to the Health Cloud app. Make sure that each user profile can see the tabs by default.
Set Up Einstein Analytics for Health Cloud: Risk Stratification

Perform these steps to install and configure Einstein Analytics for Health Cloud: Risk Stratification.

1. **Enable Tableau CRM**
   To get started configuring Analytics for Health Cloud, first enable Tableau CRM.

2. **Enable a Permission Set License for the Admin**
   Enable the Tableau CRM Platform permission set license to create a permission set for Health Cloud admins.

3. **Create a Permission Set for the Health Cloud Tableau CRM Admin**
   After you’ve enabled the Tableau CRM Platform permission set license, create a permission set to assign to the Health Cloud Tableau CRM admin user. This permission set enables full access to manage Analytics for Health Cloud.

4. **Install the Einstein Analytics for Health Cloud: Risk Stratification Package**

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**Note:** Each Health Cloud org comes with five Tableau CRM app permission set licenses. Available in English only. Localization isn’t supported, so all users see the same date, time, and number formats, regardless of their own locale and language settings.
5. **Assign the Health Cloud Tableau CRM Admin Permission Set**
   Assign the Health Cloud Tableau CRM Admin permission set to give your Health Cloud admin access to all Analytics for Health Cloud functionality.

6. **Assign the Health Cloud Analytics Integration Permission Set**
   To give Analytics for Health Cloud access to all your Salesforce org data, assign the Health Cloud Analytics Integration permission set to the integration user.

7. **Add Remote Site Settings for Analytics Patient Lists**
   Enable remote site settings so that care coordinators can send patient lists from the Analytics for Health Cloud dashboard to the Health Cloud console.

8. **Confirm Field-Level Security**
   The Analytics Cloud Integration User profile requires read permission on specific object fields so that Einstein Analytics for Health Cloud: Risk Stratification can access data from your org.

9. **Create a Permission Set for Tableau CRM Users**
   Create a permission set that enables view access to the dashboard. You can also grant permission for users to download a .CSV file of the patient or member lists that are generated in the dashboard.

10. **Enable View Access for Health Cloud Tableau CRM Users**
    Enable access for users to view the Analytics for Health Cloud: Risk Stratification. Users who are assigned a Health Cloud Tableau CRM permission set can then access Analytics Studio from the App picker.

11. **Set Up and Start Risk Scoring Dataflow**
    Schedule and start the dataflow so that your risk scoring data can be refreshed daily.

12. **Set Up Dashboards**
    Upload extended metadata (XMD) files to make sure that all custom colors, labels, and quick actions are available for dashboards in Analytics for Health Cloud.

13. **Upgrade Picklist Values and Page Layouts for Tableau CRM**
    When you upgrade an existing Health Cloud org to use Analytics for Health Cloud: Risk Stratification, you must add extra picklist values to the Account record type. Also, make sure to add extra fields to the page layouts for objects that are used to calculate patient risk scores.

14. **Add Risk Scoring Record Types to the Admin Profile**
    To expose CMS Risk Scoring data in a Tableau CRM dashboard, you must add the associated record types to the Health Cloud admin profile.

15. **Health Cloud Risk Scoring Data Tables**
    Several Health Cloud tables hold the information that is used to aggregate and calculate patient data. Once calculated, this information appears in Tableau CRM dashboards so that your company can make informed care decisions.

16. **Recalculate Patient Risk Scores**
    You can recalculate patient Centers for Medicare and Medicaid Services (CMS) risk scores in Health Cloud with a batch Apex job using the HcCMSRiskScoringScheduledJob class. You can either run the job manually as needed or schedule it.

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**Enable Tableau CRM**

To get started configuring Analytics for Health Cloud, first enable Tableau CRM.

1. From Setup, enter *Analytics* in the Quick Find box, then select *Analytics > Getting Started*.

2. Click *Enable Analytics*. 
Enable a Permission Set License for the Admin

Enable the Tableau CRM Platform permission set license to create a permission set for Health Cloud admins.

1. From Setup, enter Users in the Quick Find box, then select Users.
2. Click the user name with the System Administrator profile.
3. Click Permission Set License Assignments and then click Edit Assignments.
4. Enable the Einstein Analytics Platform Admin permission set license.
5. Save your changes.

Create a Permission Set for the Health Cloud Tableau CRM Admin

After you've enabled the Tableau CRM Platform permission set license, create a permission set to assign to the Health Cloud Tableau CRM admin user. This permission set enables full access to manage Analytics for Health Cloud.

1. From Setup, enter Permission in the Quick Find box, then select Permission Sets.
2. Click New.
3. Enter a name for the role, such as Health Cloud Tableau CRM Admin.
4. For License, select None.
5. Save your changes.
6. On the Permission Set Overview page, click System Permissions.
7. Select Manage Analytics.
8. Save your changes.

Install the Einstein Analytics for Health Cloud: Risk Stratification Package


Make sure that you've installed and configured Health Cloud before installing the Einstein Analytics for Health Cloud: Risk Stratification package.

1. Paste the following URL for the package into your browser navigation bar: http://industries.force.com/healthcloudwave.
2. Press Enter.
3. Enter your Salesforce password.
4. Select Install for Admins only and then click Install.
   If it takes a while, you can select Done and move on to do something else while installation finishes. Check your email for confirmation that installation was successful.
5. Verify installation of the package.
   a. From Setup, enter Installed Packages in the Quick Find box, then select Installed Packages.

SEE ALSO:

Install Health Cloud Packages
Assign the Health Cloud Tableau CRM Admin Permission Set

Assign the Health Cloud Tableau CRM Admin permission set to give your Health Cloud admin access to all Analytics for Health Cloud functionality.

1. From Setup, enter Permission in the Quick Find box, then select Permission Sets.
2. Click the Health Cloud Analytics admin permission set and then click Manage Assignments.
3. Click Add Assignments.
4. Select the admin users who manage Analytics for Health Cloud.
5. Click Assign and then click Done.

Assign the Health Cloud Analytics Integration Permission Set

To give Analytics for Health Cloud access to all your Salesforce org data, assign the Health Cloud Analytics Integration permission set to the integration user.

1. From Setup, enter Permission in the Quick Find box, then select Permission Sets.
2. Click Health Cloud Analytics Integration and then click Manage Assignments.
3. Click Add Assignments.
4. Select the checkbox next to User, Integration.
5. Click Assign and then click Done.

Add Remote Site Settings for Analytics Patient Lists

Enable remote site settings so that care coordinators can send patient lists from the Analytics for Health Cloud dashboard to the Health Cloud console.

Before any Apex callout can call an external site, that site must be registered in the Remote Site Settings page, or the callout fails. Salesforce prevents calls to unauthorized network addresses.

When the list generated in the dashboard contains more than 500 entries, it’s processed by a queueable job. As a best practice, set up two remote site settings entries for your org—one for the Visualforce page and one for the queueable job.

1. From Setup, enter Remote Site Settings in the Quick Find box, then select Remote Site Settings.
2. Click New Remote Site.
3. Enter a descriptive term for the Remote Site Name.
4. Enter the URL for the remote site. The URL’s format differs depending on whether you use a Visualforce page for the list or send the records to a queueable job.
   You can find the remote URL for the Visualforce page by viewing its preview in your org and copying the domain name from that URL.
   a. From Setup, enter Visualforce Pages in the Quick Find box and select Visualforce Pages.
   b. Navigate to the HcWaveListIntegrationPage, click the name of the page, and select Preview.
   c. Copy the page URL from your browser and use it as the value for this field.
      For example, if the URL is: https://MyDomainName--healthcloudga.visualforce.com/apex/HcWaveListIntegrationPage. Enter https://MyDomainName--healthcloudga.visualforce.com as the value for Remote Site URL.

   Note: If you don’t have a My Domain deployed in your org, your URL format is different. If you have a My Domain deployed and enhanced domains are enabled in your org, your URL format is different. The Stabilize URLs in Visualforce, Experience
Builder, Site.com studio, and content files My Domain setting also affects this format. For details, see My Domain URL Formats in Salesforce Help.

