

Health Cloud Administration

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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.

Most of the Health Cloud objects, APIs, and features are part of the Salesforce platform. We also deliver Health Cloud features in managed packages and unmanaged add-on packages to help you quickly implement specific features. 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. Patients or members and other participants are represented as Person accounts.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

[Where Do I Start with Health Cloud?](#)

The landscape of the healthcare industry is as varied and unique as the people that your company cares for. Are you an admin for a payer organizer and want to give your call center agents powerful tools to help your members? Or do you work for a provider organization and plan to set up the Health Cloud console to help your care coordinators manage patient care? You might even be an admin for a medtech company looking to set up tools to streamline field inventory management and increase medical device sales. But where do you begin with your Health Cloud implementation?

[Learn About the Health Cloud Data Models](#)

Before you start with managed packages and permission sets, take a deep breath. Health Cloud offers a multitude of capabilities and it's easy to get lost in them. As our first step, let's examine the structure of Health Cloud and find the data models that are most relevant to you.

[Health Cloud Sales and Commercial Excellence](#)

Health Cloud Sales and Commercial Excellence helps teams better engage with their customers by streamlining the end-to-end process, from lead generation to fulfilling orders. Accurate forecasts ensure transparency across your sales and commercial units. Explore a trial org and then learn about what's included, what setup we recommend, and how to get ready for your implementation.

[Health Cloud for Life Sciences](#)

Health Cloud for Life Sciences is a leaner offering of Health Cloud that focuses on the key business use cases of the Life Sciences space.

[Health Cloud for Insurance](#)

Design member and provider claim journeys with integrated document management to automate claim intake and reduce administrative costs with digital self-service claim tools. Manage provider claim denials, appeals, and grievances in a compliant and intuitive way using a comprehensive claims data model integrated with service codes and benefits structures.

[Types of People in Health Cloud](#)

At its core, healthcare is focused on patients or members. But every patient or member is surrounded by a team of people who support them. Health Cloud provides a 360-degree view of the patient or member that includes their primary care physician, additional care team members such as physical therapists and family members, and even medical supply companies.

[Quick Start List for a Successful Health Cloud Implementation](#)

Health Cloud implementation involves managed packages, person accounts, Chatter settings, data privacy settings, permission sets and licenses, and more. To help you get through the setup without breaking a sweat, here's a list of tasks to complete to ensure a successful implementation.

[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.

[Customize the Health Cloud Console](#)

We've built the Health Cloud console to be a powerful tool that you can tailor to fit how your organization manages people and the activities related to their care. From translating labels, using your own timeline icons, or changing fields in the patient card, you have the flexibility to make the console work the way your users work. Although not every component of a managed package is customizable, you can edit the key components 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. 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.

[Contact Center for Health Cloud](#)

Contact Center for Health Cloud digitizes customer service processes for contact centers and empowers agents to swiftly address members' questions and concerns.

[Code Sets and Code Set Bundles](#)

Having accurate information and standardized definitions is vital for the healthcare industry. For example, a patient who is transferred from one provider to another faces serious consequences if both providers differ in their interpretation of the patient's data. To avoid this scenario, the healthcare industry uses terminology systems that standardize the definitions of various situations and clinical data. These systems consist of subunits that the industry terms Coding, Codeable Concept, and Value Set.

[Reporting in Health Cloud](#)

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

[Flow for Health Cloud](#)

Flow for Health Cloud expands the existing Salesforce Flow suite with additional features built for complex industry workflows. In addition to Flow and MuleSoft, Flow for Health Cloud includes OmniStudio, Business Rules Engine, Document Generation and Intelligent Form Reader, and Data Processing Engine. Flow for Health Cloud consists of a unique portfolio of automation solutions, all built around your customer.

[OmniStudio for Health Cloud](#)

OmniStudio is a managed package of application components built on the Salesforce platform that you can download and install into Health Cloud. Configure users to give your care coordinators the ability to access the remote site and enable admins to customize appointment flows.

[Help Patients Connect with Providers](#)

Connect patients to providers by enabling patients, members, and agents to search for healthcare providers by specialty, location, and other factors. Use provider relationship cards to quickly and efficiently show users what they need to know about providers.

[Protect Personal Health Information](#)

Healthcare organizations across the world are required to comply with regulations such as HIPAA that govern protected health information. Failure to comply with these regulations has legal consequences. Organizations must ensure that any person who seeks confidential information must first prove their identity and access.

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.

Intelligent Appointment Management

Scheduling and managing appointments is at the center of key patient engagement processes such as patient intake, cost estimation of services, patient education, and post-visit surveys. With the Health Cloud Intelligent Appointment Management's easy-to-use console, call center agents and care coordinators can efficiently and accurately schedule appointments.

Reduce Patient No-Shows with CRM Analytics Prediction

Intelligently highlight the days and times a patient is most likely to attend based on the history of similar people by using the CRM Analytics Prediction for Intelligent Appointment Management add-on. When you identify ideal appointment times up front, you increase the likelihood of patients showing up for their appointments, save your staff from spending time on coordinating reschedules, and maximize your health care providers' time.

Virtual Care

Healthcare is no longer confined to the four walls of a physical facility. With Virtual Care video visits, you can enable care from anywhere.

Medication Management and Medication Review

Improve patients' medication regimen and reduce medication-related errors with Medication Management and Medication Review. Capture standardized information related to medication with the help of Medication Review. Use Medication Management to perform medication reconciliation of patients' medication list and detect potential drug-to-drug interactions.

Advanced Therapy Management

Advanced Therapy Management in Health Cloud supports slot management and scheduling across multiple territories in a single place, to help users easily search for and book appointments across multiple sites.

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 Document Reader

Use optical character recognition to automatically extract data with Amazon Textract using your AWS account. Specify the document type that can be associated with the form, upload the form, and map the form's fields to a Salesforce object's fields. For example, you can specify that a patient's birth date in a referral form must be stored in the Birthdate field of the patient's Contact record. The extracted information can be used to create or update record fields, or to verify data that's already in the org. For example, you can check a person's birth date against the birth date in their scanned passport.

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.

Document Generation in Health Cloud

With Document Generation, you can generate intake forms, contracts, reports, non-disclosure agreements, and more.

Manage Patient or Member Care to Improve Outcomes

A care plan gives the healthcare team a history of the patient and the progress or challenges related to their health. Care plans can have any number of problems, goals, and tasks that you can track from the person's tab in the console. You can also manage the associated team of professional and personal caregivers from a care plan.

[Orchestrate Patient Care with Integrated Care Management](#)

Integrated Care Management helps your care managers create enhanced care plans and coordinate care more efficiently for their patients. The feature's integration with Discovery Framework (Assessments) gives care managers recommendations when they create care plans. And because Integrated Care Management is built over the OmniStudio framework, you have greater flexibility to customize the feature to your organization's requirements.

[Care Coordination for Slack](#)

Improve patient outcomes and reduce healthcare costs by using the Care Coordination for Slack app to alert your care coordinators about updates to their patients' health records.

[Unified Health Scoring](#)

Unified Health Scoring gives your users a holistic view of their patients' health profiles. Using this feature, you can define a unified health profile for your organization that shows your users everything concerning their patients' health. You can also configure contextual actions that prompt your users to intervene based on a patient's score. This multidimensional view together with contextual prompts help your users plan their interventions better for improved health outcomes, greater patient engagement, and reduced healthcare costs.

[Provide Easy Access to Protocols and Articles](#)

Salesforce Knowledge enables you to easily create and manage content and make it available to other healthcare professionals, as well as patients, members, and the care team.

[Provide Assessments and Surveys for Gathering Information and Feedback](#)

Improve quality of care by gathering information that helps you manage your patients' or members' health more efficiently. Whether it's an industry standard screener or a member feedback survey, you have the information you need.

[Crisis Support Center Management](#)

Empower counselors to swiftly respond to a crisis using a simplified intake flow that records details about the client and the interaction. Users can also capture notes, track the client's interaction history, create and share Knowledge articles, and share provider details.

[Manage Your Network of Providers](#)

Find and manage provider partners and support efficient recruiting, credentialing, contracting, and self-service within a single cloud platform.

[Help High-Risk Patients and Members](#)

Give your users a holistic understanding of patients and members, so that they can provide more personalized care and support. Social workers and case managers capture critical social and environmental factors like homelessness and low income as barriers and related social determinants. With social determinants of health, they can create intervention tasks to address barriers and help mitigate avoidable adverse health events for patients and members.

[Manage Care Requests](#)

Give your users the tools to collaborate seamlessly when submitting, assigning, or processing care requests. Utilization management makes it easier for provider and payer organizations to gather member and clinical data, streamline care request reviews, and evaluate requests for medical necessity.

[Verify Patient Benefits](#)

Integrate benefit verification into the end-to-end patient access workflow to help caregivers and patients reduce the time and effort it takes to find out what coverage is available under each patient's health benefits.

[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.

Use Care Programs to Track and Manage Cohorts of Patients and Members

Maximize the impact of your care programs with enrollment and management tools to help drive adherence and improve outcomes. Care programs can cover services such as patient outreach, access to medications, access to care, financial assistance, or remote monitoring. 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.

Process Insurance Claims from External Sources

The claims data model makes externally sourced claims data available as external objects, so users can answer queries from providers and members without using multiple screens or applications. The Claims data model uses external objects, allowing 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.

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 template flows and customize them according to your business processes to help your call center reps handle service requests from patients and members.

Set up Action Plans

An action plan defines the tasks and other items needed to complete a business process, such as handling a patient intake or scheduling a visit. You can create action plans for various objects, including account, campaign, case, contact, contract, lead, and opportunity records, and custom objects.

Manage Campaigns

Campaigns are an effective way to help patients and members stay engaged with their care team and stick with their care plans. From health education to appointment reminders, you can improve patient participation throughout a connected experience. Build campaigns and create health journeys across populations, identify groups of people who share a need, and then assign them to the campaigns. Recruit, onboard, and engage the providers in your network through targeted campaigns. Payers can manage the entire member journey through acquisition, onboarding, engagement, and retention to create a seamless member experience.

Support and Manage Provider Referrals

Help your users monitor referrals from submission to closure. Health Cloud referral management provides tools to prioritize the best referrals, ensure timely referral processing, and track final confirmation of a referral from the referring physician.

Provide Patient and Member Insights with Analytics

CRM Analytics for Health Cloud gives you a complete view of your data to help you deliver connected, one-to-one patient or member care. Use business insights from CRM Analytics apps to drive intelligent patient engagement, improve care effectiveness, and identify and manage risk throughout your patient and member population.

Manage Commercial Excellence

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, and create account manager targets.

Manage Inventories, Surgical Cases, and Cycle Counts with Intelligent Sales

Maximize productivity for your sales teams by giving them the tools required to efficiently plan and execute their surgical case visits and cycle counts. Give your teams valuable insight into field inventory and impacted revenue, with visits-based product availability projections. If someone has a product shortfall, they can request a product transfer from a nearby inventory. Reps can also blaze through cycle counts with fewer errors using their mobile devices.

[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.

[View Events Using Enhanced Timeline in Health Cloud](#)

The Enhanced Timeline component shows key events relating to a person or a resource in one place, so your users can see information from a single source of truth.

Where Do I Start with Health Cloud?

The landscape of the healthcare industry is as varied and unique as the people that your company cares for. Are you an admin for a payer organizer and want to give your call center agents powerful tools to help your members? Or do you work for a provider organization and plan to set up the Health Cloud console to help your care coordinators manage patient care? You might even be an admin for a medtech company looking to set up tools to streamline field inventory management and increase medical device sales. But where do you begin with your Health Cloud implementation?

Setting up a Health Cloud is no small task! And with the abundance of information that's available, finding the right resources isn't always easy. Your head is likely swimming with questions. How do I set up patients and members? How do I customize the Health Cloud console?

The solution: landing pages.

Landing pages act like a compass pointing you to the resources that help you to learn about an area within Health Cloud. A landing page is a comprehensive table with assets that help you to understand and set up a feature area. Whether you're using Health Cloud for the first time or you just want to refresh your memory, landing pages are your best friend.

If you're new to Health Cloud, start with the landing page for the area of healthcare that your company operates within. We have big-picture landing pages that are targeted to your area of healthcare whether you're a provider, payer, life sciences, or medtech company. We also have focused landing pages for the major feature areas of Health Cloud.

Meet Maya Ray—a Salesforce admin for Bloomington Healthcare. She's setting up Health Cloud so that her care coordinators can provide outstanding patient care. First, she looks at the [Get to Know Health Cloud for Providers](#) landing page to get an overview of Health Cloud and an idea of what features are available to Bloomington Healthcare. She wants to understand how care plans work in Health Cloud so she can customize the feature to fit the way her organization works. From the provider landing page, she can find the care plans page and open it. The care plans page helps her learn about the data model, take Trailhead modules, and find Help topics that help her to set up care plans in her org.

Maya knows that she can search Salesforce Help to find landing pages for other Health Cloud features that she wants to set up. With landing pages, Maya finds it so much easier to do her job!

[Health Cloud in the Payer Sector](#)

Design member and provider claim journeys with integrated document management to automate claim intake and reduce administrative costs with digital self-service claim tools. Manage provider claim denials, appeals, and grievances in a compliant and intuitive way using a comprehensive claims data model integrated with service codes and benefits structures.

[Health Cloud in the Pharmaceuticals and Life Sciences Sector](#)

Engage with patients who participate in your patient services or therapeutic support programs. Improve program adherence, decrease dropout rates, and reduce overall clinical time by managing every step of a patient's health journey.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Health Cloud in the Provider Sector

Delivering outstanding patient care means more than just managing patient information and healthcare events. It’s about creating a strong, collaborative relationship between your care team and the patients they provide care for. Health Cloud gives care coordinators a consolidated view of critical patient records, access to a patient’s care team, and additional tools to improve healthcare outcomes. With a complete view of the patient, your team now has easy access to the right patient information including current conditions and medications, appointment history, social determinants, and communication preferences.

Create a Health Cloud Trial Org

Sign up for a trial to get hands on with a comprehensive, fully-configured Health Cloud org.

Health Cloud in the Payer Sector

Design member and provider claim journeys with integrated document management to automate claim intake and reduce administrative costs with digital self-service claim tools. Manage provider claim denials, appeals, and grievances in a compliant and intuitive way using a comprehensive claims data model integrated with service codes and benefits structures.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Health Cloud for Payers

Get Oriented	 Get to know Health Cloud for Payers. • Health Cloud for Payers • Health Cloud Utilization Management • Health Cloud Specialist Superbadge • Health Cloud Data Models
Salesforce Shield	 Protect patient data with Salesforce Shield. • Salesforce Shield Learning Map
Data Models	 Explore the Health Cloud data models and objects that support payers. • Claims • Health Insurance

- [Social Determinants](#)
- [Utilization Management](#)
- [Benefits Verification Data Model](#)
- [Provider Network Management](#)
- [Program Management](#)

Install the Unmanaged Packages and Grant Permissions

Related Unmanaged Packages		Install the Care Request Extensions, Reports for Patient Referral Management, and Flow Templates for Payers packages. • Install Health Cloud Packages
Related Permission Sets and Permission Set Licenses		Assign permission set licenses and permission sets. • Assign Health Cloud Permission Set Licenses • Health Cloud Social Determinants Permission Set • Health Cloud Utilization Management Permission Set

Optimize the Health Cloud Console to Manage Members

Health Cloud Console		Customize the console to reflect the way you manage patients. • Customize the Health Cloud Console
Care Plans		Create customized care plans to help members and patients achieve better outcomes. • Manage Patient or Member Care to Improve Outcomes
Patient or Member Card		Give care coordinators and managers with the basic information they need about a patient or member. • Display Information About a Patient or Member
Householding Map		Get a comprehensive view of the patients' household relationships. • Manage a Patient or Member's Relationships
Timelines and Life Events		Track your patients' health with timeline and life events. • Monitor Health Events Over Time • Manage Life Events
Social Determinants of Health		Capture critical social and environmental factors like homelessness and low income as barriers in the care of your patients or members. • Set Up Social Determinants to Assist High-Risk Patients and Members

Surveys and Assessments		Gather information that helps you manage your patients' or members' health more efficiently. • Provide Assessments for Gathering Information
App Templates for Patients and Members		Create your own dedicated, branded app that helps people stick with goals and get faster access to treatment. • Release Your Patient or Member Experience as an App
Care Gaps		Identify and track gaps in a person's care where the care team can make a difference. • Enable Care Teams to Track Gaps

Streamline Member Processes

Benefits and Eligibility Verification		Help caregivers and patients reduce the time and effort it takes to find out what coverage is available under each patient's health benefits. • Enable Users to Verify Patient Benefits
Medication Management		Gain a single view of a member's medications to streamline administration. • Medication Management
Intelligent Appointment Management		Simplify agent-assisted scheduling and empower patients to schedule their own appointments. • Support Intelligent Document Automation
Remote Monitoring		Gather personalized care metric targets for each patient, making it easy to correlate care metrics and identify healthcare gaps. • Remote Monitoring Patients
Provider Relationship Management		Let patients, members, and agents search for healthcare providers by specialty, location, and other factors. • Help Patients to Connect with Providers
Referral Management		Help users monitor referrals from submission to closure. • Support and Manage Provider Referrals
Utilization Management		Streamline care request reviews and evaluate reviews for medical necessity. • Support and Manage Care Requests with Utilization Management
Intelligent Document Automation		Streamline intake and referral conversion on a digital, HIPAA-compliant workspace • Support Intelligent Document Automation

Extend Health Cloud for Payers

 **Note:** These features require separate licenses.

Analytics for Healthcare		Get a complete view of your data to help you deliver connected, one-to-one patient or member care • Provide Patient and Member Insights with Analytics
Provider Network Management		Attract and retain top talent and decrease provider onboarding time. • Set Up and Manage Your Network of Providers
Campaigns and Journeys		Enroll members into journeys and campaigns with Marketing Cloud Distributed Marketing integrated into Health Cloud • Manage Campaigns • Build Relationships and Personalized Journeys with Campaigns • Campaigns in Marketing Cloud
Salesforce Scheduler		Let members self-schedule non-physician appointments and equipment reservations • Appointment Booking with Salesforce Scheduler
		• Set Up Salesforce Scheduler
Intelligent Form Reader with Amazon Textract		Help increase accuracy and efficiency by automatically extracting text from faxed documents • Intelligent Form Reader
Field Service Lightning		Empower field care providers with mobile patient management • Field Service Basics
		• Field Service

 **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.

Health Cloud in the Pharmaceuticals and Life Sciences Sector

Engage with patients who participate in your patient services or therapeutic support programs. Improve program adherence, decrease dropout rates, and reduce overall clinical time by managing every step of a patient's health journey.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Health Cloud for Pharmaceuticals and Life Sciences

Get Oriented



Get to know Health Cloud for Pharmaceuticals and Life Sciences.

- [Health Cloud Specialist Superbadge](#)
- [Health Cloud Data Models](#)
- [Consent Management for Health Cloud](#)



- [Accelerate R&D Innovation](#)



- [Program Management](#)

Salesforce Shield



Protect patient data with Salesforce Shield.

- [Salesforce Shield Learning Map](#)

Data Models



Explore the Health Cloud data models and objects that support life sciences.

- [Program Management](#)
- [Care Management](#)
- [Social Determinants](#)
- [Health Cloud Data Model](#)

Optimize the Health Cloud Console for Patient Management

Health Cloud Console		Customize the console to reflect the way you manage patients. • Customize the Health Cloud Console
Patient or Member Card		Give care coordinators and managers with the basic information they need about a patient or member. • Display Information About a Patient or Member
Care Programs		Use care programs for patient outreach, access to medications, access to care, financial assistance, or remote monitoring. • Use Care Programs to Track and Manage Cohorts of Patients and Members
Householding Map		Get a comprehensive view of the patients' household relationships. • Manage a Patient or Member's Relationships
Timelines and Life Events		Track your patients' health with timeline and life events. • Monitor Health Events Over Time • Manage Life Events
Social Determinants of Health		Capture critical social and environmental factors like homelessness and low income as barriers in the care of your patients or members. • Set Up Social Determinants to Assist High-Risk Patients and Members
Surveys and Assessments		Gather information that helps you manage your patients' or members' health more efficiently. • Provide Assessments for Gathering Information
		• Get Started with Salesforce Surveys
App Templates for Patients and Members		Create your own dedicated, branded app that helps people stick with goals and get faster access to treatment. • Release Your Patient or Member Experience as an App

Streamline Patient Processes

Benefits and Eligibility Verification		Help caregivers and patients reduce the time and effort it takes to find out what coverage is available under each patient's health benefits. • Enable Users to Verify Patient Benefits
Consent Management		Associate consent documents with a care program. • Consent Management for Health Cloud

Intelligent Appointment Management		Simplify agent-assisted scheduling and empower patients to schedule their own appointments. • Intelligent Appointment Management
Intelligent Document Automation		Streamline intake and referral conversion on a digital, HIPAA-compliant workspace. • Support Intelligent Document Automation

Extend Health Cloud for Pharmaceuticals and Life Sciences

 **Note:** These features require separate licenses.

Analytics for Healthcare		Get a complete view of your data to help you deliver connected, one-to-one patient or member care. • Provide Patient and Member Insights with Analytics
Campaigns and Journeys		Enroll members into journeys and campaigns with Marketing Cloud Distributed Marketing integrated into Health Cloud. • Manage Campaigns • Build Relationships and Personalized Journeys with Campaigns • Campaigns in Marketing Cloud
Intelligent Form Reader with Amazon Textract		Help increase accuracy and efficiency by automatically extracting text from faxed documents. • Intelligent Form Reader
Salesforce Scheduler		Let members self-schedule non-physician appointments and equipment reservations. • Appointment Booking with Salesforce Scheduler
		• Set Up Salesforce Scheduler

 **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.

Health Cloud in the Provider Sector

Delivering outstanding patient care means more than just managing patient information and healthcare events. It's about creating a strong, collaborative relationship between your care team and the patients they provide care for. Health Cloud gives care coordinators a consolidated view of critical patient records, access to a patient's care team, and additional tools to improve healthcare outcomes. With a complete view of the patient, your team now has easy access to the right patient information including current conditions and medications, appointment history, social determinants, and communication preferences.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Health Cloud for Providers

Get Oriented



Get to know Health Cloud for Providers.

- [Care Coordination Basics](#)
- [Health Cloud Specialist Superbadge](#)
- [Health Cloud Data Models](#)

Salesforce Shield



Protect patient data with Salesforce Shield.

- [Salesforce Shield Learning Map](#)

Data Models



Explore the Health Cloud data models and objects that support providers.

- [Care Management](#)
- [Clinical Data Model](#)
- [Provider Network Management](#)
- [Electronic Health Records](#)
- [Social Determinants](#)
- [Health Cloud Data Model](#)

Optimize the Health Cloud Console for Patient Management

Health Cloud Console		Customize the console to reflect the way you manage patients. • Customize the Health Cloud Console
Care Plans		Create customized care plans to help members and patients achieve better outcomes. • Manage Patient or Member Care to Improve Outcomes
Patient or Member Card		Give care coordinators and managers with the basic information they need about a patient or member. • Display Information About a Patient or Member
Care Programs		Use care programs for patient outreach, access to medications, access to care, financial assistance, or remote monitoring. • Use Care Programs to Track and Manage Cohorts of Patients and Members
Householding Map		Get a comprehensive view of the patients' household relationships. • Manage a Patient or Member's Relationships
Timelines and Life Events		Track your patients' health with timeline and life events. • Monitor Health Events Over Time • Manage Life Events
Social Determinants of Health		Capture critical social and environmental factors like homelessness and low income as barriers in the care of your patients or members. • Set Up Social Determinants to Assist High-Risk Patients and Members
Surveys and Assessments		Gather information that helps you manage your patients' or members' health more efficiently. • Provide Assessments for Gathering Information
		• Get Started with Salesforce Surveys
App Templates for Patients and Members		Create your own dedicated, branded app that helps people stick with goals and get faster access to treatment. • Release Your Patient or Member Experience as an App
Care Gaps		Identify and track gaps in a person's care where the care team can make a difference. • Enable Care Teams to Track Gaps

Streamline Patient Processes

Benefits and Eligibility Verification		Help caregivers and patients reduce the time and effort it takes to find out what coverage is available under each patient's health benefits. • Enable Users to Verify Patient Benefits
Medication Management		Gain a single view of patient or member medications to streamline administration. • Medication Management
Intelligent Appointment Management		Simplify agent-assisted scheduling and empower patients to schedule their own appointments from anywhere. • Intelligent Appointment Management
Intelligent Document Automation		Streamline intake and referral conversion on a digital, HIPAA-compliant workspace. • Support Intelligent Document Automation
Provider Relationship Management		Let patients, members, and agents search for healthcare providers by specialty, location, and other factors. • Help Patients to Connect with Providers
Referral Management		Help users monitor referrals from submission to closure. • Support and Manage Provider Referrals

Analyze Patient Data

CRM Analytics for Health Cloud - Risk Stratification		Identify and manage high-risk patients. • Set Up CRM Analytics for Health Cloud: Risk Stratification

Extend Health Cloud for Providers

 **Note:** These features require separate licenses.

Analytics for Healthcare		Get a complete view of your data to help you deliver connected, one-to-one patient or member care. • Provide Patient and Member Insights with Analytics
Provider Network Management		Attract and retain top talent and decrease provider onboarding time. • Set Up and Manage Your Network of Providers
Salesforce Scheduler		Let members self-schedule non-physician appointments and equipment reservations. • Appointment Booking with Salesforce Scheduler

	 • Set Up Salesforce Scheduler
Campaigns and Journeys	 Enroll members into journeys and campaigns with Marketing Cloud Distributed Marketing integrated into Health Cloud. • Manage Campaigns • Build Relationships and Personalized Journeys with Campaigns • Campaigns in Marketing Cloud
Intelligent Form Reader with Amazon Textract	 Help increase accuracy and efficiency by automatically extracting text from faxed documents. • Intelligent Form Reader
Field Service Lightning	 Empower field care providers with mobile patient management. • Field Service Basics
	 • Field Service



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.

Create a Health Cloud Trial Org

Sign up for a trial to get hands on with a comprehensive, fully-configured Health Cloud org.



Note: Trial orgs are intended for proof of concept and guided self-exploration. Trial orgs expire in 30 days.

1. Go to one of the trial org signup pages:

Learning Org

This fully-configured org includes rich sample data and lets you see all the Health Cloud features in action. Use these orgs to see what a comprehensive enablement looks like.

Pre-Release Org

This org provides a preview of upcoming release features. You can create these orgs only during sandbox preview windows. If the page doesn't include a sign-up form, the preview window is closed.

Base Org

This unconfigured org is a blank slate with only the necessary licenses and permissions. Use these orgs for quick proof of concept projects or general testing.

2. Enter your contact information.
3. Read and accept the service agreement.
4. Click **Start My Free Trial**.

Look for an email with your login credentials.

Learn About the Health Cloud Data Models

Before you start with managed packages and permission sets, take a deep breath. Health Cloud offers a multitude of capabilities and it's easy to get lost in them. As our first step, let's examine the structure of Health Cloud and find the data models that are most relevant to you.

Health Cloud is a powerful CRM tool for supporting providers, payers, pharma, and med tech companies. Built on the Salesforce platform, some Health Cloud objects, APIs, and other capabilities are built directly into Salesforce. Health Cloud also expands on Salesforce objects such as cases, leads, and campaigns to help manage patients and members. But Health Cloud is more than just an extension of core Salesforce objects.

Health Cloud offers a managed package that brings together best practices and successful setup processes from healthcare and life sciences directly into your Salesforce org so that you don't have to manually configure them. The Health Cloud managed package also gives you access to additional objects, Lightning components, and Apex triggers. Additionally, Health Cloud offers multiple optional add-on packages for more specific purposes like claims management or patient referral. Most of these add-on packages are unmanaged, and they can help you expand Health Cloud's capabilities. For example with Care Request Extensions, Health Cloud provides Lightning components and flows, which can be customized by users to suit their requirements.

Health Cloud also offers unique data models, user interface, and processes specific to healthcare. A data model consists of the objects and the fields that are used in Salesforce records. Health Cloud-specific data models offer standard and custom objects and fields that support specific healthcare concerns. For example, the Benefits Verification data model has objects and fields that help patients, providers, and payers confirm their benefits coverage and eligibility.

To help your company navigate the world of healthcare with ease, Health Cloud offers clinical and insurance data models, social determinants of health, and so on. If you're part of a payer organization, you could be interested in learning about the Health Insurance data model or the Provider Network Management data model. Based on your role, find the data model that is most helpful to your work.

Data Models	Roles
Benefits Verification	Providers, Payers: Contact Center Agents, Front Desk Staff, Benefits Processors, Patients Life Sciences: Field Case Managers, Patient Services Agents
Care Management	Providers: Care Coordinators
Claims	Payers: Member Services, Agent Care Managers, Utilization Management Nurses
Clinical	Providers: Care Coordinators, Case Managers, Social Workers, Nurses Payers: Call Center Agents or Service Agents, Intake Specialists, Office Admins Life Sciences: Pharmacists
Code Sets for Diagnosis and Procedure	Providers: Care Coordinators, Case Managers, Social Workers, Nurses Payers: Service Agents, Intake Specialists Life Sciences: Pharmacists
Electronic Health Records	Providers: Care Coordinators, Case Managers, Social Workers, Nurses Payers: Service Agents, Intake Specialists Life Sciences: Pharmacists

Data Models	Roles
Health Insurance	Payers: Call Center Agents (Intake), Service Agents, Utilization Management Nurses, Payer Medical Directors, Payer Clinicians
Home Health Care	Providers: Schedulers, Caregivers, Clinical Managers (Home Care Aides), Care Coordinators, Intake Coordinators Payers: Authorizations Units
Intelligent Appointment Management	Providers: Care Coordinators, Assistant Care Coordinators, or External Care Coordinators Payers: Schedulers, Call Center Agents, Referral Coordinators
Intelligent Sales	Med Tech: Admins, Sales Reps, Warehouse Managers
Life Sciences Program Management	Providers: Care Coordinators, Case Managers Life Sciences: Program Managers, Admins, Patient or Member Call Center Reps, Patient Services Executives
Provider Network Management	Payers: Payer Marketing Specialists, Provider Relationship Managers, Physician Liaisons, Payer Network Specialists, Payer Credentialing Specialists, Payer Contracting Managers, Admins, Network Managers Providers: Provider Business Analysts, Office Managers, Physicians, Provider Managers, Admins, Hospital Admins
Remote Monitoring and Device Registration	Providers: Care Coordinators, Caregivers Med Tech: Field Care Managers, Patient Support Reps Developer Admins, Admins, Rising-Risk Health Consumers
Social Determinants	Payers: Call Center Staff, Case Managers, Care Coordinators Providers: Physicians, Case Managers
Utilization Management	Providers: Care Coordinators, Providers Payers: Call Center Agents (Intake), Service Agents, Utilization Management Nurses, Payer Medical Directors, Payer Clinicians

Health Cloud Sales and Commercial Excellence

Health Cloud Sales and Commercial Excellence helps teams better engage with their customers by streamlining the end-to-end process, from lead generation to fulfilling orders. Accurate forecasts ensure transparency across your sales and commercial units. Explore a trial org and then learn about what's included, what setup we recommend, and how to get ready for your implementation.



 Get Oriented What is Health Cloud Sales and Commercial Excellence? Video: Watch a Demo Create a Health Cloud Trial Org Choose the Right Edition: Health Cloud vs Health Cloud for Life Sciences	 Dive In: Learn About Recommended Core Features Leverage Sales Agreements to Manage Your Run-Rate Business Plan Ahead with Account-Based and Advanced Forecasting Manage Field Inventories, Surgical Cases, and Cycle Counts with Intelligent Sales	 Go Deeper: Learn About Features for Specific Business Needs Automate Processes with OmniStudio Automate Complex Decision-Making Solutions Using Business Rules Engine Manage Important Documents with Intelligent Document Automation
 Extend Further: Learn About Additional Capabilities & Add-Ons Gain Insights into Account Performance, Product, and Pricing with Analytics for Healthcare Manage Your Commercial Edge with Rebate Management	 Get Ready for Your Implementation Quick Start List for a Successful Health Cloud Implementation Assign Permission Sets for Intelligent Sales Extend Field Inventory Processes with Sample Flows	 Know Your Resources & Get Help Trailhead: Surgical Case Visit and Field Inventory Management Using Health Cloud Health Cloud Developer Guide Trailblazer Community: Salesforce Health Cloud Accelerators Catalog: Find Expert Coaching

 **Tip:** When you're ready to set up things, go to the [Guidance Center](#) for personalized help right inside the app. Then, look for the **Explore Sales and Commercial Excellence** section. If you don't see this section, click **View More**.

Health Cloud for Life Sciences

Health Cloud for Life Sciences is a leaner offering of Health Cloud that focuses on the key business use cases of the Life Sciences space.

With Health Cloud for Life Sciences, you can streamline your operations with features that improve access to therapy, provider engagement, commercial excellence, and more. You also get a set of components that you can use to support your own unique business requirements.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions

What You Get

Here are the features you get with Health Cloud for Life Sciences.

Access to Therapy

Advanced Therapy Management on page 300:

- Sites and available capacity configuration
- Multi-step and multi-site scheduling
- Rescheduling and cancellation support

Care Program Management on page 477:

- Streamlined patient support programs
- Effective program scaling
- Improved digital patient engagement

Provider Engagement

Intelligent Sales on page 557:

- Visit scheduling and execution
- Field inventory management
- Cycle counts scheduling and execution
- Product shortfalls and revenue impact projections
- List of expiring products

Commercial Excellence

Sales Agreements on page 556:

- Sales agreement terms
- Volume and revenue forecasts
- Actual volumes and revenues
- Agreement compliance

Account Manager Targets:

- Set targets for currency or non-currency measure types
- Assign targets portions to direct reports
- Distribute targets by product, account, and time period

Sales Forecasts:

- Predictive market forecasts
- Real-time collaboration
- Target setting

Advanced Account Forecasting:

- Forecast management for global enterprises
- Real-time insights with multiple dimensions
- Collaboration with internal and external teams

Components

Enhanced Timeline:

- Chronological view of events

Intelligent Document Automation on page 329:

- Simplified document management
- Reduced manual data entry
- Automatic queue routing for forms

Digital Process Automation (*Standard Health Cloud limits apply*):

- [Omnistudio](#)
- [Business Rules Engine](#)
- [Data Processing Engine](#)

Life Events and Business Milestones on page 83:

- View important milestones that a business has achieved
- View the major events in a patient's life
- Configure different event types
- Hide sensitive events as necessary
- Use events and milestones to engage better with customers and patients

Assessments and the Discovery Framework on page 398:

- Build complex questionnaires to gather comprehensive data

Health Cloud for Insurance

Design member and provider claim journeys with integrated document management to automate claim intake and reduce administrative costs with digital self-service claim tools. Manage provider claim denials, appeals, and grievances in a compliant and intuitive way using a comprehensive claims data model integrated with service codes and benefits structures.

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.

SEE ALSO:

[Developer Guide: Insurance Objects](#)

[Developer Guide: Insurance Objects](#)

Types of People in Health Cloud

At its core, healthcare is focused on patients or members. But every patient or member is surrounded by a team of people who support them. Health Cloud provides a 360-degree view of the patient or member that includes their primary care physician, additional care team members such as physical therapists and family members, and even medical supply companies.

There are two ways to model people in Health Cloud: the person account model and the traditional account-contact model.

Person account model

A person account record combines fields from a contact and an account to represent a person. In Health Cloud you see one consolidated record with information from the account and contact records. But behind the scenes, it's actually fields from the

Account and Contact objects that are linked, representing a single person. In this model, a person doesn't have to be associated with an organization.

Traditional account-contact model

If you've worked with any other cloud in Salesforce, you're familiar with the traditional account-contact model. In this model, accounts represent organizations, and contacts represent people. A contact exists only in relation to an account. For example, Eric Pérez is a sales rep at StayHealthy MedTech Company. His contact record is related to the business account for StayHealthy MedTech Company.

Let's look at Charles Green. Charles is suffering from flu, and has been in home isolation with his wife, Shawna Green, who's also his caregiver. His primary care physician, Dr. Rukmini Mondal, has been monitoring his health. Let's see how each of these people is represented in Health Cloud.

Patients or Members

A patient or member is represented with a person account. Health Cloud doesn't represent patients as contacts. Instead, patients or members are shown as person accounts representing a single person. So Charles Green, our patient in Health Cloud, has a person account. His account and contact information are combined and presented as a single record.



Note: In Health Cloud, always model your patients or members as person accounts.

Providers

When you model a provider, you must represent them both as a provider and as an organization or person. To represent your providers in terms of what they do, you use the Healthcare Provider object. To represent providers as organizations or people, you use the Account or Contact objects as needed.



Note: Use business accounts for organizations, and either person accounts or contacts for people. We recommend using person accounts over contacts.

- To represent Dr. Rukmini Mondal, we create a Person Account or Contact record that represents the person Rukmini Mondal and a Healthcare Provider record that represents the doctor Rukmini Mondal. Then we reference her Person Account or Contact record in her Healthcare Provider record.



Note: If the person Rukmini Mondal is modeled as a person account, use the Account field in Healthcare Provider. If she's modeled as a contact, use the Practitioner field instead.

- To represent the StayHealthy organization, create a Business Account record and a Healthcare Provider record for it. Then reference the business account record in the Healthcare Provider record using its Account field.
- Local branches or facilities of providers also need Healthcare Facility records that reference a business account for that specific branch or facility. For instance, to represent the Santa Fe branch of StayHealthy, create a Business Account record, a Healthcare Provider record, and a Healthcare Facility record for the Santa Fe branch. Reference the Business Account record from both the Healthcare Provider and Healthcare Facility records. You can connect the business account of the local branch to the business account of the parent organization using the Parent Account field on the local branch's account record.
- To represent Dr. Rukmini Mondal working at the StayHealthy branch at Santa Fe, create a Healthcare Practitioner Facility record that references Rukmini's Healthcare Provider record, the Santa Fe branch's Healthcare Facility record, and the Santa Fe branch's business account record.

Everyone else in Health Cloud

For all other people represented in the org, such as caregivers, we recommend that you use person accounts. This is because it's important to plan ahead while structuring people entities. For example, what if a caregiver like Shawna Green, who has been caring for Charles Green, catches the flu and becomes a patient herself? When caregivers are already set up as person accounts, it's easy to change or add roles.