To use a queueable job to process lists with over 500 entries, copy the URL from the Setup page.

a. Go to Setup in your org.

b. Copy the page URL from your browser and use it as the value for this field.
   For example, the URL is: https://MyDomainName.my.salesforce.com/setup/. Enter https://MyDomainName.my.salesforce.com as the value for Remote Site URL.

5. To allow access to the remote site regardless of whether the user’s connection is over HTTP or HTTPS, select the Disable Protocol Security checkbox. When selected, Salesforce can pass data from an HTTPS session to an HTTP session, and from HTTP to HTTPS. Only select this checkbox if you understand the security implications.

6. Optionally, enter a description of the site.

7. Make the setting active.

8. Click Save.

Confirm Field-Level Security

The Analytics Cloud Integration User profile requires read permission on specific object fields so that Einstein Analytics for Health Cloud: Risk Stratification can access data from your org.

1. From Setup, enter Profiles in the Quick Find box, then select Profiles.

2. Click Analytics Cloud Integration User.

3. In the Field-Level Security section, next to Account, click View.

4. Confirm that Read Access is selected for all fields. If any fields aren't selected, click Edit and select Read Access for those fields.

5. Save your changes, and then click Back to Profile.

6. Confirm that the following objects also have read access.
   - Account
   - Contact

Create a Permission Set for Tableau CRM Users

Create a permission set that enables view access to the dashboard. You can also grant permission for users to download a .CSV file of the patient or member lists that are generated in the dashboard.

1. From Setup, enter Permission in the Quick Find box, then select Permission Sets.

2. Click New.

3. Enter a label and a description for the permission set.
   For example, View Analytics Dashboard.

4. For License, select None.

5. Save your changes.

6. On the Permission Set Overview page for the new permission set, click System Permissions.

7. Select Use Analytics. Optionally, select Download Analytics Data to let users download a .CSV file of the patient or member list generated in the dashboard.
Important: Only grant feature access to individuals who have a valid need to know the protected health information of all individuals your company treats.

8. Save your changes.

Enable View Access for Health Cloud Tableau CRM Users

Enable access for users to view the Analytics for Health Cloud: Risk Stratification. Users who are assigned a Health Cloud Tableau CRM permission set can then access Analytics Studio from the App picker.

Note: Always allow popups in your browser for your org domain so that the Tableau CRM app can open.

1. From the App Launcher, find and open AnalyticsStudio.
2. From Apps, hover over Analytics for Health Cloud and click Share from the list.
3. Select the users with the Risk Stratification (HCC) permission and can see all patient or member data.

Important: Only grant feature access to individuals who have a valid need to know the protected health information of all individuals your company treats.

4. Save your changes.

Set Up and Start Risk Scoring Dataflow

Schedule and start the dataflow so that your risk scoring data can be refreshed daily.

If a Tableau CRM user has access to a dataset, they have access to all records in the dataset, by default. Only grant access to individuals who have a valid need to know the PHI of all individuals your company treats. However, you can implement row-level security on a dataset to restrict access to records. To implement row-level security in this dashboard, update the default dataflow to add a row-level security filter to the datasets associated with Account and Contact. These filters can be used to restrict access so that users see only the information that they can access based on their role. Row-Level Security for Datasets provides more information on implementing row-level security for datasets.

1. In Tableau CRM Studio, click the gear icon and then click Data Manager to open the data monitor.
2. In the Monitor Data Tasks picklist, select Dataflow View.
3. Next to the dataflow with your namespace and __SalesEdgeEltWorkflow, select Schedule from the list.
4. Schedule the dataflow for every 1 day at 4 AM, or as needed (hourly or daily).
5. Save your changes and click Done.
6. Next to the dataflow with your namespace and __SalesEdgeEltWorkflow, select Start from the list.
   Dataflow is now running and could take time to finish depending on the size of the datasets. Data must be present in the org for dataflow to work. For the initial data flow, the org must contain at least one Provider record with a valid Related Contact record.

Set Up Dashboards

Upload extended metadata (XMD) files to make sure that all custom colors, labels, and quick actions are available for dashboards in Analytics for Health Cloud.

Important: Before starting this task, the dataflow must have finished running at least once.

1. Download the XMD files.
   a. From Setup, enter Static in the Quick Find box, then select Static Resources.
b. Click healthcloudwaveresources.

c. To download the resources .zip file, click View File.

d. Extract the .zip file of XMD files.

   Note: Record the location of the extracted files.

2. Update the datasets.

a. From the App Launcher, find and open Analytics Studio.

b. Click the Datasets tab.

c. Next to FinalDashboardDataset, hover, and select Edit from the list.

d. Under Add Extended Metadata File (JSON), click Select file or drag here.

e. From the downloaded and extracted zip folder, upload the FinalDashboardDataset file.

   Note: The XMD file name corresponds with the dataset name.

f. Click Update Dataset.

Upgrade Picklist Values and Page Layouts for Tableau CRM

When you upgrade an existing Health Cloud org to use Analytics for Health Cloud: Risk Stratification, you must add extra picklist values to the Account record type. Also, make sure to add extra fields to the page layouts for objects that are used to calculate patient risk scores.

1. Add the custom picklist fields to the Account record type.

   a. From Setup, enter Account in the Quick Find box, then select Record Types.

   b. Select the Individual record type.

   c. Click Edit for the following picklists and select all available values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Type</td>
<td>Dual, NonDual, FBDual, ESRD</td>
</tr>
<tr>
<td>Medicare Enrollee</td>
<td>New Enrollee, Continued</td>
</tr>
<tr>
<td>OREC</td>
<td>Age, Disabled</td>
</tr>
</tbody>
</table>

   d. Save your work.

2. Add extra fields to the page layouts for the following objects. You can access the page layout from the object management settings for the object.

<table>
<thead>
<tr>
<th>Objects</th>
<th>Fields to Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account (Patient Layout)</td>
<td>Disabled, Enrollment Type, Institution, Low Income, Medicaid Eligibility Status, Medicare Enrollee, OREC</td>
</tr>
<tr>
<td>EHR Encounter</td>
<td>Hospitalize Period End, Hospitalize Period Start, Period End</td>
</tr>
</tbody>
</table>
Add Risk Scoring Record Types to the Admin Profile

To expose CMS Risk Scoring data in a Tableau CRM dashboard, you must add the associated record types to the Health Cloud admin profile.

1. From Setup, enter Profiles in the Quick Find box, then select Profiles.
2. Select the Health Cloud Admin profile, click Clone, and name the new profile.
   
   **Note:** If you’ve already created a custom admin profile, click Edit to add the record types.

3. In the Custom Record Type Settings, click Edit next to the Program object.
4. Add the CMS Risk Scoring record type to the Selected Record Types picklist.
5. Select the CMS Risk Scoring as the default record type.

6. Click Save.

Health Cloud Risk Scoring Data Tables

Several Health Cloud tables hold the information that is used to aggregate and calculate patient data. Once calculated, this information appears in Tableau CRM dashboards so that your company can make informed care decisions.

Health Cloud delivers tables that store the data used to calculate patient risk scores.
Risk Score Medicaid Interactions
Disease interaction scores and originally disabled interactions for patients who are enrolled in both Medicare and Medicaid.

Risk Score Disease Interaction
Disease interactions used to calculate risk scores.

Risk Score HCC Code
Mappings between HCC codes and risk scores.

Risk Score Age Band New Enrollee
Mapping used to calculate risk score for age groups of patients who are newly enrolled in Medicare. For example, patients who are between 35–44 years old and patients who are 60–64 are in two different age bands.

Risk Score Age Band Continued Enrollee
Mappings used to calculate risk score for age groups for patients who have been enrolled in Medicare for more than a year. For example, patients who are between 35–44 years old and patients who are 60–64 are in two different age bands.

Manage Mappings Between Conditions and HCC Codes
Salesforce provides the most current mappings between ICD condition and HCC codes. These codes are used to calculate patient risk for the Analytics for Health Cloud: Risk Scoring app. You can add or edit these mappings, but doing so can affect the accuracy of your results.

Manage Programs
Use the Programs tab to manage the relevant data about the programs a patient or member participates in that are tracked or monitored in Health Cloud.

Manage Program-Patient Affiliations
Manage the associations between patients and the programs they’re enrolled in. This record can also link a person with the providers who care for them within their enrolled programs. Implement a custom integration or use Data Loader to import historical medical records from the EHR system. Then map it to the fields that appear in this tab.

View Program Patient Summary Information
View the patient’s risk score and other summary information about the individual and affiliated programs using Tableau CRM dashboards. The person’s risk score, along with demographic information such as age, gender, disability status, conditions, Medicaid eligibility, HCC codes, and other items appear in the dashboard.

Manage Provider Information
Manage the current healthcare provider names based on information from the EHR Practitioner object, or related contact and user records.

Manage Procedures
Use the EHR Procedures tab to manage the relevant data about the medical procedures a patient or member undergoes that are tracked or monitored in Health Cloud.

Manage Procedure Performer Records
Use the Procedure Performer tab to manage the relevant data about the practitioners who perform a procedure on a patient or member.

Manage Procedure Requests
Use the EHR Procedure Requests tab to manage the relevant data about requests for a patient or member to undergo a medical procedure.
Manage Mappings Between Conditions and HCC Codes

Salesforce provides the most current mappings between ICD condition and HCC codes. These codes are used to calculate patient risk for the Analytics for Health Cloud: Risk Scoring app. You can add or edit these mappings, but doing so can affect the accuracy of your results.

You can also download the most current information from the Centers for Medicare & Medicaid Services website. To replace or edit a delivered mapping, you must deselect the Active field and create another record.

1. From the Health Cloud - Admin Home page, select the Condition to HCC Code Mapping tab, and click New.
2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mapping ID</td>
<td>Identifier for a specific mapping relationship.</td>
</tr>
<tr>
<td>Condition Code</td>
<td>The ICD code for a specific condition.</td>
</tr>
<tr>
<td>HCC Code</td>
<td>The CMS HCC code.</td>
</tr>
<tr>
<td>Year + Condition + HCC Code</td>
<td>Unique key for the record that links the Valid From field, the ICD condition code, and the HCC code.</td>
</tr>
<tr>
<td>Valid From</td>
<td>Number field that holds the year in which the HCC code became valid. For example, 2016.</td>
</tr>
<tr>
<td>Valid Through</td>
<td>The last year in which the HCC code was valid. For example, if a code was replaced in 2016, that’s the year that appears in the field. Codes that are being used and that are still valid don’t have a value in this field.</td>
</tr>
<tr>
<td>Active</td>
<td>Indicates whether this condition to HCC mapping is active and available for use.</td>
</tr>
</tbody>
</table>

3. Click Save.

Manage Programs

Use the Programs tab to manage the relevant data about the programs a patient or member participates in that are tracked or monitored in Health Cloud.

The Programs tab contains information like start and end dates, reimbursement rates, and the role of the professional who’s interacting with the patient or member.

**Note:** If you don’t see the User Role, Rate, Target, Unit of Measure, and Time Span fields, then you must add them to the tab.

1. From the Health Cloud - Admin Home page, select the Programs tab, and click New.
2. Select a record type for the new program and click Continue.
3. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Name</td>
<td>Name of the program.</td>
</tr>
</tbody>
</table>
### Field | Description
--- | ---
User Role | Types of providers who qualify for reimbursement during a time period, if applicable.
Rate | Reimbursement rate for the measurement period of a participant's program.
Target | Target time to spend with the patient or member for the measurement period.
Start Date | Date when the program begins.
End Date | Date when the program ends.
Is Active | Select to activate the program.
Unit of Measure | Unit of measurement for the time spent with the patient or member during the measurement period defined in the Target field. Valid values are Minutes and Seconds.
Time Span | Measurement period for the program. Valid values are Annually, Monthly, Quarterly, and Weekly.
Report Name | Name of the Analytics dashboard that uses this information. For example, CCM Dashboard.

### Manage Program-Patient Affiliations

Manage the associations between patients and the programs they're enrolled in. This record can also link a person with the providers who care for them within their enrolled programs. Implement a custom integration or use Data Loader to import historical medical records from the EHR system. Then map it to the fields that appear in this tab.

At a minimum, you must populate the Program ID, Account ID, and Is Active field for each record.

1. From the Health Cloud - Admin Home page, select the Program Patient Affiliation tab, and click **New**.
2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>Lookup field to Account.</td>
</tr>
<tr>
<td>Program</td>
<td>Program in which the person is enrolled.</td>
</tr>
<tr>
<td>Provider</td>
<td>Name of the physician or other health care provider.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the person's Medicare Chronic Care Management (CCM) program.</td>
</tr>
</tbody>
</table>
3. Click Save.

**View Program Patient Summary Information**

View the patient’s risk score and other summary information about the individual and affiliated programs using Tableau CRM dashboards. The person’s risk score, along with demographic information such as age, gender, disability status, conditions, Medicaid eligibility, HCC codes, and other items appear in the dashboard.

Each time the scoring algorithm job runs and there has been a change in underlying records, the system generates a new Program Patient Summary record. You can identify the most current information by viewing the record that has the Most Recent checkbox selected. There is only one active record per person for a given year. Historical data is stored in the table and isn’t overwritten.

**Note:** If you edit the calculated data, it can affect the accuracy of your results.

1. From the Health Cloud - Admin Home page, select the Program Patient Summary tab, and click New.
2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>System-generated identifier.</td>
</tr>
<tr>
<td>Gender</td>
<td>Person’s gender.</td>
</tr>
<tr>
<td>Age</td>
<td>Person’s age in years as of December 31 for the year being calculated.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Disability Status</td>
<td>Indicates whether the person is flagged as disabled in the Patient record.</td>
</tr>
<tr>
<td>Institution</td>
<td>Indicates whether the person is in an institution. A blank field indicates</td>
</tr>
<tr>
<td></td>
<td>that the patient resides in a community.</td>
</tr>
<tr>
<td>New Patient</td>
<td>Indicates whether the person is a new Medicare patient or a continued</td>
</tr>
<tr>
<td></td>
<td>enrollee.</td>
</tr>
<tr>
<td>Low Income</td>
<td>Indicates whether the person falls within low-income guidelines.</td>
</tr>
<tr>
<td>Risk Score</td>
<td>Person's calculated HCC risk score.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If an individual has a risk score of 0, check to see that the</td>
</tr>
<tr>
<td></td>
<td>enrollment type is set correctly for that person.</td>
</tr>
<tr>
<td>Year</td>
<td>Year that the risk score applies to.</td>
</tr>
<tr>
<td>HCC Codes</td>
<td>HCC codes that apply to the person for the year.</td>
</tr>
<tr>
<td>Age Band</td>
<td>Person's age group in years as of December 31 for the year being calculated.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>Date when the risk score was calculated.</td>
</tr>
<tr>
<td>Most Recent</td>
<td>Identifies that this summary information is the most current for the</td>
</tr>
<tr>
<td></td>
<td>person for that year.</td>
</tr>
<tr>
<td>Number of Conditions</td>
<td>Number of medical conditions associated with the person.</td>
</tr>
<tr>
<td>Patient Program</td>
<td>Lookup field to the Program Patient Affiliation object.</td>
</tr>
<tr>
<td>Affiliation</td>
<td></td>
</tr>
<tr>
<td>Conditions</td>
<td>List of Hierarchical Condition Category (HCC) codes associated with the</td>
</tr>
<tr>
<td></td>
<td>person.</td>
</tr>
</tbody>
</table>

3. Click **Save**.

**Manage Provider Information**

Manage the current healthcare provider names based on information from the EHR Practitioner object, or related contact and user records.

1. From the Health Cloud - Admin Home page, select the Providers tab, and click **New**.
2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider Name</td>
<td>Name of the physician or other healthcare provider.</td>
</tr>
<tr>
<td>EHR Practitioner</td>
<td>Name of the provider as it exists in the EHR Practitioner object.</td>
</tr>
<tr>
<td>Related Contact</td>
<td>Contact record for the provider.</td>
</tr>
</tbody>
</table>
3. Click **Save**.