SEE ALSO:

[Salesforce Help: Enable Person Accounts](#)

Quick Start List for a Successful Health Cloud Implementation

Health Cloud implementation involves managed packages, person accounts, Chatter settings, data privacy settings, permission sets and licenses, and more. To help you get through the setup without breaking a sweat, here's a list of tasks to complete to ensure a successful implementation.

First, let's meet Maya Ray, an admin at StayHealthy Foundation. Maya is trying to get Health Cloud up and running in her Salesforce org. She has the *Health Cloud Administration Guide* open in one tab and Trailhead open in another, but she's still confused. Does she have to install the Health Cloud managed package first or assign the permission sets?

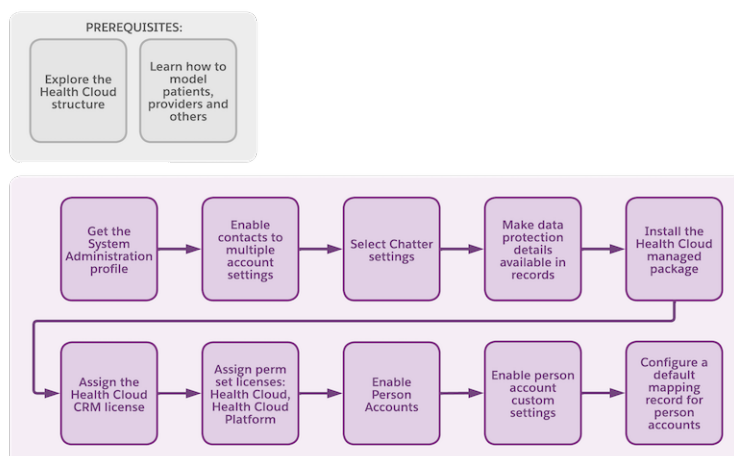
Maya wants to eliminate errors and minimize duplicate work (and the added stress that comes with it), and we get that. Setting up a new product from scratch can be stressful and there's room for error. That's why it's important to understand exactly which tasks to complete and in what order. So for a smooth implementation experience, we've provided a list of tasks in their order of implementation, along with a workflow diagram.



Important: For a successful Health Cloud implementation, Maya is required to learn about the structure of Health Cloud, including the data models and unmanaged packages. We also recommend that Maya learns about how patients, providers, and so on, are modeled in Health Cloud.

After Maya goes to Setup and ensures that she's assigned herself the System Admin profile, she's ready to roll.

1. [Enable Contacts to Multiple Accounts Settings.](#)
2. [Set up Chatter.](#)
3. [Make Data Protection Details Available in Records](#)
4. [Install the Health Cloud Managed Package.](#)
5. Assign the Health Cloud CRM license.
6. [Assign the Health Cloud permission set license and the Health Cloud Platform permission set license.](#)
7. [Enable Person Accounts](#)
8. [Update the Person Account setting to Enable.](#)
9. [Set up a mapping record for Person Accounts.](#)



After Maya completes all of these tasks, she is ready to start customizing her Health Cloud org.

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: The Business Rules Engine is available to help you automate complex lookups and calculations in Health Cloud. Use Business Rules Engine components to design automated business solutions in a workflow created using any tool. See [Business Rules Engine](#) for detailed information.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

[Enable Contacts to Relate to Multiple Accounts](#)

Relate a single contact to multiple accounts so you can easily track the relationships between people and organizations. For example, a care provider represented as a contact can be related to an organization's primary account as well as to a patient's person account record. Enabling Contacts to Multiple Accounts is required to use person accounts in Health Cloud.

[Enable Chatter Settings](#)

Chatter helps Health Cloud users collaborate in real time with Salesforce. It's a fast, simple tool that enables users to talk to each other, work together, and share information. Suppose Charles Green's care coordinator, April Guthman, wants to post updates about his flu diagnosis for his therapist. Chatter helps her do so with a few clicks.

[Make Data Protection Details Available in Records](#)

To help maintain the privacy of your users' data, enable data protection details for lead, contact, and person account records.

[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.

[Configure Custom Record Types for Individuals](#)

Health Cloud gives you the flexibility to configure custom record types for individuals.

[Configure Custom Record Types for Groups](#)

To configure a custom household or group record type, you must first create a custom account record type using the Account (Household) Layout.

[Add Health Cloud Users](#)

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

[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, clone a standard profile and edit it to meet your organization's needs.

[Assign Health Cloud Permission Sets and Permission Set Licenses](#)

Permission sets enable users to use specific tools and settings according to their user license. With permission set licenses, you can give users access to features beyond those included in their basic user licenses. To use Health Cloud users need the Health Cloud permission set license and the Health Cloud Platform permission set license.

[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.

[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.

[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.

[Set Up Person Accounts to Represent Health Cloud Members and Patients](#)

Person accounts store information about specific 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, person accounts differ from business accounts and contacts in certain key areas, and have unique considerations.

[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 availing Health Cloud's full functionality.

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

[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.

[Display Detailed Error Messages to Users](#)

Expedite debugging for your users with detailed error messages that provide insight into field-level security restrictions.

[Convert Leads to Patients](#)

Your company can use existing Salesforce Lead records to create the Patient records that are used in Health Cloud.

Enable Contacts to Relate to Multiple Accounts

Relate a single contact to multiple accounts so you can easily track the relationships between people and organizations. For example, a care provider represented as a contact can be related to an organization's primary account as well as to a patient's person account record. Enabling Contacts to Multiple Accounts is required to use person accounts in Health Cloud.

Since Health Cloud uses person accounts to represent patients, you must enable the setting that allows a contact to be related to multiple accounts. By enabling the contacts to be shared with multiple accounts, you ensure that person accounts are available to use in your org.

1. From Setup, in the Quick Find box, enter *Account Settings*, and then select **Account Settings**.
2. Select **Edit**.
3. In the Contacts to Multiple Accounts Setting section of the page, select the checkbox for Allow users to relate a contact to multiple accounts.
4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Enable Chatter Settings

Chatter helps Health Cloud users collaborate in real time with Salesforce. It's a fast, simple tool that enables users to talk to each other, work together, and share information. Suppose Charles Green's care coordinator, April Guthman, wants to post updates about his flu diagnosis for his therapist. Chatter helps her do so with a few clicks.

In Health Cloud, Chatter supports the communications necessary for teams to give patients the best care possible. A Chatter message can be in the form of a post for a specific patient. Or, it can be a question to the care coordinator's team related to a procedure. Alternatively, it can even be a poll to gather information. So, verify that Chatter is enabled in your org.

1. From Setup, in the Quick Find box, enter *Chatter* and then select **Chatter Settings**.
2. Verify that the Enable checkbox is selected for Chatter Settings.
3. If the checkbox isn't selected, click **Edit** and select the checkbox.



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

4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Make Data Protection Details Available in Records

To help maintain the privacy of your users' data, enable data protection details for lead, contact, and person account records.

1. From Setup, in the Quick Find box, enter *Data Protection and Privacy*, and then select **Data Protection and Privacy**.
2. Select **Edit**.
3. Select **Make data protection details available in records**.
4. Save your changes.



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

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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.

Before installing the Health Cloud packages:

- [Enable Contacts to Multiple Accounts Settings](#)
- [Enable Chatter](#)
- Review the [Considerations for Health Cloud Installation](#)

Ensure that you're logged into the Salesforce org where you want to install the packages.

1. Install the Health Cloud managed package.
You can find the package download URL in the Terms and Conditions section of your contract.
2. Select the other Health Cloud packages you want to install.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Omnistudio

This managed package provides application components built on the Salesforce platform that you can download and install into your Health Cloud org. It's required for some Health Cloud features.

See the current [Omnistudio Release Summary](#) for detailed installation instructions.

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.

Installer URL: <http://industries.force.com/healthcloudwave>

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. Install this package only if you use the appointment scheduling flow with Salesforce Scheduler. This installation requires a Salesforce Scheduler license.

Installer URL: <http://industries.force.com/healthcloudextensionerm>

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.

Installer URL: <http://industries.force.com/healthcloudextensionfieldservice>

Health Cloud App Template for Patients

This unmanaged package enables you to create a patient or member site and release it as an app.

Installer URL: <http://industries.force.com/healthcloudextensionpatientapp>

Health Cloud Care Request Extensions

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

Installer URL: <http://industries.force.com/healthcloudextensioncarerequest>

Health Cloud Claims

This unmanaged package delivers business processes for claims management.

Installer URL: <http://industries.force.com/healthcloudextensionclaims>

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.

Installer URL: <http://industries.force.com/healthcloudflow>

Health Cloud Reports for Patient Referral Management

This unmanaged package contains reports and a dashboard that monitor patient or member referrals in your org.

Installer URL: <http://industries.force.com/healthcloudextensionreferralmgmt>

Health Cloud Unmanaged Package Extension

This unmanaged package delivers the process that lets care coordinators convert Lead records into Patient records.

Installer URL: <http://industries.force.com/healthcloudextension>

3. Paste the URL for the package into your browser navigation bar, and press **Enter**.
4. Enter your Salesforce credentials.
5. Select the audience for the installation. For example, Install for Admins Only
6. Click **Install**.

Installation takes a while. You can safely leave this page, as you'll receive an email when installation is complete.

7. To verify that the package was installed, go to *Installed Packages* in Setup, and look for the name of the package.

SEE ALSO:

[Enable Field Service](#)
[Set Up CRM Analytics for Health Cloud](#)
[Enable Users to Import Leads as Patients](#)
[Enable Field Service](#)
[Set Up CRM Analytics for Health Cloud](#)
[Enable Users to Import Leads as Patients](#)

Considerations for Health Cloud Installation

Before you install the Health Cloud packages in your org, review these considerations.

- The managed package delivers the core of the Health Cloud capabilities. Install the Health Cloud managed package before the unmanaged packages.
- The managed package is automatically updated. Don't delete any part of the managed package after installing it. Deleting a part of the managed package can block automatic upgrades to future releases.
- The custom objects, components, classes, and triggers delivered in the 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 56, the Health Cloud custom object's API version is 55 and the standard Health Cloud object's API version is 56.
- When creating custom fields or objects, don't use the same API names as any packaged objects or fields. If you use the same names, the custom fields or objects can interfere with flows, processes, and triggers in Health Cloud.

SEE ALSO:

[Install Health Cloud Packages](#)

Configure Custom Record Types for Individuals

Health Cloud gives you the flexibility to configure custom record types for individuals.

Most Health Cloud features are designed to use person accounts to model patients, members, and practitioners. Organizations, such as hospitals or medical practices, are modeled as accounts. You can configure other custom record types if you need them for individuals or groups, based on the default record type provided by 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** to create the mapping record.
4. Enter *Person Account* as the label for the mapping record.



Note: The first label you enter must be *Person Account*. You can choose the names for all subsequent record types.

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Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

5. You must have at least one mapping record using this label. This mapping is used by Health Cloud to create records.
6. For **Individual Record Type Name**, enter a name for the record type. This field is only for administrator use. The name can be the same as the label.
7. In the **Account Record Type** field, enter the name of a valid person account record type that you want to use in this mapping. You can use the default person account record type or one that you've created.
8. (Optional) If you're using a Developer Edition org, enter the org namespace for your org (not the package namespace) in the **Record Type Namespace (Account)** field.



Note: If you aren't using a Developer Edition org, ensure that the **Record Type Namespace (Account)** field is blank.

9. Leave the **Contact Record Type** field blank. Person accounts don't use the contact record type.
10. Leave the **Record Type Namespace (Contact)** field blank.
11. Save your work.

SEE ALSO:

[Health Cloud Developer Guide: IndividualRecordTypeMapper](#)

Configure Custom Record Types for Groups

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, in the Quick Find box, enter *Custom Metadata* and, then select **Custom Metadata Types**.
2. Select **Group Record Type Mapper** and select **Manage Group Record Type Mappers**.
3. Complete the following information for the record type mapper.
 - a. Enter the Label for your custom group record type mapper.
 - b. The Group Record Type Mapper Name is filled automatically based on this label. Keep it the same as the label.
 - c. For Account Record Type, enter your custom account record type name.
 - d. Enter the account namespace for your custom record type's org.
4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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, in the Quick Find box, enter *Users*, and then select **Users**.
2. Click **New User** to add a single user or click **Add Multiple Users** to add up to 10 users at a time.
3. For multiple users, select multiple license types that are available in your organization. Under *User License*, select the user license to associate with the users you plan to create. The user license determines the available profiles.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- Specify the information for each user. Add a first name, last name, email, and choose the **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.

Note: You cannot enable Knowledge User for multiple users. Save your work and then edit each user to enable Knowledge User.

- To email a login name and temporary password to each new user, select **Generate new password and notify user immediately**.
For multiple users, select **Generate passwords and notify user via email**.
- To specify more details for the users that you've created, edit individual users as needed.
- Save your changes.

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, clone a standard profile 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.

- In Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
- Select a profile to configure.
- Add or enable the following items for the profile.
 - Page Layouts
 - Person Account: Patient layout
 - Case (Care Plan record type): Care Plan layout
 - Lead (Patient record type): Patient layout
 - Task (Care Plan Task record type): Health Task layout
 - Record Types
 - Account: Business, Household
 - Cases: CarePlan

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- Contacts: Business
- Lead: Patient
- Person Account: Person
- Tasks: Care Plan Task

4. Save your changes.

SEE ALSO:

[Salesforce Help: Assign Record Types to Profiles in the Original Profile User Interface](#)

[Salesforce Help: Enable and Disable the Translation Workbench](#)

[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 Sets and Permission Set Licenses

Permission sets enable users to use specific tools and settings according to their user license. With permission set licenses, you can give users access to features beyond those included in their basic user licenses. To use Health Cloud users need the Health Cloud permission set license and the Health Cloud Platform permission set license.

Health Cloud is built directly into the Salesforce platform, but some of its features are delivered as a managed package. Health Cloud needs both parts to do its job. That's why you need two permission set licenses: the Health Cloud Platform permission set license enables users to use the health-specific features built into core Salesforce, and the Health Cloud permission set license gives them access to the additional features delivered in the managed package.

There are other Health Cloud permission sets that grant access to specific Health Cloud objects that enables some optional functionality you may need.

1. Familiarize yourself with your list of available licenses and permissions and know what each does.

To see what permission set licenses are available, go to **Company Settings** in Setup and click **Company Information**.



Note: The permission sets available to you depend in part on which features are included in your Salesforce contract.

2. Assign the required permission set licenses to all your Health Cloud users.

- a. In the Permission Set License Assignments related list, select **Edit Assignments**, and then select **Enabled** for these permission set licenses:

Health Cloud

This permission set license provides access to standard and custom Salesforce objects that enables features delivered in the Health Cloud managed package.

Health Cloud Platform

This permission set license provides access to Health Cloud-related standard Salesforce objects for features that are built directly on the platform and aren't part of the managed package.

Health Cloud for Experience Cloud Site

This permission set license provides access to Health Cloud objects and features for site users.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To assign permission set licenses or permission sets:

- Manage Users

 **Note:** The Health Cloud for Experience Cloud Site permission set license is currently not available for Partner Community users.

 **Note:** Don't assign a Health Cloud permission set to Health Cloud Experience 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.

- a. In the Permission Set Assignments related list, select **Edit Assignments**, and then add the following permission sets to Enabled 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’s 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 Network Management data model. Clone this permission set to create your own version where you can provide your users with additional access. For the included objects, see [The Health Cloud Foundation Permission Set](#) on page 38.

Health Cloud Member Services

Assigns the Health Cloud Platform permission set license. Grants read-access to Health Insurance and Utilization Management records. Clone this permission set to create your own version and include write access. For the included objects, see [The Health Cloud Member Services Permission Set](#) on page 39.

Health Cloud Social Determinants

Grants read access to Health Cloud Social Determinants records. Clone this permission set to create your own version and include write access. For the included objects, see [The Health Cloud Social Determinants Permission Set](#) on page 40.

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 permission set to create your own version where you can provide your users with additional access. For the included objects, see [The Health Cloud Utilization Management Permission Set](#) on page 41.

Provider Network Management

Enables payer organizations to manage provider credentialing and recruiting. For the included objects, see [Provider Network Management Permission Set](#) on page 423.

CRM Analytics

Provides admins access to CRM Analytics for Health Cloud functionality. Clone this permission set to create your own version where you can provide your users with additional access.

Health Cloud ERM

Provides permissions for Health Cloud Emergency Response Management.

5. Save your changes.

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 isn't 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 doesn't 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: Permission Set Licenses](#)

[Salesforce Help: Permission Sets](#)

[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're also assigning the associated permission set license.

Before you assign or unassign Health Cloud Permission Set Licenses, make sure you have the following in place:

- 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 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 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 Settings > 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.

EDITIONS

Available in: Lightning
Experience

Available in: **Enterprise** and
Unlimited Editions with
Health Cloud

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.

SEE ALSO:

[Salesforce Help: Data Loader](#)

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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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: `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: `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: `Select Id, PermissionSetId, AssigneeId FROM PermissionSetAssignment WHERE PermissionSetId = 'YOUR_UNIQUE_PERMSET_ID'`.
Use your permission set Id in place of `YOUR_UNIQUE_PERMSET_ID`.
 - 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.

SEE ALSO:

[Salesforce Help: Data Loader](#)

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 Network 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 provides 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 Network Management data model.

The Health Cloud Foundation 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
- Identity Documents
- Locations
- Operating Hours
- Person Education

The Health Cloud Member Services Permission Set

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

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

Object	Access Type
Accounts	Read
Care Barrier Determinants	Read, Create, Edit, Delete
Care Barrier Types	Read, Create, Edit, Delete
Care Barriers	Read, Create, Edit, Delete
Care Determinant Types	Read, Create, Edit, Delete
Care Determinants	Read, Create, Edit, Delete
Care Diagnoses	Read
Care Intervention Types	Read, Create, Edit, Delete
Care Preauth Items	Read
Care Preauths	Read
Care Program Campaigns	Read
Care Program Eligibility Rules	Read
Care Program Enrollee Products	Read
Care Program Enrollees	Read
Care Program Enrollment Cards	Read
Care Program Goals	Read
Care Program Products	Read
Care Program Providers	Read
Care Program Team Members	Read
Care Programs	Read
Care Request Drugs	Read
Care Request Extensions	Read
Care Request Items	Read
Care Requests	Read
Cases	Read
Contacts	Read

Object	Access Type
Coverage Benefit Items	Read
Coverage Benefits	Read
Enrollment Eligibility Criteria	Read
Healthcare Diagnoses	Read
Healthcare Procedures	Read
Locations	Read
Member Plans	Read
Operating Hours	Read
Plan Benefit Items	Read
Plan Benefits	Read
Purchaser Plan Associations	Read
Purchaser Plans	Read

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.

Object	Access Type
Accounts	Read
Care Barrier Determinants	Read, Create, Edit, Delete
Care Barrier Types	Read, Create, Edit, Delete
Care Barriers	Read, Create, Edit, Delete
Care Determinant Types	Read, Create, Edit, Delete
Care Determinants	Read, Create, Edit, Delete
Care Intervention Types	Read, Create, Edit, Delete
Care Program Campaigns	Read
Care Program Eligibility Rules	Read
Care Program Enrollee Products	Read
Care Program Enrollees	Read
Care Program Enrollment Cards	Read

Object	Access Type
Care Program Goals	Read
Care Program Products	Read
Care Program Providers	Read
Care Program Team Members	Read
Care Programs	Read
Cases	Read
Contacts	Read
Enrollment Eligibility Criteria	Read
Healthcare Diagnoses	Read
Healthcare Procedures	Read
Locations	Read
Operating Hours	Read

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.

Object	Access Type
Accounts	Read
Care Barrier Determinants	Read, Create, Edit, Delete
Care Barrier Types	Read, Create, Edit, Delete
Care Barriers	Read, Create, Edit, Delete
Care Determinant Types	Read, Create, Edit, Delete
Care Determinants	Read, Create, Edit, Delete
Care Diagnoses	Read, Create, Edit
Care Intervention Types	Read, Create, Edit, Delete
Care Preauth Items	Read
Care Preauths	Read
Care Program Campaigns	Read
Care Program Eligibility Rules	Read

Object	Access Type
Care Program Enrollee Products	Read
Care Program Enrollees	Read
Care Program Enrollment Cards	Read
Care Program Goals	Read
Care Program Products	Read
Care Program Providers	Read
Care Program Team Members	Read
Care Programs	Read
Care Request Drugs	Read, Create, Edit
Care Request Extensions	Read, Create, Edit
Care Request Items	Read, Create, Edit
Care Request Reviewers	Read, Create, Edit
Care Requests	Read, Create, Edit
Cases	Read
Contacts	Read
Coverage Benefit Items	Read
Coverage Benefits	Read
Enrollment Eligibility Criteria	Read
Healthcare Diagnoses	Read
Healthcare Procedures	Read
Locations	Read
Member Plans	Read
Operating Hours	Read
Plan Benefit Items	Read
Plan Benefits	Read
Purchaser Plan Associations	Read
Purchaser Plans	Read

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.

Ask your Salesforce representative to make person accounts available in your organization.

1. From the object management settings of the following objects, go to **Fields & Relationships**.
2. For each of the field labels, select **Set Field-Level Security**.
3. To ensure the fields have Edit permission, check the boxes for **Visible** for the relevant profiles.

Object	Field Label
Accounts	- Account Name - Account Owner - Care Plan - Primary Contact - Source System - Source System ID
AccountContactRelationship	- End Date - Active - Roles - Start Date
Asset	
Cases	- Account Name - Case Origin - Contact Name - Description - Priority - Status - Subject - Type
Contacts	- Birthdate - Mailing Address - Name - Phone - Source System ID



Note: The Birth Date field is a custom formula field that reformats

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Field Label
	the date retrieved from <code>Birthdate</code> . Access is defined in the Health Cloud permission sets.
Tasks	• Comments • Due Date • Goal • Name • Priority • Problem • Public • Recurrence Interval • Related To • Repeat This Task • Status • Task Type • Task Record Type • Task Subtype

Anyone who adds external users who are contacts to a care team needs Edit access to the following fields on the User object.

Object	Field Label
User	• Alias • Email • Last Name • Nickname • Profile • Username • User License

4. 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`.
5. Save your work.

Set Up Person Accounts to Represent Health Cloud Members and Patients

Person accounts store information about specific 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, person accounts differ from business accounts and contacts in certain key areas, and have unique considerations.

[Enable Person Accounts for Use in Health Cloud](#)

Turn on person accounts so that you can use them to represent patients and members in your Health Cloud org.

[Turn on Person Accounts in Health Cloud](#)

After you enable person accounts in your org, update the Use Person Accounts setting so that you can use person accounts to represent patients and members in Health Cloud.

[Map Person Accounts in Health Cloud](#)

With person accounts enabled, configure a default mapping record to create patients or members 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 Patient Details Tab for Person Accounts \(In Classic\)](#)

Set up the patient details tab to help users find all the patient information they need at a glance.

SEE ALSO:

[Salesforce Help: Enable Person Accounts](#)

Enable Person Accounts for Use in Health Cloud

Turn on person accounts so that you can use them to represent patients and members in your Health Cloud org.



Note: After Person Accounts is enabled, it can't be disabled. We recommend that you create a sandbox to preview how person accounts affect your Salesforce org.

1. From Setup, in the Quick Find box, enter *Person Accounts*, and then select **Person Accounts**.
2. Go through the steps listed on the Setup page.
 - Acknowledge the org implications of enabling person accounts.
 - Make sure the account object has at least one record type.
 - Make sure user profiles that have read permission on accounts have read permission on contacts.
 - The organization-wide default sharing is set so that either Contact is **Controlled by Parent** or both Account and Contact are **Private**.
3. Turn on person accounts.

After Person Accounts is enabled, a person account record type is created. You can create additional record types for person account if needed.

Next, update the setting that enables you to use person accounts with Health Cloud. See [Turn On Person Accounts in Health Cloud](#) on page 46.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Turn on Person Accounts in Health Cloud

After you enable person accounts in your org, update the Use Person Accounts setting so that you can use person accounts to represent patients and members in Health Cloud.

 **Note:** Enable Person Accounts in your org before updating this setting.

Person accounts pull information from both Account and Contact fields (including first and last names, and email address) and present it as one record in Health Cloud. For example, Charles Green's person account appears as one record to his care coordinator in Health Cloud. However, it's technically stored in the database as an account and a contact.

1. From Setup, in the Quick Find box, enter *Custom Settings*, and then select **Custom Settings**.
2. In the list of custom settings, click **Manage** next to the *Use Person Account* custom settings.
3. Click **Edit** next to Use Person Account.
4. Select **Enable**.
5. Save your changes.

After person accounts are enabled, [assign them to profiles](#).

SEE ALSO:

[Enable Person Accounts](#)

[Assign Record Types and Page Layouts](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Map Person Accounts in Health Cloud

With person accounts enabled, configure a default mapping record to create patients or members in Health Cloud.

1. From Setup, in the Quick Find box, enter *Custom Metadata*, and 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. The Individual Record Type Mapper Name field is auto-populated. Keep it as is or add a custom name.
This field is for internal use only.
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. Alternatively, you can use the same value you entered for Label, that is, *Person Account*.
7. In the Record Type Namespace (Account) field, enter the namespace for your org.
8. Leave the Contact Record Type field blank, as person accounts don't use the contact record type..
9. Leave the Record Type Namespace (Contact) field blank.
10. In Lead Record Type, enter the name of the lead record type you want to map.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

11. For Record Type Namespace (Lead), enter your namespace.
12. Save your work.

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. If you're using Lightning Experience, from Setup, in the Quick Find box, enter *Person Account*, and then select **Person Account**. Next, scroll to the Page Layouts section.
If you're using Salesforce Classic, from Setup, in the Quick Find box, enter *Person Account*, and then select **Page Layouts**.
2. Click **New**.
3. Select an existing page layout from the dropdown.
4. Type a name for the new layout.
5. Click **Save**.
6. Add these fields to the layout:
 - Primary Contact
 - Individual Type
 - Source System
 - Source System ID
 - Medical Record Number
 - Birth Date
 - Gender
7. Assign the new layout to user profiles.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Customize the Patient Details Tab for Person Accounts (In Classic)

Set up the patient details tab to help users find all the patient information they need at a glance.

1. From Setup, in the Quick Find box, enter *Person Accounts*. In the search results, under Person Account, select **Page Layouts**.
2. Click **Edit** next to the page layout you created for person accounts in your org.
3. Click **Custom Console Components**.
4. Under Primary Tab Components, go to Left Sidebar.
5. In Type, select Visualforce.
6. In Component, search and select PatientProfile_Page.
7. Enter a value for Width.
8. Save your work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 availing Health Cloud's full functionality.

Platform Encryption

Platform Encryption helps you natively encrypt your most sensitive data at rest, enabling 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](#)

[Salesforce Help: Platform Encryption](#)

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

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 - Lightning Admin app.
2. On the Filter Criteria tab, select **All** in the View field and then select the name of the filter criterion for the list you're working with.
3. On the Highlights Panel of the filter criterion, 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.

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Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- Grant access to other users, groups, or roles, then save your changes.

Access Level	Org-Wide Result
Full Access	The user can view, edit, and delete the list.
Read/Write	Anyone with access to the Health Cloud console can use and edit the list.
Private	Only the user who created the list view can view, edit, or delete the patient or member list.
Public Read Only	Anyone with access to the Health Cloud console can use the list.

SEE ALSO:

[Salesforce Help: Sharing Settings](#)

[Salesforce Help: Sharing Settings](#)

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 specify the record type for storing patient records and other data.

See [IndividualRecordTypeMapper](#) in the *Health Cloud Developer Guide*.

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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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, in the Quick Find box, enter *Custom Metadata*, and then select **Custom Metadata Types**.
2. Click **Manage Records** next to **Health Cloud Setting**.
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.

SEE ALSO:

[Customize Care Team Roles](#)

[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.

Setting	Controls
Careplan_Role_Care_Coordinator	Label for Care Coordinator that appears throughout the app.
Careplan_Role_Patient	Label for Patient that appears throughout the app.
ConfigureCareTeamInNewCarePlan	Adds the care team section in the new care plan flow in Lightning Experience.
HcFeatureDriver	Defines whether a contact or account record appears for a patient or member in the Details tab of the console.
HcHelpTray	Reserved for internal use.
HcFieldSet_AddMember	Adds an external care team member.
HcFieldSet_CandidatePatientListView	Fields that appear on the list view for candidate patients.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Setting	Controls
HcFieldSet_GoalDefaultFieldSet	Fields that appear as part of care plan goals.
HcFieldSet_ProblemDefaultFieldSet	Fields that appear as part of care plan problems.
HcFieldSet_TaskListDefaultFieldSet	Columns that appear in the patient or member task list.
PatientCreateFlow_default	Patient creation job flow.
PatientCreateMappingGroup_default	Patient creation data mapping.

1. From Setup, in the Quick Find box, enter *Custom Metadata* and, then select **Custom Metadata Types**.
2. Click **Manage Records** next to **Health Cloud Setting**.
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 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 Setting 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're overriding.
7. To make the settings available, select the **Active** checkbox.
8. Save your changes.

Display Detailed Error Messages to Users

Expedite debugging for 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.

Convert Leads to Patients

Your company can use existing Salesforce Lead records to create the Patient records that are used in Health Cloud.

A lead record represents a person who isn't yet a patient in Health Cloud, but has shown interest by making an inquiry or requesting an appointment. When you convert a lead record to a patient, the converted patient record is always a person account. 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. If you have to enter a person, and you're not sure if they're a patient or not, enter them as a lead. You can qualify the lead as a patient and convert them into a person account.

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](#)

[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 don't overwrite the values of the mapped account and contact fields. For more details, see [Considerations for Converting Leads](#) in Salesforce Help.

1. From the object management settings for Leads, go to the **Fields & Relationships**, and then select **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

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- MedicalRecordNumber
- Number of Locations
- Primary
- Product Interest
- SIC Code
- Source System
- Source System ID

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 maps all lead record types to Person accounts. If your company uses lead record types for other purposes, you can use the Individual Record Type Mapper to ensure that those leads convert to your desired record types.

For example, suppose a company uses two Lead record types: Patient and Unaffiliated Provider. They want to convert Patient Lead record types to person account records, and Unaffiliated Provider record types to account records. Using the Individual Record Type Mapper, they create two mapping records.

- The Patient mapping record specifies *IndustriesPerson* as the Account and Contact record types.
- 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](#)

[Configure Custom Record Types for Individuals](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 the object management setting for Leads, go to **Search Layouts for Salesforce Classic**.
- 2. Select **Edit** from the dropdown next to `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. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with 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.

 **Note:** This process isn't compatible with custom fields on account that are marked as required. Before activating this process, review your custom account fields.

- 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.

Field	Description
Process Name	The name for your process, such as <i>Lead to Patient</i> . This name appears in the process management page, so consider naming your process so that you can differentiate it from other processes.
API Name	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, <code>API Name</code> can't be changed for the process.
Description	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.
The process starts when	Select the option to start this process when <code>A record changes</code> .

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create, edit, or view processes:

- Manage Flow
- AND
- View All Data

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 for executing the action.
 - d. Set the following conditions:

Field	Operator	Type	Value
Converted	Equals	Boolean	False
IsMarkedForPatientConversion	Equals	Boolean	True

- e. For Conditions, select *All of the conditions are met (AND)*.
- f. Click **Save**.

Process Builder - Lead to Patient

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Lead

NotConverted

TRUE → IMMEDIATE ACTIONS → STOP

FALSE → Add Criteria → IMMEDIATE ACTIONS → STOP

FALSE → STOP

Define Criteria for this Action Group

Criteria Name*
Not Converted

Criteria for Executing Actions*

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

Set Conditions

	Field*	Operator*	Type*	Value*
1	[Lead].IsConv...	Equals	Boolean	False
2	[Lead].health...	Equals	Boolean	True

+ Add Row

Conditions*

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

☐ Customize the logic

Advanced

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 Person Account*.
 - d. Select the *Lead to Individual Conversion Apex* class.

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

Field	Type	Value
leadIds	Field Reference	Lead ID

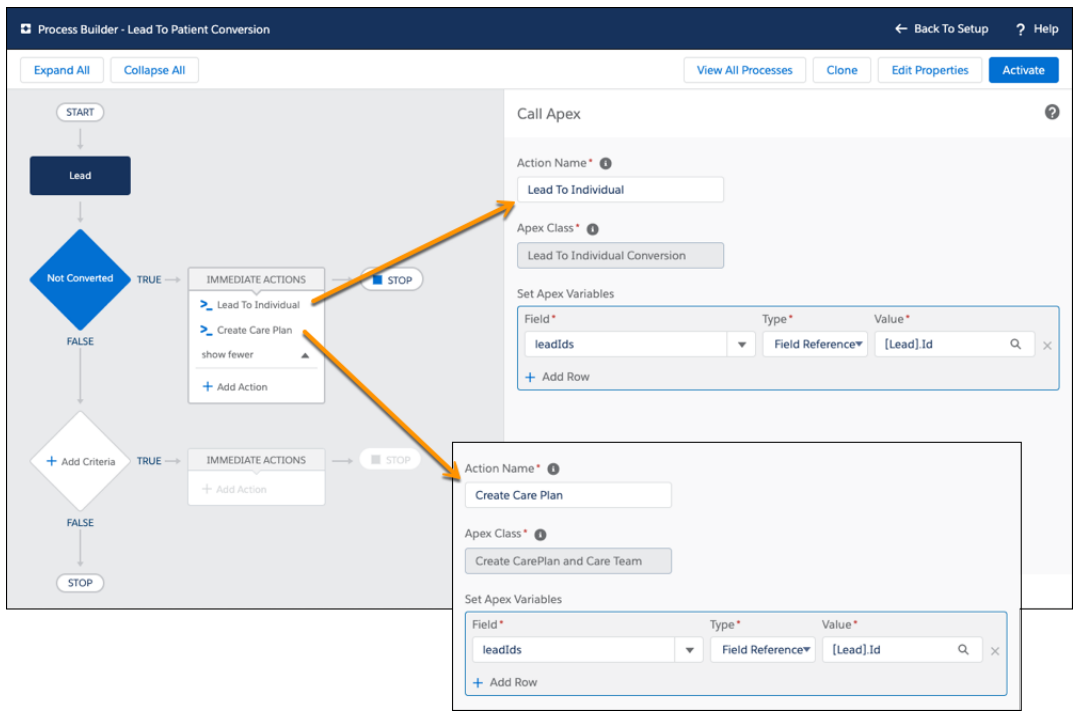
f. Click **Save**.

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

In the **Set Apex Variables** field, select the following.

Field	Type	Value
leadIds	Field Reference	Lead ID

h. Click **Save**.



8. 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.)

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 in Lightning Experience, go to App Launcher and select **Health Cloud - Lightning Admin**. To use the Health Cloud - Admin app in Salesforce Classic, 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.

Customize the Health Cloud Console

We've built the Health Cloud console to be a powerful tool that you can tailor to fit how your organization manages people and the activities related to their care. From translating labels, using your own timeline icons, or changing fields in the patient card, you have the flexibility to make the console work the way your users work. Although not every component of a managed package is customizable, you can edit the key components to make your instance of Health Cloud fit your users' needs.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About the Health Cloud Console

Get Oriented



Get to know the Health Cloud console.

- [Meet the Health Cloud Console](#)

Data Models



Explore the Health Cloud data models and objects that appear in the console.

- [Health Cloud Data Model](#)

Customize the Console

[Health Cloud in Lightning Experience](#)

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

[Customize Patient or Member Information](#)

Provide care coordinators and managers with important information 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 Patient or Member Lists](#)

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

[Customize the Create External Member Fields](#)

You can customize the fields that appear on the window 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 people 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 give care coordinators and patients a chronological view of health care events. This topic applies to legacy Timeline, not Enhanced Timeline.

[Manage Life Events](#)

Capture events and milestones in a patient's life with Life Events. You can create custom 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.

[Show Data Sources with Custom Icons](#)

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

[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.

[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.

Health Cloud in Lightning Experience

If you've been supporting Health Cloud use via the Salesforce Classic interface, delight your users by switching to the Lightning Experience. Use the Lightning Experience Transition Assistant as your control center for tackling the transition. From Setup in Salesforce Classic, click **Get Started** in the Transition 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Enable Lightning Experience

- ☐ [Enable Lightning Experience using the Lightning Experience Transition Assistant.](#)
- ☐ Turn on 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 Page

- ☐ In the Lightning App Builder, create a 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 **Activate**.
- ☐ Select these org and app defaults.
 - Org and App Defaults: Don't set this page as the org or app default.
 - Select Apps: Health Cloud - Lightning Console.
 - Selected Record Types: Person Account, Account, and any other record types you've configured using the Individual Record Type Mapper.
 - Selected Profiles: Any profiles that need access to the page.

Create Optional Lightning Pages

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

Lightning Page	Label	Page Layout	Component Name
Patients	Patients	One Column	Patient List View for Health Cloud
Today	Today	Main Column and Right Sidebar (for Chatter)	Today View for Health Cloud

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 Patient or Member Information

Provide care coordinators and managers with important information 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.

The screenshot displays the Patient Console interface. On the left, there are three main sections: 'Patient Navigation' (labeled 1), 'Patient Info' (labeled 2), and 'Patient Card' (labeled 3). The 'Patient Navigation' section has a search bar with 'OPEN NEW TAB' and a dropdown arrow. The 'Patient Info' section shows a patient profile for 'Charles Green' with birthdate 'January 1, 1984 (39 Years 3 Months)' and gender 'Gender not specified'. The 'Patient Card' section lists various medical record fields: AGENT/GUARDIAN/GUARANTOR, LANGUAGES, MEDICATIONS, IMMUNIZATIONS, ALLERGIES, LAST ENCOUNTER, and CAMPAIGNS. On the right, the 'Person Account' section for 'Charles Green' shows contact information: Email 'charles@green.com', Mobile '(415) 222-2345', and Age '39 Years'. Below this, the 'Details' tab is active, showing account information: Account Owner 'Admin User', Account Name 'Charles Green', Mobile '(415) 222-2345', Email 'charles@green.com', and Medical Record Number '123456789'. A section for 'Additional Information' is partially visible at the bottom right.

- The Patient Navigation menu (1) lets care coordinators navigate to the pages they need straight from the patient console.
- The Patient Info section (2) provides basic identification information about the patient, such as birthday and gender, and a thumbnail photo, if available.
- The Patient Card section (3) contains medical record fields for medications, allergies, and more.
- The Highlights panel (4) shows the information you want to highlight about the patient, such as contact information and medical record number.
- The Details pane (5) provides detailed information about the patient.

[Customize the Patient Navigation Component](#)

Make it quick and easy for care coordinators to get to the information they need. Specify which subtabs open, and in what order, when a care coordinator opens a patient record in the console.

[Display Information on the Patient Info Component](#)

The Patient Info component shows essential identification information about the person, including a thumbnail photo when one is available. This component isn't customizable.

[Customize Medical Data on the Patient Card Component](#)

The Patient Card helps care coordinators track a patient's condition at a glance by showing data from various objects that store the patient's health data. Remove unneeded fields from the Patient Card, or add fields from any object that has a reference to the patient record.

[Customize the Highlights Panel in the Health Cloud Console](#)

The Highlights panel contains information you want front and center, such as the patient's contact information, Medical Record Number, and the name of the care coordinator or other internal person who's responsible for tracking this patient. Customize the Highlights panel to show the information that's most pertinent for your organization.

[Customize the Patient Details Tab](#)

When you use a custom page layout to show Patient details, modify the associated page layout.

[Use the Advanced Patient Card](#)

The Advanced Patient Card leverages FlexCards from OmniStudio to deliver greater flexibility and ease of use. It lives in a component named *HealthCloudPtCardPatientCard* on your Account Layout page.

Customize the Patient Navigation Component

Make it quick and easy for care coordinators to get to the information they need. Specify which subtabs open, and in what order, when a care coordinator opens a patient record in the console.

The Patient Navigation component helps care coordinators jump to the pages they need without leaving the patient console. Customize the tab navigation list with the items your care coordinators most frequently use. Add a navigation item to one of the default menu categories, or add a category with new child navigation options.

EDITIONS

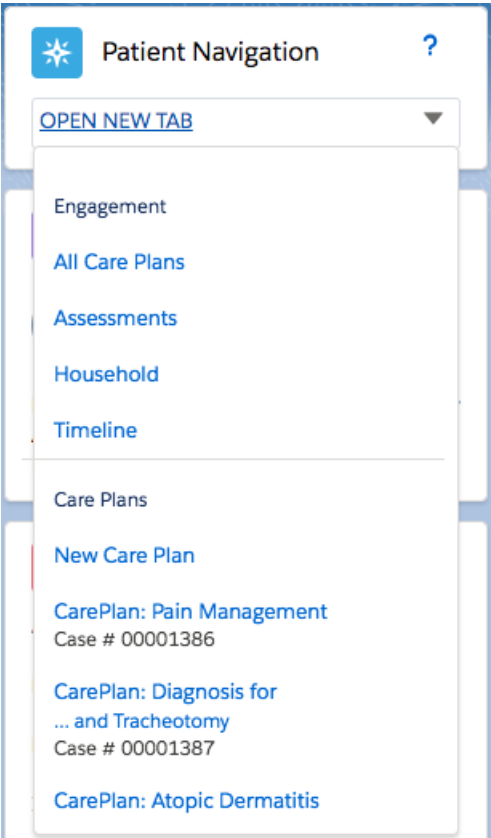
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To customize the patient card navigation menu:

- Customize Application



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.

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

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

Field	Details
Name	Name of the parent category that contains child menu navigation items. The category name is just a heading and isn’t a navigation link.
Category Label	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 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.
Category Name	Name of the parent category that contains child menu navigation items. The category name is just a heading and isn’t a navigation link.
Default Subtab	When selected, the related subtab appears by default in the Health Cloud console.

Field	Details
URL Parameter	(Optional) Add more URL parameters to the existing Visualforce page or URL to open the new tab. URL parameter format key=value,key2=value
Tab Type	Specify the type of tab for this page: <i>Primary</i> or <i>Subtab</i> . A primary tab is the main item to work on. A subtab is related to an item on a primary tab.
Subcategory Name	Name of the child category in the menu list. This text is the clickable link that opens the page or tab.
Subcategory Label	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.
Subtab Sort Order	Indicates the order in which this tab appears in the console when it's been selected as a default tab. 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.
Page Type	Content type of the new page. Specify <i>VFpage</i> , <i>URL</i> , or <i>LWC</i> . Make sure to add external URLs to the console's allowlist so that console users can access that domain.
URL	URL to access the page.

 **Important:** Restrict user access to custom settings and [grant permissions to custom settings using profiles or permission sets](#).

4. Save your changes.

 **Example:** The following example shows how to add a subtab entitled `All Medical Records` to a category named `Medical Records`. The example uses a custom VF page that displays all of a patient's medical records.

Field	Details
Name	All Medical Data.
Category Label	To use a localized or customized version of the Category Name field, enter it here. When there's a value in this field, it's used instead of the value in Category Name.
Category Name	Medical Record
Default Subtab	Enabled so that the subtab shows by default when the page loads
URL Parameter	Not necessary
Tab Type	<i>Subtab</i>

Field	Details
Subcategory Name	All Medical Records
Subcategory Label	To use a localized or customized version of the Subcategory Name field, enter it here. When there's a value in this field, it's used instead of the value in Subcategory Name.
Subtab Sort Order	7.0 This category displays in the seventh position on the menu.
Page Type	<i>VFpage</i> Make sure to add external URLs to the console's allowlist so that console users can access that domain.
URL	/apex/<VF page name>

Display Information on the Patient Info Component

The Patient Info component shows essential identification information about the person, including a thumbnail photo when one is available. This component isn't customizable.



The information on the Patient Info component comes from the patient's contact record and from Chatter.

Information	Source
Thumbnail photo	Chatter profile photo
Patient or member name	Contact Name
Date of birth and age	Contact Birthdate
Gender	Contact Gender

Customize Medical Data on the Patient Card Component

The Patient Card helps care coordinators track a patient's condition at a glance by showing data from various objects that store the patient's health data. Remove unneeded fields from the Patient Card, or add fields from any object that has a reference to the patient record.

 **Note:** The delivered fields on the Patient Card are based on objects in the EHR Data Model. If you're using the Clinical Data Model, add fields to the Patient Card based on the Clinical Data Model objects, then delete the delivered fields.

Watch a Demo:  [Add Essential Information to the Patient Card](#)

Add a Field to the Patient Card Component

To add a field to the Patient Card component, first create a formula field to filter which records to display, then create a Patient Card Configuration record.

Sample Override Filter Field Formulas for the Clinical Data Model

Use these formulas as is, or as a starting point to create your own formulas, to filter records in the Clinical Data Model.

Remove a Field from the Patient Card Component

To remove a field from the Patient Card component, delete the corresponding Patient Card Configuration record.

Automatically Refresh the Patient Card

It's critical to display the most recent clinical information about a patient on the Patient Card. Create an Apex trigger that refreshes the Patient Card whenever data is updated.

Add a Field to the Patient Card Component

To add a field to the Patient Card component, first create a formula field to filter which records to display, then create a Patient Card Configuration record.

 **Note:** The delivered fields in the Patient Card component, with the exception of Campaigns, show data from the EHR Data Model. When you upgrade to the Clinical Data Model, we recommend deleting the EHR Data Model records, then creating records based on Clinical Data Model objects.

1. Create a formula field to filter which records to display. You enter the name of this field in the Override Filter Field when you create a Patient Card Configuration record.
 - a. Create a checkbox formula field on the object you want to pull data from, for example, Health Condition.
 - b. Enter a formula that returns true or false. For example, to display records from the Health Condition object where the status is Active or Relapse, enter the formula `IF ( OR ( ( ISPICKVAL ( ConditionStatus , "Active" ) ) , ( ISPICKVAL ( ConditionStatus , "Relapse" ) ) ) , true, false)`.
 - c. Save your work.

 **Note:** See [Sample Override Filter Field Formulas for the Clinical Data Model](#) on page 68 for formula examples.

2. Create a Patient Card Configuration record, and enter the name of your formula field in the Override Filter Field.
 - a. From the App Launcher, find and select **Patient Card Configurations**.
 - b. Click **New**.
 - c. Enter values for each field:

Field Name	Required Value
Patient Card Configuration Name	The name for this record, for example, Health Conditions. This name doesn't appear on the Patient Card.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create, change, or delete fields:

- **Customize Application**

Field Name	Required Value
Object Name	The API name of the object to pull data from, for example, HealthCondition.
Field Name	The API name of the field on the object that has the data you want to display, for example, Severity.  Note: Entering a lookup field generates an error. To display the value of a lookup field, create a formula field that retrieves the value from the related object, then enter the name of the formula field here.
Friendly Field Name	The label to display on the Patient Card, for example, Conditions.
Sort Order	Indicates the vertical order of this field on the Patient Card. For example, if you want this field to be first, enter <code>1</code> .
Sort By	The API name of a field on the target object used to sort multiple records, for example, Severity.
Language	The locale setting for the Patient Card.
Active	Indicates whether the Patient Card Configuration is active.
Ascending	Indicates whether the values of this Patient Card field are sorted by ascending order.
Patient Account Lookup	The API name of the field in the object that references the patient record, for example, PatientId.
Limit	The maximum number of values displayed at a time in this field.
Override Filter Field	The API name of the formula field that determines which records are displayed on the Patient Card. Enter the name of the field you created earlier.

d. Save your work.

Considerations when adding fields:

- Consider specifying a field in Field Name that's required in the target object. Even if a record meets the criteria to appear on the patient card, it doesn't appear if the value of the field you specify for Field Name is null.
- The text you enter in Friendly Field Name isn't available for localization using the Translation Workbench. For this text to appear in another language, clone the configuration record and enter a new Friendly Field Name value using the language that 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.
- If you clone a configuration record to localize the label, modify the sort order for the new record. You can't have two records with the same assigned sort order, so create a different version number for the new record. For instance, if the English record has 4 in the Sort Order field, then assign the Spanish version 4.1.

- When you create two patient card configuration records from the same object, the fields are displayed next to each other regardless of the sort order.

SEE ALSO:

[Sample Formulas for Override Filter Fields for the Clinical Data Model](#)

[Build a Formula Field](#)

Sample Override Filter Field Formulas for the Clinical Data Model

Use these formulas as is, or as a starting point to create your own formulas, to filter records in the Clinical Data Model.

Object	Display Conditions	Formula
Person Name	Must not be the patient's primary name	IF(NOT(IsPrimary) , true, false)
Person Language	No conditions	true
Identifier	No conditions	true
Health Condition	Status must be Active or Relapse	IF(OR((ISPICKVAL(ConditionStatus , "Active")), (ISPICKVAL(ConditionStatus , "Relapse"))) , true, false)
Allergy Intolerance	Status must be Active	IF(ISPICKVAL(Status , "Active") , true, false)
Medication Statement	- Status must not be Not-taken, Unknown, or Entered-in-error - Must be from the last two years	IF((AND((NOT(OR((ISPICKVAL(Status , "Not-taken")), (ISPICKVAL(Status , "Unknown")), (ISPICKVAL(Status , "Entered-in-error"))))), ((YEAR(TODAY())) - (YEAR(DATEVALUE(StartDateTime)))) <= 2)) , true, false)
Patient Immunization	Status must be Completed	IF(ISPICKVAL(Status , "Completed") , true, false)
Clinical Encounter	Must have happened in the last two years	IF(((YEAR(TODAY())) - YEAR(DATEVALUE(StartDate))) <= 2), true, false)
Clinical Service Request	- Status must not be Entered-in-Error - Must have happened in the last two years	IF((AND((NOT(ISPICKVAL(Status , "Entered-in-Error")))), ((YEAR(TODAY())) - (

Object	Display Conditions	Formula
		<code>YEAR(DATEVALUE(StartDate))) <= 2))), true, false)</code>
Patient Medical Procedure	- Status must not be Entered in error - Must have happened in the last two years	<code>IF((AND((NOT(ISPICKVAL(Status , "Entered in error")), ((YEAR(TODAY())) - (YEAR(DATEVALUE(StartDate)))) <= 2))), true, false)</code>
Clinical Observation	Must have happened in the last two years	<code>IF(((YEAR(TODAY())) - YEAR(DATEVALUE(EffectiveDateTime))) <= 2), true, false)</code>
Diagnostic Summary	- Usage type must be Diagnostic Summary - Status must not be Entered-in-error - Must be issued in the last two years	<code>IF((AND((NOT(ISPICKVAL(Status , "Entered-in-error")), (ISPICKVAL(UsageType , "Diagnostic Summary")), ((YEAR(TODAY())) - (YEAR(DATEVALUE(IssuedDateTime)))) <= 2))), true, false)</code>
Clinical Alert	- Status must not be Entered-in-Error - Must be from the last two years	<code>IF((AND((NOT(ISPICKVAL(Status , "Entered-in-Error")), ((YEAR(TODAY())) - (YEAR(DATEVALUE(StartDate)))) <= 2))), true, false)</code>

SEE ALSO:

[Add a Field to the Patient Card Component](#)

Remove a Field from the Patient Card Component

To remove a field from the Patient Card component, delete the corresponding Patient Card Configuration record.

 **Note:** Deleting a Patient Card Configuration record frees up its sort order value for use in other records. If you inactivate the record instead of deleting it, the field is removed from the Patient Card component but you can't reuse the sort order.

1. From the App Launcher, find and select **Patient Card Configurations**.
2. Click the name of the record for the field you want to remove, for example, **Allergies**.
3. Click , then click **Delete**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create, change, or delete records:

- Customize Application

Automatically Refresh the Patient Card

It's critical to display the most recent clinical information about a patient on the Patient Card. Create an Apex trigger that refreshes the Patient Card whenever data is updated.

 **Note:** You can also refresh fields in the Patient Card by using the HC Platform Event as a component in a flow.

Create a trigger for each object that has fields to refresh on the Patient Card. This example creates a trigger that refreshes fields from the EHR Patient object.

1. Click , then click **Developer Console**.
2. In the Developer Console, click **File > New > Apex Trigger**.
3. Enter *EhrPatientTrigger* for the trigger name.
4. Select **HealthCloudGA__EhrPatient__c** for the sObject.
5. Click **Submit**.
6. Replace the default code with the sample code provided in the example.
7. Save your work.
8. To test the trigger, navigate to a patient record and update one of the fields that appears on the Patient Card. Then, verify that the Patient Card displays the new value.
9. Repeat these steps to refresh fields on the Patient Card that come from other objects.

 **Example:** This trigger fires after update, after insert, and after delete. The trigger uses the `HCPlatformEvent` with the event type of `PatientCardDataRefresh`.

```
trigger EhrPatientTrigger on HealthCloudGA__EhrPatient__c (after update, after insert,
after delete) {
    HealthCloudGA__HCPlatformEvent__e hcEvent = new
HealthCloudGA__HCPlatformEvent__e(HealthCloudGA__Event_Type__c =
'PatientCardDataRefresh');
    // Call method to publish events
```

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud.

USER PERMISSIONS

To edit platform event definitions:

- Customize Application

To define an Apex trigger:

- Author Apex

```
Database.SaveResult sr = EventBus.publish(hcEvent);
// Inspect publishing result
if (sr.isSuccess()) {
    System.debug('Successfully published event.');
```

```
} else {
    for(Database.Error err : sr.getErrors()) {
        System.debug('Error returned: ' +
            err.getStatusCode() +
            ' - ' +
            err.getMessage());
    }
}
```

```
}
```

SEE ALSO:[Salesforce Help: Define Apex Triggers](#)[Salesforce Help: Define and Manage Platform Events](#)[Salesforce Help: Publishing Platform Events](#)

Customize the Highlights Panel in the Health Cloud Console

The Highlights panel contains information you want front and center, such as the patient's contact information, Medical Record Number, and the name of the care coordinator or other internal person who's responsible for tracking this patient. Customize the Highlights panel to show the information that's most pertinent for your organization.

Information on the Highlights panel comes from a compact layout. To customize the Highlights panel in the Health Cloud Console, clone and then customize the default compact layout for the person account object:

1. From the object management settings for person account, go to Compact Layouts.
2. Click the **System Default** layout, then click **Clone**.
3. Enter a label and name, and choose the fields to display.
4. Save your work.
5. Click **Compact Layout Assignment** and set your new Compact Layout as the assigned layout for Primary Contact Layout and Record Types.
6. Save your work.

SEE ALSO:[Compact Layouts](#)

Customize the Patient Details Tab

When you use a custom page layout to show Patient details, modify the associated page layout.

 **Note:** 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 the object management settings for accounts, go to Page Layouts.
2. Click **Patient Layout**.
3. Click **Custom Console Components**.
4. In the Primary Tab Components section, add this information to the Left Sidebar section.

Field	Value
Style	Stack
Width px	350
Autosize Components	Selected
Type	Visualforce page
Component	PatientProfile_Page
Height %	100

5. Save your changes.

Use the Advanced Patient Card

The Advanced Patient Card leverages FlexCards from OmniStudio to deliver greater flexibility and ease of use. It lives in a component named `HealthCloudPtCardPatientCard` on your Account Layout page.

The Advanced Patient Card retrieves data from standard and custom objects, as long as the object has a reference to the Account object and is supported by DataRaptor. It can display up to three records for each object.

Modify the Lightning Record Page on the Account object to see the Advanced Patient Card in Health Cloud.

 **Note:** Advanced Patient Card and Patient Card are two different entities. Using Advanced Patient Card has no impact on Patient Card.

1. From Setup, in the Quick Find box, enter OmniStudio, then select OmniStudio Settings and turn on Standard OmniStudio Runtime.
2. Click the Object Manager tab, then click Account.
3. Click Lightning Record Pages.
4. Open the Account record page and click **Edit**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

EDITIONS

Available in: Lightning Experience with OmniStudio

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- From the Standard components, drag FlexCard to the left side of the page layout.
- In the FlexCard properties, under FlexCard Name, enter HealthCloudPtCardPatientCard.
- Click **Save** > **Activation** > **Assign as Org Default**.

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*.

To add a custom object to the list filter criteria, create a cross object relationship.

- From the Health Cloud - Lightning Admin home page, find and select the Cross Object Relationships tab, and click **New**.
- Specify the details of the relationship:

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

- Save your changes.

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.

Cross Object Relationship Name	From Object	To Object
AccountToCondition	Account	EhrCondition__c

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Cross Object Relationship Name	From Object	To Object
AccountToContact	Account	Contact
AccountToEhrMedicationPrescriptions	Account	EhrMedicationPrescription__c
AccountToEncounter	Account	EhrEncounter__c
AccountToObservation	Account	EhrObservation__c

Customize the Create External Member Fields

You can customize the fields that appear on the window 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 the object management settings for Accounts, select **Field Sets**.
2. To edit the field set, click **New External Member**.
3. Drag and drop the fields you want to display on the New External member window.

 **Note:** You can only add fields from Account and the related primary contact.

4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Refine the Householding Map for Care Coordinators

The householding map brings together patients or members, care plans, caregivers, households, businesses, and other people 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 and 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 a person account using the Account Contact Relationship standard object.

Create a Custom Record Type to Represent Households

Set up a custom household page layout with the appropriate fields and create a record type to represent it.

Enable Users to Add Reciprocal Roles

To enable your users to create reciprocal roles, grant them access to the contact role record type.

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 provide commonly used reciprocal role records. You can add reciprocal roles records 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 add to the Household tab.

Speed Up Account-Contact Relationship Calculations

The Use Standard Trigger metadata type for Account-Contact Relationship Triggers speeds up relationship calculations for Accounts and Contacts.

How Are Patient and 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 a person account 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Standard or Custom	Represents	Record Types
Account	Standard	• Business • Institution • Group	• Business • Institution • Household
Account Contact Relationship	Standard	The membership in a relationship group and the relationship between a person and an account. • The membership in a relationship group lets you roll up a member's information to the group. • For a business account to be a member of a relationship group, the business must first be related to a person in the group.  Note: The Use Standard Trigger metadata type for Account-Contact Relationship	N/A

Object	Standard or Custom	Represents	Record Types
		Triggers 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 Manage Records next to Use Standard Trigger . Then click Edit next to Account Contact Relationship Trigger . On the Use Standard Trigger (Managed) page, turn on the Active checkbox, and save your changes.	
Contact-Contact Relationship	Custom	The relationship between two contacts.	N/A
Person Account	Standard	Individual person	Person
Reciprocal Role	Custom	The complementary role implied by the relationship of a person to another person or entity. For example, Parent is the reciprocal role for Child.	N/A

Create a Custom Record Type to Represent Households

Set up a custom household page layout with the appropriate fields and create a record type to represent it.

Make sure that the field-level security of the Source System Identifier, Status Reason, Source System, and Parent Record Type fields is set to visible for all profiles.

1. From the object management settings for Account, select **Page Layouts**.
2. To create a page layout for Household, click **New**.
3. Select Household Layout from the dropdown next to Existing Page Layout, and type a name for the new layout.
4. Save your work.
5. Add fields to the new household layout. For example, Primary Contact.
6. Create a record type. Go to Record Type, and click **New**. Make sure to select Household from the dropdown next to Existing Record Type.
7. Create a label name that matches the name of the new household page layout you created.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

8. Select the checkbox for active.
9. Select the checkbox for Make Available next to the profile you want to assign the new record type to, and click **Next**.
10. Select **Apply one layout to all profiles** and then select the page layout you created.
11. Save your changes.

Enable Users to Add Reciprocal Roles

To enable your users to create reciprocal roles, grant them access to the contact role record type.

1. From Setup, in the Quick Find, box enter *Profiles*, and select **Profiles**.
2. Select the user's profile. For example, System Administrator.
3. Navigate to the Record Type Settings section.
4. Click **Edit** next to Reciprocal Roles.
5. Drag **Contact Role** from the Available Record Types to the Selected Record Types. Make sure the default record type is **Contact Role**.
6. Save your work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 provide commonly used reciprocal role records. You can add reciprocal roles records 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 reciprocal roles.

1. You can add reciprocal roles in the Create Contact-Contact Relationship modal on the Household tab. In the Related Role, select **+ New Reciprocal Role**.
2. Enter the name of the role. For example, *Parent*.
3. Enter the name of the reciprocal role. For example, *Child*.
4. Save your work.

When a guest user provides information that triggers the creation of a contact-to-contact-relationship record, the inverse contact-to-contact relationship isn't created, even if the `createinverserole` flag is on. To avoid getting an error when that happens, go to **Setup > Custom Settings > Industries Application Config**, and create a record for the guest user profile with Create Inverse unchecked.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

SEE ALSO:

[Enable Users to Add Reciprocal Roles](#)

Update Roles for Account Contact Relationships

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

1. From the object management settings for Account Contact Relationships, select **Fields & Relationships**.
2. Select **Roles**.
3. Add or remove roles as needed.
4. Save your changes.

 **Note:** The Use Standard Trigger metadata type for Account-Contact Relationship Triggers 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 **Manage Records** next to **Use Standard Trigger**. Then click **Edit** next to **Account Contact Relationship Trigger**. On the Use Standard Trigger (Managed) page, turn on the **Active** checkbox, and save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Speed Up Account-Contact Relationship Calculations

The Use Standard Trigger metadata type for Account-Contact Relationship Triggers speeds up relationship calculations for Accounts and Contacts.

1. On the Custom Metadata Types page in Setup, click **Manage Records** next to **Use Standard Trigger**.
2. Click **Edit** next to **Account Contact Relationship Trigger**.
3. On the Use Standard Trigger (Managed) page, turn on the **Active** checkbox.
4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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**.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To allowlist domains for a Salesforce console:

- Customize Application

Customize the Timeline View

Add or remove healthcare events from the timeline view to give care coordinators and patients a chronological view of health care events. This topic applies to legacy Timeline, not Enhanced Timeline.

 **Important:** Health Cloud has two options for tracking timeline events: Timeline and Enhanced Timeline. We recommend that you use Enhanced Timeline to take advantage of advanced configuration capabilities and responsive layout. Additionally, based on the access granted, your users can also create and edit events in a timeline. To learn more, see [Enhanced Timeline](#).

On the Timeline View Configurations tab, add events to the timeline by exposing fields on custom or standard objects. Then choose 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 - Lightning Admin page, find and select the Timeline View Configurations tab, and click **New**.
2. Enter the following:

Field	Description
Timeline View Configuration Name	Name of the timeline event. This name appears only on setup pages.
Object Category	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 preconfigured objects are either <code>Engagement Data</code> or <code>Medical Data</code> .
Friendly Name	Label that appears in the timeline for the event.  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. You should also ensure that the cloned record has the same values for the Object, Position Field, Detail Field, and Filter Criterion fields as the original configuration record.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Field	Description
	The system displays the label text that matches the user's language setting.
Object Name	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.
Detail Field	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 timeline event. To display other fields from the object as hover text, add them to the Hover Field Name field.  Note: This field isn't used in the Timeline for Health Cloud Empower component.
Hover Field Name	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 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.
Position Field	Date field that the system uses to position the event chronologically on the correct date on the timeline.
Graphical Icon	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.  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.

Field	Description
Sort Order	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 <code>3</code> in the <code>Sort Order</code> field, then assign the Spanish version <code>3.1</code>.  Note: This field isn't used in the Timeline for Health Cloud Empower component.
Active	Select to activate this field and have it appear on the timeline.
Patient Account Lookup	Name of the lookup to display on the timeline when multiple lookups to Account exist. The default for this field is <code>Account__c</code>.  Note: To use delivered Account lookups for standard objects like Contact or Task, you must append <code>Id</code> to the lookup field name. For example, to configure a lookup from Contact to Account, use <code>AccountId</code> in this field. Similarly, for a lookup from Task to What, use <code>WhatId</code>.
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.
Language	The setting that specifies the language of the text in the <code>Friendly Name</code> field.
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 <code>Active</code> checkbox selected are available to appear on the timeline when they're selected using the events filter. But only those configuration records with the <code>Show on Load</code> setting selected appear on the timeline by default.
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. Save your changes.

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

4. The Timeline Filter component comes with a default row. To add filters, click **Add Row**.

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 on 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. Save your changes.



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

Field	Description
Timeline View Configuration Name	Tasks
Object Category	Engagement Data
Friendly Name	Tasks
Object Name	Task
Detail Field	Subject
Hover Field Name	Subject, ActivityDate
Position Field	ActivityDate

Field	Description
Graphical Icon	timeline_icon_check_png
Sort Order	3
Active	Selected
Patient Account Lookup	WhatId
Filter Criterion	
Language	English (United States)
Show On Load	Selected
Configuration Target	Health Cloud Console App; Timeline For Health Cloud Empower



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:

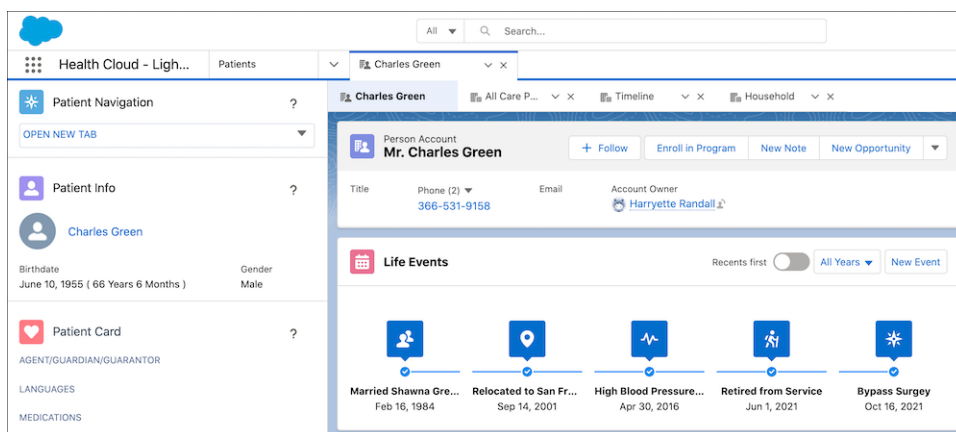
[Show Data Sources with Custom Icons](#)

[Show Data Sources with Custom Icons](#)

Manage Life Events

Capture events and milestones in a patient's life with Life Events. You can create custom 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.

The Life Events component shows life events in the patient's person account record page. Let's look at Charles Green, a patient at StayHealthy Clinic. Charles was diagnosed with high blood pressure in 2016. In 2021, a few months after his retirement, Charles underwent bypass surgery. To capture these events, Harryette Randall, the admin at StayHealthy Clinic, creates an event for High Blood Pressure under event type Diagnosis. Next, she creates a custom event type picklist value called "Surgery" to capture Charles' coronary bypass surgery. To provide more insight into Charles' life, Harryette add events under event types Marriage, Relocation, Retirement, and so on.



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 Event Types and Mark Events as Unique

To get a complete view of your patients' health, add major events that shape their journey. If the default event types don't address your needs, you can create additional event types, such as job loss, divorce, or chronic stress. You can also mark certain events as unique, and deactivate or reactivate the event types according to your need.

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, it's inappropriate to mention a life event 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 Life Events component until you add a life event of that type for the patient.

Display a Patient's Life Events

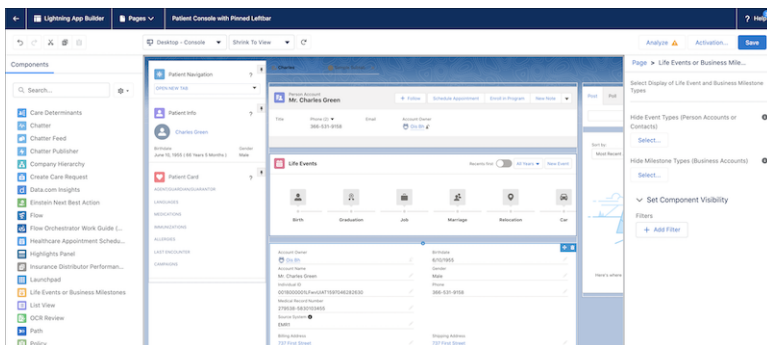
Add the Person Life Event component to your custom Account record page to give care team members an at-a-glance view of their patient's life events to help them identify a care plan tailored to the patient's condition and life events.

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 person account record page, Patient Console with Pinned Leftbar.
3. Drag the **Life Events or Business Milestones** component to the editable portion of the page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



4. Save your changes.

Customize Event Types and Mark Events as Unique

To get a complete view of your patients' health, add major events that shape their journey. If the default event types don't address your needs, you can create additional event types, such as job loss, divorce, or chronic stress. You can also mark certain events as unique, and deactivate or reactivate the event types according to your need.

Health Cloud offers the following event types: Birth, Graduation, Job, Marriage, Relocation, Car, Home, Baby, Diagnosis, Retirement. To add more event types, you can add new event type picklist values.

Some event types, like birth, occur only once in a lifetime. To prevent users from accidentally creating more than one event of such an event type, mark the event type as unique. You can also deactivate event types that you don't need, or reactivate inactive event types when needed.

1. From the object management settings for Person Life Event, go to **Fields & Relationships**.
2. Select **Event Type**.
3. Under Event Type Picklist Values, click **New**, and then add the new event types.
4. Save your changes.
5. If you want to disable an active event type, 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.
6. To capture a once-in-a-lifetime event, click **Edit** next to the value that you want to mark as unique, and select the checkbox for Unique. Save your changes.

SEE ALSO:

[PersonLifeEvent](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 *Life Events*, and then select **Life Events and Business Milestones**.
2. For the icon that you want to change, select **Change Icon**.
3. Click **Upload Files**, and select the SVG file for the icon. The SVG file must be a single path SVG file.
4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 the object management settings for Person Life Event, select **Compact Layouts**.
2. Create a layout by clicking **New** or clone the System Default layout and edit it.
To clone the System Default layout, click **System Default** and click **Clone**.
3. Enter a label for the compact layout, and add the fields to include.
4. 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.

5. Save the layout.
6. Click **Compact Layout Assignment**, and then click **Edit Assignment**.
7. From the Primary Compact Layout list, select your compact layout.
8. Save your changes.

Hide Sensitive Life Event Types

At times, it's inappropriate to mention a life event 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 Life Events component until you add a life event of that type for the patient.

Ask your Salesforce representative to make person accounts available in your organization.

1. From Setup, in the Quick Find box, enter *App Builder*, and then select **Lightning App Builder**.
2. Open a page that contains the Life Events component. For example, open Patient Console with Pinned Leftbar and click **Edit**.
3. In the properties pane, click **Select** under Hide Event Types (Person Accounts or Contacts).
4. Drag the event types that you want to hide from Available to **Selected**, and then click **OK**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Hide Event Types (Person Accounts or Contacts)

Select life event types that you want to hide when there are no corresponding events. When you hide an event type, it appears again when an event of that type is created. This property supports using an expression to define its custom label. The correct format is `{!$Label.customLabelName}`.

Available		Selected
Birth		Diagnosis
Graduation		
Job		
Marriage	◀ ▶	
Relocation		
Home		

Cancel OK

5. Save the page.

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. 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 example, you can make it easier to identify the source of a record in the Care Gaps list by attaching the logo of the originating company.

1. From the Health Cloud - Admin Home page in Salesforce Classic, select the Documents tab, and click **New**.
2. Enter a name for the icon. The name you assign to your icon is case-sensitive.
3. The Document Unique Name is autopopulated. Keep it as is.
4. Select **Externally Available Image**.
If this is selected, Health Cloud components can display the image.
5. For Folder, select **Health Cloud Assets** from the picklist.
6. Enter a description and keywords to use later as search criteria.
7. Click **Choose File**.



Note: Logo images should be 48x48 pixel PNG files.

8. Save your work.
9. Specify where you want the icon to appear.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To upload new documents:

- Create on Documents

For example, suppose you want to make the icon identify a source system for Care Gaps.

- a. Switch back to Lightning Experience.
- b. From Setup, in the Quick Find box, enter *Custom Metadata Types*, and then select **Custom Metadata Types**.
- c. Select **Manage Records** next to Source System Logo Mapping and add a record.
- d. Give it a label and name. For the Source System Name, use the name that is 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.

- e. Save your work.

SEE ALSO:

[Customize the Timeline View](#)
[Enable Care Teams to Track Gaps](#)
[Customize the Timeline View](#)
[Enable Care Teams to Track Gaps](#)

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.

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

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, in the Quick Find box, enter *Custom Labels*, and then select **Custom Labels**.
2. In the list of custom label, select the name of the custom label you want to modify and click **Edit**. 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).
5. Save your changes.

Complete these steps for each label and you're all set!

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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, in the Quick Find box, enter *Custom Labels*, and then select **Custom Labels**.
2. Select the name of the custom label to open.
3. To change a translation, click **Override** next to the language in which you want to add the new translation text.
4. Enter the **Translation Text**.
5. Save your changes.

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.

SEE ALSO:

[Salesforce Help: Enable and Disable the Translation Workbench](#)

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*.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

Create, edit, or delete custom labels:

- Customize Application

Create or override a translation:

- Manage Translation

OR

View Setup and Configuration and be designated as a translator

Labels with Patients [Help for this Page](#)

Custom Labels are custom text values, up to 1,000 characters, that can be accessed from Apex Classes or Visualforce Pages. If Translation Workbench has been enabled for your organization, these labels can then be translated into any of the languages Salesforce.com supports. This allows developers to create true multilingual apps by presenting information to users - for example, help text or error messages - in their native language. You can create up to 5,000 custom labels.

View: **Labels with Patients** [Edit](#) [Create New View](#) [<Previous Page](#) [Next Page>](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [AB](#)

[New Custom Label](#)

Action	Name	Categories	Short Description	Value	Language
Edit Del	bannerNewPatientsInLast		Banner description for number of new patients in last X days	New patients last 7 days	English
Edit Del	bannerPatientsResponsibleFor		Banner description for number of patients user is responsible for	Patients I'm responsible for	English
Edit Del	candidatePatientRecordLabel		Candidate Patient Record label	Candidate Patient Record	English
Edit Del	canPatConvertDuplBoth		Failure reason when convert candidate, with same MRN as other candidate/patient	Duplicate with another selected candidate and an existing patient	English
Edit Del	canPatConvertDuplPat		Failure reason when convert candidate, with same MRN as existing patient	Duplicate with an existing patient	English
Edit Del	canPatConvertFailMsgLabel		Candidate Patient Conversion failure message	Patient Convert Failed!	English
Edit Del	canPatConvertSuccessMsgLabel		Candidate Patient Conversion success message	Patient Convert Success!	English
Edit Del	canPatListPageTitle		Candidate Patient List Page title	Candidate Patient List	English
Edit Del	canPatListViewAllView		All candidate patients view label	Candidate Patients - All	English
Edit Del	canPatListViewConvertedView		Converted candidate patients view label	Candidate Patients - Converted	English
Edit Del	canPatListViewConvToPatientAction		Convert to Patients action label	Convert to Patients	English
Edit Del	canPatListViewFieldSet		Fieldset name - do not translate.	CandidatePatientListView	English
Edit Del	canPatListViewNotConvertedView		Unconverted candidate patients view label	Candidate Patients - Not Converted	English
Edit Del	canPatPageTitle		Candidate Patient List Page title	Candidate Patient List	English
Edit Del	Field Label Candidate Patient Name		Candidate Patient Name Label	PATIENT NAME	English

[Show me fewer](#) / [more records per list page](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [AB](#)

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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](#)

[Customize Medical Data on the Patient Card Component](#)

[Customize the Timeline View](#)

[Customize the Patient Navigation Component](#)

[Salesforce Help: Create and Edit Custom Label Translations](#)

[Customize Medical Data on the Patient Card Component](#)

[Customize the Timeline View](#)

[Customize the Patient Navigation Component](#)

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](#)

[Data Loader](#)

[Insert, Update, or Delete Data Using Data Loader](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To access the page to download Data Loader:

- Modify All Data

To use Data Loader:

- API Enabled

AND

The appropriate user permission for the operation you are performing.

Customize the Health Cloud Apps

You can change some of the properties of the Health Cloud Apps. 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:** As the Candidate Patient custom object is being retired, use the Lead object instead of the Candidate Patient object. If you need a Candidate Patient field that Lead doesn't support, create the fields.

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

1. From Setup, in the Quick Find box, enter *Apps*, and 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*.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To view apps:

- View Setup and Configuration

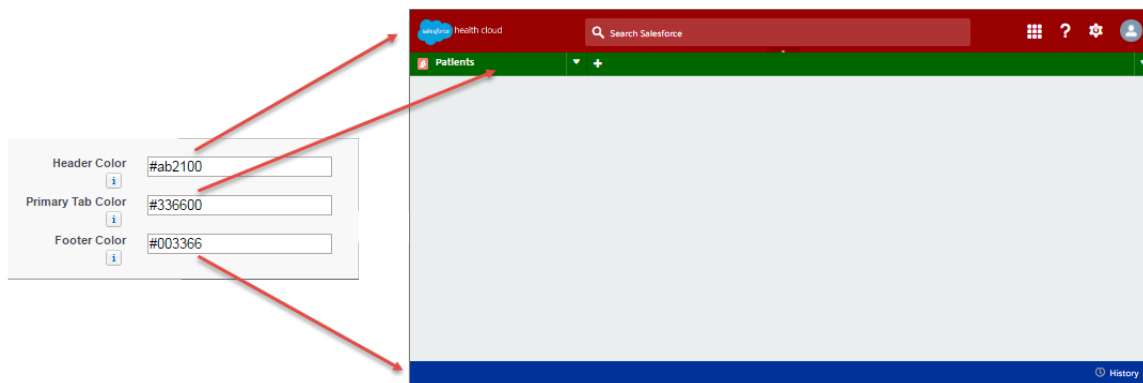
To manage apps:

- Customize Application



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's 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 CRM 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**.