**Manage Procedures**

Use the EHR Procedures tab to manage the relevant data about the medical procedures a patient or member undergoes that are tracked or monitored in Health Cloud.

The EHR Procedures tab contains information about a procedure such as date it was performed, the name of practitioners involved, reason for the procedure.

1. From the Health Cloud - Admin Home page, select the EHR Procedures tab, and click **New**.
2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request</td>
<td>Reference to the request for the procedure.</td>
</tr>
<tr>
<td>Account</td>
<td>The individual account that represents the patient or member.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the procedure.</td>
</tr>
<tr>
<td>Category</td>
<td>High-level categorization of the procedure.</td>
</tr>
<tr>
<td>Code</td>
<td>Industry-standard code for the procedure.</td>
</tr>
<tr>
<td>Code Label</td>
<td>Industry-standard name for the procedure.</td>
</tr>
<tr>
<td>Body Site</td>
<td>Anatomical location for the procedure.</td>
</tr>
<tr>
<td>Reason 1</td>
<td>Reason that the procedure was requested.</td>
</tr>
<tr>
<td>Reason 2</td>
<td>Reason that the procedure was requested.</td>
</tr>
<tr>
<td>Reason 3</td>
<td>Reason that the procedure was requested.</td>
</tr>
<tr>
<td>Reason 4</td>
<td>Reason that the procedure was requested.</td>
</tr>
<tr>
<td>Performed Date Time</td>
<td>Date and time that the procedure was performed.</td>
</tr>
<tr>
<td>Not Performed</td>
<td>Indicates that the procedure was not performed as scheduled.</td>
</tr>
<tr>
<td>Reason Not Performed</td>
<td>Reason that the procedure wasn’t performed.</td>
</tr>
<tr>
<td>Encounter</td>
<td>Encounter associated with the procedure.</td>
</tr>
<tr>
<td>Location</td>
<td>Physical location where the procedure was performed, such as a clinic or a medical office.</td>
</tr>
<tr>
<td>Outcome</td>
<td>Result of the procedure.</td>
</tr>
<tr>
<td>Report</td>
<td>Name of the report related to the procedure.</td>
</tr>
</tbody>
</table>
Manage Procedure Performer Records

Use the Procedure Performer tab to manage the relevant data about the practitioners who perform a procedure on a patient or member.

The EHR Procedure Performer tab contains information about a procedure such as which practitioner performed it and what their role was.

1. From the Health Cloud - Admin Home page, select the EHR Procedure Performer tab, and click New.
2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DescriptionField</td>
<td>Name of the procedure.</td>
</tr>
<tr>
<td>Name of the practitioner performing the procedure.</td>
<td></td>
</tr>
<tr>
<td>Performer Role</td>
<td>Practitioner’s role during the procedure.</td>
</tr>
</tbody>
</table>

3. Save your work.

Manage Procedure Requests

Use the EHR Procedure Requests tab to manage the relevant data about requests for a patient or member to undergo a medical procedure.

The EHR Procedure Request tab contains information about a procedure such as who ordered it, the reason it was requested, and its priority.

1. From the Health Cloud - Admin Home page, select the EHR Procedure Requests tab, and click New.
2. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>The account that represents the patient or member.</td>
</tr>
<tr>
<td>Ordered By</td>
<td>Name of the practitioner making the request.</td>
</tr>
<tr>
<td>Category</td>
<td>High-level categorization of the procedure.</td>
</tr>
<tr>
<td>Code</td>
<td>Industry-standard code for the procedure.</td>
</tr>
</tbody>
</table>

3. Save your work.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code Label</td>
<td>Industry-standard name for the procedure.</td>
</tr>
<tr>
<td>Body Site</td>
<td>Anatomical location for the procedure.</td>
</tr>
<tr>
<td>Reason 1</td>
<td>Reason that the procedure was requested.</td>
</tr>
<tr>
<td>Reason 2</td>
<td>Reason that the procedure was requested.</td>
</tr>
<tr>
<td>Reason 3</td>
<td>Reason that the procedure was requested.</td>
</tr>
<tr>
<td>Reason 4</td>
<td>Reason that the procedure was requested.</td>
</tr>
<tr>
<td>Priority</td>
<td>Priority of the procedure.</td>
</tr>
<tr>
<td>Ordered On</td>
<td>Date and time the request was created.</td>
</tr>
<tr>
<td>Scheduled Date Time</td>
<td>Scheduled date and time to perform the procedure.</td>
</tr>
<tr>
<td>Encounter</td>
<td>Encounter associated with the procedure.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the procedure.</td>
</tr>
<tr>
<td>Notes</td>
<td>Additional information about the procedure.</td>
</tr>
<tr>
<td>Source System ID</td>
<td>Record ID from a system outside of Salesforce.</td>
</tr>
</tbody>
</table>

3. Save your work.

**Recalculate Patient Risk Scores**

You can recalculate patient Centers for Medicare and Medicaid Services (CMS) risk scores in Health Cloud with a batch Apex job using the `HcCMSRiskScoringScheduledJob` class. You can either run the job manually as needed or schedule it.

Risk scores are recalculated for patient records that are affiliated with a care program and have the Recalculate flag set to true. The flag resets to true whenever a patient’s information changes.

**Recalculate Patient Risk Scores as Needed**
Recalculate Medicare and Medicaid patient risk scores in Health Cloud as needed with a batch Apex job.

**Recalculate Patient Risk Scores at a Scheduled Time**
Recalculate Medicare and Medicaid patient risk scores in Health Cloud at a specific time with a batch Apex job.
Recalculate Patient Risk Scores as Needed

Recalculate Medicare and Medicaid patient risk scores in Health Cloud as needed with a batch Apex job.

Invoke the `HcCMSRiskScoringScheduledJob` class in your Apex job.

1. Open the Developer Console.
2. Select Debug | Open Execute Anonymous Window.
3. In the Enter Apex Code window, enter this text.

   ```
   HealthcloudGA.HcCMSRiskScoringScheduledJob s = new HealthcloudGA.HcCMSRiskScoringScheduledJob (year);
   s.execute(null);
   ```

   - Enter the year as a four-digit number, for example, 2017.
   - The batch size is optional. If you don’t specify a batch size, the job processes up to 200 records.
   - Optionally, set a value to ignore the recalculate flag and run the algorithm for all active patients.

4. Click Execute.

Recalculate Patient Risk Scores at a Scheduled Time

Recalculate Medicare and Medicaid patient risk scores in Health Cloud at a specific time with a batch Apex job.

Use the `HcCMSRiskScoringScheduledJob` class and the `Schedule.system` method to schedule the job and a CronTrigger expression to initiate the schedule.

Example: To run the `HcCMSRiskScoringScheduledJob` class each day at midnight, select Debug | Open Execute Anonymous Window. Enter the following text in the Enter Apex Code window in Developer Console.

```
HealthcloudGA.HcCMSRiskScoringScheduledJob riskJob = new HealthcloudGA.HcCMSRiskScoringScheduledJob (2017);
String sch = '0 00 00 * * ?';
String jobName = 'Risk Scoring Job';
System.schedule('Risk Scoring Job', sch , riskJob);
```

Manage Device Sales

Medical Device manufacturers can manage their volume and price agreements at the product level with their customers using sales agreements. They can also manage account and product specific forecasts.

To make sales agreements and forecasting available to your users, see Manage Your Manufacturing Activities.

Sales Agreements

Create sales agreements at the account level. Include multiple products within a single sales agreement and specify planned sales quantities, prices and discounts. Review planned revenue associated with the agreement and also specify a schedule frequency for the agreement such as One Time, Monthly, Quarterly or Yearly to align with the business objective.
Over time, you can compare planned quantities to actual quantities as order are booked and use this insight to monitor and enforce compliance to the agreement.

This sample sales agreement tracks anticipated shipments of a product at three price levels.

**Forecast Device Sales**

Improve business predictability and sales performance by creating account level forecasts for multiple products in your portfolio. Create a baseline forecast using market and account growth factors relative to last year’s actuals. Specify forecast horizon and forecast bucket granularity such as monthly versus quarterly.