Customize the Health Cloud Apps in Lightning

You can change some of the properties of the Health Cloud Apps in your organization.

Customize the Health Cloud Apps in Lightning

You can change some of the properties of the Health Cloud Apps in your organization.

Personalize your Lightning apps from the Lightning console. You can add your company's logo, change the color of page elements, and enable keyboard shortcuts in the Health Cloud console. Remember to save your changes as you navigate.

1. From Setup, in the Quick Find box, enter *Apps*, and then select **App Manager**.

2. Click  next to the app that you want to modify, and then click **Edit**.

3. Enter a name for the app.

This app name appears in the app menu.

4. Retain the autopopulated name in the Developer Name field.

5. Add a description for your app.

6. To specify a custom logo for your app, under App Branding, click **Upload**.

When choosing a custom app logo:

- Ensure that the image is in .jpg, .png, .bmp, or .gif format and is less than 5 MB.
- Ensure that the image is larger than 128 by 128 pixels. Otherwise, it's scaled to fit.

7. If necessary, change the color of the app's page elements by entering the hex code beginning with #.

8. In App Options, choose the navigation style, and then choose the form factor to support your app.

You can also control end-user personalization and temporary tabs for external items.

9. Under Utility Items (Desktop Only), add the utility bar to your desktop. Click **Add Utility Item**, and then set the Utility Bar Alignment.

10. In Navigation Items, select navigation tabs to include in your app.

11. In Navigation Rules, choose whether you want the app to open as a workspace tab or as a subtab of related record.

12. Under User Profiles, to select the profiles that can access the app, drag user profiles from Available Profiles to Selected Profiles.

13. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Customize the Classic Apps in Lightning Experience

You can customize some properties of standard classic apps in Lightning Experience. While you can't customize the app's label or logo, you can choose the tabs and their sequence, the landing tab, and the profiles to which you want to assign the app.

1. From Setup, in the Quick Find box, enter *Apps*, and then select **App Manager**.

2. Click  next to the Classic app that you want to modify, and then click **Edit**.

3. Choose the tabs to display.

4. To set the order, move the selected tabs up and down.

5. Select the Default Landing Tab.

6. To display the org in Lightning Experience, select the checkbox for Show in Lightning Experience.

7. Select the profiles to which you want to assign the app.

8. Save your changes.

Contact Center for Health Cloud

Contact Center for Health Cloud digitizes customer service processes for contact centers and empowers agents to swiftly address members' questions and concerns.

Built with the help of existing Salesforce components, the Contact Center in Health Cloud helps contact center agents to quickly verify the member's identity, capture interaction details, review member health plan information, and address member concerns.

Contact center agents can also decide the next best actions based on the member's request.

Let's review the components that the Contact Center includes, and find out how they help the contact center agents. You can customize all components according to the requirements of your company.

- **Identity Verification:** Helps contact center agents validate the member's identification details such as account name, account number, phone number or postal code.
- **Timeline:** Provide contact center agents with a complete view of all engagement interactions, topics discussed, and cases created or updated. Agents can also create cases, engagement interactions, and topics.
- **Patient Card:** Provides a complete view of the patient's health data, including medication requests, health conditions, allergies, and immunizations details. Agents can also create the related records from the patient card.
- **Action Launcher:** Provides quick actions that are contextualized for the contact center.
- **Record Alerts:** Informs agents about changes in records that require attention.
- **Profile Card and Member Plan FlexCard:** Provides information about member plans and basic details about the patient.
- **Knowledge Articles:** Helps contact center agents search for relevant knowledge topics.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

[Enable Admin Settings to Use Contact Center](#)

To use the Contact Center for Health Cloud app, first enable Contact Center and Timeline, and set up Identity Verification.

[Assign Permission Sets and Permission Set Licenses for Contact Center Users](#)

Provide contact center agents with the permissions and licenses required to use the Contact Center in Health Cloud.

[Set Up Standard Object Permissions for the Contact Center User](#)

Clone the standard user profile and add standard object permissions for the Engagement Interaction, Engagement Topic, Engagement Attendee, and Record Alert objects. Assign the profile to your contact center agent.

[Configure the Contact Center](#)

Before contact center agents can start using the Contact Center, some configuration is required. Add tabs to the person account's related list, turn on field-level security, and set the default app layout for the Contact Center.

[Enable Users to Create Knowledge Articles in the Contact Center](#)

Follow the Service Setup Assistant to add users who can create knowledge articles.

[Explore the Components of the Contact Center](#)

Contact Center for Health Cloud offers a 360-degree view of the member, including patient info, member plan details, health-related specifications, and a timeline of the member's interactions with the contact center agents. Agents can also use quick actions to complete tasks, receive alerts, and read knowledge articles.

Enable Admin Settings to Use Contact Center

To use the Contact Center for Health Cloud app, first enable Contact Center and Timeline, and set up Identity Verification.

1. From Setup, in the Quick Find box, enter *Contact Center Settings*, and then select **Contact Center Settings**.
2. Enable **Contact Center for Health Cloud**.
3. From Setup, in the Quick Find box, enter *Timeline*, and then select **Timeline**.
4. Enable **Timeline Configuration**.
5. From Setup, in the Quick Find box, enter *Identity Verification Settings* and then select **Identity Verification Settings**.
6. Follow guided setup to set up Identity Verification.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

Assign Permission Sets and Permission Set Licenses for Contact Center Users

Provide contact center agents with the permissions and licenses required to use the Contact Center in Health Cloud.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
2. Select the appropriate user.
3. In the Permission Set License Assignment related list, and click **Edit Assignment**.
4. Select these permission set licenses.
 - a. Contact Center for Health Cloud
 - b. Health Cloud Platform
 - c. OmniStudio User
5. Save your work.
6. In the Permission Set Assignments related list, click **Edit Assignment**.
7. Move these permission sets to the Enabled Permission Sets list.
 - a. Contact Center for Health Cloud
 - b. Health Cloud Foundation
 - c. Knowledge LSF Permission Set
 - d. OmniStudio User
8. Save your work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

Set Up Standard Object Permissions for the Contact Center User

Clone the standard user profile and add standard object permissions for the Engagement Interaction, Engagement Topic, Engagement Attendee, and Record Alert objects. Assign the profile to your contact center agent.

1. From Setup, in the Quick Find box, enter *Profiles*, and then click **Profiles**.
2. Click **Clone** next to the Standard User profile.
3. Add a profile name. For example, *Contact Center User*.
4. Click **Edit** and go to Standard Object Permissions.
5. Provide Read, Create, and Edit access to Engagement Interaction, Engagement Topic, Engagement Attendee, and Record Alert objects.
6. Save your changes.
7. Assign the profile to the contact center agent.
 - a. From Setup, in the Quick Find box, enter *Users*, and then click **Users**.
 - b. Click **Edit** next to the contact center agent's name.
 - c. In Profile, select the profile you created by cloning the standard user profile.
 - d. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

Configure the Contact Center

Before contact center agents can start using the Contact Center, some configuration is required. Add tabs to the person account's related list, turn on field-level security, and set the default app layout for the Contact Center.

[Configure the Person Account Page Layout for Contact Center](#)

Help contact center agents view the member's insurance plan details and medication statements at a glance in the Contact Center. Add important fields like Gender and Birthdate to the person account page layout so that it shows up in the Profile card. Add Medication Statement and Member Plans to the person account record's related lists.

[Configure the Service Appointment Tab for the Contact Center](#)

Enable contact center agents to set up service appointments in the Contact Center. In Lightning App Builder, create tabs for the Healthcare Appointment Scheduler component.

[Enable Field-Level Security for the Account Number Field](#)

Turn on field-level security for Account Number so that contact center agents can validate a caller's identity using the member's account number.

[Configure the Contact Center as the App Default Layout](#)

Make it easy for agents to access the Contact Center by setting the contact center app as the app default in Lightning App Builder.

[Configure Path Settings for Engagement Interactions in Contact Center](#)

Help contact center agents view the progression of patient interactions, from the initial call to identity verification and resolution. Set up a path to display the status of the engagement interaction.

Configure the Person Account Page Layout for Contact Center

Help contact center agents view the member's insurance plan details and medication statements at a glance in the Contact Center. Add important fields like Gender and Birthdate to the person account page layout so that it shows up in the Profile card. Add Medication Statement and Member Plans to the person account record's related lists.

1. In the object management settings for Person Account, go to Page Layout.
2. Click **Person Account Layout**.
3. Click **Fields**.
4. Move Gender and Birthdate to the editable part of the page.
5. Click **Related List**.
6. Move Medication Statement and Member Plan to the editable part of the page.
7. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

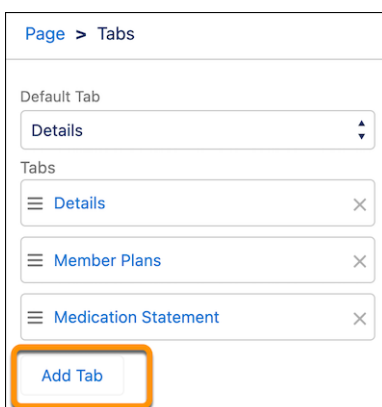
To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

Configure the Service Appointment Tab for the Contact Center

Enable contact center agents to set up service appointments in the Contact Center. In Lightning App Builder, create tabs for the Healthcare Appointment Scheduler component.

1. From the App Launcher, find and select **Contact Center**.
2. Go to Accounts, and select a person account record to open in the Contact Center.
3. Click , and then click **Edit Page**.
4. In the Lightning App Builder, select the person account's tab section.
5. In the properties pane, click **Add Tab**.



6. Click the new tab, labeled Details, then click  and select **Custom**.
7. Add a name for your tab. For example, *Appointments*.
8. Click **Done**.
9. Select the newly created tab, and move the Healthcare Appointment Scheduler component onto the editable part of the tab.

EDITIONS

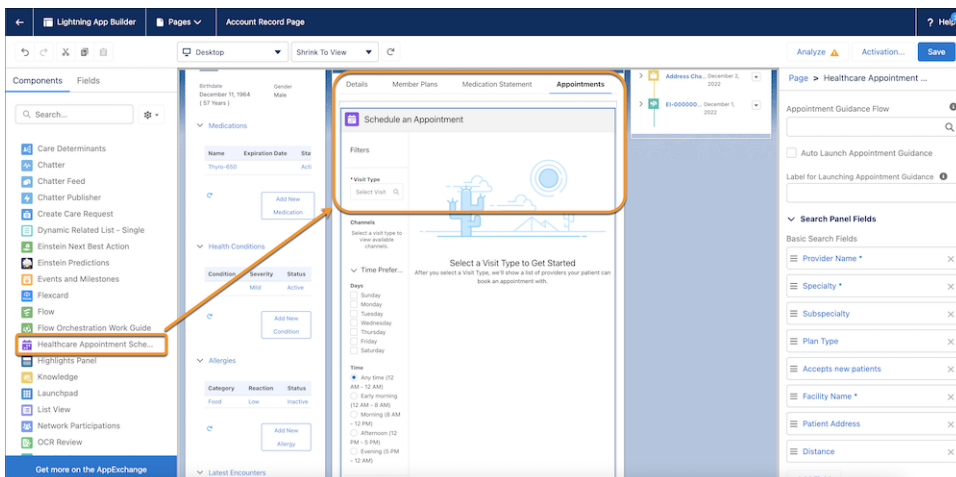
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud



10. Review the fields and remove any you don't want to display on the Appointment tab.

11. Save your changes, click **Activate**, and then set the page as the org default.

12. Next, add the Service Appointment field in the Related List of the Person Account's Page Layout.

To add the Care Barrier tab, repeat the preceding steps. Add "Care Barriers" as the Barrier Header Label, and move the Care Determinants component to the newly created tab. You don't need to add Care Determinants in the Person Account page layout's Related List tab.

SEE ALSO:

[Salesforce Help: Enable Care Coordinators to Schedule Appointments for Patients](#)

[Salesforce Help: Add the Care Determinants Component to a Record Page](#)

Enable Field-Level Security for the Account Number Field

Turn on field-level security for Account Number so that contact center agents can validate a caller's identity using the member's account number.

1. In the object management settings for Account, go to Field & Relationships.
2. Click **Account Number**, and then click **Set Field-Level Security**.
3. For the Contact Center Agent profile, select **Visible**.
4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

Configure the Contact Center as the App Default Layout

Make it easy for agents to access the Contact Center by setting the contact center app as the app default in Lightning App Builder.

1. In the App Launcher, find and select **Accounts**.
2. Open any business account record.
3. Click , then click **Edit Page**.
4. Click **Save** and then click **Activation**.
5. In the Activation: Account Record Page window, go to the App Default tab.
6. Click **Assign as App Default**.
7. In the Select Apps window, click **Contact Center**.
8. Click **Next**, then **Next**, and **Save**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

Configure Path Settings for Engagement Interactions in Contact Center

Help contact center agents view the progression of patient interactions, from the initial call to identity verification and resolution. Set up a path to display the status of the engagement interaction.

1. From Setup, in the Quick Find box, enter *Path Settings*, and then select **Path Settings**.
2. Click **Enable**.
3. Click **New Path**.
4. In the Name Your Path and Choose an Object window, add the following details.
 - a. In Path Name, enter *Engagement Interaction Path*.
 - b. In API Reference Name, *Engagement_Interaction_Path* is auto-populated. Keep it as is.
 - c. In Object, select **Engagement Interaction**.
 - d. In Record Type, leave the default value, *--Master--*.
 - e. For Picklist, select **Status**.
 - f. Click **Next**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

Step 1: Name Your Path and Choose an Object

The object and record type you choose determine the business process for your users.

Path Name

Engagement Interaction Path

API Reference Name

Engagement_Interaction_Path

Object

Engagement Interaction

Record Type

--Master--

Picklist

Status

5. In the Select Fields and Provide Guidance window, add fields for each status value.
 - a. Click **Add/Update Fields**.

- b. Move fields from the Available column to the Selected Fields column.
 - c. Add guidance for success.
 - d. Save your changes.
6. Click **Next**.
7. Select **Activate Your Path**.
8. To display a celebratory animation when users complete the path, select **Enable Celebrations**, and add these details:
 - a. Select the picklist value for celebration.
 - b. Select a Celebration Frequency.
 - c. Click **Finish**.

The path is activated and available in the Engagement Interaction object. When the contact center agent receives the member's call and captures the interaction details, they see the progression of the interaction in the Engagement Interaction object.

- [Configure a Path Assistant on Engagement Interactions](#)

SEE ALSO:

[Salesforce Help: View the Status of an Engagement in the Contact Center](#)

Enable Users to Create Knowledge Articles in the Contact Center

Follow the Service Setup Assistant to add users who can create knowledge articles.

1. From Setup, in the Quick Find box, enter *Service Setup Assistant*, and then select **Service Setup Assistant**.
2. Click **View All**.
3. Find and select **Knowledge Setup**.
4. Click **Start**.
5. Select the users who create knowledge articles. For example, select the contact center user.
6. Add a data category group and data group. For example, *Contact Center Knowledge* and *Contact Center*.
7. Click **Finish**.

[Configure Record Types for Knowledge Articles in the Contact Center](#)

Knowledge articles help contact center agents create frequently asked questions (FAQs). To create articles and how-tos, configure a Knowledge record type for how-to topics and add fields as needed.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

Configure Record Types for Knowledge Articles in the Contact Center

Knowledge articles help contact center agents create frequently asked questions (FAQs). To create articles and how-tos, configure a Knowledge record type for how-to topics and add fields as needed.

1. From the object management settings for Knowledge, go to Record Types.
2. Click **New**.
3. For Existing Record Type, leave the default value, *-Master-*.
4. Enter a name for Record Type Label. For example, enter *How-To*. The API name is auto-populated.
5. Add a description and select **Active**.
6. Select **Make Available** for profiles of users who create How-To knowledge articles.
7. Click **Next**.
8. Select **Apply one layout to all profiles**, and then select **Knowledge Layout** next to the field.
9. Save your changes.

SEE ALSO:

[Salesforce Help: Create Knowledge Articles in the Contact Center](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

Explore the Components of the Contact Center

Contact Center for Health Cloud offers a 360-degree view of the member, including patient info, member plan details, health-related specifications, and a timeline of the member's interactions with the contact center agents. Agents can also use quick actions to complete tasks, receive alerts, and read knowledge articles.

[Identity Verification and Engagement Details in the Contact Center](#)

Help contact center agents confirm a member's identity and capture engagement details such as the reason for a call by using Identity Verification.

[Enhanced Timeline for the Contact Center](#)

Enable contact center agents to view important information on a timeline. Contact Center's Timeline is an interactive component that displays past engagements, discussion topics, and cases. Agents can set date ranges to view specific events, and create and update records.

[FlexCards for the Contact Center](#)

The contact center uses FlexCards to provide contact center agents with critical information about the patient's details, health information, and insurance plan. FlexCards are customizable templates that you can configure and stylize.

[Action Launcher for the Contact Center](#)

Help contact center agents quickly deploy commonly-used processes and workflows. Configure frequently-used actions and pin them to the Action Launcher component.

[Record Alerts in the Contact Center](#)

In the Contact Center, Record Alerts notifies the contact center agent when there's a record change that requires immediate attention. Simply configure which record changes you want to trigger those alerts.

[Open CTI Softphone for the Contact Center](#)

Integrate the Contact Center with Open Computer Telephony Integration (CTI) Softphone to help contact center agents seamlessly manage members' calls directly in Salesforce.

Identity Verification and Engagement Details in the Contact Center

Help contact center agents confirm a member's identity and capture engagement details such as the reason for a call by using Identity Verification.

The Contact Center integrates directly with Computer Telephony Integration (CTI) so that contact center agents can validate a caller's identity in real time. Identity verification in the Contact Center uses the Verify Customer Identity flow template to confirm identifiers and log the call details, including the topics discussed. The flow also includes the Verify Linked Customer Identity subflow that helps agents perform additional levels of verification. Verify Linked Customer Identity lets users confirm the member's account number, postal code, phone number, and so on.

The details of the interaction are stored in Engagement Interaction, Engagement Attendee, and the Engagement Topic records. To find out more about, see [Components of Identity Verification](#).

You can customize the out-of-the-box identity verification flow to suit your needs. Add required and optional fields to verify or use different search criteria to find the account to verify. To customize the flows:

1. Set up [Identity Verification Process Definition](#) records to link the process configuration to the flow.
2. Set up [Identity Verification Process Detail](#) records to search objects for verification or change the number of additional verifiers. For example, enable the identity verification flow to search for member details in the Contact object.
3. Set up [Identity Verification Process Fields](#) records to customize fields that appear in search results. For example, to check if the patient is an active member, add the IsActive field to the list of optional verifiers.
4. To configure a new flow, [customize the Verify Customer Identity flow](#) template.

SEE ALSO:

[Salesforce Help: Verify a Member's Identity and Capture Engagement Details in the Contact Center](#)

Enhanced Timeline for the Contact Center

Enable contact center agents to view important information on a timeline. Contact Center's Timeline is an interactive component that displays past engagements, discussion topics, and cases. Agents can set date ranges to view specific events, and create and update records.

You can customize the timeline component to meet your company's needs. Add new objects and fields or create an entirely new timeline.



Note: You can only have one timeline associated with the Contact Center.

[Customize the Existing Timeline in the Contact Center](#)

You can configure objects to track in the Contact Center's timeline component. To customize the existing timeline, first deactivate it. Edit the timeline to add a new object, and activate it again. Or create a new timeline.

SEE ALSO:

[Salesforce Help: Track Interaction Events on the Contact Center's Timeline](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

EDITIONS

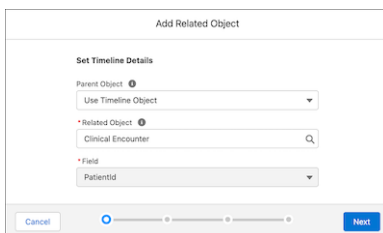
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

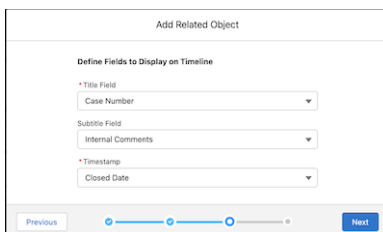
Customize the Existing Timeline in the Contact Center

You can configure objects to track in the Contact Center's timeline component. To customize the existing timeline, first deactivate it. Edit the timeline to add a new object, and activate it again. Or create a new timeline.

1. From Setup, in the Quick Find box, enter *Timeline* and then select **Timeline**.
2. Next to Contact Center Account Timeline, click , and then click **Deactivate**.
3. Click , and now click **Edit**.
4. Go to Timeline Related Objects, and click **Add New Object**.
5. In Related Object, select a related object, such as Clinical Encounter, to the existing objects: Engagement Interaction, Engagement Topic, and Case.



6. Customize the record visibility of the related object.
7. Add a title field, subtitle field, timestamp, and fields displayed on the timeline. For example, configure the timeline to show case records only when the Status field equals "New". Select Case Number as the title, Internal Comments as the subtitle, and Closed Date as the timestamp for the Case object.



8. Add fields to show on the timeline, and click **Add**.
9. Click **Activate**.

To create a new timeline, first deactivate the existing timeline. Click **New Timeline** to provide a label and API name. Repeat the steps to add objects, set the visibility of the related object, and add fields to display on the timeline.

- Make Information Easily Viewable with Enhanced Timeline

FlexCards for the Contact Center

The contact center uses FlexCards to provide contact center agents with critical information about the patient's details, health information, and insurance plan. FlexCards are customizable templates that you can configure and stylize.

 **Note:** The OmniStudio Admin license is required to customize FlexCards.

The contact center includes these FlexCards: Advanced Patient Card, Profile card, and Member Plan card.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- [OmniStudio FlexCards](#)

[Advanced Patient Card for Contact Center](#)

In the Contact Center, Advanced Patient Card is an interactive FlexCard that contact center agents can use to review and create records about a patient’s health.

[Profile Card and Member Plan FlexCards for Contact Center](#)

In the Contact Center, Profile Card and Member Plan cards provide a quick summary of member information and insurance plan details.

Advanced Patient Card for Contact Center

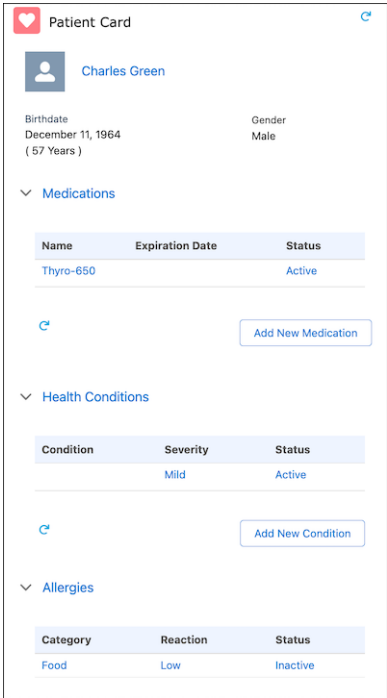
In the Contact Center, Advanced Patient Card is an interactive FlexCard that contact center agents can use to review and create records about a patient’s health.

Contact center agents get a complete view of health factors, including:

- Medication Requests
- Health Conditions
- Allergy Intolerances
- Encounters
- Patient Immunizations
- Care Requests

EDITIONS

Available in: Lightning Experience
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Each part of the patient card was built using multiple FlexCards that display information and corresponding DataRaptors that retrieve the information from Salesforce records.

Component or Object	FlexCard	DataRaptor
Patient Card	HealthCloudPtCardPatient	HealthCloudPtCardGetAccountDetails

Component or Object	FlexCard	DataRaptor
Patient Info	HealthCloudPtCardPatientInfoCard	HealthCloudPtCardGetPatientDetails
Medication Request	HealthCloudPtCardPatientMedicationCard	HealthCloudPtCardGetMedicationDetail
Health Conditions	HealthCloudPtCardPatientHealthConditionCard	HealthCloudPtCardGetHealthCondition
Allergy Intolerance	HealthCloudPtCardPatientAllergiesCard	HealthCloudPtCardGetAllergyDetails
Encounter	HealthCloudPtCardPatientLatestEncounterCard	HealthCloudPtCardGetLatestEncounter
Patient Immunization	HealthCloudPtCardPatientImmunizationCard	HealthCloudPtCardGetImmunization
Care Request	HealthCloudPtCardPatientCareRequestCard	HealthCloudPtCardGetCareRequestDetails

- [Use the Advanced Patient Card](#)

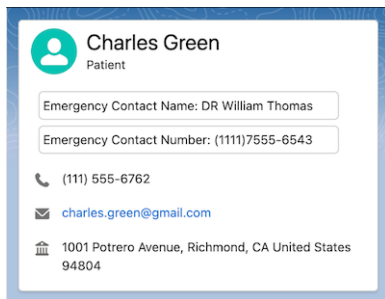
SEE ALSO:

[Salesforce Help: Add Medication Information To the Patient Card in the Contact Center](#)

Profile Card and Member Plan FlexCards for Contact Center

In the Contact Center, Profile Card and Member Plan cards provide a quick summary of member information and insurance plan details.

The Profile Card presents basic information such as name and age, and contact information.



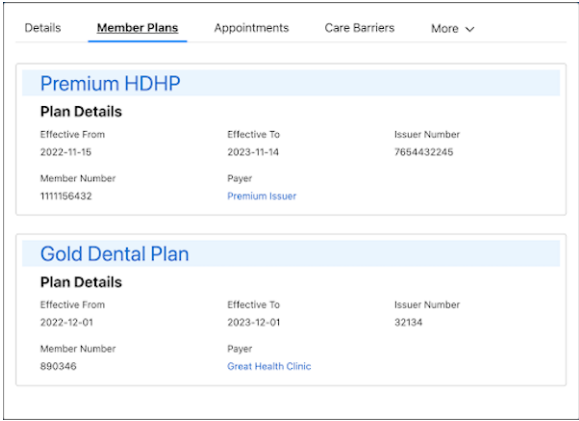
EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

The Member Plan card provides information about the patient's insurance plans. The Member Plan card consists of two FlexCards:

- *ContactCenterforHealthCloudMemberPlanList*: Collates all of a member's insurance plans. This is a parent card under which *ContactCenterforHealthCloudMemberPlanDetail* is nested.
- *ContactCenterforHealthCloudMemberPlanDetail*: Contains information about each member plan, including issuer number, effective start and end dates, and more.



Component or Object	FlexCard	DataRaptor
Profile	ContactCenterforHealthCloudProfileCard	ContactCenterforHealthCloudRetrieveProfileCard
Member Plans	ContactCenterforHealthCloudMemberPlanList	—
Member Plan Details	ContactCenterforHealthCloudMemberPlanDetail	ContactCenterforHealthCloudRetrieveMemberPlan

SEE ALSO:

[Salesforce Help: View Profile Details and Member Plan Information in the Contact Center](#)

Action Launcher for the Contact Center

Help contact center agents quickly deploy commonly-used processes and workflows. Configure frequently-used actions and pin them to the Action Launcher component.

For example, a member calls the Contact Center to file a claim or change their primary care physician. The contact center agent can quickly access these actions through the Action Launcher in the Contact Center, saving the agent valuable time for other tasks.

[Customize the Action Launcher in the Contact Center](#)

Create your own quick actions and configure them in the Contact Center Action Launcher component. For example, if the contact center agent frequently gets requests to add patient medications, create a deployment from the Action Launcher in Setup.

EDITIONS

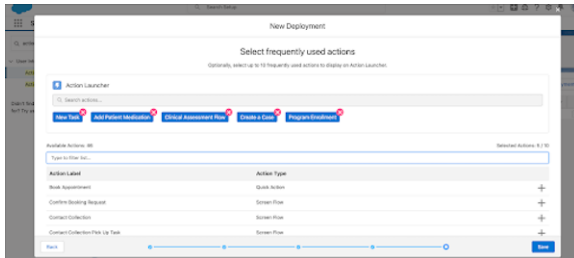
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

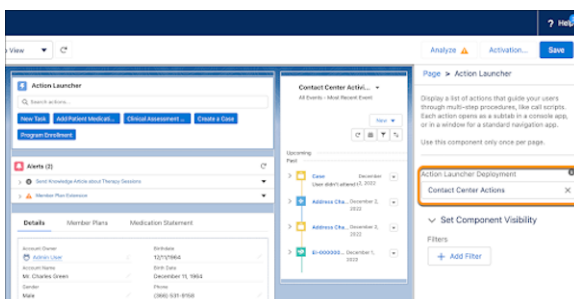
Customize the Action Launcher in the Contact Center

Create your own quick actions and configure them in the Contact Center Action Launcher component. For example, if the contact center agent frequently gets requests to add patient medications, create a deployment from the Action Launcher in Setup.

1. From Setup, in the Quick Find box, enter *Action Launcher*, and then click **Action Launcher**.
2. Click **New Deployment**, and click **Next**.
3. Enter a label. The API name is auto-updated.
4. Select whether you want to add flows and quick actions or OmniScripts, or both. Click **Next**.
5. Select the object for which you want to show the actions. For the Contact Center, select Account as the object, and Click **Next**.
6. From the list of available actions, screen flows or OmniScripts, choose items that appear in the Action Launcher search results. Click **Next**.
7. Select frequently used actions to pin to the Action Launcher.



8. Save your changes.
9. From the App Launcher, go to the Contact Center and open the person account's record page in Lightning App Builder.
10. In the Properties pane, in Action Launcher Deployment, add the deployment you configured.



11. Activate and save your changes
 - [Create an Action Launcher Deployment](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

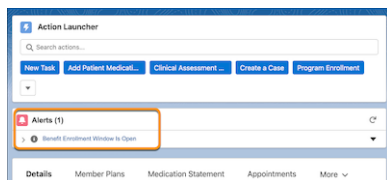
- Manage Contact Center for Health Cloud

Record Alerts in the Contact Center

In the Contact Center, Record Alerts notifies the contact center agent when there's a record change that requires immediate attention. Simply configure which record changes you want to trigger those alerts.

Record Alerts displays notifications based on the rules configured. For example, you can configure an alert for when a patient's benefit enrollment window is Open.

When you create the record alert, the notification shows up in the Contact Center.



- [Create a Record Alert Manually](#)

SEE ALSO:

[Salesforce Help: Review Alerts in the Contact Center](#)

Open CTI Softphone for the Contact Center

Integrate the Contact Center with Open Computer Telephony Integration (CTI) Softphone to help contact center agents seamlessly manage members' calls directly in Salesforce.

Open CTI is a JavaScript API that displays CTI functionality in a browser, so there's no need to install a CTI adapter.

 **Note:** If you want to opt for Amazon Connect, you can use [Service Cloud Voice](#) instead of Open CTI.

Here's how the Open CTI Softphone integration works.

- The member calls the contact center.
- The telephony system identifies the member and collects data such as member account number.
- To retrieve member records, such as account details, the CTI adapter passes the member's collected data to Salesforce via web services.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- The results of the search are sent to the CTI adapters.
- The CTI Adapter sends HTTP requests via Salesforce Open CTI to execute the incoming call screen pop, and update the softphone status.

[Configure CTI Softphone for the Contact Center](#)

Import a definition file, add directory numbers, and customize the softphone layout for your CTI integration.

[Add the CTI Softphone to the Contact Center](#)

Make the CTI Softphone easily accessible to the contact center user by adding it to the contact center app.

SEE ALSO:

[Salesforce Help: Set Up Service Cloud Voice](#)

[Salesforce Help: Plan Your Service Cloud Voice Contact Center](#)

Configure CTI Softphone for the Contact Center

Import a definition file, add directory numbers, and customize the softphone layout for your CTI integration.



Note: If you've built a custom CTI adapter, make sure you first create a [definition file to support the customization](#).

1. From Setup, in the Quick Find box, enter *Call Center*, and then click **Call Center**.
2. In Getting Started, click **Continue**.
3. In the Call Center Import window, click **Import** to bring in details from a [Call Center Definition File](#).
4. [Add the contact center user to the contact center](#). In Call Center Users, click Manage Call Center Users to add the contact center user.
5. Add a contact center [directory number](#).
6. [Customize the softphone layout](#) for your contact center. Click **Edit** next to Standard Softphone Layout to make your changes.
7. Save your changes.

SEE ALSO:

[Salesforce Help: Get Started with Open CTI](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

To add users to a call center

- Manage Call Centers

To import call center definition files

- Customize Application

Add the CTI Softphone to the Contact Center

Make the CTI Softphone easily accessible to the contact center user by adding it to the contact center app.

1. From Setup, in the Quick Find box, enter *App Manager*, and then click **App Manager**.
2. Next to Contact Center, click , and then click **Edit**.
3. In App Settings, go to Utility Items (Desktop Only).
4. Click **Add Utility Item**.
5. In the search bar, enter *Open CTI Softphone*, and then click **Open CTI Softphone**.
6. Save your changes.
7. Go to User Profiles, and make sure the contact center user's profile is in the Selected column.
8. Save your changes.

SEE ALSO:

[Salesforce Help: Receive Calls from Members Through Open CTI Softphone](#)

Code Sets and Code Set Bundles

Having accurate information and standardized definitions is vital for the healthcare industry. For example, a patient who is transferred from one provider to another faces serious consequences if both providers differ in their interpretation of the patient's data. To avoid this scenario, the healthcare industry uses terminology systems that standardize the definitions of various situations and clinical data. These systems consist of subunits that the industry terms Coding, Codeable Concept, and Value Set.

In the Health Cloud implementation of the Clinical data model, coding is termed code set and codeable concept is termed code set bundle.

[Codings, Codeable Concepts, and Value Sets](#)

To work effectively with these entities, it's important to know what they are first. These entities are related to each other by way of hierarchies, concepts, or contexts.

[Recommendations for Using Code Sets and Code Set Bundles](#)

The type and range of codes required vary across organizations. The code requirements also depend on the type of care and services organizations provide and on the terminology systems they prefer. As such, Health Cloud doesn't pre-populate these objects with any codes from terminology systems.

[Predecessors to Code Sets and Code Set Bundles in Health Cloud](#)

Before the Spring '21 release, Health Cloud had the Healthcare Procedure and Healthcare Diagnosis objects. These objects stored codes specifically related to procedures and diagnoses. These codes were used for prior-authorization requests and approval processes.

Codings, Codeable Concepts, and Value Sets

To work effectively with these entities, it's important to know what they are first. These entities are related to each other by way of hierarchies, concepts, or contexts.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Contact Center for Health Cloud

- Manage Contact Center for Health Cloud

To add users to a call center

- Manage Call Centers

To import call center definition files

- Customize Application

Codings relate to codeable concepts as a hierarchy. Basically, a codeable concept is a set of codings that represent the same concept. However, a value set groups codings more loosely based on their context. Let's take a closer look at what these entities are and how they're structured.

Coding

A coding, or code set in Health Cloud, represents a specific concept in the context of the terminology system that defines that concept. Multiple codings can represent the same real-world concept. However, their form depends on the terminology systems that define them and the versions of those systems. Codings consist of five components: Code, Display, System, Version, and User Selected.

Code: The symbol that represents the concept. This code can be a string of numbers or characters, and not necessarily a word. If this attribute is absent in a coding, the terminology system has no defined code to represent that coding's concept. Consider a code as the form of a coding.

Display: The text that represents the meaning of the code and its concept.

System: The URI of the terminology system that defines the concept of a coding. There are many terminology systems that the industry uses, like LOINC, SNOMED, RxNorm, ICD, and so on.

Version: The version of the terminology system that defines the coding. As mentioned earlier, the form a coding takes can change across versions of the terminology system.

User Selected: The boolean value that specifies whether the code is explicitly chosen by a user, as opposed to being selected by an automated algorithm. The expectation is that codings marked true for this attribute are more likely to be more accurate. If there are multiple codings that represent the same concept, codings marked true for this attribute tend to be more accurate. The Health Cloud implementation calls this attribute Primary.

Here's what a JSON sample for a coding looks like:

```
<coding>
  <system value="http://snomed.info/id"/>
  <version value="International Release - 20130731"/>
  <code value="389145006"/>
  <display value="Allergic Asthma"/>
  <primary value="true"/>
</coding>
```

The Health Cloud implementation of coding doesn't support hierarchies because the FHIR definition of a coding doesn't specify hierarchies. However, if your organization requires recording hierarchies, you can do that by adding a self-reference field to the Code Set object.

Codeable Concept

A codeable concept represents a unique real-world concept that's represented by codings. Codeable concepts bind together codings from across systems and versions, with the binding factor being the shared concept that those codings represent. For instance, let's say that system 1 represents COVID-19 as C19 in version 2.31 and as CVD2019 in version 1.13, and system 2 represents COVID-19 as C204. The codeable concept that represents the real-world concept of COVID-19 binds all three codings together.

The Health Cloud implementation of codeable concepts, called code set bundles, allow only 15 codings to be bound together while FHIR places no such constraint on codeable concepts.

Here's a JSON sample for a codeable concept:

```
<codeableConcept>
  <!-- SNOMED code -->
  <coding>
    <system value="http://snomed.info/id"/>
```

```

    <version value="International Release - 20130731"/>
    <code value="389145006"/>
    <display value="Allergic Asthma"/>
    <primary value="true"/>
  </coding>
  <!-- ICD code -->
  <coding>
    <system value="urn:oid:2.16.840.1.113883.6.42"/>
    <version value="9"/>
    <code value="493.00"/>
    <display value="Extrinsic asthma - unspecified"/>
    <primary value="false"/>
  </coding>
  <text value="Atopic Asthma"/>
</codeableConcept>

```

Value Set

A value set, like a codeable concept, binds together different codings. However, a value set is grouped by the context of the codings that are bound together and isn't a shared concept that aligns across terminology systems. For instance, while a codeable concept binds together codes representing a specific illness, a value set binds together code sets representing multiple illnesses.

Health Cloud hasn't explicitly implemented value sets using any object or component. However, to achieve a basic degree of grouping, you can group together code set records that have the same values for the Code Set Type field.