Enable account reps and sales managers to edit forecasts, annotate edits, track changes and view impact of forecast changes on key metrics such as revenue.
Maximize productivity for your sales teams by giving them the tools required to efficiently plan and execute their sales visits. You can also give your teams valuable insight into field inventory, with visits-based product availability projections. If someone has a product shortfall, they can request a product transfer from a nearby inventory.

Working with Intelligent Sales incorporates three types of activities. The optimal way to use Intelligent Sales is to divide and conquer these activity types with different user personas.

1. **Data Setup - Salesforce Admin**: The Salesforce admin sets up the org with the right data. For instance, they create records for account and inventory locations with the right attributes and a compatible address format.

2. **Visit Planning and Inventory Management - Sales Ops**: The sales ops team creates visits with the right resources, the right products, and the right assessment tasks. The team anticipates shortfalls in the visits they create, and proactively requests product transfers when shortfalls happen. Inventory management responsibilities can also be shared with sales reps.

3. **Visit Execution - Sales Reps**: The sales reps make site visits to fulfill their surgical case orders and perform visit tasks defined in the visit. They primarily rely on the mobile app for these visits.

**The Intelligent Sales Data Model**

Intelligent Sales uses multiple objects in its data model to work its magic for your sales teams. But not all user roles interact directly with these objects. Admins interact with these objects more than a sales rep or other field-oriented roles.

**Enable Intelligent Sales**

Before your users can use Intelligent Sales, you must enable the Intelligent Sales and Visit Inventory Management org prefs in your Salesforce org.

**Assign Permission Sets for Intelligent Sales**

Assign the ActionPlans, Health Cloud Foundation, and Industries Visits permission sets to your users so that they can use Intelligent Sales.

**Set Up Visit and Inventory Access**

Set up the right object permissions so that users access just the visits and inventories they’re responsible for. You can use Sharing Settings and custom Apex triggers to setup access.

**Configure the Product Transfer Page Layout**

Configure the page layout of Product Transfer before your users start using Intelligent Sales. The default layout doesn’t include Source Location, Status, and Expected Pickup Date fields. So, you must add these fields to your page layout.
Set Up Data for Intelligent Sales

To help your users get the most out of Intelligent Sales, make sure that your Salesforce org is set up with the right data. For instance, make sure that your entries in objects like Location, Product Item, and Product Fulfillment Location have the right attributes.

The Intelligent Sales Data Model

Intelligent Sales uses multiple objects in its data model to work its magic for your sales teams. But not all user roles interact directly with these objects. Admins interact with these objects more than a sales rep or other field-oriented roles.

Here’s the list of objects that are part of the Intelligent Sales data model. But you don’t manually create records in all of them.

- **Account:** Hospitals that your organization deals with. Create these records manually.
  - Patients that your devices are registered for in a surgical visit. If you use the Patient Registration flow in your action plan template, you don’t create these records manually. Also, if you have person accounts enabled for your Salesforce org, these records have the person account record type.

- **Contact:** The point of contact for your sales reps at a given account location. Create these records manually.

- **Location:** The locations of different hospitals and your field rep’s inventories. Create these records manually.

- **Address:** The address details for your locations. Create these records manually.

- **Product:** The different products your organization deals in. Create these records manually.

- **Product Item:** A combination of a product, the location of its inventory, and the quantity available at that location. Create these records manually.

- **Serialized Product:** Stores serial numbers of individual products and the product item record that they’re associated with. Each new serialized product that’s associated with a product item record automatically increments the quantity specified in that product item record. Create these records manually. If your product is serialized, the initial quantity must be zero. Any change to the quantity is automatically handled based on changes in Serialized Product.

- **Product Fulfillment Location:** A combination of different records that ties a sales rep to an inventory, an account, and an account location. Create these records manually.

  A product fulfillment location consists of these references:
  - A product
  - An account that orders the product
  - The location of the account
  - The location of the product inventory fulfilling the order
  - The sales rep responsible for the inventory and the location

- **Product Availability Projection:** Stores information about the projected availability of products related to visits and transfer requests. Don’t create or edit any records in this object, its data is managed automatically. Give your users read access to this object so that they can see their inventory projections in the Intelligent Sales app.

- **Product Required:** The products that are added as required for different visits. The visit creation flow creates the record for you.

- **Product Transfer:** Product transfers requested by sales reps when they have shortfalls. The visit creation flow creates the record for you.

- **Product Request:** Records the date a sales rep needs a transfer to happen. The visit creation flow creates the record for you.

- **Product Request Line Item:** The junction object that connects a product request record and the corresponding product transfer record. The request transfer flow creates the record for you.

- **Action Plan Template:** Reusable templates for your visits that add assessment tasks to those visits. Create these records manually.
• **Assessment Task**: Tasks the sales reps complete during a visit. The visit creation flow creates the record for you.

• **Work Type**: The duration-related properties of a visit. Create these records manually.

• **Visit**: Visits created by sales teams to fulfill product orders from accounts. The visit creation flow creates the record for you. This object is the central part in this data model.

• **Visitor**: The sales reps assigned to different visits. The visit creation flow creates the record for you.

• **Visited Party**: The contacts sales reps visit at accounts. The visit creation flow creates the record for you.

• **Order**: This object isn’t a required part of the Intelligent Sales data model, it’s only used when you use the Order Authorization flow in your action plan template. When you use the order authorization flow, an order record is automatically created with the billing details, including the product, quantity, and amount.

---

**Enable Intelligent Sales**

Before your users can use Intelligent Sales, you must enable the Intelligent Sales and Visit Inventory Management org prefs in your Salesforce org.

1. From Setup, enter *Inventory Settings* in the Quick Find box and select *Inventory Settings*.
2. Set Visit Inventory Management to enabled if it’s not already enabled.
3. Enter *Intelligent Sales Settings* in the Quick Find box and select *Intelligent Sales Settings*.
4. Set Intelligent Sales to enabled if it’s not already enabled.
5. Enter *Visit Calendar Settings* in the Quick Find box and select *Visit Calendar Settings*.
6. Enable Add Visits to Salesforce Calendar.

Your Salesforce org now has access to the Intelligent Sales app and the Visits data model.

---

**Assign Permission Sets for Intelligent Sales**

Assign the ActionPlans, Health Cloud Foundation, and Industries Visits permission sets to your users so that they can use Intelligent Sales.

1. From Setup, enter *Permission Sets* in the Quick Find box and select *Permission Sets*.
2. Select *ActionPlans* and click *Manage Assignments*.
3. Click *Add Assignments*, select your users, and click *Assign*.

Repeat these steps for the Health Cloud Foundation and Industries Visits permission sets.

---

**Set Up Visit and Inventory Access**

Set up the right object permissions so that users access just the visits and inventories they’re responsible for. You can use Sharing Settings and custom Apex triggers to setup access.

Before you set up view permissions, it’s a good idea to create different profiles for the different business functions at your organization.

Here’s how you configure object permissions related to visits and product inventories for a sales rep.

1. From Setup, enter *Sharing Settings* in the Quick Find box and select *Sharing Settings*.
2. Click *Edit* for Organization-Wide Defaults.
3. Set Product Fulfillment Location, Product Item, and Visit to *Private*.
4. Save your changes.
5. Enter *Profiles* in the Quick Find box and select *Profiles*. 
6. Click the profile you set up for your sales reps.
7. Click Edit and go to the Stand Object Permissions section.
8. Select Read, Create, Edit, and Delete for Visits, Product Items, and Product Fulfillment Locations.
10. Save your changes.

Now you’re ready to set up your Apex Triggers.

SEE ALSO:
Profiles

Set Up Apex Triggers for Visit and Inventory Access
You can use these Apex triggers with profile-based permissions and organization-wide sharing settings to make sure that users access just their visits and inventories.

To set up Apex triggers, you must create a few utility classes first.

1. Click Setup and select Developer Console.
2. Create the VisitAccess utility class.
   a. Select File > New > Apex Class.
   b. For the Apex class name, enter VisitAccess.
   c. Delete the auto-generated content and paste the following sample.

```java
public class VisitAccess {
    static Set<String> accessLevels = new Set<String>{'read', 'edit'};

    public static void insertVisitAccess(Visit visit, User user, String accessType) {
        insertVisitAccess(visit, new List<User>{user}, accessType);
    }

    public static void insertVisitAccess(Visit visit, Id objectId, String accessType) {
        if(isUser(objectId)) {
            insertVisitAccess(visit, new User(id=objectId), accessType);
        }
    }

    public static void insertVisitAccess(Visit visit, List<User> users, String accessType) {
        if(visit==null || visit.Id==null || users==null || users.isEmpty()) {
            return;
        }
    }
}
```

Set Up Visit and Inventory AccessAdminister Health Cloud
List<VisitShare> shareVisitList = new List<VisitShare>();
for(User user: users) {
    if(user==null)
        continue;
    VisitShare shareVisit = New VisitShare();
    shareVisit.ParentId=visit.Id;
    shareVisit.UserOrGroupId = user.Id;
    shareVisit.AccessLevel = accessType;
    shareVisitList.add(shareVisit);
}
try{
    Database.insert(shareVisitList);
} catch(Exception e) {
    System.debug('Unexpected exception : ' + e);
}

public static void updateVisitAccess(Visit visit, List<Id> oldUsers, List<Id> newUsers, String access) {
    if(visit==null) {
        return;
    }
    if(oldUsers!=null) {
        for(Id userId : oldUsers) {
            if(isUser(userId)) {
                deleteVisitAccess(visit, new User(id=userId));
            }
        }
    }
    if(newUsers!=null) {
        for(Id userId : newUsers) {
            if(isUser(userId)) {
                insertVisitAccess(visit, userId, access);
            }
        }
    }
}

public static void updateVisitAccess(Visit oldVisit, Visit updatedVisit, String access) {
    //Comment this condition if for any update visit need to be shared
    if(oldVisit.VisitorId==updatedVisit.VisitorId) {
        return;
    }
    updateVisitAccess(oldVisit, oldVisit!=null?new List<Id>{oldVisit.VisitorId}:new List<Id>(), updatedVisit!=null?new List<Id>{updatedVisit.VisitorId}:new List<Id>(), access);
}

    //remove user from oldVisit if user does not have any more access to oldVisit, and link user to newVisit
    public static void updateVisitAccess(Visit oldVisit, Visit newVisit, List<User> users, String access) {
        if(users==null || users.isEmpty()) {
            return;
        }
        for(User user: users) {
            if(user==null) {
                continue;
            }
            VisitShare shareVisit = New VisitShare();
            shareVisit.ParentId=visit.Id;
            shareVisit.UserOrGroupId = user.Id;
            shareVisit.AccessLevel = accessType;
            shareVisitList.add(shareVisit);
        }
        try{
            Database.insert(shareVisitList);
        } catch(Exception e) {
            System.debug('Unexpected exception : ' + e);
        }
    }
}
return;

if(access==null||!accessLevels.contains(access)) {
    access='edit';
}
for(User user : users) {
    if(oldVisit!=null)
        deleteVisitAccess(oldVisit, user);
    if(newVisit!=null)
        insertVisitAccess(newVisit, user, access);
}

//remove user from oldVisit if user does not have any more access to oldVisit, and link user to newVisit
public static void updateVisitAccess(Visit oldVisit, Visit newVisit, Id objectId, String access) {
    if(isUser(objectId)) {
        updateVisitAccess(oldVisit, newVisit, new List<User>{new User(id=objectId)}, access);
    }
}

public static void deleteVisitAccess(Visit visit, List<User> users) {
    List<VisitShare> visitShareList = new List<VisitShare>();
    for(User user : users) {
        if(isUserLinkedToVisit(user, visit))
            continue;
        List<VisitShare> visitShare = [select Id from VisitShare where ParentId = :visit.Id and UserOrGroupId = :user.Id and RowCause='Manual'];
        if(!visitShare.isEmpty()) {
            visitShareList.add(visitShare.get(0));
        }
    }
    delete visitShareList;
}

public static void deleteVisitAccess(Visit visit, User user) {
    deleteVisitAccess(visit, new List<User>{user});
}

public static void deleteVisitAccess(Visit visit, Id objectId) {
    if(isUser(objectId)) {
        deleteVisitAccess(visit, new User(id=objectId));
    }
}

public static Boolean isUser(Id objId) {
    if(objId==null)
        return false;
    List<User> users = [select Id from User where Id = :objId];
    return !users.isEmpty();
}
public static Boolean isUser(Object obj) {
    if(obj==null)
        return false;
    try {
        User user = (User)obj;
    } catch(TypeException e) {
        return false;
    }
    return true;
}

public static Boolean isUserLinkedToVisit(User user, Visit visit) {
    List<Visit> visits = [select Id from Visit where VisitorId = :user.Id and Id=:visit.Id];
    List<Visitor> visitors = [select Id from Visitor where AssigneeId = :user.Id and VisitId=:visit.Id];
    return !visits.isEmpty() || !visitors.isEmpty();
}

d. Select File > Save.

3. Create the visit trigger.
   a. Select File > New > Apex Trigger.
   b. For the trigger name, enter VisitTrigger, and select Visit from the sObject picklist.
   c. Delete the auto-generated content and paste the following sample.

```
trigger VisitTrigger on Visit (after insert, after update) {
    List<VisitShare> visitShares = new List<VisitShare>();
    for(Visit visit : trigger.new) {
        if(trigger.isUpdate) {
            Visit oldVisit = trigger.oldMap.get(visit.Id);
            VisitAccess.updateVisitAccess(oldVisit, visit, 'edit');
        }
        if(trigger.isInsert) {
            VisitAccess.insertVisitAccess(visit, visit.VisitorId, 'edit');
        }
    }
}
```

d. Select File > Save.

4. Create the visitor trigger.
   a. Select File > New > Apex Trigger.
   b. For the trigger name, enter VisitorTrigger, and select Visitor from the sObject picklist.
   c. Delete the auto-generated content and paste the following sample.

```
trigger VisitorTrigger on Visitor (after insert, after update, after delete) {
    if(trigger.isInsert) {
        for(Visitor visitor : trigger.new) {
```
VisitAccess.insertVisitAccess(new Visit(id=visitor.VisitId), visitor.AssigneeId, 'edit');
}
}

if(trigger.isUpdate) {
    for(Visitor visitor : trigger.new) {
        Visitor oldVisitor = trigger.oldMap.get(visitor.Id);
        VisitAccess.updateVisitAccess(new Visit(id=oldVisitor.VisitId), new Visit(id=visitor.VisitId), visitor.AssigneeId, 'edit');
    }
}
}

if(trigger.isDelete) {
    for(Visitor visitor : trigger.old) {
        VisitAccess.deleteVisitAccess(new Visit(id=visitor.VisitId), visitor.AssigneeId);
    }
}

Public class ProductItemAccess {

    public static void insertAccess(List<ProductItem> productItems, List<Id> users, String access) {

        if(productItems==null || productItems.isEmpty() || users==null || users.isEmpty()) {
            return;
        }

        productItems = getProductItemsWithId(productItems);
        List<ProductItemShare> shareList = new List<ProductItemShare>();
        for(Id user: users) {
            if(user==null)
                continue;
            for(ProductItem item : productItems) {
                ProductItemShare share = New ProductItemShare();
                share.ParentId=item.Id;
                share.UserOrGroupId = user;
                share.AccessLevel = access;
                shareList.add(share);
            }
        }
        try{
            Database.insert(shareList);
        }
    }
}

Now, sales reps can see only the visits they're assigned to.

5. Create the ProductItemAccess utility class.

   a. Select **File > New > Apex Class**.

   b. For the Apex class name, enter ProductItemAccess.

   c. Delete the auto-generated content and paste the following sample.