Recommendations for Using Code Sets and Code Set Bundles

The type and range of codes required vary across organizations. The code requirements also depend on the type of care and services organizations provide and on the terminology systems they prefer. As such, Health Cloud doesn't pre-populate these objects with any codes from terminology systems.

As an admin, it's up to you to populate these objects with the codes your organization needs. As the volume of required codes can be immense, we recommend that you use the Salesforce Data Loader to import code data into your orgs.

Data integrity in your code database is vital to the smooth functioning of your organization. Especially if you're in the payer industry, it's likely that you don't want your users to modify codes or add new ones. Such code changes can interfere with the automated approval processes you've set up and result in unintended authorizations. Therefore, we recommend modifying the access permissions on these objects after you populate these objects with the data your organization needs. You can give your users Read-Only access to these objects, or even prevent new record creation in them after your initial data loading.

Predecessors to Code Sets and Code Set Bundles in Health Cloud

Before the Spring '21 release, Health Cloud had the Healthcare Procedure and Healthcare Diagnosis objects. These objects stored codes specifically related to procedures and diagnoses. These codes were used for prior-authorization requests and approval processes.

Code Set and Code Set Bundle are more generic objects designed to store a wider variety of standardized codes required by the industry, and are more aligned with FHIR R4.

The new Code Set and Code Set Bundle objects improve on the old objects by adding support for terminology system information. This added support comes in the form of the Source System and Version fields.

 **Note:** Objects, flows, and apps that previously used Healthcare Diagnosis and Healthcare Procedure have been or will be extended to support the use of Code Set and Code Set Bundle. Healthcare Diagnosis and Healthcare Procedure are to be gradually phased out with future releases.

Reporting in Health Cloud

Set up your reporting environment for Health Cloud. Use the report builder to create a basic report and organize your reports to make it easy to find information. You can also find useful dashboard apps on the Salesforce AppExchange and add them to the Health Cloud 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 for Lightning Experience* module in Trailhead.

[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.

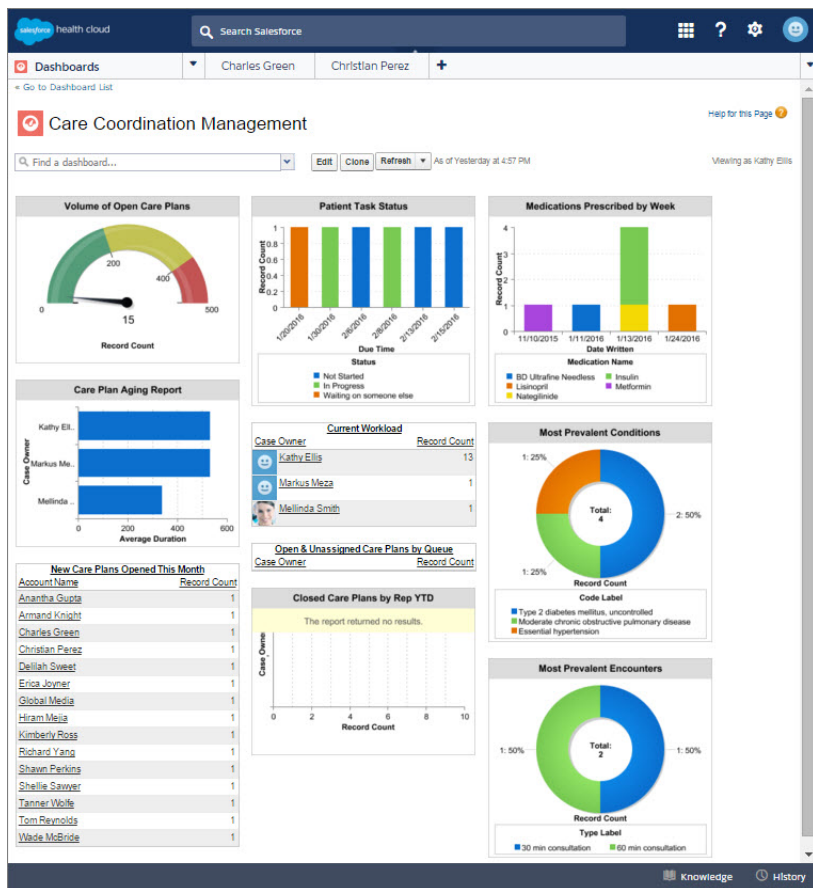
[Understand Which FHIR Objects Need Custom Report Types](#)

To report on Health Cloud data stored in some FHIR objects, create custom report types.

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.



After 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, in the Quick Find box, enter *App*, and then select **App Manager**. 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> 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 **Health Cloud Reports for Patient Referral Management**.
4. Let users know they can find and edit the reports from the referral management app or from the Reports tab.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Understand Which FHIR Objects Need Custom Report Types

To report on Health Cloud data stored in some FHIR objects, create custom report types.

The following FHIR objects require custom Report Types:

- Allergy Intolerance
- Clinical Encounter
- Medication Statement
- Health Condition
- Diagnostic Summary
- Patient Immunization
- Patient Medical Procedure
- Care Observation
- Code Set Bundle

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

SEE ALSO:

[Create a Custom Report Type](#)

Flow for Health Cloud

Flow for Health Cloud expands the existing Salesforce Flow suite with additional features built for complex industry workflows. In addition to Flow and MuleSoft, Flow for Health Cloud includes OmniStudio, Business Rules Engine, Document Generation and Intelligent Form Reader, and Data Processing Engine. Flow for Health Cloud consists of a unique portfolio of automation solutions, all built around your customer.

Flow for Health Cloud is included with Health Cloud. Document Generation is available with an add-on license.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Business Rules Engine

Business Rules Engine helps you simplify the process of determining eligibility or qualification and automate complex decision-making. Use Decision Tables to define workflow actions for customer use cases based on a collection of rules.

For more information, see [Business Rules Engine](#)

Data Processing Engine

Data Processing Engine helps you transform data that's available in your Salesforce org and write back the transformation results as new or updated records.

For more information, see [Data Processing Engine](#)

Document Generation

With Document Generation, you can generate documents, such as contracts, proposals, and service agreements, using OmniScripts.

For more information, see [Document Generation in Health Cloud](#).

Flow Builder and Flow Orchestration

Flow Builder provides declarative process automation for every Salesforce app, experience, and portal with point-and-click automation. Flow Orchestration lets you create multi-step processes that interact with multiple users.

For more information, see [Flow Builder](#)

Intelligent Form Reader

Intelligent Form Reader uses optical character recognition to automatically extract data from documents into Salesforce using Amazon Textract.

For more information, see [Intelligent Form Reader](#)

MuleSoft Composer and Robotic Process Automation (RPA)

MuleSoft Composer helps you use pre-built connectors to integrate information stored in different systems. MuleSoft RPA combines robotics and automation to automate repetitive manual tasks.

For more information, see [Mulesoft Composer](#)

OmniStudio

OmniStudio provides a suite of services, components, and data model objects that combine to create Industry Cloud applications. Use OmniScripts and FlexCards to create dynamic customer interactions without code. OmniStudio's DataRaptors and Integration Tools, combined with OmniScripts and FlexCards, make it easy to pull and blend data from Salesforce and external systems, run calculations against the data, and surface it in context.

For more information, see [OmniStudio](#).

Examples of Features that Use Flow for Health Cloud

Here are some Health Cloud features that use one or more Flow for Health Cloud solutions.

Utilization Management

Utilization Management uses OmniScripts, Integration Procedures, DataRaptors, and Business Rules engine to provide a smooth, guided user interaction that empowers your users to easily handle the complex prior authorization process. For more information, see [Manage Rules for Automating Prior Authorization Request Workflows](#).

Advanced Patient Card

The Advanced Patient Card provides a consolidated view of a patient and their clinical records using a configurable OmniStudio FlexCard. The user can create new records directly from the card. For more information, see [Use the Advanced Patient Card](#).

Provider Search

Provider Search uses the Data Processing Engine to transform provider data into a format that users can search. Additionally, it provides the capability to run a data sync in production on demand. For more information, see [Configure Provider Search to Help People Find Providers](#).

Assessments

Assessments use OmniScripts to create health screenings and gather patient intake information, Document Generation to generate Assessment Summaries, and DataRaptors to integrate data from previously-supplied question responses in either the Discovery Framework data model or the Health Cloud data model. For more information, see [Provide Assessments to Analyze a Patient's Health](#).

OmniStudio for Health Cloud

OmniStudio is a managed package of application components built on the Salesforce platform that you can download and install into Health Cloud. Configure users to give your care coordinators the ability to access the remote site and enable admins to customize appointment flows.

EDITIONS

Available in Lightning Experience in **Enterprise** and **Unlimited** editions.

Why Omnistudio?

OmniStudio provides a suite of services, components, and data model objects that you can use to create applications and workflows using data from Health Cloud and from external sources. When we update the OmniStudio package, the upgrades are pushed automatically to you. The OmniStudio package is required for Business Rules Engine and Decision Explorer.

OmniStudio includes:

- OmniScripts, which define and contain user-interaction components and give you the flexibility to create logic for guided flows.
- DataRaptors, which transfer and transform data between Salesforce and the OmniScripts, FlexCards, and Integration Procedures tools.
- Integration Procedures, which bundle server-side data integration operations for efficiency and reuse.
- FlexCards, which display data and launch actions.

Install the Summer '21 or later release of the OmniStudio package. See [OmniStudio Release Summary for Installation and Upgrade](#).

As an alternative, you can install the Summer '21 or later release of the Vlocity Health package with OmniStudio licenses. Follow the OmniStudio post-installation instructions regardless of which package you install.

Follow the OmniStudio post-installation instructions. Set up FlexCards and configure designer, non-designer, and Experience site users of OmniStudio.



Note: Experience site users are also called Digital Experience users or Community users.

[Get Ready to Install OmniStudio for Health Cloud](#)

Prepare to add the OmniStudio managed package into your Health Cloud org so that you can create guided interactions and other rich user experiences without code.

[Install the OmniStudio Package for Health Cloud](#)

Install OmniStudio as a managed package into your Health Cloud org.

Get Ready to Install OmniStudio for Health Cloud

Prepare to add the OmniStudio managed package into your Health Cloud org so that you can create guided interactions and other rich user experiences without code.

EDITIONS

Available in Lightning Experience in **Enterprise** and **Unlimited** editions.

Get Started with DataPacks

To help you get up and running with OmniStudio, the Salesforce Industries Process Library offers sample processes and assets to help you quickly configure Health Solutions workflows using OmniStudio components and features. After you install OmniStudio, download and install these DataPacks, as they're called, to quickly configure key workflows for your users.



Note: Beginning with the 'Spring 22 release, the OmniStudio package replaces Vlocity INS. If you started using Health Solutions before Spring '22, check with your account executive about licensing before you install OmniStudio.

Before you Install OmniStudio

- Make sure that your org doesn't already have OmniStudio installed. From Setup, search for and then select **Installed Packages**. If you have OmniStudio, don't install it again.
- Make sure you have the OmniStudio Admin, OmniStudio Runtime for Communities, and OmniStudio User permission set licenses.

- Complete the required steps to prepare your org for OmniStudio. See [Prepare to Install the OmniStudio Package](#).
- Deploying the Lightning web components in the Health Cloud DataPacks to your org requires that you use Visual Studio Code and Salesforce Developer Experience (DX). If you're unfamiliar with the Salesforce DX environment, complete the [Quick Start: Lightning Web Components](#) project and the [Lightning Web Components Basics](#) in Trailhead before you download and install the DataPacks.

Install the OmniStudio Package for Health Cloud

Install OmniStudio as a managed package into your Health Cloud org.

Every OmniStudio release has a unique download link. After the package installs, complete the required post-installation tasks.

1. Log out of all Salesforce orgs.
2. Go to the [OmniStudio release summary documentation](#) for a link to the current managed package installer.
3. Click the URL for the current OmniStudio package, or copy and paste it into your browser.
4. Log in to your Health Cloud org.
5. Select **Install for All Users** and then click **Install**.
6. On the Approve Third-Party Access page, select the SSL Encrypted box for both websites, select **Yes, grant access to these third-party web sites**, and then click **Continue**.
7. When you receive an email indicating that the installation was successful, click **Done**.
8. Complete the post-installation tasks for the current release. For details, see [OmniStudio release summary](#) documentation.

EDITIONS

Available in Lightning Experience in **Enterprise** and **Unlimited** editions.

USER PERMISSIONS

To install packages:

- Download AppExchange Packages

Help Patients Connect with Providers

Connect patients to providers by enabling patients, members, and agents to search for healthcare providers by specialty, location, and other factors. Use provider relationship cards to quickly and efficiently show users what they need to know about providers.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Provider Search and Provider Relationship Management

Get Oriented	 Get to know how you can connect your patients, members, and providers. • Health Cloud Provider Relationships and Search • Learn About the Provider Data Model • Health Cloud for Payers • Health Cloud for Providers • Deliver Great Patient Care with Health Cloud
Data Models	 Explore the Health Cloud data models and objects that support provider search and provider relationships. • Provider Relationship Management  • Provider Network Management Data Model

Set Up and Manage Provider Search and Provider Relationship Management

[Help People Find Providers with Provider Search](#)

Powered by the provider data model, Provider Search helps your users find healthcare providers based on criteria such as location, specialty, and whether the provider is accepting new patients. You can even see the location of each provider right in Health Cloud.

[Set Up Provider Relationship Cards to Show Practitioner Information](#)

Set up provider relationship cards to quickly and efficiently show users what they need to know about providers and the facilities where they work, all in one place.

Help People Find Providers with Provider Search

Powered by the provider data model, Provider Search helps your users find healthcare providers based on criteria such as location, specialty, and whether the provider is accepting new patients. You can even see the location of each provider right in Health Cloud.

How Does Provider Search Work?

Provider Search uses data stored in various records, such as Contact, Account, Healthcare Provider, and Healthcare Practitioner Facility to name a few. However, some of this data isn't searchable on its own. Provider Search includes automation that maps the source data to a searchable object called Care Provider Searchable Field. Automation keeps the data from the source records in sync so that your users always have the most recent information.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Learn More and Get Started

[Compare Provider Search and Legacy Provider Search](#)

Winter '23 introduced a new version of Provider Search. Provider Search in existing customer orgs with Health Cloud versions before Winter '23 is now called *Legacy Provider Search*.

[Set Up Provider Search in Health Cloud](#)

To set up Provider Search, first ensure your data is ready. Then you can give users access to the right fields and enable the necessary features in Setup. After that you can configure your users' search experience.

[Standard Fields Used in Provider Search](#)

The Care Provider Searchable Field object stores data from the Healthcare Provider and Healthcare Practitioner Facility objects. It improves the speed and scalability of allowing users to search for Providers.

[Provider Search Limitations](#)

Understand the limitations and considerations for Provider Search.

SEE ALSO:

[Health Cloud Developer Guide: CareProviderSearchableField Object](#)

Compare Provider Search and Legacy Provider Search

Winter '23 introduced a new version of Provider Search. Provider Search in existing customer orgs with Health Cloud versions before Winter '23 is now called *Legacy Provider Search*.

Existing customers can continue to use Provider Search (Legacy) without any impact until the Winter '24 release.

 **Important:** In Winter '24, all orgs using Provider Search Legacy must upgrade to the new Provider Search using Data Processing Engine. It's suggested that you upgrade now for best performance and scalability. To upgrade, [enable the new Provider Search](#).

Review these important considerations:

- Provider Search shows as “Disabled” on the Provider Search Settings page for existing customers.
- Provider Search (Legacy) remains active for existing customers until Provider Search is enabled.
- Provider Search (Legacy) uses a Sync Job that runs every 6 hours. Existing customers can continue to use the sync job until the Winter '24 release.
- The data model for Provider Search hasn't changed.
- You can continue to add custom fields to the Healthcare Provider and Healthcare Practitioner Facility objects and sync them to the Provider Search Searchable Field object.

Here is a comparison between Provider Search and Provider Search (Legacy).

Feature	Provider Search	Provider Search (Legacy)
Processing Technology	Data Processing Engine	Sync Job
Sync Data In Sandbox	Yes	Yes
Sync Data in Production	Yes	No
Add Custom Fields	Yes	Yes

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud

Data Update Frequency

Every 24 hours

Every 6 hours

Set Up Provider Search in Health Cloud

To set up Provider Search, first ensure your data is ready. Then you can give users access to the right fields and enable the necessary features in Setup. After that you can configure your users' search experience.

[Set Up Data for Provider Search](#)

To use Provider Search you need records with basic information for practitioners, facilities, and their relationships.

[Use Custom Fields to Run Provider Searches](#)

In addition to the standard fields in the Provider data model, you can also run searches for providers using custom fields. To use your custom fields with Provider Search, map them to custom fields in the Care Provider Searchable Field object. You can also create custom fields to set up dependent picklists to help users search more easily.

[Give Users Access to Provider Search Fields](#)

To view the results of a provider search, your users need access to several fields. You must also grant access to Analytics Cloud Integration User profile, which is used by the Data Processing Engine to generate searchable records.

[Prepare to Enable Provider Search](#)

Provider Search uses the Data Processing Engine to transform data from your provider and facility records to a searchable object. Assign the Data Pipelines Base User permission to the Health Cloud user enabling Provider Search and then enable Data Pipelines.

[Enable Provider Search](#)

Enable Provider Search to let internal users and site members find the right healthcare providers.

[Verify Access for Fields Used in Provider Search](#)

Provider Search uses Data Processing Engine to create Care Provider Searchable Field Records. To ensure that the Data Processing Engine for Provider Search runs properly, the Analytics Cloud Integration User and system administrator need Read access to fields Provider Search uses.

[Configure Provider Search for Users](#)

Add the Provider Search component to a Lightning page and customize your Health Cloud users' search experience.

[Enable Users to Copy Provider Search Results](#)

Enable the copy button so that your users can copy and share their provider search results via email or some other method.

[Let Site Users Search for Providers](#)

Make provider relationship cards available to end users in your Experience Cloud site. For example, CareMedica Health System insurance wants to enable its plan members to get information about the practitioners and facilities in its network.

[Synchronize Provider Search Data Manually](#)

Data for Provider Search in `CareProviderSearchableField` is updated automatically. For Provider Search, the data pipelines definition runs one time per day. If waiting to test your setup isn't practical, use the on-demand Provider Search data sync option.

Set Up Data for Provider Search

To use Provider Search you need records with basic information for practitioners, facilities, and their relationships.

To make the data in the provider search data model searchable, Health Cloud converts it into a searchable format using a background process called provider sync. The process moves the source data to a searchable object called Care Provider Searchable Fields. This object speeds up provider searches because it gathers information ahead of time from various source fields across multiple objects.

For each provider and facility, create records that contain the basic information your users will need in search results.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

 **Note:** These steps assume that you're manually defining a few facilities and practitioners to get provider search up and running. For a real-world implementation, we recommend that you import the data using Data Loader or the Composite API.

1. 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.
2. For a practitioner, such as a doctor, chiropractor, or therapist, create a Healthcare Provider record and associate the practitioner with a facility.
 - a. Create a Healthcare Provider record and specify the practitioner's Contact record in the Contact field (leaving the Account field empty).

 **Note:** Make sure to leave the Account field empty to avoid provider search sync issues.

- b. Create a Healthcare Practitioner Facility record specifying the facility's Account record in the Account field and the practitioner's Contact record in the Contact field.

 **Note:** For a solo practitioner, such as a family doctor in private practice, you need an Account record for the practice, a Contact record for the practitioner, and a Healthcare Practitioner Facility record that connects the practitioner to the practice. (For our purposes here, a practice is considered a kind of facility.)

3. To define a relationship between a practitioner and a facility, 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.

For example, a doctor working at more than one hospital will appear in a Healthcare Practitioner Facility record for each hospital where they work.

4. Make sure these fields are populated, at minimum:

Source Field	Target Field in CareProviderSearchableField	Required for Practitioner	Required for Facility
Account.Name	FacilityName	✓	✓
Account.ShippingAddress	Address	✓	✓
Account.Phone	FacilityPhone	✓	✓
Contact.FirstName	ProviderName	✓	
Contact.LastName	ProviderName	✓	
HealthcareProvider.Account	(Lookup to Account object)		✓

Source Field	Target Field in CareProviderSearchableField	Required for Practitioner	Required for Facility
HealthcareProvider.Practitioner	(Lookup to Contact object)	✓	
HealthcarePractitionerFacility.Account	(Lookup to Account object)		✓
HealthcarePractitionerFacility.Practitioner	(Lookup to Contact object)	✓	

For Provider Search Legacy the data is updated every six hours. However, you can manually update this data in your sandbox org at any time.

For Provider Search using Data Processing Engine, the data is automatically updated one time per day. You can manually update this data in your sandbox or production org at any time.

To verify that your provider data is available for users to search, find Provider Search Sync Logs in the app launcher.

The Provider Search Sync Logs enable users to check the sync status of providers that are set up for search. The Sync Status field reflects whether a provider's sync is a Success or Failure. If a provider's data didn't successfully sync to the Care Provider Searchable Fields object, review the message.

 **Note:** The Provider Search sync log only covers data being synchronized between source objects and the search object. If something is going wrong when data is created or updated in the source object, try resolving the issue there first, then retry the sync.

SEE ALSO:

[Health Cloud Developer Guide: Care Provider Searchable Fields object](#)

[Health Cloud Developer Guide: Healthcare Provider object](#)

[Health Cloud Developer Guide: Healthcare Practitioner Facility object](#)

Use Custom Fields to Run Provider Searches

In addition to the standard fields in the Provider data model, you can also run searches for providers using custom fields. To use your custom fields with Provider Search, map them to custom fields in the Care Provider Searchable Field object. You can also create custom fields to set up dependent picklists to help users search more easily.

Consider the following when creating custom fields:

- Provider Search uses Data Pipeline definitions with Data Processing Engine to generate the searchable records.
- Enabling Data Pipelines automatically creates the Analytics Cloud Integration User profile and grants visibility to any standard or custom fields in the org.
- The Analytics Cloud Integration User profile requires Read access on all objects, fields, and custom fields used in Provider search. If you create custom fields after enabling Data Pipelines, be sure to update field visibility for the Analytics Cloud Integration User.
- The custom fields must be in either the `HealthcareProvider` or `HealthcarePractitionerFacility` objects.
- The custom fields must be of type Text, Picklist, or Picklist (Multi-Select).

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Data Processing Engine:

- Data Pipelines Base User

To enable Data Pipelines:

- Customize Application

If you're creating custom fields to use with dependent picklists for searches, your fields must use the same object. For example, you can create a custom field on one of the source objects used with provider search, then set up a field dependency to an existing field on the same source object. To store the data from your custom field, create a new field on Care Provider Searchable Field and map the new fields. Then when you set up your Provider Search component, you can include the new field you created on the Care Provider Searchable Field object that uses the dependency.

To create a custom field for use in provider search:

1. From Object Manager, find and select **Care Provider Searchable Field**.
2. Create a text field to map to the custom field that you want to use in your searches.
Make a note of the API name you set for this new field.
3. Grant visibility access to the Analytics Cloud Integration User for the new field.
4. In Setup, use the Quick Find box to find **Care Provider Search Config**.
5. Click **New Care Provider Search Config**.
6. Enter these values.

Field	Value
Label	A label for the mapping configuration.
Name	The API name of the mapping configuration.
Mapped Object	The object that has your custom field.
	 Note: You can use custom fields from only the <code>HealthcareProvider</code> and <code>HealthcarePractitionerFacility</code> objects.
Source Field	Enter the API name of the custom field you want to use.
Target Field	Enter the API name of the custom text field that you created in Care Provider Searchable Field.  Note: For Text Area (Long) there is a limitation of 4000 characters and anything exceeding that will be truncated after the provider search sync job is finished.

7. Select **IsActive**.
8. Save your configuration.
9. Open a page configured with the Provider Search component in Lightning App Builder.
10. Under Advanced Search Fields, click **Add Field**.
11. Save and activate your configuration.

SEE ALSO:

[Salesforce Help: Field-Level Security](#)

[Salesforce Trailhead: Set Up Provider Search](#)

Give Users Access to Provider Search Fields

To view the results of a provider search, your users need access to several fields. You must also grant access to Analytics Cloud Integration User profile, which is used by the Data Processing Engine to generate searchable records.

1. From Setup, in the Quick Find box enter *Profiles*, and then select **Profiles**.
2. Select the name of the Profile to edit.
3. Click **Edit**.
4. In the **Standard Object Permissions** section, assign **Read** access to the fields in the Care Provider Searchable Field object and the source object:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Field in Care Provider Searchable Field Object	Corresponding Field in Source Object
FacilityName	Account.Name
ProviderName	Contact.Name
Specialty	CareSpecialty.SpecialtyType
SubSpecialty	CareTaxonomy.TaxonomyType
PlanType	HealthcarePayerNetwork.NetworkType
IsAcceptingNewPatients	HealthcareFacilityNetwork.PanelStatus
ProviderType	HealthcareProvider.ProviderType
GenderRestriction	HealthcareFacilityNetwork.GenderRestriction
NationalProviderIdentifier	HealthcareProviderNpi.Npi

5. Save your work.
6. Repeat for the Analytics Cloud Integration User.
Provider Search uses Data Pipeline definitions with Data Processing Engine to generate the searchable records. The Data Processing Engine includes an Analytics Cloud Integration User profile, which requires Read access on all objects, fields, and custom fields used in Provider search.
7. Repeat for additional profiles that need read access.

SEE ALSO:

[Salesforce Help: Create and Assign User Profiles](#)

Prepare to Enable Provider Search

Provider Search uses the Data Processing Engine to transform data from your provider and facility records to a searchable object. Assign the Data Pipelines Base User permission to the Health Cloud user enabling Provider Search and then enable Data Pipelines.

 **Note:** If your org existed before Winter '23, you're using legacy Provider Search. Legacy Provider Search doesn't require data pipelines.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
2. Select a user with a System Administrator Profile.
3. In the Permission Set Assignments related list, select **Edit Assignments**, and add the Data Pipelines Base User permission set to the Enabled Permission Sets.
4. Save your work.
5. From Setup, in the Quick Find box, enter *Data Pipeline*, and then select **Getting Started**.
6. On the Data Pipelines Getting Started page, **Enable** Data Pipelines.

SEE ALSO:

[Salesforce Help: Manage Permission Set Assignments](#)

[Salesforce Help: Data Processing Engine](#)

[Salesforce Help: Get Familiar with Salesforce Data Pipelines](#)

Enable Provider Search

Enable Provider Search to let internal users and site members find the right healthcare providers.

When Provider Search is enabled, it creates a Data Pipeline definition that transforms data from Contact, Account, Healthcare Provider, and Healthcare Practitioner Facility records to the searchable Care Provider Searchable Field object. This object ensures that search queries for providers are returned quickly. The Data Pipelines process runs one time per day. Or you can manually sync at any time.

 **Important:** If your org existed before Winter '23, you're using legacy Provider Search. Enabling this setting irreversibly disables legacy Provider Search.

1. From Setup, in the Quick Find box, enter *Provider Search*, and then select **Provider Search Settings**.
2. On the Provider Search settings page, turn on Provider Search.

SEE ALSO:

[Salesforce Help: Data Processing Engine](#)

[Salesforce Help: Legacy Provider Search](#)

[Salesforce Help: Data Pipelines](#)

[Salesforce Help: Data Processing Engine](#)

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud

USER PERMISSIONS

To administer Health Cloud:

- Health Cloud Foundation permission set

To use Data Processing Engine:

- Data Pipelines Base User permission

To enable Data Pipelines:

- Customize applications

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To administer Health Cloud:

- Health Cloud Foundation permission set

To use Data Processing Engine:

- Data Pipelines Base User permission

To enable Data Pipelines:

- Customize application

Verify Access for Fields Used in Provider Search

Provider Search uses Data Processing Engine to create Care Provider Searchable Field Records. To ensure that the Data Processing Engine for Provider Search runs properly, the Analytics Cloud Integration User and system administrator need Read access to fields Provider Search uses.

Health Cloud uses the Data Processing Engine to convert provider search data into a searchable format, so that users can quickly and easily find provider data. The process moves the source data to a searchable object called Care Provider Searchable Field. When you enable Provider Search, Salesforce creates the Data Processing Engine definition and an Analytics Cloud Integration User, which by default has Read access to all fields in the provider search data model.

The Data Processing Engine fails if someone changes field level security on any existing provider search field or adds a custom field and doesn't grant Read access to the system administrator and Analytics Cloud Integration User.

To troubleshoot issues with provider search:

1. Verify that the FHIR Data Model is enabled. The FHIR Data Model gives Read access to fields that aren't accessible through the user interface.
2. Verify that the Analytics Cloud Integration User and system administrator have Read access to all of these objects and fields.

Object Name	Field Name
Account	Active
Account	Name
Account	Operating Hours
Account	Phone
Account	Shipping Address
Board Certification	Certification Type
Board Certification	Healthcare Provider
Board Certification	Practitioner
Business License	Is Active
Business License	Healthcare Provider
Business License	Jurisdiction Country
Business License	Jurisdiction Other
Business License	Jurisdiction State
Business License	Name
Business License	Status
Care Provider Facility Specialty	Account
Care Provider Facility Specialty	Active
Care Provider Facility Specialty	Practitioner Facility

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Data Processing Engine:

- Data Pipelines Base User

To enable Data Pipelines:

- Customize Application

To edit field level access on provider management Health Cloud Objects

- Health Cloud Foundation

Care Provider Facility Specialty	Specialty
Care Specialty	Active
Care Specialty	Specialty Type
Care Taxonomy	Active
Care Taxonomy	Taxonomy Type
Contact	Gender
Contact	Name
Healthcare Facility Network	Account
Healthcare Facility Network	Active
Healthcare Facility Network	Panel Status
Healthcare Facility Network	Payer Network
Healthcare Facility Network	Practitioner
Healthcare Facility Network	Practitioner Facility
Healthcare Payer Network	Active
Healthcare Payer Network	Name
Healthcare Practitioner Facility	Account
Healthcare Practitioner Facility	Active
Healthcare Practitioner Facility	Operating Hours
Healthcare Practitioner Facility	Practitioner
Healthcare Provider	Account
Healthcare Provider	Exclude from search
Healthcare Provider	Name
Healthcare Provider	Practitioner
Healthcare Provider	Provider Class
Healthcare Provider	Provider Type
Healthcare Provider	Status
Healthcare Provider NPI	Account
Healthcare Provider NPI	Active
Healthcare Provider NPI	NPI
Healthcare Provider NPI	Practitioner
Healthcare Provider Taxonomy	Account

Healthcare Provider Taxonomy	Active
Healthcare Provider Taxonomy	Practitioner
Healthcare Provider Taxonomy	Taxonomy
Operating Hours	Name
Operating Hours	Time Zone
Person Education	Active
Person Education	Degree
Person Education	Education Level
Person Education	Healthcare Provider
Person Language	Individual
Person Language	Language

3. Verify that the Analytics Cloud Integration User and system administrator have Read access to custom fields used in provider search.

Configure Provider Search for Users

Add the Provider Search component to a Lightning page and customize your Health Cloud users' search experience.

Before you start, check that the maps and location service is turned on and that the data integration rule for geocoding in the Care Provider Searchable Fields object is enabled. Go to Setup, in the Quick Find Box enter *Data Integration Rules*, and select **Data Integration Rules**. Look for the **Geocodes for Care Provider Searchable Field Address** and check that the status is **Active**. Then look for the **Geocodes for Account Shipping Address** and check that the status is **Active**. If setup is incomplete, contact your Salesforce account representative.

Optionally, set up dependent picklists to help users find the right choices faster when searching. For more information, see [Use Custom Fields to Run Provider Searches](#).

1. In Lightning App Builder, edit the page where you want to add the Provider Search component.

- Place the Provider Search component on the Account record page.
- Place the component on the Home page of your Health Cloud app.
- Create an app that contains only the provider search component.



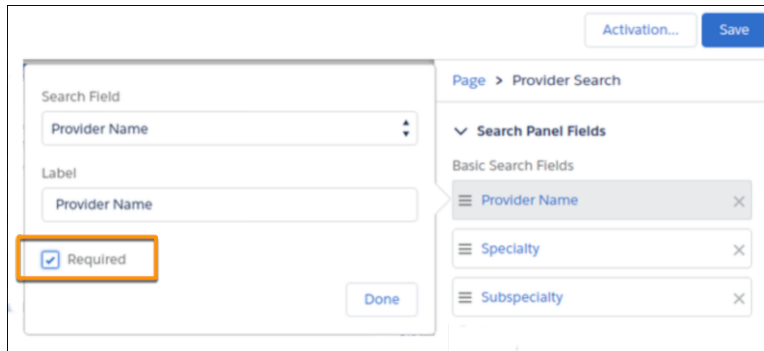
Note: In a standalone app, users can't filter by eligibility according to insurance plan.

2. Drag the Provider Search component to the page.
3. In the properties panel, under Search Panel Fields, choose the fields users can search. Select **Required** for fields that must be supplied.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



4. If you have more fields than fit on a single screen, users can click **View Advanced Search** to show all fields. If you'd rather let users see all fields at once, unselect **Hide Advanced Search**.
5. Under **Search Results Fields**, rearrange the selected field order as needed.
6. Save and activate your page.
7. In the App Launcher, search for the page or app and try it out.

 **Tip:** If you have a mobile app set up, some users can make phone calls directly from the provider search result card.

If you don't see search results immediately after setting up provider search, you can manually sync the data. Provider Search automatically syncs the data once per day. Provider Search Legacy syncs the data every six hours.

SEE ALSO:

[Salesforce Help: Geocode Data Integration Rules](#)

[Salesforce Help: Define Dependent Picklists](#)

Enable Users to Copy Provider Search Results

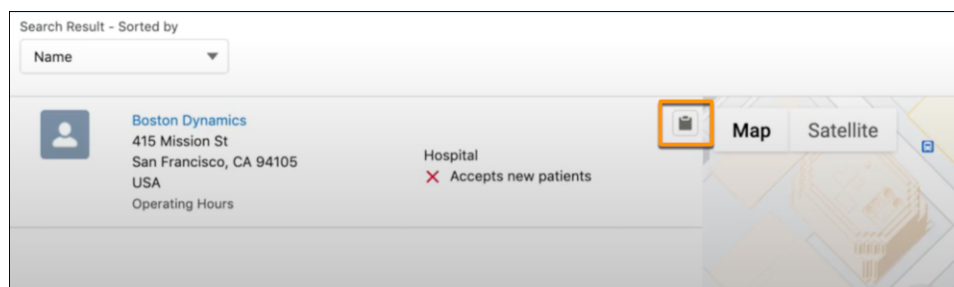
Enable the copy button so that your users can copy and share their provider search results via email or some other method.

1. From the Provider Search page, click the gear icon and select **Edit page**.
2. In the configuration column at the right side of Lightning App Builder, select **Show Action Bar**.
3. Save your changes and alert your users that the **Copy**  button is available.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Let Site Users Search for Providers

Make provider relationship cards available to end users in your Experience Cloud site. For example, CareMedica Health System insurance wants 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 Care Provider Searchable Field object.
You don't need to give additional access to the source fields because the Care Provider Searchable Field object stores data from the source records.
2. Use Experience Builder to add the Provider Search component to a page on your site.
3. Save and publish your changes.

SEE ALSO:

[Salesforce Help: Navigate Experience Builder](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Synchronize Provider Search Data Manually

Data for Provider Search in `CareProviderSearchableField` is updated automatically. For Provider Search, the data pipelines definition runs one time per day. If waiting to test your setup isn't practical, use the on-demand Provider Search data sync option.

First, check that all the necessary fields from Healthcare Provider and Healthcare Practitioner Facility are mapped to fields in Care Provider Searchable Field.

For Provider Search Legacy, on-demand data synchronization is available only in sandbox orgs.

For Provider Search, on-demand data synchronization and daily sync uses the data pipelines recipe run time limit of 30 hours per month.

1. From Setup, in the QuickFind box, enter *Provider Search Settings*, and then select **Provider Search Settings**.
2. Click **Sync Data**.
It takes time to sync the data. For Provider Search, only one data pipeline recipe can run at a time. Use the Jobs Monitor tab of Data Manager to see the status of your sync. Use the Usage tab to see current hours of recipe job run time for the month.
3. After the data is synchronized, run a provider search and check that everything is working as expected.

SEE ALSO:

[Salesforce Help: Monitor a Recipe Job](#)

[Salesforce Help: View Data Pipeline Usage](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Standard Fields Used in Provider Search

The Care Provider Searchable Field object stores data from the Healthcare Provider and Healthcare Practitioner Facility objects. It improves the speed and scalability of allowing users to search for Providers.

Here's the set of standard fields in the Provider data model and other standard objects that are already mapped to the Care Provider Searchable Field object.

Source Field	Target Field in Care Provider Searchable Field	For Practitioners	For Facilities
Account.Name	FacilityName		✓
Account.Name	ProviderName		✓
Account.OperatingHoursId	OperatingHours		✓
Account.Phone	FacilityPhone		✓
Account.PhotoUrl	PhotoUrl		✓
BoardCertification.CertificationType BoardCertification.HealthcareProvider must also be specified.	CertificationType	✓	
CareSpecialty.SpecialtyType Sourced from a Care Provider Facility Specialty record, which connects a facility (CareProviderFacilitySpecialty.AccountId) to a care specialty (CareProviderFacilitySpecialty.SpecialtyId) All source records must be Active.	Specialty		✓
CareSpecialty.SpecialtyType Sourced from a Care Provider Facility Specialty record, which connects a Healthcare Practitioner Facility record (CareProviderFacilitySpecialty.PractitionerFacilityId) to a care specialty (CareProviderFacilitySpecialty.SpecialtyId) The Healthcare Practitioner Facility record then connects the facility (HealthcarePractitionerFacility.AccountId) to a practitioner (HealthcarePractitionerFacility.PractitionerId) All source records must be Active.	Specialty	✓	
Contact.Name	ProviderName	✓	
Contact.PhotoUrl	PhotoUrl	✓	
HealthcareFacilityNetwork.Account	PlanType		✓
HealthcareFacilityNetwork.PanelStatus <i>PanelStatus = Open</i> indicates <i>Accepting New Patient = true</i> Account must be provided. If PractitionerFacility is also provided, facility is assumed.	IsAcceptingNewPatients		✓

Source Field	Target Field in Care Provider Searchable Field	For Practitioners	For Facilities
HealthcareFacilityNetwork.PanelStatus <i>PanelStatus = Open indicates Accepting New Patient = true</i> PractitionerFacility must be provided.	IsAcceptingNewPatients	✓	
HealthcareFacilityNetwork.PractitionerFacility HealthcareFacilityNetwork.Name and PayerNetwork.Name must also be populated.	PlanType	✓	✓
HealthcareProvider lookup	Provider	✓	✓
HealthcareProvider.ProviderType	ProviderType	✓	✓
HealthcareProviderNpi.Account	NationalProviderIdentifier		✓
HealthcareProviderNpi.Practitioner	NationalProviderIdentifier	✓	
HealthcareProviderTaxonomy.TaxonomyType <i>Taxonomy.TaxonomyType must also be specified.</i> <i>Not valid for a practitioner-facility combination.</i>	SubSpecialty	✓	
HealthcarePractitionerFacility.OperatingHoursId	OperatingHours	✓	
PersonEducation.EducationLevel <i>Degree, Status, DegreeEarner, and HealthCareProvider must also be specified.</i>	EducationLevel	✓	

SEE ALSO:

[Health Cloud Developer Guide: Care Provider Searchable Fields object](#)

Provider Search Limitations

Understand the limitations and considerations for Provider Search.

Provider Search for Unauthenticated Users

Provider Search is available only for authenticated Experience site users. Every user who accesses your site as an unauthenticated user is mapped to a guest profile that is automatically created. Currently, there's only a limited set of objects exposed to the guest user profile.

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Provider Search Sync

Provider Search syncs data once every day, whereas Provider Search Legacy syncs data every six hours. Here are the limitations of the sync:

- You can't configure or customize the sync job.
- You can't write to the CareProviderSearchableTable with your own automated sync job.



Note: Any changes made to the Healthcare Provider object will be updated by the sync job.

Care Provider Searchable Field Object

The Care Provider Searchable Field object is intended for internal use only. It isn't designed to be used with sharing rules. Applying sharing rules on top of the object will not return the expected results.

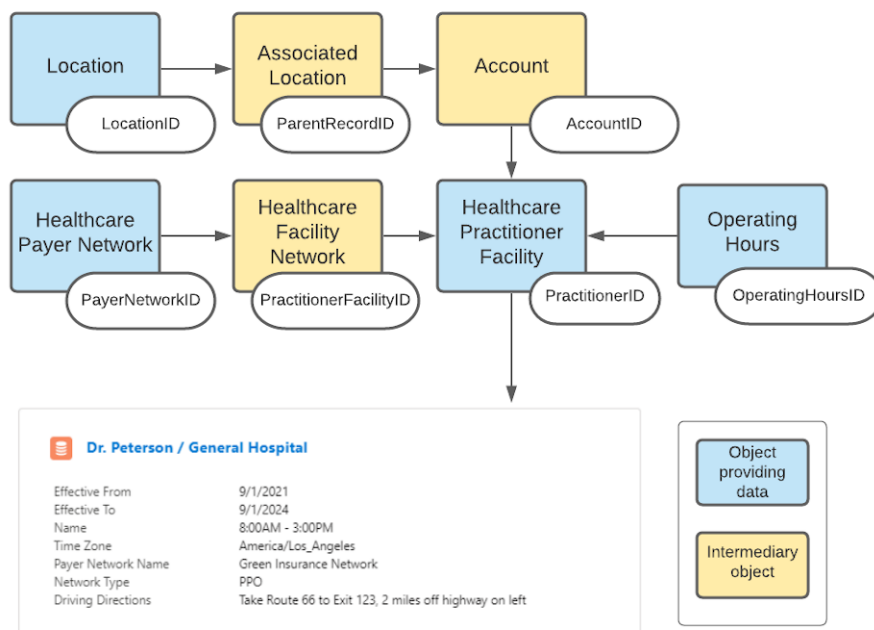
Set Up Provider Relationship Cards to Show Practitioner Information

Set up provider relationship cards to quickly and efficiently show users what they need to know about providers and the facilities where they work, all in one place.

Identify the information your users look for on each Provider Relationship Card, then use the card setup wizard to connect the various objects that contain that information.

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

A relationship card can draw its content from objects that its parent or child objects, up to three hops away. For example, this card is based on the Healthcare Practitioner Facility object, but it also uses information from objects that are related to that object through one or two intermediate objects. The fields in blue are the objects that we are pulling information from to display, in this scenario.



You'll generally want a card to show each practitioner at a given practice or hospital or health center (from the Healthcare Practitioner Facility object), with their contact information, specialty information, and anything else related that your organization finds useful.

Types of Provider Cards

Relationship cards can connect and display a lot of different types of information. Here are some common kinds of relationship information that you'd want to display on a provider relationship card, and how you'd initially set it up using out-of-the-box Health Cloud.

Set Up the Information Sources for a Relationship Card

Relationship cards show your users information about practitioners and the facilities where they work. What is shown on the card is up to you. It might include the doctor's contact information, accounts the practitioner has a relationship with (employer, hospital affiliations, practice locations, billing company, etc.), details of the practitioner's relationship to those accounts, and some key information about the related accounts.

Create Provider Cards for a Facility

Design cards to show your users information about providers and the facilities where they work. For example, a network specialist may need to know at a glance which facilities Dr. Carol Peterson is practicing at and when she is there.

Provider Card Fields

Use the fields provided on the card setup page to configure your provider cards the way you want them.

Import Data for Provider Cards

The data that helps users identify practitioners is stored in the provider objects. To create these records quickly, you can use Composite API requests to create and link multiple records using a single API call.

Types of Provider Cards

Relationship cards can connect and display a lot of different types of information. Here are some common kinds of relationship information that you'd want to display on a provider relationship card, and how you'd initially set it up using out-of-the-box Health Cloud.

Which practitioners work at this facility?

In this example, the practitioner is modeled as a person account.

Displaying On	Account page
Object relationship	Account to Person Account
Card to Page Relationship	Direct
Object containing the principal information	HealthcarePractitionerFacility
Source object	AccountID

Which facilities does this practitioner work at?

In this example, facilities are modeled as accounts and practitioners are modeled as person accounts.

Displaying On	Person Account page
Object relationship	Person Account to Account
Card-Page Relationship	Direct

Object containing the principal information	Healthcare PractitionerFacility
Source Object	PractitionerID

Which other practitioners work with this practitioner?

In this example, practitioners are modeled as person accounts.

Displaying On	Person Account page
Object relationship	Person Account to Person Account
Card-Page Relationship	Direct
Object containing the principal information	HealthCloudGA__ContactContactRelation__c
Source Object	HealthCloudGA__Contact__c

Which staff members work with this practitioner? (Person Account to Contact)

In this example, practitioners are modeled as person accounts and staff members are modeled as contacts.

Displaying On	Person Account page
Object relationship	Person Account to Contact
Card-Page Relationship	Direct
Object (Principal Information)	HealthCloudGA__ContactContactRelation__c
Source Object	HealthCloudGA__Contact__c

Which staff members work with this practitioner? (Contact to Contact)

In this example, both the practitioner and the staff member are modeled as contacts.

Displaying On	Contact record
Object relationship	Contact to Contact
Card-Page Relationship	Direct
Object containing the principal information	HealthCloudGA__ContactContactRelation__c
Source Object	HealthCloudGA__Contact__c

Which practitioners work with this staff member?

In this example, the practitioner is represented by a person account and the staff member is a contact.

Displaying On	Contact page
Object relationship	Contact to Person Account
Card-Page Relationship	Direct
Object containing the principal information	HealthCloudGA__ContactContactRelation__c
Source Object	HealthCloudGA__Contact__c

Set Up the Information Sources for a Relationship Card

Relationship cards show your users information about practitioners and the facilities where they work. What is shown on the card is up to you. It might include the doctor's contact information, accounts the practitioner has a relationship with (employer, hospital affiliations, practice locations, billing company, etc.), details of the practitioner's relationship to those accounts, and some key information about the related accounts.

As an example, let's build a relationship card that users will encounter on the Contact record page when they look up a doctor. This card will provide the key things users need to know in order to interact with a given practitioner at a specific facility. In this case, that practitioner is Dr. Carol Peterson, who works at General Hospital. (If Dr. Peterson also works at other locations, a similar card shows up to describe her activities at each location.) We'll assume users will want to see a few key fields on the card:

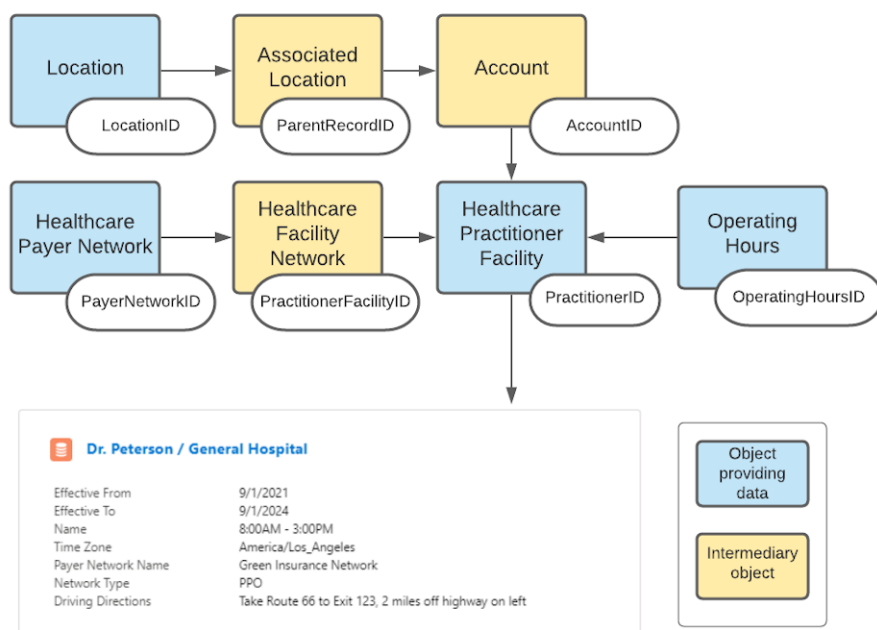
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Field	Purpose	Object Where Info is Stored
Effective To	When Dr. Peterson's working relationship with General Hospital is scheduled to end.	Healthcare Practitioner Facility
Effective From	When Dr. Peterson's working relationship with General Hospital began.	Healthcare Practitioner Facility
Operating Hours	Times during which Dr. Peterson sees patients at General Hospital.	Operating Hours
Time zone	The time zone General Hospital is in.	Operating Hours
Payer Network Name	Health insurance company that covers Dr. Peterson's work at General Hospital.	Healthcare Payer Network
Network Type	The type of insurance plan, such as PPO, HMO, or EPO.	Healthcare Payer Network
Driving Directions	Instructions for getting to General Hospital.	Location

This relationship card makes it unnecessary for a care coordinator or call center agent to find the relevant record in each object in order to determine Dr. Peterson's suitability for a patient. Instead, they can see all the key information in one place.



1. In Setup, go to Provider Relationship Cards and click **New**.
2. Give the card a name that describes what it's for, such as "Doctor-Hospital Relationship."
Select the page your users will see this card on. In this case, it will be the Contact record page. Pick the Master record type.
3. Specify how the 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 would be in the Contact object. In that case, you could select **Same object** and be done. In this case, however, we want to show some further information that's not in the Contact object. The information about Dr. Peterson's available hours comes from the Operating Hours object; the information about insurance coverage comes from the Healthcare Payer Network object, and the travel directions come from the Location object. All of these objects are related to the Contact object through the Health Care Practitioner Facility object, so we'll select **Indirectly**.
4. Select the object that contains the essential information.
You can think of it as a hub-and-spoke model, with the Healthcare Practitioner Facility object as the hub, because the main point of the card is to show the practitioner's available hours at the facility. If the main point were to show a provider's qualifications, we might choose the Accreditation object as the hub.

Now you're ready to design the card itself, with information drawn from the objects you've selected.

Create Provider Cards for a Facility

Design cards to show your users information about providers and the facilities where they work. For example, a network specialist may need to know at a glance which facilities Dr. Carol Peterson is practicing at and when she is there.

This card type will live on the Contact record page for practitioners. We've set up the information sources to support this information:

- Effective To
- Effective From
- Operating Hours
- Time zone
- Payer Network Name
- Network Type
- Driving Directions

1. In Setup, go to Relationship Card Type Manager and, in the dropdown next to a card that you've created (such as Doctor-Hospital Relationship), click **Edit Card Fields**.
2. For **Indirect Source Object**, select Healthcare Practitioner Facility, then select the **Effective To** and **Effective From** fields and click **Add Selected Fields to Card**.
3. Now we'll go get the operating hours information from the Operating Hours object, which is directly related to our base Healthcare Practitioner Facility object.
 - a. Click **Select fields from parent or child object related to HealthCarePractitionerFacility**.
These are the fields that enable the relationship from the initial object.
 - b. Under **Select Object**, choose Operating Hours, and under **Select Field**, choose the OperatingHoursId lookup field.
 - c. Select **Name** from the list of fields, and click **Add Selected Fields to Card**.
4. Get the insurance plan information from the Healthcare Payer Network object, which is related to our base Healthcare Practitioner Facility object through the Healthcare Facility Network object.
 - a. Click **Select fields from related object two levels away from HealthCarePractitionerFacility**.
 - b. Under **Select Object**, choose Healthcare Facility Network, and under **Select Field**, choose the FacilityNetworkId lookup field.
 - c. In the next **Select Object** field, choose Healthcare Payer Network, and under **Select Field**, choose the PayerNetworkId lookup field.
 - d. Select **Network Type** and **Payer Network Name** from the list of fields, then click **Add Selected Fields to Card**.
5. Get the driving directions from the Location object, which is related to the Healthcare Practitioner Facility object through two intermediary objects: Account and Associated Location.
 - a. Click **Select fields from related object three levels away from HealthCarePractitionerFacility**.
 - b. Under **Select Object**, choose Account, and under **Select Field**, choose the AccountId lookup field.
 - c. In the next **Select Object** field, choose AssociatedLocation, and under **Select Field**, choose the ParentRecordId lookup field.
 - d. In the third **Select Object** field, choose Location, and under **Select Field**, choose the LocationId lookup field.
 - e. Select **Driving Directions** from the list of fields, then click **Add Selected Fields to Card**.
 - f. Save your work.

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The fields you've selected are shown in the panel on the right. Change their order and rename them as needed. For example, "Name" isn't a very intuitive label for the field that displays the doctor's available hours. You might want to rename that to something like "Hours Available."

6. In Setup, go to the Lightning Application Builder and select Contact.
7. Drop the **Relationship Card** component from the left panel onto the Account record page.
8. 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."
9. For **Card Type**, select the name of the card you created that you want to show on this page.
10. Save the page.

Provider Card Fields

Use the fields provided on the card setup page to configure your provider cards the way you want them.

Field	Description
Activate card?	Make this card available for inclusion on Account or Contact record pages.
Name the Card	Give the card a name that describes the two sides of the relationship it represents.
Reference Name	Name that appears in Setup.
Developer Name	Name used for API-level interaction.
What page will this card appear on?	Cards can appear on an Account page or a Contact page. You'll usually want a card for a practitioner to appear on the Account page of the facility where they work, and a card for a facility to appear on the Account page of a practitioner who works at that facility. For staff or physicians modeled as contacts, it can also appear on their Contact record page.
Select Object	Select the object whose record pages the card will appear on.
Select Record Type	Select the record type that this card will display on, if any.
How is this card related to the page where it appears?	Same object: All the information you want to display is in the object where the card is shown. For example, you are displaying the card on a facility's Account page and it contains the facility's address and phone number, which are stored in the facility's Account record. Directly: The information you want to display is in an object that's directly related to the current object. For example, your facility card displays the name and contact information for the person who books appointments at the facility. The Account object has a lookup field to the Contact object, which contains that information. Indirectly: The information you want to show is in a junction object that connects the base object to the page where the card is

Field	Description
	displayed. For example, Healthcare Practitioner Facility is an object that matches practitioners with the places where they work.
Which object holds the principal information this card will display? (This object is the hub from which you will jump up to three hops away in object relationships.)	For example, if the main point of the card is to show the operating hours and contact information for the facility, choose Healthcare Facility. If the main point is to show a provider's qualifications, choose Accreditation.
Select Object	Select the object where the main information is stored.
Select Record Type	Select the record type that this card will display on, if any.
Source Object	The relationship field from the object named in "Select Object" to the respective Account or Contact.

Import Data for Provider Cards

The data that helps users identify practitioners is stored in the provider objects. To create these records quickly, you can use Composite API requests to create and link multiple records using a single API call.

For example, data for healthcare provider Dr. Scott Kaplan is spread across these records: Account, Contact, Healthcare Provider, Person Education, Healthcare Provider NPI, Healthcare Practitioner Facility, Healthcare Provider Specialty, Healthcare Facility Network, and Healthcare Provider Taxonomy. That's a lot of records. The Composite resource in REST API lets you create these records in a single API call. In fact, you can create 200 records per call.

For an example of how to use Composite resource, see [Use Composite API Requests to Import Data for Provider Relationship Cards](#) in the *Health Cloud Developer Guide*.

SEE ALSO:

[Salesforce Help: Data Loader](#)

[Health Cloud Developer Guide: Provider Network Management Data Model](#)

[Health Cloud Developer Guide: Care Provider Searchable Field Object Object](#)

Protect Personal Health Information

Healthcare organizations across the world are required to comply with regulations such as HIPAA that govern protected health information. Failure to comply with these regulations has legal consequences. Organizations must ensure that any person who seeks confidential information must first prove their identity and access.

The details a person must provide to prove their identity depend upon the business. For example, the call center agent can ask the person to confirm their social security number, birth date, insurance details, or driver's license number.

The person contacting the call center could be a patient, a parent or guardian if the patient is a minor, the authorized representative of a patient, or a provider. No matter who the caller is, if they want sensitive information, an agent must verify the caller's identity first. If the inquiry concerns information in the public domain (for example, the location of a hospital), then verification isn't required.

1. [Components of Identity Verification](#)

Identity verification relies on identity verification objects and identity verification flows. Identity verification also needs one of the three objects—Engagement Interaction, Messaging Session, or Voice Call—along with the Engagement Attendee and Engagement Topic objects.

2. [How Identity Verification Works](#)

How a CSR or CCA verifies a customer or their representative's identity depends on the identity verification flow template that's used to configure the process. Sometimes you're required to verify only a caller or a customer's identity. Or, if someone is seeking information on another person's behalf, you're required to verify both identities. In addition, some identity verification flows store interaction details. Your identity verification flow can also store interaction details. If someone is calling on another person's behalf, verify both identities.

3. [Define the Link Between Identity Verification Process Configuration and Flow](#)

The Identity Verification Process Definition object links the identity verification process configuration to the identity verification flow. It also defines the layout of the search screen. To pass the configuration information to the flow, create a process definition record.

4. [Set Up Search and the Minimum Number of Additional Verifiers for Identity Verification](#)

When someone contacts a CSR or CCA with a request, the CSR or CCA first searches for the person. To set up how the search works, create an identity verification process detail record. You can also specify the minimum number of additional verifying questions to ask.

5. [Set Up Fields for Search and Verification](#)

The Identity Verification Process Field object enables you to determine what a CSR or CCA sees, such as which fields appear in search results or which fields must be verified. Create an Identity Verification Process Field record for each field that is part of your identity verification process.

6. [Create an Identity Verification Flow](#)

Depending on the kind of identity verification your organization requires, create a flow using either the Verify Caller Identity or the Verify Customer Identity flow template.

7. [Make the Identity Verification Flow Available to Agents](#)

To enable your call center agents to perform identity verification, make the flow available to them.

8. [Use External Data for Identity Verification](#)

If the data required to verify a caller resides outside of Salesforce, configure the identity verification process to use data from an external source.

SEE ALSO:

[Health Cloud Developer Guide: Identity Verification Data Model](#)

Components of Identity Verification

Identity verification relies on identity verification objects and identity verification flows. Identity verification also needs one of the three objects—Engagement Interaction, Messaging Session, or Voice Call—along with the Engagement Attendee and Engagement Topic objects.

Identity Verification is built on these objects:

- Identity Verification Process Definition: Links the configuration to the flow.
- Identity Verification Process Detail: Configures search function and sets the minimum number of additional verifying questions.
- Identity Verification Process Field: Sets up verifying questions.

An identity verification process field record looks up to an identity verification process details record. And an identity verification process detail record looks up to an identity verification process definition record. Each process definition record can have multiple related process detail records. Each process detail record can have multiple process field records.

The flow templates derive their configurations from these three identity verification objects. The flow templates are:

- Verify Caller Identity
- Verify Customer Identity Base Flow
- Verify Customer Identity
- Verify Linked Customer Identity

The engagement objects are required with the Verify Customer Identity, Verify Customer Identity Base Flow, and the Verify Linked Customer Identity flow templates. These objects store details of an interaction between a contact center agent or a customer service representative and a customer or their representative. The engagement objects are:

- Engagement Attendee
- Engagement Interaction
- Engagement Topic

If customers contact over voice calls or messages, then the Voice Call or the Messaging Session object is used instead of Engagement Interaction. The Voice Call object stores details such as the start and end date and time of a call, and the phone number of the user who's calling. Messaging Session stores details such as the start and end time of a messaging session, the ID of the messaging user, and the type of messaging channel used.

How Identity Verification Works

How a CSR or CCA verifies a customer or their representative's identity depends on the identity verification flow template that's used to configure the process. Sometimes you're required to verify only a caller or a customer's identity. Or, if someone is seeking information on another person's behalf, you're required to verify both identities. In addition, some identity verification flows store interaction details. Your identity verification flow can also store interaction details. If someone is calling on another person's behalf, verify both identities.

Verify Caller Identity, Verify Customer Identity, and the Verify Customer Identity Base Flow are the three flow templates that you can choose from for your Identity Verification process.

Flow Template	Description
Verify Caller Identity	Verifies the identity of a caller before their request can be processed by a CSR or CCA. The flow derives its configuration from the default identity verification process definition record named SampleVerificationFlow. You can't configure object-based search with this flow template or use it to perform a secondary verification. After a caller is successfully verified, the CCA is directed to the relevant record page that has all the details required to process the caller's request.
Verify Customer Identity	Verifies the identity of a customer or their representative before their request can be processed by a CSR or CCA and logs the details of an interaction between a customer or authorized representative and the CSR or CCA. The flow derives its configuration from the default identity verification process definition record, SampleVerificationFlow, and the default Identity Verification Process

Flow Template	Description
	Detail record, SampleAccountSearch. The Verify Customer Identity flow template stores interaction details in these objects: - Engagement Interaction, Messaging Session, or Voice Call—Stores details of an engagement depending on how the engagement is initiated—through Open CTI or in person, over a messaging session, or through a voice call. - Engagement Attendee—Stores details about the people participating in the interaction. - Engagement Topic—Stores details about the reason for the call. When a CSR or CCA participates in a customer-initiated engagement, an engagement interaction, messaging session, or a voice call record page opens. After successful verification: - The engagement interaction, messaging session, or voice call record is updated with details of the engagement. - An engagement attendee record is created to store details about persons who attended the call. - An engagement topic record is created to store details about what the call was about. The Verify Customer Identity flow template also includes a subflow, Verify Linked Customer Identity, that you use to perform additional levels of verification. For example, you can verify the identities of a customer and their authorized representative, or you can verify a representative, their customer, and their customer's legal ward. To use this flow, create an identity verification process detail record for each person to verify. In addition, link the records using the Linked Identity Verification Process Detail field.
Verify Customer Identity Base Flow	Gives the flexibility to launch the identity verification flow either from an engagement interaction page, a voice call record page, or from the utility bar. The template is designed to launch the flow from the record page or the utility bar based on whether a record ID is passed into the flow. If a record ID is passed, the flow runs the Verify Customer Identity flow, which is linked as a subflow. Otherwise, the flow runs the Verify Linked Customer Identity flow, which simply searches for a customer and verifies their identity. The Verify Linked Customer Identity flow appears in the Flow Builder under the name Verify Customer Identity Simple.

Irrespective of the template, with the default configuration, a user can verify a customer or their representative's account name, birth date, phone number, and postal code. The default Identity Verification configuration ensures that:

- Text-based search is performed on Account records.
- Account name, birth date, and phone number are shown in search results.
- Account name and birth date appear as required verifying questions.

- Phone number and postal code appear as additional verifying questions.
- At least one additional question is answered.

To customize the configuration, create your own identity verification process definition, process detail, and process field records.

An engagement starts before identity verification begins and ends only after the verification ends (in success or failure) for all modes of engagement—Open CTI, physical (in-person), voice call, or messaging session (including in-app messaging, web messaging, and WhatsApp).

When an engagement is initiated via Open CTI or through physical interaction, the details of the interaction are stored in an engagement interaction record. When the engagement ends, the flow doesn't update the `EndDateTime` field of the record because the flow ends before the engagement. But the flow updates the `IsAttendeeVerified`, `InitiatingAttendeeId`, and `AttendeeVerificationTime` fields of the record.

 **Note:** The `CallEndTime` field in a voice call record and the `EndTime` field in a messaging session record are updated by Omni-Channel processes at the end of an engagement.

The flow creates an engagement topic record and updates the `Name`, `RelatedPersonId`, and `EngagementId` fields.

If an associated engagement attendee record for the external attendee who initiates an engagement doesn't exist, the flow creates a record and updates the `EngagementId`, `ExternalAttendeeId`, `IsVerified`, and `VerificationTime` fields. If an engagement attendee record exists, the flow updates the `IsVerified`, and `VerificationTime` fields.

Now you can customize the verification process based on your business and legal requirements by going to the Identity Verification settings page in Setup and using the setup assistant.

Define the Link Between Identity Verification Process Configuration and Flow

The Identity Verification Process Definition object links the identity verification process configuration to the identity verification flow. It also defines the layout of the search screen. To pass the configuration information to the flow, create a process definition record.

Based on your business requirements, you can create multiple process definition records.

1. From Setup, in the Quick Find box, enter *Identity Verification Settings*, and select **Identity Verification Settings**.
2. Expand **Set Up Identity Verification** and click **Create Process Definition**.
3. Click **New Identity Verification Process Definition**.
4. Enter a label and name for the record.

The Name field stores the unique name of the record used by the API and managed packages. The name must begin with a letter and use only alphanumeric characters and underscores. It can't end with an underscore or have two consecutive underscores.

5. Select **Tab** as the search layout type, and save the record.

The Stack layout type is reserved for future use.

Set Up Search and the Minimum Number of Additional Verifiers for Identity Verification

When someone contacts a CSR or CCA with a request, the CSR or CCA first searches for the person. To set up how the search works, create an identity verification process detail record. You can also specify the minimum number of additional verifying questions to ask.

The default Identity Verification Process Detail record enables text-based search of account records in Salesforce and uses Id as the unique identifier for search records. To configure a different object for identity verification, or change the number of additional verifiers, create an Identity Verification Process Detail record.

Your business sometimes needs multiple verifications. For example, if an authorized customer representative contacts you on behalf of a customer, you verify both the representative and the customer before processing the request. To verify multiple parties, create Identity Verification Process Detail records for each person to verify:

- One record to search and verify the representative
- One record to search and verify the person they're representing

Then, link the records using the Linked Identity Verification Process Detail field in the process detail record for the representative. The data required to perform the additional verifications using the linked subflow, Verify Linked Customer Identity, is defined in the linked process detail record. For example, suppose the data to verify authorized representatives resides in contact records and the data to verify their customers resides in account records. You create two process detail records, one for the Contact object and the other for the Account object. Specify the process detail record for the Account object in the Linked Identity Verification Process Detail field of the process detail record for Contact.



Note: If your org is Person Account-enabled and you use the Account object for identity verification, person account records are queried. Otherwise, business account records are queried.

1. In Identity Verification Settings, click **Set Up Search**.

2. Click **New Identity Verification Process Detail**.

3. Enter a label and a name for the record.

The Name field stores the unique name of the record used by the API and managed packages. Begin the name with a letter and use only alphanumeric characters and underscores. Don't end the name with an underscore or use two consecutive underscores.

4. Select the process definition record you want to associate your process detail record with in the Identity Verification Process Definition field.

5. Enter a search sequence number.

The search sequence number determines the order in which the Search Type picklist values appear to your users in the identity verification flow.

6. Select the data source:

- **External:** Select this option if the representative and customer records and verification data reside outside Salesforce.
- **Salesforce:** Select this option if the representative and customer records and verification data reside in Salesforce.

7. Select the search type.

With Text-Based search, a CSR or CCA enters search keywords in the Search field. With Object-Based search, a CSR or CCA uses available fields to search for data in Salesforce. For example, if you configure first name and account number as search fields, a CSR or CCA uses those fields for search.

If your data resides in an external data source and you use the Verify Customer Identity flow template, then use the text-based search type.

8. Enter the object used for the verification process.

For example, if your customer records are stored in the Contact object, enter *Contact*.

9. Enter the field that uniquely identifies a record.

For example, ID, policy number, and account number uniquely identify records.

10. Enter conditions used to filter the search results.

For example, if you want to search only Person Account records, enter `isPersonAccount = true`.

Use the AND operator to enter multiple conditions. The OR operator isn't supported.

11. Enter the values used to sort and order the search results.

For example, if you want to sort the results by policy date and arrange the results in a descending order, enter `PolicyDate__c Desc`.

12. Enter the minimum number of additional verifying questions that a customer or their representative has to answer.

For example, to require customers or their representatives to answer at least one of the configured additional questions, enter `1`.

13. If you want to use an external data source to search for customers or their representatives' records and to get verification data, select the custom Apex class.

14. Mark the record active.

15. If your process requires two or more levels of verification, select the linked Identity Verification Process Detail record.

16. Save your changes.

Set Up Fields for Search and Verification

The Identity Verification Process Field object enables you to determine what a CSR or CCA sees, such as which fields appear in search results or which fields must be verified. Create an Identity Verification Process Field record for each field that is part of your identity verification process.

Seven process field records are created for you.

- Account name, birth date, and phone number are search results fields.
- Account name and birth date are required verification fields.
- Phone number and postal code are additional verification fields.

You can add other verification steps. For example, to add a check for a segment of a government ID, create an additional Identity Verification Process Field record for the field that holds that information.

The Field Type and Field Name fields in an identity verification process field record work together. Suppose you want to add Account Name as a search result field. Select Result Field as the Field Type and enter `AccountName` as the Field Name. Or, to set Birth Date as a required verification field, select Required Verifier as the Field Type, and enter `PersonBirthdate` as the Field Name.

1. In Identity Verification Settings, click **Set Up Fields**.

2. Click **New Identity Verification Process Field**.

3. Enter a label and name for the record.

The Name field stores the unique name of the record used by the API and managed packages. The name must begin with a letter and use only alphanumeric characters and underscores. It can't end with an underscore or have two consecutive underscores.

4. Select the process detail record that you want to associate your process field record related record with in the Identity Verification Process Detail field.

5. Select the data source.

6. Select the field type of the field you want to add for identity verification.

Possible values are:

Required Verifier

Add a required verifying question.

Optional Verifier

Add an additional verifying question.

Search Field

Perform object-based search.

 **Note:** This field type is reserved for future use.

If you want the CSR or CCA to search for a caller using their first and last names, create two Identity Verification Process Field records. Set the field type to Search Field for both records. However, the field name for one must be `FirstName` and for the other `LastName`.

Search Filter

Filter search results.

When set as the field type, specify the field name to filter search results by using the Field Name field. Both static and dynamic filtering are supported. For example, if the search operation is on Contacts for which the related Account ID is always a certain value, then set `AccountId` as the field name and the value of Field Value Formula to the related Account ID value. Or, if a CSR or CCA verifies a customer (Account object) and then performs a secondary search against all policies (Policy object) in which the verified customer is the policy holder, set Field Name to `PolicyHolder` and Field Value Formula to the dynamic value `{!SelectedParentRecordId}`.

 **Note:** You can only use record IDs to perform dynamic filtering of search results.

Result Field

Display fields in search results.

For example, when a CSR or CCA searches for a customer, you'd like the search results to include the account name, phone number, and email ID.

Additional Result Field

Retrieve data as part of the search query, but don't display the data in search results.

For example, you want to retrieve the policy number and the age of the policy owner, but don't want the agent to see this data. Write some custom logic to process this additional data.

7. Enter the name of the field for the selected field type.

For example, if you select Required Verifier as the field type and you want to set Account Name as the required verifier, enter `AccountName`.

 **Note:** You can display fields from the object configured for verification's parent object as required or additional verifiers, or in search results. For example, if you set identity verification on the Contact object, you can display fields from the Account object.

8. If you're using an external data source, select the data type of the field you specified in Field Name.

9. If you've selected Search Filter as the field type, enter the formula here. Otherwise, leave the field blank.

10. Optionally, enter a custom label to replace the standard field label in the app.

For example, if you'd like `PersonBirthDate` displayed as `DOB`, enter `DOB`.

If necessary, translate your custom labels using Translation Workbench so that your users see those labels in their preferred language.

11. Enter a sequence number for the field.

The sequence number is used in ordering how fields are displayed in the verification screen.

12. Mark the record active and save it.

Create an Identity Verification Flow

Depending on the kind of identity verification your organization requires, create a flow using either the Verify Caller Identity or the Verify Customer Identity flow template.

Create a Flow Using the Verify Caller Identity Flow Template

To use your custom identity verification process configuration, use the Verify Caller Identity flow template to create a flow and specify the Identity Verification Process Definition record name as the value of the `IdVerfProcessDefinition` constant.

Create a Flow Using the Verify Customer Identity Flow Template

Create a custom identity verification process configuration using the Verify Customer Identity flow template. Specify the names of the relevant Identity Verification Process Definition and Identity Verification Process Detail records as the values of the `IdVerfProcessDefinition` and the `IdVerfProcessDetail` constants.

EDITIONS

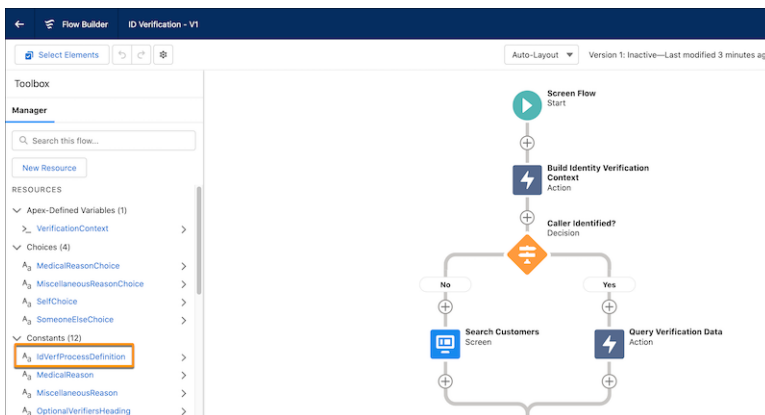
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Create a Flow Using the Verify Caller Identity Flow Template

To use your custom identity verification process configuration, use the Verify Caller Identity flow template to create a flow and specify the Identity Verification Process Definition record name as the value of the `IdVerfProcessDefinition` constant.

1. In the Identity Verification admin setup assistant, click **Create Flow**.
2. Click **New Flow**.
3. In the New Flow window, on the All + Templates tab, select **Verify Caller Identity** and click **Create**.
4. Click **Save**.
5. Enter the flow label and API name, and save the flow.
6. In Resources, edit `IdVerfProcessDefinition` and enter the relevant Identity Verification Process Definition record name as the value.



Edit Constant

* API Name
IdVerfProcessDefinition

Description
Stores the name of the Identity Verification Process Definition record. Customize the SampleVerificationFlow definition, create your own definition and enter its name in place of SampleVerificationFlow.

* Data Type ⓘ
Text

Value
VerificationDefinition

Cancel Done

7. Click **Done**.
8. Save and activate the flow.

Create a Flow Using the Verify Customer Identity Flow Template

Create a custom identity verification process configuration using the Verify Customer Identity flow template. Specify the names of the relevant Identity Verification Process Definition and Identity Verification Process Detail records as the values of the `IdVerfProcessDefinition` and the `IdVerfProcessDetail` constants.

To verify a caller who is pre-identified, set the value of the `IdVerfProcessDetail` constant. `IdVerfProcessDetail` refers to the relevant Identity Verification Process Detail record name. Set this value to indicate to the flow the process detail record to be used to verify a pre-identified caller. You must set the `IdVerfProcessDetail` value even if there's only one process detail record for a process definition record.

 **Note:** Create two separate flows, one for primary verification and the other for both primary and secondary verifications.

When using the Verify Customer Identity flow template to create a flow for identity verification, use Salesforce Open CTI to integrate third-party computer-telephony integration (CTI) systems with Salesforce. When your user accepts a call from the customer, the user creates an Engagement Interaction record to store details of the interaction. If the call is from a registered number, the `InitiatingAttendee` field in the record is auto-populated with the name associated with the number.

1. In the Identity Verification admin setup assistant, click **Create Flow**.
2. Click **New Flow**.
3. In the New Flow window, on the All + Templates tab, select **Verify Customer Identity** and click **Create**.
4. Click **Save**.
5. Enter the flow label and API name, and save the flow.
6. In Resources, edit `IdVerfProcessDefinition` and enter the relevant Identity Verification Process Definition record name as the value.

Edit Constant

IdVerfProcessDefinition ⓘ

Stores the name of the identity verification process definition record. You can customize the SampleVerificationFlow definition. You can also create your own definition and enter its name in place of SampleVerificationFlow.

* Data Type ⓘ
Text

Value
SampleVerificationFlow

Cancel Done

7. In Resources, edit `IdVerfProcessDetail` and enter the relevant Identity Verification Process Detail record name as the value.

8. Click **Done**.
9. Save and activate the flow.

SEE ALSO:

[Salesforce Open CTI](#)

Make the Identity Verification Flow Available to Agents

To enable your call center agents to perform identity verification, make the flow available to them.

[Make the Verify Caller Identity Flow Available to Agents](#)

To enable agents to use the identity verification process, embed the flow in the utility bar of your Lightning App or add the flow to a Lightning record page.

[Make the Verify Customer Identity Flow Available to Users](#)

To enable users to use the Verify Customer Identity flow, create an Engagement Interaction Lightning record page and then add the flow to the Engagement Interaction Lightning record page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Make the Verify Caller Identity Flow Available to Agents

To enable agents to use the identity verification process, embed the flow in the utility bar of your Lightning App or add the flow to a Lightning record page.

1. To embed the flow in the utility bar of a Lightning App:
 - a. From Setup, in the Quick Find box, enter *App Manager*, and select **App Manager**.
 - b. Edit the app to which you want to add the flow component.
 - c. In the Lightning App Builder, select **Utility Items (Desktop Only)**.
 - d. Click **Add Utility Item** and select **Flow**.
 - e. Enter a label for the flow, select the relevant flow in the Flow field, and click **Save**.