   ```
   public class ProductItemAccess {
       public static void insertAccess(List<ProductItem> productItems, List<Id> users, String access) {
           if(productItems==null || productItems.isEmpty() || users==null || users.isEmpty()) {
               return;
           }
           productItems = getProductItemsWithId(productItems);
           List<ProductItemShare> shareList = new List<ProductItemShare>();
           for(Id user: users) {
               if(user==null)
                   continue;
               for(ProductItem item : productItems) {
                   ProductItemShare share = New ProductItemShare();
                   share.ParentId=item.Id;
                   share.UserOrGroupId = user;
                   share.AccessLevel = access;
                   shareList.add(share);
               }
           }
           try{
               Database.insert(shareList);
           }
       }
   }
   ```
catch (Exception e) {
    System.debug(e);
}

public static void deleteAccess(List<ProductItem> productItems, List<Id> users) {
    List<ProductItemShare> shareList = new List<ProductItemShare>();
    for(Id userId : users) {
        for(ProductItem productItem : productItems) {
            List<ProductItemShare> shares = [select Id from ProductItemShare where ParentId = :productItem.Id and UserOrGroupID = :userId and RowCause='Manual'];
            if(!shares.isEmpty()) {
                shareList.addAll(shares);
            }
        }
    }
    delete shareList;
}

public static List<ProductItem> getProductItems(ProductFulfillmentLocation fulfillLocation) {
    return [select Id from ProductItem where Product2Id=:fulfillLocation.ProductId and LocationId=:fulfillLocation.FulfillmentLocationId];
}

private static List<ProductItem> getProductItemsWithId(List<ProductItem> productItems) {
    List<ProductItem> productItemsWithId = new List<ProductItem>();
    for(ProductItem item : productItems) {
        if(item==null) continue;
        if(item.id==null) {
            List<ProductItem> itemList = [select Id from ProductItem where Product2Id=:item.Product2Id and LocationId=:item.locationId];
            productItemsWithId.addAll(itemList);
        }
    }
    return productItemsWithId;
}

d. **Select File > Save.**

6. Create the ProductFulfillmentLocationAccess utility class.
   a. **Select File > New > Apex Class.**
   b. For the Apex class name, enter ProductFulfillmentLocationAccess.
   c. Delete the auto-generated content and paste the following sample.

```java
public class ProductFulfillmentLocationAccess {
    static Set<String> accessLevels = new Set<String>{'read', 'edit'};
}
```
/**
 * Gives access to users on all product fulfillment locations
 */

public static void insertAccessToAllLocations(ProductFulfillmentLocation locationToInsert, String accessType) {
    List<ProductFulfillmentLocation> fulfillLocations = [select Id, ProductId, FulfillmentLocationId from ProductFulfillmentLocation];
    insertAccess(fulfillLocations, getAllResponsibleUsers(), accessType);
    insertProductItemAccess(new List<ProductFulfillmentLocation>{locationToInsert}, new List<Id>{locationToInsert.UserId}, accessType);
}

public static void insertAccess(List<ProductFulfillmentLocation> fulfillLocations, List<Id> users, String accessType) {
    if (fulfillLocations==null || fulfillLocations.isEmpty() || users==null || users.isEmpty()) {
        return;
    }
    List<ProductFulfillmentLocationShare> shareList = new List<ProductFulfillmentLocationShare>();
    for(Id user: users) {
        if (user==null) continue;
        for(ProductFulfillmentLocation location : fulfillLocations) {
            if (location==null || location.Id==null) continue;
            ProductFulfillmentLocationShare share = New ProductFulfillmentLocationShare();
            share.ParentId=location.Id;
            share.UserOrGroupID = user;
            share.AccessLevel = accessType;
            shareList.add(share);
        }
    }
    try{
        Database.insert(shareList);
    } catch (Exception e) {
        System.debug(e);
    }
}

public static void updateAccess(ProductFulfillmentLocation oldLocation, ProductFulfillmentLocation updatedLocation, String access) {
    deleteAccess(oldLocation);
    insertAccessToAllLocations(updatedLocation, access);
}

public static void deleteAccess(List<Id> users) {
    List<ProductFulfillmentLocationShare> shareList = new List<ProductFulfillmentLocationShare>();
    for(Id userId : users) {
        if(isUserLinkedTofulfillLocation(userId)) continue;
        List<ProductFulfillmentLocationShare> shares = [select Id from
if(!shares.isEmpty()) {
    shareList.addAll(shares);
}

delete shareList;

public static void deleteAccess(ProductFulfillmentLocation fulfillLocation) {
    deleteAccess(new List<Id>{fulfillLocation.UserId});
    deleteProductItemAccess(fulfillLocation);
}

public static Boolean isUserLinkedTofulfillLocation(Id userId) {
    List<ProductFulfillmentLocation> fulfillLocations = [select Id from 
        ProductFulfillmentLocation where UserId = :userId];
    return !fulfillLocations.isEmpty();
}

public static void deleteProductItemAccess(ProductFulfillmentLocation fulfillLocation) {
    ProductItemAccess.deleteAccess(ProductItemAccess.getProductItems(fulfillLocation),
        new List<id>{fulfillLocation.UserId});
}

public static void insertProductItemAccess(List<ProductFulfillmentLocation> fulfillLocations,
    List<Id> users, String access) {
    List<ProductItem> productItems = new List<ProductItem>();
    for(ProductFulfillmentLocation location : fulfillLocations) {
        productItems.add(new ProductItem(Product2Id=location.ProductId,
            LocationId=location.FulfillmentLocationId));
    }
    ProductItemAccess.insertAccess(productItems, users, access);
}

public static List<Id> getAllResponsibleUsers() {
    List<Id> users = new List<Id>();
    List<ProductFulfillmentLocation> fulfillLocations = [select UserId from 
        ProductFulfillmentLocation];
    for(ProductFulfillmentLocation location : fulfillLocations) {
        users.add(location.UserId);
    }
    return users;
}

Select File > Save.

Now sales reps can see only the inventories they're responsible for.
Configure the Product Transfer Page Layout

Configure the page layout of Product Transfer before your users start using Intelligent Sales. The default layout doesn’t include Source Location, Status, and Expected Pickup Date fields. So, you must add these fields to your page layout.

1. From Setup, go to the Object Manager, enter Product Transfer in the Quick Find box, and select Product Transfer.
3. From the Fields menu, move (1) Expected Pickup Date, (2) Source Location, and (3) Status, and place them in the (4) Information section of Product Transfer Detail.
4. Save your changes.

The Product Transfer object now has all the attributes necessary to store transfer requests for your sales reps.

Set Up Data for Intelligent Sales

To help your users get the most out of Intelligent Sales, make sure that your Salesforce org is set up with the right data. For instance, make sure that your entries in objects like Location, Product Item, and Product Fulfillment Location have the right attributes.

Here’s the list of objects you have to create records for:

- Account
- Contact
- Location
- Address
- Product
- Product Item
- Serialized Product
- Product Fulfillment Location
- Action Plan Template
- Work Type

Set Up Your Accounts, Contacts, and Locations

The hospital accounts your organization deals with is the first set of information you add to the Intelligent Sales data model. After you add an account, you add contacts your reps meet with when they visit that account. Then you can add the accounts’ locations.

Set Up Your Products and Inventories

Records in the Product object define your products. Product inventories are stored in the Product Item object. The Product Fulfillment Location object associates sales reps with the inventories they own and accounts they are responsible for.
Set Up Your Action Plan Templates

Your users can use the action plan templates you define to create different types of visits. An action plan template adds a set of assessment tasks to a visit that your sales rep completes before ending the visit.

Patient Registration and Order Authorization

Salesforce provides two pre-built flows with Intelligent sales to make surgical visits easier. The Patient Registration and Order Authorization flows are both compatible with Intelligent Sales, and helps perform two assessment tasks that are common in surgical visits.

Set Up Your Accounts, Contacts, and Locations

The hospital accounts your organization deals with is the first set of information you add to the Intelligent Sales data model. After you add an account, you add contacts your reps meet with when they visit that account. Then you can add the accounts' locations.

1. Add an account.
   a. From the App Launcher, go to Accounts and click New.
   b. Enter the account name and other relevant information.
   c. Save your changes.