EDITIONS

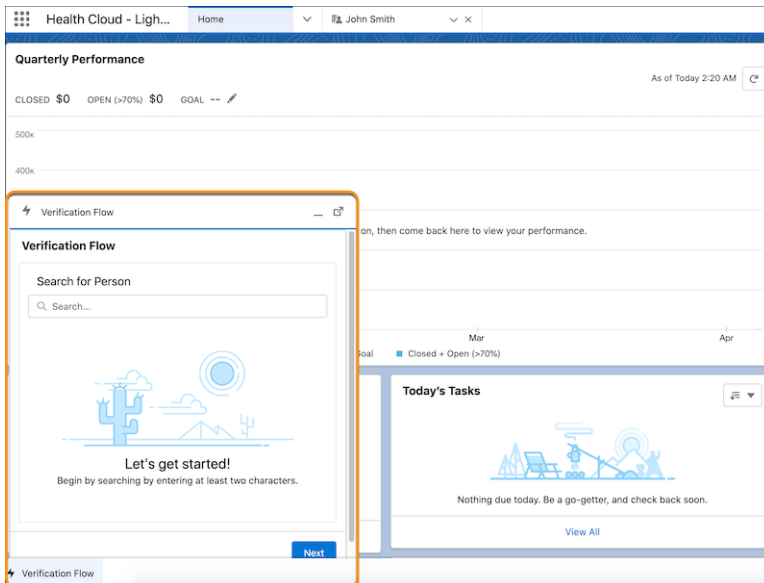
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

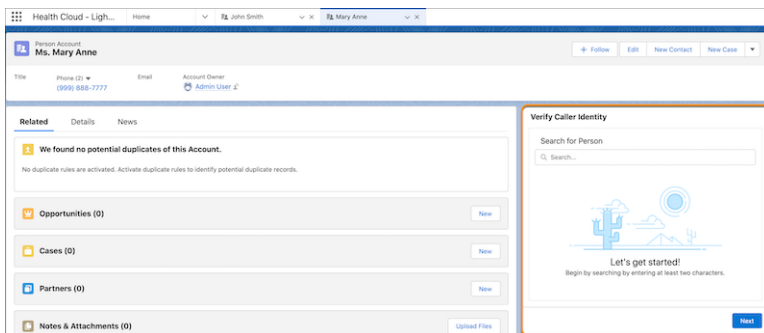
USER PERMISSIONS

To use the Verify Caller Identity flow template:

- Health Cloud permission set license



2. To add the flow to a Lightning record page:
 - a. In the Identity Verification admin setup assistant, click **Add Flow**.
 - b. From the Setup menu on the record page, select **Edit Page**.
 - c. Drop the **Flow** component on the desired area on the page.
 - d. Select the relevant flow in the Flow field.
 - e. Save and activate your changes.



Make the Verify Customer Identity Flow Available to Users

To enable users to use the Verify Customer Identity flow, create an Engagement Interaction Lightning record page and then add the flow to the Engagement Interaction Lightning record page.

1. From Setup Home, in the Quick Find box, enter *Lightning App Builder*, and then select **Lightning App Builder**.
2. Click **New**.
3. In Create a New Lightning Page, select **Record Page** and click **Next**.
4. Enter a label and select the **Engagement Interaction** object for the new Lightning record page.

Create a new Lightning page

* Label
Engagement Interaction

* Object
Engagement Interaction

Back Next

5. Click **Save**.
6. Select a page template and click **Finish**.
The No Data for this Object window appears, which says that the selected object has no records. That's fine. Engagement Interaction records are auto-created at runtime.
7. Read the message and then close the window.
8. Drop the Flow component on the page.
9. Select the relevant flow in the Flow field.
10. In the attributes panel, select **Pass record ID into this variable**.

Analyze Activation... Save

Page > Flow

Edit Flow in Flow Builder

Layout

Optionally, enter values for these flow variables. Only variables that allow input access are supported.

CallerObjectName

☐ Pass record ID into this variable
CallerRecordId

☐ Pass record ID into this variable
EngagementInteraction

☐ Pass all field values from the record into this flow variable.

RecordId
(RecordId)

☒ Pass record ID into this variable

11. Save and activate your changes.
12. Close Flow Builder.

Use External Data for Identity Verification

If the data required to verify a caller resides outside of Salesforce, configure the identity verification process to use data from an external source.

1. Create an Apex class.
The Apex class implements the identity verification process methods for building verification context, searching for customer records, and getting verification data.
2. Create an Identity Verification Process Definition record.
A process definition record links an identity verification process configuration to the identity verification flow.

3. Create an Identity Verification Process Detail record that looks up to the process definition record.

In the process detail record, set the values of the required fields and specify the Apex class that you've created. Select External as the data source. Ensure that the process detail record configuration is identical to your Apex implementation. Otherwise, the flow doesn't work as expected. If you're using the Verify Customer Identity or the Verify Customer Identity Base Flow flow template, you can't use object-based search with an external data source. Also, you must enter values for the Object and the Search Record Unique ID fields. If you don't, you get empty search results even if the Search API returns non-empty results.



Note: The Search Record Unique ID Field value must be identical to the Field Name value in one of the associated identity verification process field records.

Create two or more process detail records to configure secondary or tertiary verifications depending on your business needs.

4. Create identity verification process field records for each process detail record. Ensure that the process field records match your Apex implementation. Otherwise the flow doesn't work as expected. For each record, specify the data type of the field in the external data source using the Field Data Type field.
5. Create an identity verification flow.
6. Make the flow available to your users.

When displaying information from external data sources on the identity verification screen, make sure that you don't show any sensitive or confidential information. Your Apex class must either mask sensitive information or only partially display the information. For example, you may want to show only the last four digits of social security numbers (SSN) or account numbers and mask the rest.



Note: To disconnect from an external data source, remove all authentication information, data source connection details and mappings, as well as any other dependent configuration.

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 rollout of a patient or member Experience site, with easy customization using Experience Builder. Lightning Components help you build a patient Experience site in no time at all.

[Experience Cloud for Health Cloud FAQ](#)

Get answers to common questions about Experience Cloud for Health Cloud, a set of Experience Cloud products designed to work with Health Cloud.

[Enable Digital Experiences for Health Cloud](#)

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 are prepackaged resources that make it quick and easy to set up a private patient or member site with Experience Cloud where people can access care plans, care teams, care programs, or timelines.

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 people 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 rollout of a patient or member 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 users 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!

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

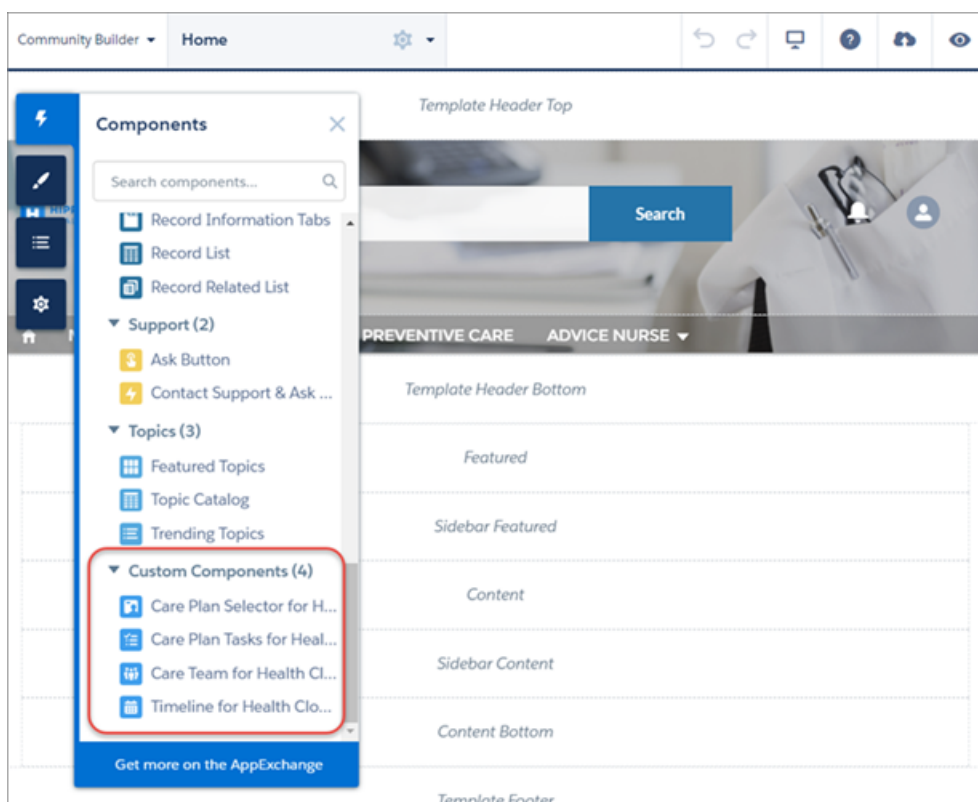


These components let you create a patient Experience site:

- The Care Plan Selector for Health Cloud Empower component (1) helps 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) enables Health Cloud Experience site users to see and filter their tasks associated with a care plan.
- Care Team for Health Cloud Empower component (3) helps you add fields from the User and Contact objects to display basic information about the patient and the care team members. 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.

 **Note:** The Health Cloud Empower Lightning components are only available after you've installed the Health Cloud managed package.



SEE ALSO:

[Salesforce Help: Experience Cloud](#)

Experience Cloud for Health Cloud FAQ

Get answers to common questions about Experience Cloud for Health Cloud, a set of Experience Cloud products designed to work with Health Cloud.

What is Experience Cloud for Health Cloud?

Experience Cloud for Health Cloud combines Health Cloud objects, components, and flows in industry-specific community portals. Customers can create engaging, personalized, and secure self-service experiences across the patient, member, and partner journeys. Experience Cloud for Health Cloud includes these three products.

Experience Cloud for Health Cloud — Recommended for B2C use cases such as member-patient collaborations. Released in Summer '21.

Experience Cloud Plus for Health Cloud — Recommended for B2C use cases and for B2B use cases such as provider-payer collaboration with more role-based sharing, reports, and dashboards.

External Apps for Health Cloud — Recommended for B2B use cases that involve working with partners, such as payers working with brokers or suppliers collaborating on manufacturing plans and forecasts. Includes Leads and Opportunities.

The differences between Experience Cloud for Health Cloud and Experience Cloud Plus for Health Cloud are the same as the differences between Experience Cloud and Experience Cloud Plus. The latter provides advanced sharing, more CRUD access to specific objects, customizable dashboards, and more.

For purchasing details, see [Health Cloud Pricing](#).

Is there a Partner Community for Health Cloud?

For scenarios where external brokers need access, External Apps for Health Cloud provisions partner licenses and Health Cloud permission set licenses to the customer org.

Partner Community licenses represent users as Account-Contact records, while Health Cloud represents users as Person Accounts. However, if necessary, an Apex service can programmatically synchronize data between traditional B2B Account-Contact records and parallel or existing Person Account records.

Can guest users self-register as Person Accounts?

Guest user self-registration is a common use case. For example, a user scheduling a COVID vaccination can self-register before making the appointment.

Experience Cloud builder has a component for self-registration. Also, there are multiple ways to create users as Person Accounts in Experience Cloud.

[5 Ways to Create Users in Experience Cloud](#)

[Self-Registration in Community](#)

[Configure Person Accounts for Self-Registration](#)

Can Experience Cloud for Health Cloud users access Quote objects?

The Quote object isn't supported by default in Experience Cloud for Health Cloud and Experience Cloud Plus for Health Cloud licenses. However, with the Sell & Administer Benefits and Distribution Management add-ons, an Apex service gives end users the ability to create and access information from Quotes. For details about add-on products, see [Benefit Sales and Administration Pricing](#) and [Distribution Management Pricing](#).

What features are unique to Experience Cloud for Health Cloud products?

Experience Cloud Plus for Health Cloud and External Apps for Health Cloud were launched as part of Emergency Response Management with Contact Tracing. This feature adds a health assessment portal and contact tracing functionality to Health Cloud and provides access

to the Contact Encounter and Contact Encounter Participant objects. For example, members can log into Kaiser and submit a health questionnaire or submit contacts for contact tracing purposes.

As Salesforce builds new Health Cloud data model entities and new Lightning Web Component User Interfaces, these become part of the new Experience Cloud for Health Cloud. Support for existing Health Cloud entities and Lightning Web Components continues for legacy Experience Cloud customers. However, over time, more Health Cloud-specific functionality will be accessible via Experience Cloud for Health Cloud only.

For example, if regular Experience Cloud supports the Case object, that support continues. In addition, Experience Cloud for Health Cloud supports the Case object. However, in future Health Cloud releases, new entities are supported only in Experience Cloud for Health Cloud and not in any other Experience Cloud product.

The new digital process automation (DPA) runtime is only available for Experience Cloud for Health Cloud products.

What if I've used Health Cloud and Customer Communities before?

Salesforce previously released components that Health Cloud customers could use with Experience Cloud, and those components remain available and upgradable. However, starting in Summer '21, customers need the Experience Cloud for Health Cloud products to take advantage of new Experience Cloud components released as part of Health Cloud.

How do I upgrade from Experience Cloud to Experience Cloud for Health Cloud?

Upgrading from a regular Experience Cloud license to an Experience Cloud for Health Cloud license follows the same process as any license swap—ask your account executive for details. Users must have the Health Cloud permission set license enabled to access Health Cloud objects in Experience Cloud for Health Cloud.

How do I migrate community users from Service Cloud to Experience Cloud for Health Cloud?

When you upgrade from Service Cloud to Health Cloud, you must convert Contacts to Person Accounts. Also, you must recreate Contact-based community users by sending registration emails.

You can't convert the portal-enabled Business Accounts or Contacts in Service Cloud to the Person Accounts in Health Cloud. However, if necessary, an Apex service can programmatically synchronize data between traditional B2B Account-Contact records and parallel or existing Person Account records.

How can I enable site user access for Health Cloud customers?

Site users can use Health Cloud features and objects if they have the Health Cloud for Experience Cloud Sites permission set license and its feature-specific permission sets. For details, see [Experience Cloud Setup Checklist](#).

Enable Digital Experiences for Health Cloud

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 lets care coordinators, patients, insurance plan members, and care teams collaborate in a private site. Although all Health Cloud users share the site, access to information is

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 you click **OK** on the confirmation message page to enable the Experience Cloud site.

SEE ALSO:

[Salesforce Help: Experience Cloud](#)

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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Available in: Lightning Experience

Available in: **Professional, Enterprise, Unlimited, and Developer** Editions

	Customer Community	Customer Community Plus	Partner Community	External Apps
Account	Read , Edit	Create, Read , Edit	Create, Read , Edit	Read , Edit
AccountBrand	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AccountRelationship		Read	Read	

	Customer Community	Customer Community Plus	Partner Community	External Apps
Accreditation	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
ActionPlan			Create, Read, Edit, Delete	Create, Read, Edit, Delete
ActionPlanTemplate	Read	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Address	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
AiVisitRecommendation	Read, Edit	Read, Edit	Read, Edit	Read, Edit
AiVisitTaskRcmd	Read, Edit	Read, Edit	Read, Edit	Read, Edit
ApplicationCase		Create, Read, Edit, Delete		
AppointmentTopicTimeSlot	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
AssessmentIndicatorDefinition	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AssessmentTask	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AssessmentTaskContentDocument	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AssessmentTaskDefinition	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AssessmentTaskIndDefinition	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AssessmentTaskOrder	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Asset	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Assortment	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
AssortmentProduct	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
AuthApplicationAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete		Create, Read, Edit, Delete
AuthApplicationPlace	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AuthLocationAccessSchedule	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AuthorizationForm	Read	Read	Read	Read
AuthorizationFormConsent	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
AuthorizationFormDataUse	Read	Read	Read	Read
AuthorizationFormText	Read	Read	Read	Read
AuthorizedInsuranceLine	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Award	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
BackgroundOperation	Read	Read	Read	Read
Benefit	Read	Read	Read	Read
BenefitParameterValue	Read	Read	Read	Read

	Customer Community	Customer Community Plus	Partner Community	External Apps
BenefitType	Read	Read	Read	Read
BoardCertification	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
BusinessLicense	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
BusinessLicenseApplication	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
BusinessMilestone	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
BusinessProfile	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
BusinessType	Read	Read	Read	Read, Edit
BusRegAuthorizationType	Read	Read	Read	Read
BusRegAuthTypeDependency	Read	Read	Read	Read
BuyerAccount	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
Campaign			Create, Read, Edit	
CareBarrier	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareBarrierDeterminant	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareBarrierType	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareDeterminant	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareDeterminantType	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareDiagnosis	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareInterventionType	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareMetricTarget	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CareObservation	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CarePgmProvHealthcareProvider	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CarePractnFacilityAppt	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CarePreauth	Read	Read	Read	Read
CarePreauthItem	Read	Read	Read	Read
CareProgram	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProgramCampaign	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete

	Customer Community	Customer Community Plus	Partner Community	External Apps
CareProgramEligibilityRule	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProgramEnrollee	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
CareProgramEnrolleeProduct	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
CareProgramEnrollmentCard	Create, Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read
CareProgramGoal	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProgramProduct	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProgramProvider	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProgramTeamMember	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProviderAdverseAction	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
CareProviderFacilitySpecialty	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CareProviderSearchableField	Read	Read	Read	Read
CareRegisteredDevice	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
CareRequest	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareRequestDrug	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareRequestExtension	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareRequestItem	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareRequestReviewer	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareSpecialty	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
CareSpecialtyTaxonomy		Create, Read, Edit, Delete		Create, Read, Edit, Delete
CareTaxonomy	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
Case	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ChannelProgram			Read	
ChannelProgramLevel			Read	
ChannelProgramMember			Read	
Claim	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ClaimCase	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
ClaimCoverage	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ClaimItem	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ClaimParticipant	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ClaimPaymentSummary	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete

	Customer Community	Customer Community Plus	Partner Community	External Apps
CodeSet	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CommSubscription	Read	Read	Read	Read
CommSubscriptionChannelType	Read	Read	Read	Read
CommSubscriptionConsent	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CommSubscriptionTiming	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ComplaintCase	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ConsumptionSchedule			Create, Read, Edit	
Contact	Create, Read , Edit	Create, Read , Edit	Create, Read , Edit	Create, Read , Edit
ContactEncounter	Create, Read	Create, Read	Create, Read, Edit, Delete	
ContactPointAddress	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit
ContactPointConsent	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ContactPointEmail	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ContactPointPhone	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ContactPointTypeConsent	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Contract	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ContractLineItem		Create, Read, Edit	Create, Read, Edit	
CourseOffering	Read	Read	Read	Read
CoverageBenefit	Read	Read	Read	Read
CoverageBenefitItem	Read	Read	Read	Read
CoverageType	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
CustomerProperty	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
DandBCompany			Create, Read, Edit, Delete	
DataUsePurpose	Read	Read	Read	Read
DeliveryTask	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
DistributorAuthorization	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Document	Read	Read	Read	Read
DocumentChecklistItem	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
DocumentTemplate	Read	Read	Read	Read
DocumentTemplateClause	Read	Read	Read	Read
ElectronicMediaGroup	Read	Read	Read	

	Customer Community	Customer Community Plus	Partner Community	External Apps
EngagementChannelType	Read	Read	Read	Read
EnrolleeBenefit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
EnrollmentEligibilityCriteria	Read	Read	Read	Read
Entitlement	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
EntitlementContact	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
Examination	Read	Read	Read	Read
Expense	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ExpenseReport	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
FulfillmentOrder	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
GeneratedDocument	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
HealthCareDiagnosis	Read	Read	Read	
HealthcareFacilityNetwork	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
HealthcarePayerNetwork	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
HealthcarePractitionerFacility	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
HealthCareProcedure	Read	Read	Read	
HealthcareProvider	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
HealthcareProviderNpi	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
HealthcareProviderSpecialty	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
HealthcareProviderTaxonomy	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
Household	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Idea	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
IdeaTheme	Read	Read	Read	Read
IdentityDocument	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit
Image	Create, Read	Create, Read	Create, Read	Create, Read
Individual	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
IndividualApplication	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InfoAuthorizationRequest	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
InspectionAssessmentInd	Read	Read	Read	Read
InspectionType	Read	Read	Read	Read, Edit
InspectionViolation		Read	Read	

	Customer Community	Customer Community Plus	Partner Community	External Apps
InStoreLocation	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
InsuranceClaimAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicy	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicyAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicyCoverage	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicyMemberAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicyParticipant	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicySurcharge	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicyTransaction	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsuranceProfile	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
JobProfile	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
JournalSubType	Read	Read	Read	Read
JournalType	Read	Read	Read	Read
Lead	Create, Read , Edit			
LegalEntity	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicant	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantAddress	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantDeclaration	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantEmployment	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantIncome	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantLiability	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicationAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicationFinancial	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicationLiability	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicationProperty	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicationTitleHolder	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Location	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
LocationGroup	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
LoyaltyLedger	Read	Read	Read	Read

	Customer Community	Customer Community Plus	Partner Community	External Apps
LoyaltyMemberCurrency	Read	Read	Read	Read
LoyaltyMemberTier	Read	Read	Read	Read
LoyaltyProgram	Read	Read	Read	Read
LoyaltyProgramCurrency	Read	Read	Read	Read
LoyaltyProgramMbrPromotion	Read	Read	Read	Read
LoyaltyProgramMember	Read	Read	Read	Read
LoyaltyProgramPartner	Create, Read , Edit, Delete	Create, Read , Edit, Delete	Create, Read , Edit, Delete	Create, Read , Edit, Delete
LoyaltyTier	Read	Read	Read	Read
LoyaltyTierBenefit	Read	Read	Read	Read
LoyaltyTierGroup	Read	Read	Read	Read
MaintenancePlan	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
MaintenanceWorkRule	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
MemberBenefit	Read	Read	Read	Read
MemberPlan	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
OccupationLicenseApplication		Create, Read, Edit	Create, Read, Edit	
OmniDataTransform	Read	Read	Read	Read
OmniDataTransformItem	Read	Read	Read	Read
OmniESignatureTemplate	Read	Read	Read	Read
OmniProcess	Read	Read	Read	Read
OmniProcessCompilation	Read	Read	Read	Read
OmniProcessElement	Read	Read	Read	Read
OmniScriptSavedSession	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
OmniUiCard	Read	Read	Read	Read
OperatingHours	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
Opportunity			Create, Read , Edit	
Order	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
OrderDeliveryMethod	Read, Create, Edit	Read, Create, Edit	Read	Read, Create, Edit
OrderSummary	Read, Edit	Read, Edit	Read, Edit	Read, Edit
PartnerFundAllocation			Create, Read, Edit	

	Customer Community	Customer Community Plus	Partner Community	External Apps
PartnerFundClaim			Create, Read, Edit	
PartnerFundRequest			Create, Read, Edit	
PartnerMarketingBudget			Create, Read, Edit	
PartyConsent	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PartyIncome	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PartyRelatedParty	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PartyRelationshipType	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PersonEducation	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
PersonEmployment		Create, Read, Edit, Delete		Create, Read, Edit, Delete
PersonExamination	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
PersonLifeEvent	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
PgmRebateTypBnftMapping	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PlanBenefit	Read	Read	Read	Read
PlanBenefitItem	Read	Read	Read	Read
Polygon	Read	Read		Read, Create, Delete, Edit
PreliminaryApplicationRef	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Pricebook2	Read	Read	Read	Read
Producer	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ProducerCommission	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ProducerPolicyAssignment	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Product2	Read	Read	Read	Read
ProductCatalog	Read	Read	Read	Read
ProductCategory	Read	Read	Read	Read
ProductCategoryProduct	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ProductCoverage	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ProductItem	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ProductRequest	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ProductServiceCampaign	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ProductTransfer	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ProgramRebateType	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit

	Customer Community	Customer Community Plus	Partner Community	External Apps
ProgramRebateTypeBenefit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ProgramRebateTypeFilter	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ProgramRebateTypePayout	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ProgramRebateTypPayoutSrc	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Promotion	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PromotionChannel	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PromotionProduct	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PromotionProductCategory	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PublicComplaint	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
PublicProgram	Read	Read	Read	Read
PurchaserPlan	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PurchaserPlanAssn	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Question	Create, Read	Create, Read	Create, Read	Create, Read
Quote			Create, Read , Edit	
RebateMemberProductAggregate	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RebatePayment	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RebatePayoutAdjustment	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RebateProgram	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RebateProgramMember	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ReceivedDocument	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
RecordsetFilterCriteria	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RegAuthorizationTypeProduct	Read	Read	Read	Read
RegulatoryAuthority	Read	Read	Read	Read
RegulatoryAuthorizationType	Read	Read	Read	Read
RegulatoryCode	Read	Read	Read	Read
RegulatoryCodeAssessmentInd	Read	Read	Read	Read
RegulatoryCodeViolation	Read	Read	Read	Read
RegulatoryTrxnFee	Create, Read, Edit	Create, Read, Edit		Create, Read, Edit
RegulatoryTrxnFeeltem	Create, Read, Edit	Create, Read, Edit		Create, Read, Edit
ResidentialLoanApplication	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete

	Customer Community	Customer Community Plus	Partner Community	External Apps
RetailLocationGroup	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RetailStore	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RetailStoreGroupAssignment	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
RetailStoreKpi	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RetailVisitKpi	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ReturnOrder	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
SalesAgreement	Read, Edit	Read, Edit	Read, Edit	Read, Edit
SecuritiesHolding	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
SerializedProduct	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ServiceAppointment	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ServiceContract		Create, Read, Edit	Create, Read, Edit	
ServiceCrew	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ServiceResource	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Read
ServiceTerritory	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
Shift	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ShiftPattern	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Shipment	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
SocialPost	Read	Read	Read	Read
Solution	Read	Read	Read	
StoreActionPlanTemplate	Create, Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
StoreAssortment	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
StoreProduct	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Survey	Read	Read	Read	Read
SurveyInvitation	Read	Read	Read	Read
SurveyResponse	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
SurveySubject	Read	Read	Read	Read
TimeSheet	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
TrainingCourseParticipant	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
TransactionJournal	Read	Read	Read	Read
TrnCourse	Read	Read	Read	Read

	Customer Community	Customer Community Plus	Partner Community	External Apps
UnitOfMeasure	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
UnitOfMeasureConversion	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
VehicleUserAssignment	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ViolationEnforcementAction	Read, Edit	Read, Edit	Read	Read, Edit
ViolationInspAssessmentInd		Read	Read	
ViolationType	Read	Read	Read	Read
ViolationTypeAssessmentInd	Read	Read	Read	Read
Visit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
VisitedParty	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Visitor	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
VolunteerProject	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Voucher	Read	Read	Read	Read
VoucherDefinition	Read	Read	Read	Read
WarrantyTerm	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
WebCart	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
WebStore	Read	Read	Read	
WebStoreCatalog	Read	Read	Read	
Wishlist	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
WorkCapacityLimit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkerCompCoverageClass	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
WorkOrder	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkPlan	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkPlanSelectionRule	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkPlanTemplate	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkStepTemplate	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkType	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
WorkTypeCareSpecialty	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
WorkTypeCodeSetBundle	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit

	Customer Community	Customer Community Plus	Partner Community	External Apps
WorkTypeGroup	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	

SEE ALSO:

[Salesforce Help: Communities Licenses](#)
[Salesforce Help: Lightning Communities Licenses](#)
[Salesforce Help: Lightning Platform Starter and Plus](#)
[Salesforce Help: Communities Licenses](#)
[Salesforce Help: Lightning Communities Licenses](#)
[Salesforce Help: Lightning Platform Starter and Plus](#)
[Salesforce Help: Communities Licenses](#)
[Salesforce Help: Lightning Communities Licenses](#)
[Salesforce Help: Lightning Platform Starter and Plus](#)

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.

SEE ALSO:

[Salesforce Help: Communities Licenses](#)
[Salesforce Help: Lightning Communities Licenses](#)
[Salesforce Help: Lightning Platform Starter and Plus](#)
[Salesforce Help: Communities Licenses](#)
[Salesforce Help: Lightning Communities Licenses](#)
[Salesforce Help: Lightning Platform Starter and Plus](#)

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
- ☐ Color scheme (or an image to upload to automatically generate one)
- ☐ Image to use as a header
- ☐ Thumbnail images (385x385 pixels), if you're using [Featured Topics](#)

Configure the internal Salesforce org:

- ☐ [Enable Digital Experiences for Health Cloud](#). 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 Community 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. In addition, site users need Read access to Timeline View Configuration, Filter Column, Filter Condition, and Filter Criterion to use Health Cloud Empower components.
- ☐ [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 1** 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 Experience Cloud](#)

[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`.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Use Health Cloud Empower Lightning Components

Health Cloud Empower Lightning components are prepackaged resources that make it quick and easy to set up a private patient or member site with Experience Cloud where people can access care plans, care teams, care programs, or timelines.

[Care Plan Selector for Health Cloud Empower](#)

The Care Plan Selector for Health Cloud Empower component is a picklist that helps an Experience Cloud user select a specific person'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 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 shows all the members of a patient's care team so they can work together in an Experience Cloud site.

[Care Plan Tasks for Health Cloud Empower](#)

The Care Plan Tasks for Health Cloud Empower component helps 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 enables patients who are logged in to the site to 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:

[Health Cloud Developer Guide: Empower Components](#)

Care Plan Selector for Health Cloud Empower

The Care Plan Selector for Health Cloud Empower component is a picklist that helps an Experience Cloud user select a specific person'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. In your Experience Cloud site's workspace, select **Builder**.
2. On the top-left corner of the page, click .
3. Under Custom Components, select and drag the **Care Plan Selector for Health Cloud Empower** component onto an editable area of the page.
4. 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 person's birthdate to the picklist in addition to their name and their care plan name.

Show all care plans

Select to enable a person to see all the care plans they belong to. This option is only available if you've enabled multiple care plans in your org. If the person only has one care plan, this option doesn't appear in the picklist.

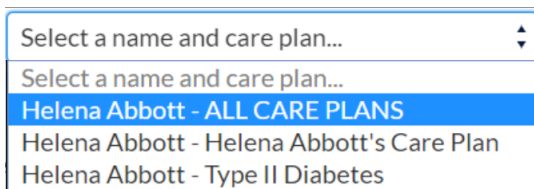
Include birth year

Select to show the patient or member's year of birth in the picklist.

Show birth month as text

Select to display the person's birth month as Jan or Feb instead of 01 or 02.

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



SEE ALSO:

[Developer Guide: Care Plan Selector for Health Cloud Empower Component](#)

[Developer Guide: Care Plan Selector for Health Cloud Empower Component](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Care Programs for Health Cloud Empower

The Care Programs component displays the programs a user is enrolled in. If your organization has adopted the 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. In your Experience Cloud site's workspace, select **Builder**.
2. On the top-left corner of the page, click .
3. Under Health Cloud components, select and drag the **Care Programs for Health Cloud Empower** component onto an editable area of the page.
4. In the property editor, configure the component's properties.

Title Source

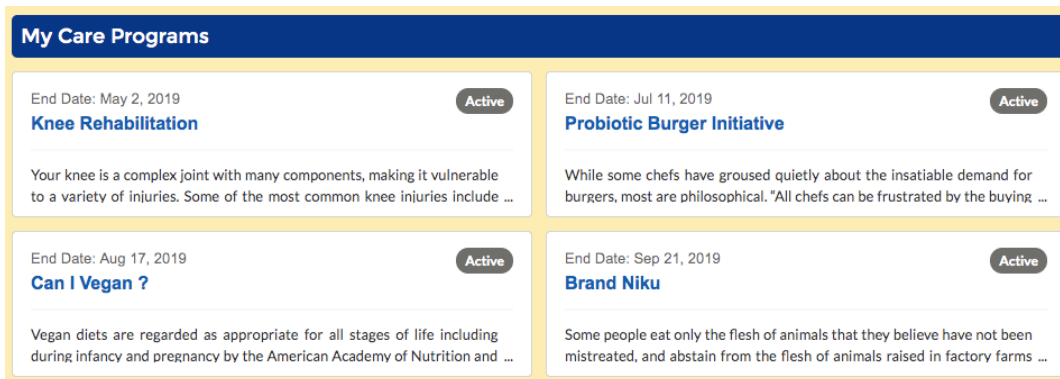
Specify the label you want to use. You can create a custom label or use one that exists.



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.



Example: Sample Care Programs component:



My Care Programs

End Date: May 2, 2019 Knee Rehabilitation Your knee is a complex joint with many components, making it vulnerable to a variety of injuries. Some of the most common knee injuries include ... Active	End Date: Jul 11, 2019 Probiotic Burger Initiative While some chefs have groused quietly about the insatiable demand for burgers, most are philosophical. "All chefs can be frustrated by the buying ... Active
End Date: Aug 17, 2019 Can I Vegan ? Vegan diets are regarded as appropriate for all stages of life including during infancy and pregnancy by the American Academy of Nutrition and ... Active	End Date: Sep 21, 2019 Brand Niku Some people eat only the flesh of animals that they believe have not been mistreated, and abstain from the flesh of animals raised in factory farms ... Active

SEE ALSO:

[Manage Programs](#)

[Manage Programs](#)

Care Team for Health Cloud Empower

The Care Team for Health Cloud Empower component shows all the members of a patient's care team so they can work together in an 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 sites. Ensure that only authorized users have access to this contact information and that all communications with patients are conducted in compliance with HIPAA regulations.

Only the members of a patient's care team can see the Care Team for Health Cloud Empower component for that patient.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

If a patient has multiple care plans, the members of all the associated care teams appear in the component. (Use the Care Plan Selector for Health Cloud Empower to display the patient's care plans.)

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.

1. In your Experience Cloud site's workspace, select **Builder**.
2. On the top-left corner of the page, click .
3. Under Custom Components, select and drag the **Care Team for Health Cloud Empower** component onto an editable area of the page.
4. 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 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:

	Charles Green Birthdate April 19, 1967
	Andy Molina Role Primary Care Physician
	Mellinda Smith Role Care Coordinator
	Shawna Green Role Care Giver

SEE ALSO:

[Developer Guide: Care Team for Health Cloud Empower Component](#)

Care Plan Tasks for Health Cloud Empower

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

 **Note:** Assign the Aura-Enabled Apex Class Access for Health Cloud permission set to users who need to access the Care Plan Tasks for Health Cloud Empower component.

1. In your Experience Cloud site's workspace, select **Builder**.
2. On the top-left corner of the page, click .
3. Under Custom Components, select and drag the **Care Plan Tasks for Health Cloud Empower** component onto an editable area of the page.
4. 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

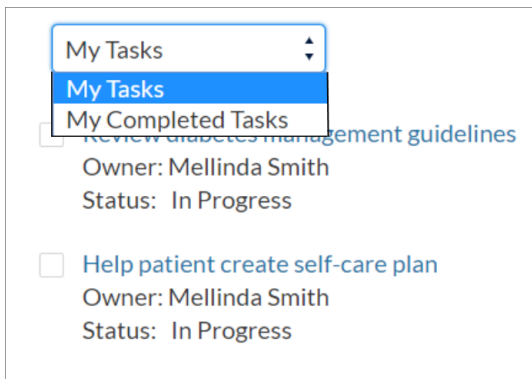
This setting is currently unavailable. Enabling it doesn't do anything.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

 **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](#)

[Developer Guide: Care Plan Tasks for Health Cloud Empower Component](#)

Timeline for Health Cloud Empower

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

 **Important:** Health Cloud has two options for tracking timeline events: Timeline and Enhanced Timeline. We recommend that you use Enhanced Timeline to take advantage of advanced configuration capabilities and responsive layout. Additionally, based on the access granted, your users can also create and edit events in a timeline. To learn more, see [Enhanced Timeline](#).

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 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. In your Experience Cloud site's workspace, select **Builder**.
2. On the top-left corner of the page, click .
3. Under Custom Components, select and drag the **Timeline for Health Cloud Empower** component onto an editable area of the page.
4. 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 events

Select to show past activity in the timeline.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Show future events

Select to show future activity in the timeline.

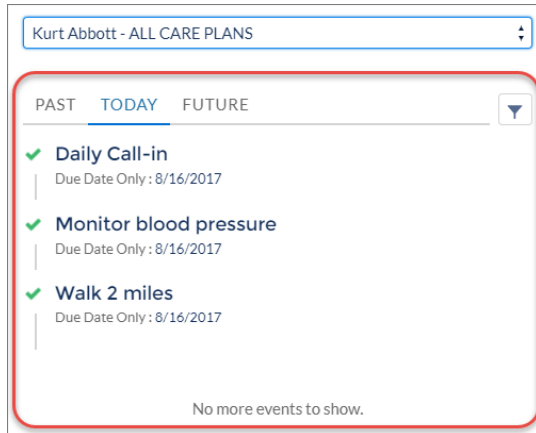
Page Reload Size

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.

 **Example:** Sample Timeline for Health Cloud Empower component:



SEE ALSO:

[Developer Guide: Timeline for Health Cloud Empower Component](#)

[Developer Guide: Timeline for Health Cloud Empower Component](#)

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.

Field Set	Related Object	Component	Description
HcPatientInfoFields	User	Care Team for Health Cloud Empower	Controls which fields appear for the person who is the center of the site.
HcTeamMemberFields	User	Care Team for Health Cloud Empower	Controls which fields appear in the site for team members who aren't patients or members.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Field Set	Related Object	Component	Description
HcCarePlanTaskFields	Activities	Care Plan Tasks for Health Cloud Empower	Controls which fields appear for tasks in the site.

1. From the management settings for the related object, go to Field Sets.
2. Click **New**. You can also clone the field set and edit the cloned field set.
3. Enter a **Field Set Label**. Field Set Name is autopopulated. Keep it as is.
Field Set Label is the name presented to subscribers who install the field through a managed package.
4. In the **Where is this used?** area, provide a brief description of which pages use the field set, and for what purpose.
5. Click **Save**.
6. 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 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.
7. To remove a field from the field set, drag the element back to the object palette, or click the  icon next to the element.
8. 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.
9. Save your work.

SEE ALSO:

[Developer Guide: Create Custom Health Care Empower Components](#)

[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 people 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 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.
2. Install the Health Cloud App Template for Patients and Members package from <http://industries.force.com/healthcloudextensionpatientapp>.
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.