2. Add a contact to your account.
   a. Go to the Related tab of your account page.
   b. In the Contacts section, click New.
   c. Enter the contact's name and other relevant information.
   d. Save your changes.

3. Add a location for your account.
   This location is tied to your account in the Product Fulfillment Location object.
   a. From the App Launcher, go to Locations and click New.
   b. Enter a location name, location type, and other relevant information.
   c. Save your changes.

Set Up Your Products and Inventories

Records in the Product object define your products. Product inventories are stored in the Product Item object. The Product Fulfillment Location object associates sales reps with the inventories they own and accounts they are responsible for.

1. Add a product.
   a. From the App Launcher, go to Products and click New.
   b. Enter the name, product code, and description.
   c. Select Active and Product Family as appropriate for the product.
   d. If you expect this product to have serial numbers, then select Serialized. If not, don’t select it.

   Note: If a product is serialized, it can’t be deserialized as long as any inventory associated with that product has a non-zero quantity
Save your record.

On the record page for your new product, go to the Related tab and click Add Standard Price.

Make sure that the price book selected is the standard price book and enter the list price.

Save your changes.

2. Add an inventory location.
   a. From the App Launcher, go to Locations and click New.
   b. Enter a location name, location type, and other relevant information.
   c. Select Inventory Location.
   d. Save your record.
   e. On the details page of your location, click Edit Visitor Address.
   f. In the Visitor Address field, click New Address.
   g. In the New Address window, select your location in the Parent field.
   h. Enter the location’s address accurately, using the Address, City, State/Province, Zip/Postal Code, and Country fields.
      Note: If this data isn’t accurate, your users can’t find nearby inventories to request product transfers from.
   i. Save the address record.
   j. Save your changes to the location.

3. Define an inventory.
   a. From the App Launcher, go to Product Items and click New.
   b. In the Product Name field, select the product you’re creating an inventory for.
   c. In the Location field, select the location you created for the product’s inventory.
   d. In the Quantity On Hand field, enter a value as follows:
      • If your product is serialized, then enter 0. This number is automatically updated with each serial number you create for this inventory.
      • If your product isn’t serialized, enter the actual quantity available at that inventory.
   e. Enter a unit of measure for the quantity and save your record.
      Note:
      • If your product is serialized, then the unit of measure must be Each.
      • Don’t add serial numbers for your products here. Use the Serialized Product object instead.

4. Add serial numbers for products that are serialized. Skip this step if you didn’t select Serialized when you created the product record.
   a. From the App Launcher, go to Serialized Product and click New.
   b. Enter a serial number.
   c. Select the product item associated with the inventory you want to add this serial number to.
      Note: Leave the Asset field blank.
d. Select the product this serial number belongs to. Make sure that the product you select here and the product associated with the product item you selected are the same.

e. Enter an expiration date as required and save your record.

5. Define a product fulfillment location.
   a. From the App Launcher, go to Product Fulfillment Locations and click New.
   b. Enter a name for your product fulfillment location.
   c. Select a product in the Product field.
   d. Select the inventory location in the Fulfillment Location field.
   e. In the Responsible User field, select the user in charge of this inventory.
   f. In the Account field, select the accounts this user is responsible for. If the fulfillment location is a warehouse, leave this field blank.
   g. In the Account Location field, select the location of the account that this user visits. If the fulfillment location is a warehouse, leave this field blank.
   h. Save your record.

⚠️ Important: It’s critical that you set up your product and inventory data accurately. Make sure that your users create visits that are consistent with the records in the Product Item and Product Fulfillment Location objects. Inconsistent records interfere with the product availability projection and estimated revenue risk.

Set Up Your Action Plan Templates

Your users can use the action plan templates you define to create different types of visits. An action plan template adds a set of assessment tasks to a visit that your sales rep completes before ending the visit.

Before you create an action plan template, make sure you have the business flows that your sales reps need for their assessment tasks. You can either build your own flows using the Flow Builder, or you can use the Patient Registration and Order Authorization flows provided with Intelligent Sales. If you create a flow, make sure that this flow accepts VisitId and AssessmentTaskId as input.

1. Create an action plan template.
   a. From the App Launcher, go to Action Plans and click New.
   b. Enter a name and select the template owner.
   c. Make sure that the option that lets users add items to action plans is not selected.
   d. In the Action Plan Type field, select Visit Execution.
   e. In the Target Object field, select Visits.
   f. Save your record.

2. Add task flows in an action plan template and publish it.
   a. In the Items tab of your action plan template, click Add Flow.
      🚨 Warning: Only add task flows to your template. Intelligent Sales doesn’t support assessment task definitions.
   b. In the Task Flow picklist, select the flow you want to add to your template.
   c. If you want this task to be a mandatory task during visits, select Required.
   d. Save your changes.
   e. Add more task flows as per your business requirements.
f. After you add all the task flows you need in your template, click Publish Template.

SEE ALSO:
- Flows
- Trailhead: Get Started With Flows

Patient Registration and Order Authorization
Salesforce provides two pre-built flows with Intelligent sales to make surgical visits easier. The Patient Registration and Order Authorization flows are both compatible with Intelligent Sales, and helps perform two assessment tasks that are common in surgical visits.

Patient Registration
This flow helps your reps assign products to the patients they’re used for in a visit. During visit execution, this flow creates an account record for the patient and records information about the products used, such as the serial number. If Person Accounts are enabled for your Salesforce org and the sales rep has access to person accounts, the record created is always a person account record. And if not, it’s a business account record.

Order Authorization
This flow helps your reps generate an order record when a product is consumed during a visit. It also helps capture the visited party’s signature and consent to be billed for the order. This order record also has additional information such as the product consumed, its quantity, serial number, order amount, shipping address, and billing address. It also has a built-in barcode scanner that helps reps enter serial numbers faster.

Support Health Cloud for Mobile Users
Field Service enables care team members to carry Health Cloud with them. Users can complete tasks and interactively update records while they deliver services outside your facility, such as mobile nursing and home health care.

1. Install the Health Cloud Package Extension for Field Service
   This optional extension package delivers the process that lets care team members access Health Cloud data on mobile devices using Field Service.

2. Set Up Field Service Flows for Health Cloud
   Configure the flows that Field Service users can use to deliver health services remotely.

Install the Health Cloud Package Extension for Field Service
This optional extension package delivers the process that lets care team members access Health Cloud data on mobile devices using Field Service.

1. Verify that Field Service is up and running in your org.


3. Enter your Salesforce password and click Install.
   Installation may take a while. You can click Done now and check your email later for confirmation that installation was successful.
4. To verify installation of the unmanaged package, use Quick Find to find Installed Packages and look for Field Service Flows for Health Cloud.

The package installs a set of flows, which you can inspect under Setup > Process Automation > Flows.

SEE ALSO:
Install Health Cloud Packages

Set Up Field Service Flows for Health Cloud

Configure the flows that Field Service users can use to deliver health services remotely.

1. Create a list view in Service Appointments, using filters to find the appointments you want.
   For example, to show this month’s appointments, you might set Scheduled Start greater or equal to LAST 30 DAYS and Scheduled End less than or equal to NEXT 30 DAYS.

2. In Setup, find Field Service Mobile Settings.
   a. Under Customization, change the Default List View Developer Name to the name of the list view you created.
   b. Under Restrict Visibility, select Visible to all users.

3. Set up app extensions to define your flows.
   b. Give your new app extension the name of one of the flows that were installed with the Health Cloud Field Service package.
   c. For Launch Value, enter the name of that flow.

   d. Create an app extension for each of the flows that were installed with the Health Cloud Field Service package.

SEE ALSO:
Create a List View

Display Detailed Error Messages to Users

Expedite debugging for you and your users with detailed error messages that provide insight into field-level security restrictions.

A detailed error message includes information about the access type, fields, and object.

1. From Setup, in the Quick Find box, enter Custom Settings, then select Custom Settings.

2. Click Industries Application Config.
3. Click **Manage** and then click **Edit**.
4. Select **Show Detailed Error Messages**.
5. Save your changes.