EDITIONS

Available in: Lightning Experience

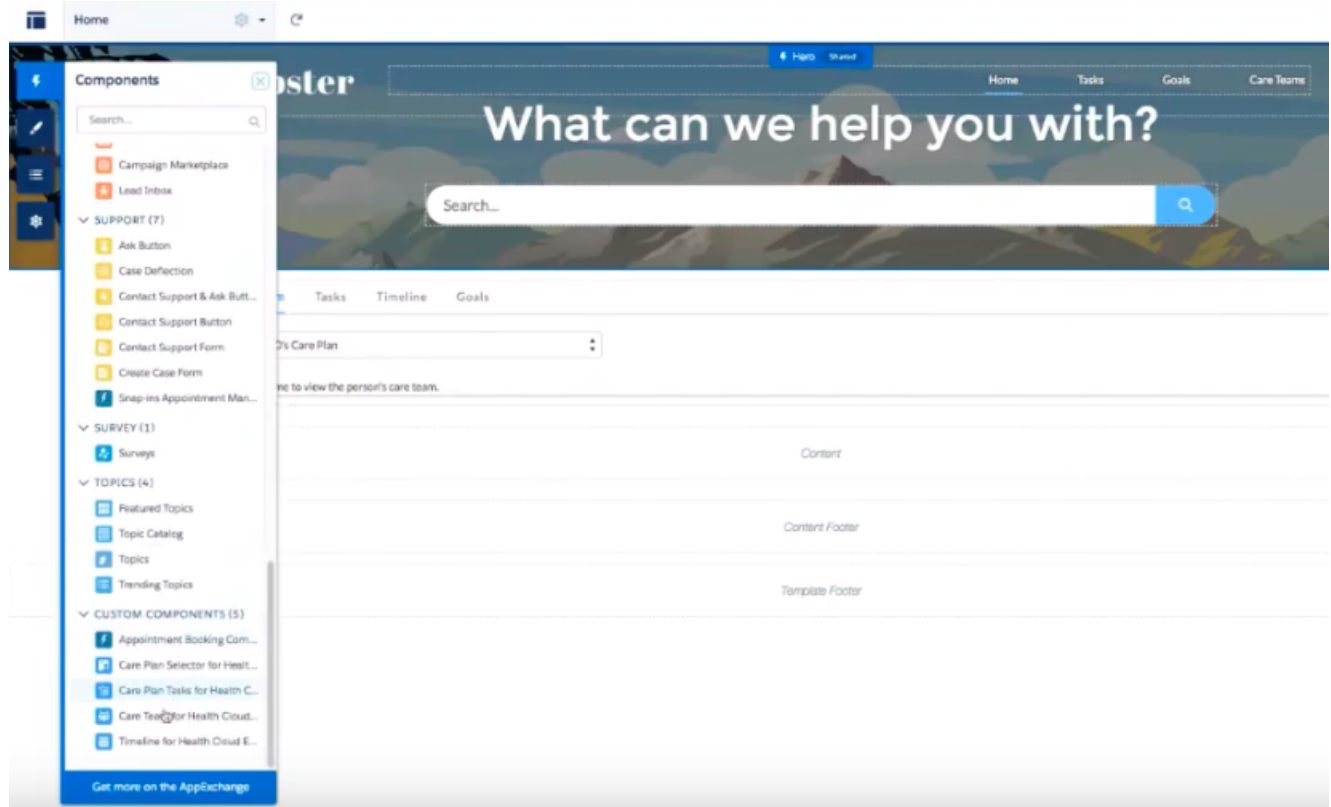
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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

b. Click **New** and select **Health Cloud App Template**.

Health Cloud App 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:

[Salesforce Help: Mobile Publisher](#)

Intelligent Appointment Management

Scheduling and managing appointments is at the center of key patient engagement processes such as patient intake, cost estimation of services, patient education, and post-visit surveys. With the Health Cloud Intelligent Appointment Management's easy-to-use console, call center agents and care coordinators can efficiently and accurately schedule appointments.

 **Note:** Before you set up Intelligent Appointment Management, you must enable Person Accounts.

The console also supports EHR integration by providing FHIR-aligned connectors with out-of-the-box Mulesoft Accelerators. You choose your own scheduling engine: either connect to an electronic health records (EHR) system, or run everything from Health Cloud with Salesforce Scheduler. And with Einstein Predictions, you can deploy AI to help reduce no-shows.

1. [Get Your Org Ready for Intelligent Appointment Management](#)

Before you use Intelligent Appointment Management, make sure you enable Provider Search and set up data for providers. Store provider and facility information in the Healthcare Provider object, and add information about the providers' areas of specialization in the Healthcare Provider Specialty object.

2. [Enable Intelligent Appointment Management](#)

To get started with Intelligent Appointment Management, first make Patient Appointment Scheduling available in your org. When you enable Patient Appointment Scheduling, care coordinators and call center agents can set up patient appointments seamlessly.

3. [Configure Visit Types](#)

Create visit types to help users view appointment availability for relevant providers. To set up a Visit Type, create a Work Type record.

4. [Create Work Type Code Set Bundles for Scheduling](#)

When you set up Intelligent Appointment Management, work type code set bundles map visit types to code set bundles, which describe the work in the scheduling system.

5. [Create Care Specialty Records](#)

Create a Care Specialty record to associate a care specialty with a practitioner. Associating a care specialty with a practitioner helps patients find providers that offer a particular specialty.

6. [Create Care Provider Facility Specialty Records](#)

Create a Care Provider Facility Specialty record to associate providers with their care specialties. Creating this record helps patients find a provider by the specialties they offer at a facility.

7. [Link a Visit Type to a Care Specialty](#)

To link a visit type to a care specialty, create a Work Type Care Specialty record. When your user selects a visit type in the Intelligent Appointment Management console to schedule an appointment, the linked care specialty is auto-selected in the console.

8. [Provide Appointment Statuses and Status Categories](#)

Enable users to track the status of their appointments with customized statuses and status categories. You can add status values that are meaningful to your organization in the Status Values Picklist. Map the picklist values to status categories to help users manage their appointments better.

9. [Connect Healthcare Practitioners with Facilities](#)

Enable patients to find their healthcare practitioners faster by associating the healthcare practitioner records with a facility. If the healthcare practitioner provides primary care to the patient, make sure you select the checkbox for the Primary Care Physician field.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation permission set

10. [Add National Provider Identifiers](#)

Intelligent Appointment Management uses a numeric ID to specify a practitioner or facility. In the US, this ID is the National Provider Identifier (NPI), but you can substitute the ID used in your country or region. To record a provider's ID, create a Healthcare Provider NPI record.

11. [Set Up Reciprocal Roles and Relationships for Intelligent Appointment Management](#)

Intelligent Appointment Management uses the relationships between a patient and their providers to surface appointments with existing providers at the top of the search results. Health Cloud uses two objects to represent the relationship between a patient and their assigned provider: the Reciprocal Role object and the Contact-Contact Relationship object. The Intelligent Appointment Management Configuration references the Reciprocal Role object.

12. [Set Up Your Back-End Scheduling System](#)

Intelligent Appointment Management uses data such as provider availability for booking patient appointments. You can store this data in Salesforce Scheduler or an external scheduling system.

13. [Create Call Center Agent and Care Coordinator Users](#)

Create profiles for call center agents and care coordinators. People in these roles book appointments for patients in Intelligent Appointment Management. After you create the profiles, you create user records and assign permission sets.

14. [Enable Care Coordinators to Schedule Appointments for Patients](#)

Make the Intelligent Appointment Management console available to call center operators or care coordinators by adding a tab to the account page layout.

15. [Configure Intelligent Appointment Management Component](#)

Configure the Intelligent Appointment Management console to make it easy to find the perfect appointment for a patient.

16. [Show Assigned and Past Provider Badges](#)

Often, a number of care providers and healthcare practitioners are involved in a patient's care. To easily schedule appointments with the required practitioner, such as the primary care physician, you must display assigned and past provider badges on the provider's card.

17. [Enable Patients to Schedule Their Own Appointments](#)

Many patients and plan members prefer the control and convenience of booking their appointments online rather than working through a call center. Set up an Experience site to enable patients or their caregivers to find time slots and book appointments on their own, using a configurable flow powered by OmniStudio.

18. [Appointment Guidance](#)

Choosing the perfect appointment for a patient can be difficult, but logically walking through a flow that can take the guesswork out of it. Create a custom screen flow to launch in the Intelligent Appointment Management console that guides your call center operators or care coordinators when setting a patient appointment.

Get Your Org Ready for Intelligent Appointment Management

Before you use Intelligent Appointment Management, make sure you enable Provider Search and set up data for providers. Store provider and facility information in the Healthcare Provider object, and add information about the providers' areas of specialization in the Healthcare Provider Specialty object.

Before you set up Intelligent Appointment Management, complete these steps.

1. Ensure that Person Accounts are enabled and configured for Health Cloud.
2. Enable Data Pipelines.
 - a. From Setup, in the Quick Find box, enter *Data Pipelines*, then select **Getting Started**.
 - b. Turn on **Data Pipelines**.
3. Enable Provider Search.
 - a. From Setup, in the Quick Find box, enter *Provider Search*, then select **Provider Search Settings**.
 - b. Turn on **Provider Search**.
4. Consider setting up sharing settings to define your default internal access to Public Read Only for objects used in Intelligent Appointment Management.
Some of these objects are: Care Provider Searchable Field, Healthcare Practitioner Facility, Healthcare Provider, Service Resource, Service Territory, and Work Type.
5. Create a Healthcare Provider record for each facility (Account) record.
Make sure each facility is represented as a business account.
6. Create a Healthcare Provider record for each practitioner record.
Practitioners can be represented as person accounts or contacts.



Note: While creating a Healthcare Provider record, make sure to leave the Account field empty. Populating both the Account and Practitioner fields can cause provider search sync issues.

7. Associate practitioners with their specialties by creating a Care Provider Facility Specialty record for each Healthcare Practitioner Facility record. In a later task, you associate visit types with these specialties.
8. Check that the patient record layout includes the mailing address field.
The mailing address field on the patient's record is used for the driving distance filter.

Now you're ready to enable Intelligent Appointment Management. Then you can complete additional setup tasks, including setting up profiles and user records for your call center agents and care coordinators.

SEE ALSO:

[Set Up Person Accounts to Represent Health Cloud Members and Patients](#)
[Set Your Internal Organization-Wide Sharing Defaults](#)
[Set Up Data for Provider Search](#)
[Create Call Center Agent and Care Coordinator Users](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud:

- Health Cloud Foundation

To use Health Cloud console:

- Health Cloud Standard

To enable Provider Search:

- Data Pipelines Base User

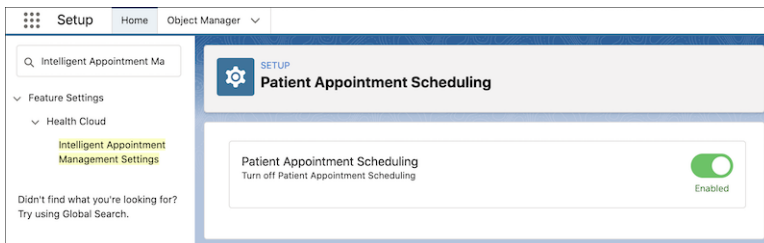
To use Intelligent Appointment Management:

- Health Cloud Appointment Management

Enable Intelligent Appointment Management

To get started with Intelligent Appointment Management, first make Patient Appointment Scheduling available in your org. When you enable Patient Appointment Scheduling, care coordinators and call center agents can set up patient appointments seamlessly.

1. From Setup, in the Quick Find box, enter *Intelligent Appointment Management Settings*, and then select **Intelligent Appointment Management Settings**.
2. Turn on Patient Appointment Scheduling.



SEE ALSO:

- [The Health Cloud Foundation Permission Set](#)
- [Set Up Provider Search in Health Cloud](#)

Configure Visit Types

Create visit types to help users view appointment availability for relevant providers. To set up a Visit Type, create a Work Type record.

Another name for a Visit Type is an Appointment Template.

A Visit Type is a category of a Work Type object, but it's not necessarily a clinical category. In Health Cloud, visit types describe the timing, duration, or importance of a visit, or reason for a visit. For example, you can create visit types for an annual physical, follow-up, diabetes checkup, or physiotherapy. The Health Cloud data model stores information about each visit type.

- If you're using Salesforce Scheduler as your scheduling engine, the Salesforce data model stores information about which providers have specialties that let them service specific Visit Types. Salesforce Scheduler only serves up appointment availability from these providers.
- If you're using an external scheduling engine, Salesforce sends an appointment request to the system with the desired visit type. That external scheduling engine interprets the message, finds providers for that visit type, and returns appointments from those providers.

1. In the App Launcher, find and select **Work Types**.
2. Click **New**.
3. For Work Type Name, enter a name for the Visit Type.
The name of the Work Type record becomes available as a value in the Visit Type picklist.
4. Under Description, add extra details about the Visit Type.
5. Optionally select an Operating Hours record.

If you don't select operating hours for a work type, the work type is considered to be always available. See [Configure Operating Hours for Providers and Facilities](#) on page 200.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation permission set

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation permission set

6. Under Estimated Duration, add a value for the expected time needed for the visit type.
7. Specify the unit of time in Duration Type, either Hours or Minutes.

New Work Type

Description

• Work Type Name
Physiotherapy

Description

• Estimated Duration
1.00

• Duration Type
Hours

Service Report Template
Search Service Report Layouts...

Auto-Create Service Appointment
☐

8. If you're using Salesforce Scheduler, entering values for these fields is optional:
 - Block Time Before Appointment — Preparation time before a meeting.
 - Block Time Before Unit — Hours or Minutes.
 - Block Time After Appointment — Wrap up time after a meeting.
 - Block Time After Unit — Hours or Minutes.
 - Timeframe Start — Start of the available appointment time range presented to the user.
 - Time Frame Start Unit — Hours or Minutes.
 - Timeframe End — End of the available appointment time range presented to the user.
 - Time Frame End Unit — Hours or Minutes.

External schedulers don't use these fields.

9. Save the record.

Create Work Type Code Set Bundles for Scheduling

When you set up Intelligent Appointment Management, work type code set bundles map visit types to code set bundles, which describe the work in the scheduling system.

Standardization of definitions and concepts is essential in healthcare, which is why we need code sets and code set bundles. A code set is system-defined code that represents a concept in the context of its system. A code set bundle is a collection of code sets across different systems and versions that all represent the same real-world concept. For details, see the [Intelligent Appointment Management data model](#).

Work type code set bundles capture visit type details, including scheduling system, service provided, and any visit type custom flows. For example, an appointment for an endoscopy procedure booked through an external scheduling system is represented with codes that indicate the appointment type, and the service type and category. The procedure requires a patient to keep their stomach empty for four to eight hours beforehand and avoid certain medications in the preceding week. You can create a custom screen flow that lists the visit requirements and configure it for the endoscopy visit type using the Flow Name field. During a patient call, when your user selects endoscopy as the visit type, the procedure requirements are displayed and your user can share the details with the patient.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation permission set

Important: If you use Salesforce Scheduler as the scheduling system for booking appointments, creating a Work Type Code Set Bundle record is mandatory.

1. In the App Launcher, find and select **Work Type Code Set Bundles**.
2. Select **New**.
3. Enter a name for your Work Type Code Set Bundle record. For example, *Physiotherapy*.
4. For **Parent**, specify the visit type for which you're choosing a scheduling system.
5. For **Scheduling System**, specify whether the availability data for this visit type is in Salesforce Scheduler or an external system.
 - To specify Salesforce Scheduler, select **Salesforce**.
 - To specify an external EHR system, select **External**.

6. If you selected an external scheduling system, specify the visit type (reason for visit), service type, and service category.
7. To trigger a flow when the specified visit type is selected, enter the name of the flow.

8. Save your changes.

Create Care Specialty Records

Create a Care Specialty record to associate a care specialty with a practitioner. Associating a care specialty with a practitioner helps patients find providers that offer a particular specialty.

1. From Setup, in the Quick Find box, enter *Intelligent Appointment Management*, and then select **Intelligent Appointment Management Settings**.
2. Expand the Get Started with Intelligent Appointment Management section and click **Create Care Specialty**.
3. Enter the external system Specialty Code for the specialty.
4. Enter the care specialty name.
5. Enter a description of the specialty.
6. Select the type of care specialty.
7. Select the Specialty Usage option that indicates this specialty is related to the practitioner.
8. For Effective From, enter the date from which this specialty is effective.
9. For Effective To, enter the data after which this specialty is no longer effective.
10. Select **Active** to activate the Care Specialty.
11. **Save** your work.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud:

- Health Cloud Foundation

Create Care Provider Facility Specialty Records

Create a Care Provider Facility Specialty record to associate providers with their care specialties. Creating this record helps patients find a provider by the specialties they offer at a facility.

1. From Setup, in the Quick Find box, enter *Intelligent Appointment Management*, and then select **Intelligent Appointment Management Settings**.
2. Expand the Get Started with Intelligent Appointment Management section and click **Create Care Provider Facility Specialty**.
3. Enter a Provider Specialty Facility name.
4. Select the practitioner's Specialty or create a new one.
5. Select the Practitioner Facility where the practitioner practices the specialty.
6. Select **Primary Specialty** if this record is the practitioner's primary specialty at this facility.
7. Select the Specialty Role for the practitioner at this facility.
8. For Effective From, enter the date from which this provider facility specialty is effective.
9. For Effective To, enter the date after which this provider facility specialty is no longer effective.
10. For Source System, enter the source of the external system for this record, if applicable.
11. For Source System Identifier Field, enter the ID of the external record on the source system, if applicable.
12. To activate the care provider facility specialty select **Active**.
13. **Save** your work.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud:

- Health Cloud Foundation

Sync data for Provider Search to confirm that the Healthcare Provider Facility Specialty data is shown in the Care Provider Searchable Field object.

Link a Visit Type to a Care Specialty

To link a visit type to a care specialty, create a Work Type Care Specialty record. When your user selects a visit type in the Intelligent Appointment Management console to schedule an appointment, the linked care specialty is auto-selected in the console.

- 1. In the App Launcher, find and select **Work Type Care Specialties**.
- 2. Click **New**.
- 3. Enter a name for the work type care specialty record.
- 4. Select the work type.
- 5. Select the appropriate care specialty.
- 6. Save the record.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

- To use Health Cloud
- Health Cloud Foundation permission set

Provide Appointment Statuses and Status Categories

Enable users to track the status of their appointments with customized statuses and status categories. You can add status values that are meaningful to your organization in the Status Values Picklist. Map the picklist vales to status categories to help users manage their appointments better.

 **Note:** Make sure that the field-level security of the Source System Identifier, Status Reason, Source System, and Parent Record Type fields is set to visible for all profiles.

Statuses are grouped into four categories: Scheduled, Cannot Complete, Canceled, and Completed. Each status must map to one of the predefined status categories. If the status categories make sense to your users, you can reuse the status categories as statuses.

Table 1: Status Picklist Values and Their Definitions

Status Picklist Values	Meaning
Scheduled	The appointment slot is confirmed.
Dispatched	This value isn't relevant for Intelligent Appointment Management.
In Progress	This value isn't relevant for Intelligent Appointment Management.
Cannot Complete	The slot is no longer available.
Completed	The appointment is completed.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

- To use Health Cloud
- Health Cloud Foundation permission set

Status Picklist Values	Meaning
Canceled	The provider or the patient has canceled the appointment. This field is required. The user can cancel an appointment only if status value is configured for the Canceled category.
Not Started	This value isn't relevant for Intelligent Appointment Management.
None	This value isn't relevant for Intelligent Appointment Management.

You can have multiple values for a category, but multiple categories can't map to the same status value.

1. From Setup, click the Object Manager tab.
2. Click **Service Appointment**, then click **Fields & Relationships**.
3. Click **Status**.
4. In the Status Picklist Values section, select **New**, to create an appointment status value.
 - a. Enter a value for Label. For example, *Delayed*.
 - b. Enter the same value for API Name.
 - c. Select a status category.
 - d. Save your changes.
 - e. Repeat these steps for each status your users need.

Connect Healthcare Practitioners with Facilities

Enable patients to find their healthcare practitioners faster by associating the healthcare practitioner records with a facility. If the healthcare practitioner provides primary care to the patient, make sure you select the checkbox for the Primary Care Physician field.

1. From the App Launcher, find and select **Healthcare Practitioner Facilities**.
2. Click **New**.
3. Enter a name for the practitioner's facility.
4. Select **Active**.
5. For Account, specify the account associated with the practitioner facility.
6. For Practitioner, specify the practitioner that works at the facility.
7. If the facility is the practitioner's primary facility, select **Primary Facility**.
8. If the practitioner provides primary care, select **Primary Care Physician**.



Note: Make sure the Service Territory Member field looks up to the relevant Healthcare Practitioner Facility record if you're using Salesforce Scheduler. This is not required if you're using an external data source.

9. Add any other information you need, and then save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation permission set

New Healthcare Practitioner Facility

Information

Practitioner Facility Name

The GH Clinic

Active

☒

Account

Chicago Cell Engineering

Practitioner

Rukmini Mondal

Primary Facility

☒

Primary Care Physician

☒

Gender Restriction

--None--

Highest Valid Age

Lowest Valid Age

Operating Hours

Search Operating Hours...

24x7 Support

☐

Availability Exceptions

Healthcare Provider

Search Healthcare Providers...

Owner Name

Admin User

Source System

Source System Identifier

Initial Start Date

Effective From

Effective To

Directory Print Indicator

☐

Termination Date

Termination Reason

--None--

Termination Requested By

Search People...

SSA/County Code

Service Territory Member

STM-0039

Healthcare Facility

Search Healthcare Facilities...

Sync data for Provider Search to confirm that the Healthcare Practitioner Facility data is shown in the Care Provider Searchable Field object.

Add National Provider Identifiers

Intelligent Appointment Management uses a numeric ID to specify a practitioner or facility. In the US, this ID is the National Provider Identifier (NPI), but you can substitute the ID used in your country or region. To record a provider's ID, create a Healthcare Provider NPI record.

 **Note:** If a provider has no NPI configured, the Appointment Management console doesn't display time slots for that provider.

1. From the App Launcher, find and select **Healthcare Provider NPIs**.
2. Click **New**.
3. Enter a name for the record.
4. For the NPI Type field, specify that the record is for an individual (practitioner).
5. Specify the name of the practitioner.
6. Enter the NPI number.
7. Select **Active**.

EDITIONS

Available in: Lightning Experience
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation permission set

8. Fill out other fields as required, and save your changes.

Sync data for Provider Search to confirm that the Healthcare Provider NPI data is shown in the Care Provider Searchable Field object.

Set Up Reciprocal Roles and Relationships for Intelligent Appointment Management

Intelligent Appointment Management uses the relationships between a patient and their providers to surface appointments with existing providers at the top of the search results. Health Cloud uses two objects to represent the relationship between a patient and their assigned provider: the Reciprocal Role object and the Contact-Contact Relationship object. The Intelligent Appointment Management Configuration references the Reciprocal Role object.

1. Set up custom tabs for Reciprocal Roles and Contact-Contact Relationship objects.
 - a. From Setup, in the Quick Find box, enter *Tabs*, and then select **Tabs**.
 - b. Click **New**.
 - c. For Object, select **Reciprocal Roles**.
 - d. Select a tab style, and then click **Next**.
 - e. The tab is visible to all profiles. Leave the setting as is and click **Next**.
 - f. Select the custom tabs for which the new custom tab is available.
 - g. Save your changes.
 - h. Repeat the steps for the Contact-Contact Relationship object.
2. Assign Account and Contact record types for the Reciprocal Role.
 - a. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
 - b. Select the profile used by the admin. For example, System Administrator.
 - c. Under Record Type Settings, click **Edit** next to Reciprocal Roles.
 - d. Move Account Role and Contact Role from Available Record Types to Selected Record Types.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To enable contact to contact relationships:

- Customize Application

- e. Save your changes.
- 3. Create a Reciprocal Role for the patient's provider.
 - a. From the App Launcher, find and select **Reciprocal Roles**.
 - b. Click **New**.
 - c. Click **Contact Role** and then click **Next**.
 - d. Create a role for the patient's provider. For example, Primary Care Physician.
 - e. In Inverse Role, enter *Patient*.
 - f. Save your changes.
- 4. Associate a patient to their providers using a Contact-Contact Relationship record. Create a Contact-Contact Relation with Contact as the patient record and Related Contact as the practitioner record. Add the Related Role as PCP.
 - a. From the App Launcher, find and select **Contact-Contact Relations**.
 - b. Click **New**.
 - c. For Contact, select the patient record.
 - d. For Related Contact, select the practitioner record.
 - e. For Related Role, add the Reciprocal Role you created. For example, PCP.
 - f. Select **Active**.
 - g. Save your changes.

Set Up Your Back-End Scheduling System

Intelligent Appointment Management uses data such as provider availability for booking patient appointments. You can store this data in Salesforce Scheduler or an external scheduling system.

[Set Up an External Scheduling System](#)

Using a scheduling system outside of Salesforce for booking and managing appointments requires some setup, including configuring identifier records, creating a named credential, and updating settings.

[Set Up Salesforce Scheduler](#)

Using Salesforce Scheduler as the scheduling system for booking and managing appointments requires configuring operating hours, territories, facilities, and resources of the health care providers you'll be scheduling appointments for.

Set Up an External Scheduling System

Using a scheduling system outside of Salesforce for booking and managing appointments requires some setup, including configuring identifier records, creating a named credential, and updating settings.

1. [Configure Identifier Records for Providers and Patients](#)
To schedule appointments using an external system, first set up identifier records. Identifier records map records in Health Cloud to corresponding records in an external system that has scheduling, such as EHR.
2. [Create a Named Credential](#)
Create a named credential for your external scheduling system. Salesforce handles all authentication, and you can skip remote site settings, which are otherwise required for REST calls to external sites.

3. [Configure Intelligent Appointment Management Settings for an External Scheduler](#)

Configure the Intelligent Appointment Management settings for the external scheduling system, including the Named Credential and the Assigned Provider Role.

4. [Connect to the External Scheduling System](#)

Specify the REST endpoints that connect Health Cloud to the external scheduling system.

Configure Identifier Records for Providers and Patients

To schedule appointments using an external system, first set up identifier records. Identifier records map records in Health Cloud to corresponding records in an external system that has scheduling, such as EHR.

1. From the App Launcher, find and select **Identifiers**.
2. Click **New**.
3. Add the effective dates for which the identifier record is valid.
4. For Source System, specify the external scheduling system to which the identifier record maps.
5. For Parent Record, specify the Health Cloud object for which you want to create the identifier record.
For the healthcare practitioner, the parent record is the Contact object. For the patient and facility records, the parent record is the Account object.
6. For **ID Value**, enter the value of the Health Cloud identifier.
7. For **Source System ID**, specify the ID of the corresponding record in the external scheduling system.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation permission set

New Identifier

Identifier Information

Name

Parent Record ⓘ

Rukmini Mondal

ID Type

Search Code Set Bundles...

ID Value

1782

Issuing Authority

Search Accounts...

ID Usage Type

--None--

Effective Date

Date Time

1/1/2010 12:00 PM

End Date

Date Time

12/31/2040 12:00 PM

Source System

EHR-HA1

Source System ID

EHR-HA1-5645476457

Source System Modified ⓘ

Date Time

Cancel Save & New Save

8. Save your changes.

Create a Named Credential

Create a named credential for your external scheduling system. Salesforce handles all authentication, and you can skip remote site settings, which are otherwise required for REST calls to external sites.

A named credential specifies the base URL for REST endpoints and any required authentication parameters in one definition, which simplifies REST call setup. If you register the base URL in your org's remote site settings instead, you must handle the authentication yourself. For example, for an Apex callout, your code must handle authentication, which can be less secure and especially complicated for OAuth implementations.

- An example URL value that references the HAPI FHIR open-source system is `https://hapi.fhir.org/baseR4`.
- For more details about the Health Cloud named credential, see [Operations](#). For detailed general steps to create a named credential, see [Define a Named Credential](#).

SEE ALSO:

[About Named Credentials](#)

Configure Intelligent Appointment Management Settings for an External Scheduler

Configure the Intelligent Appointment Management settings for the external scheduling system, including the Named Credential and the Assigned Provider Role.

1. In Setup, in the Quick Find box, enter *Intelligent Appointment Management Configuration*, and then select **Intelligent Appointment Management Configuration**.
2. Click **New Intelligent Appointment Management Configuration**.
3. Enter a label for the configuration.
4. Enter the Named Credential that you created for this configuration.
5. Enter the role of the Assigned Provider, for example *Primary Care Physician*. The Assigned Provider Role value must map to the assigned providers' relationship with their patients defined in the Reciprocal Role record. See [Set Up Reciprocal Roles and Relationships for Intelligent Appointment Management](#) on page 193.
6. If you have only one external scheduling system, select **Use Single Source System**.
7. To use this configuration record, select **Is Active**.

You can have multiple appointment configurations, but only one can be active at a time.

 **Important:** A configuration record isn't active by default. You must manually activate it and deactivate any other configuration records. At least one configuration record must be active for Intelligent Appointment Management to work.

8. Save the configuration.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation permission set

Connect to the External Scheduling System

Specify the REST endpoints that connect Health Cloud to the external scheduling system.

1. From Setup, in the Quick Find box, enter *Intelligent Appointment Management URL Configuration*, and then select **Intelligent Appointment Management URL Configuration**.
2. Click **New Intelligent Appointment Management URL Configuration**.
3. Enter a Label for the configuration. The Name is autofilled based on the Label.
4. Look up and select the **Intelligent Appointment Management Configuration** that you set up.
5. Select the Endpoint Name from the picklist, for example **Find Slots**.
6. Enter the URL Path for the selected REST endpoint, and save the configuration.
For example, a URL Path that references the HAPI FHIR open-source system is `/Slot/_search`.
7. Repeat these steps, creating an Intelligent Appointment Management URL Configuration for each REST endpoint.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation permission set

Set Up Salesforce Scheduler

Using Salesforce Scheduler as the scheduling system for booking and managing appointments requires configuring operating hours, territories, facilities, and resources of the health care providers you'll be scheduling appointments for.

1. [Enable Salesforce Scheduler for Health Cloud](#)
Enable Salesforce Scheduler so you can book and manage patient appointments with Intelligent Appointment Management.
2. [Configure Intelligent Appointment Management Settings for Salesforce Scheduler](#)
Configure Intelligent Appointment Management settings for Salesforce Scheduler, including the Named Credential and the Assigned Provider Role.
3. [Make Providers Available for Appointment Scheduling](#)
To make a provider available for appointment scheduling, edit the Salesforce Scheduler permission set and then assign the permission set to all relevant providers.
4. [Configure Operating Hours for Providers and Facilities](#)
Configure operating hours for providers and facilities to use when scheduling appointments in Intelligent Appointment Management.
5. [Create a Service Resource for Providers](#)
Create service resource records to represent providers. You can then associate those providers with territories and visit types.
6. [Create a Service Territory for Facilities](#)
Create a service territory to represent a facility in which service resources operate. For example, you can represent a hospital as a service territory. Later, you can assign providers who practice at that hospital as service territory members.
7. [Create a Service Territory Member](#)
8. [Create Appointment Modes](#)
A visit with a provider can take place over phone, video, or in person. To create an appointment mode, add the relevant appointment type picklist value.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

9. [Assign Visit Types to Service Territories](#)

Map each visit type (work type) to a service territory.

10. [Enable Shifts for Channel Support in Intelligent Appointment Management](#)

Give providers the flexibility to take appointments from anywhere and define when they're available on video, in person, or by phone. Create shifts that vary daily or weekly.

Enable Salesforce Scheduler for Health Cloud

Enable Salesforce Scheduler so you can book and manage patient appointments with Intelligent Appointment Management.

1. From Setup, in the Quick Find box, enter *Salesforce Scheduler Settings*, and then select **Salesforce Scheduler Settings**.
2. Find **Salesforce Scheduler for Health Cloud**, and turn it on.
3. Click **Enable** in the confirmation modal window.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud.

Salesforce Scheduler is available for an extra cost in Lightning Experience.

USER PERMISSIONS

To manage apps:

- Customize Application

Configure Intelligent Appointment Management Settings for Salesforce Scheduler

Configure Intelligent Appointment Management settings for Salesforce Scheduler, including the Named Credential and the Assigned Provider Role.

1. From Setup, in the Quick Find box, enter *Intelligent Appointment Management Configuration*, and then select **Intelligent Appointment Management Configuration**.
2. Click **New Intelligent Appointment Management Configuration**.
3. Enter a label for the configuration.
4. Enter the Named Credential that you created for this configuration.

Salesforce Scheduler requires a Named Credential but doesn't use it. To create a mock Named Credential:

- a. From Setup, in the Quick Find box, enter *Named Credential*, and then select **Named Credential**.
 - b. Click **New Named Credential**.
 - c. Enter a **Label** of *Appointment Management* and a Name of *Appointment_Management*.
 - d. The **URL** must be properly formatted, but the value doesn't matter. You can use *https://www.example.com*.
 - e. Click **Save**.
5. Enter the role of the Assigned Provider, for example *Primary Care Physician*. The Assigned Provider Role value must map to the assigned providers' relationship with their patients defined in the Reciprocal Role record. See [Set Up Reciprocal Roles and Relationships for Intelligent Appointment Management](#) on page 193.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Salesforce Scheduler

- Schedulable resource add-on

AND

Salesforce Platform Starter license

6. Select **Is Active**.

You can have multiple appointment configurations, but only one can be active at a time.

 **Important:** A configuration record isn't active by default. You must manually activate it and deactivate any other configuration records. At least one configuration record must be active for Intelligent Appointment Management to work.

7. Save the configuration.

Make Providers Available for Appointment Scheduling

To make a provider available for appointment scheduling, edit the Salesforce Scheduler permission set and then assign the permission set to all relevant providers.

1. Add providers as users in the org.

2. Create a permission set with the Salesforce Scheduler permission set license.

a. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.

b. Click **New**.

c. Enter a label, API name, and description for your permission set. To keep it simple, use *Salesforce Scheduler Resource*.

d. In the License picklist, select **Salesforce Scheduler**, and click **Save**.

e. On the permission set overview page, under System, click **System Permissions**.

f. Click **Edit**.

g. Enable the **Let a user be included in appointments in Salesforce Scheduler** permission.

h. Click **Save**.

i. In the Permission Changes Confirmation dialog, click **Save**.

3. Assign the Salesforce Scheduler Resource permission set to the users who you have created or identified to be available as providers. Assigning the permission set automatically assigns the associated permission set license to the user.

a. On the Salesforce Scheduler Resource permission set overview page, click **Manage Assignments**, and then click **Add Assignments**.

b. Select the users who you want to assign the Salesforce Scheduler Resource permission set to, and then click **Assign**.

c. Click **Done**.
- EDITIONS
- Available in: Lightning Experience
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud
- USER PERMISSIONS
- To use Salesforce Scheduler

 - Schedulable resource add-on

AND

Salesforce Platform Starter license
- Permission Set

Salesforce Scheduler Resource

Find Settings...

Clone

Delete

Edit Properties

Manage Assignments

Permission Set Overview

>

System Permissions

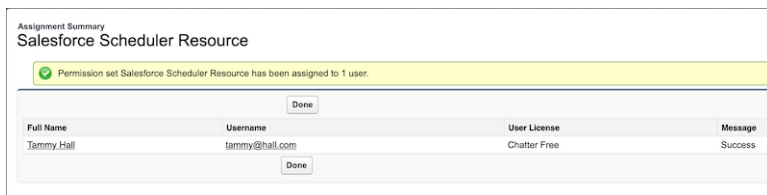
System Permissions

Save

Cancel

System

Permission Name	Enabled	Description
Let a user be included in appointments in Salesforce Scheduler.	☒	Let a user be included in appointments in Salesforce Scheduler.



Configure Operating Hours for Providers and Facilities

Configure operating hours for providers and facilities to use when scheduling appointments in Intelligent Appointment Management.

Providers are represented as service resources and facilities are service territories. Providers are related to a facility using service territory member records. You can set up operating hours for a facility or for a provider at a specific facility.

There are a few ways to set up operating hours.

- From the Operating Hours tab.
Create operating hours this way for service territories (facilities).
- From a service territory member record (which links a provider to a facility for scheduling), click **Add Time Slots** in the Operating Hours card.
To access this record, open a service territory record and click the Related tab to view the Service Territory Members related list. Or from a service resource record, go to the Service Territories related list.
- From a work type record (which represents a type of visit), click **Add Time Slots** in the Operating Hours card.

Here's how to do it from the Operating Hours tab.

1. From the App Launcher, find and select **Salesforce Scheduler Setup**.

This app opens up multiple object tabs, including Service Territories, Service Resources, Operating Hours, and more.

2. Go to the Operating Hours tab.
3. Click **New**.
4. Enter a name for the operating hours and select a time zone.
5. To add a time slot, under Set Service Appointment Windows, click **Add Row**.
6. Select a day, start time, and end time for the time slot. Optionally, select a work type.

If the end time is on the next day, that time slot appears in the next day's column while scheduling an appointment. For example, the start time is 8:00 PM on Tuesday and the end time is 12:00 AM on Wednesday. The time slot appears in the column for Wednesday and not in the column for Tuesday.

7. If [Concurrent Scheduling is enabled](#), you can also define time slots for concurrent appointments and specify the maximum number of appointments in a time slot. Under Set Concurrent Service Appointment Windows, click **Add Row**. For more information, see [Define Time Slots for Concurrent Scheduling](#).



Note: Create concurrent time slots only for those operating hours that you plan to assign to service territory members. During appointment scheduling, only the concurrent time slots in the service territory member's operating hours are available for selection. Any concurrent time slots in the work type's or service territory's operating hours aren't available.

8. **Save** your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Salesforce Scheduler

- **Schedulable resource add-on**

AND

Salesforce Platform Starter license

If you created operating hours for a facility, you can associate those hours to the facility when you create its service territory record. Sync data for Provider Search to confirm that the operating hours data is shown in the Care Provider Searchable Field object.

Create a Service Resource for Providers

Create service resource records to represent providers. You can then associate those providers with territories and visit types.

Although providers are already represented as Contacts or Person Accounts for Intelligent Appointment Management, they must be represented as Service Resources for Salesforce Scheduler.

- 1. From the App Launcher, find and select **Salesforce Scheduler Setup**.
This app opens up multiple object tabs, including Service Territories, Service Resources, Operating Hours, and more.
- 2. Go to the Service Resources tab.
- 3. Click **New**.
- 4. Select a provider user and enter a resource name—typically, the user's name.
- 5. Select **Active** to be able to assign the resource to appointments.
- 6. Set resource type to **Technician**.
- 7. Save your changes.

New Service Resource

Information

Name

Tammy Hall

Active

☒

User

Tammy Hall

X

Include in Scheduling Optimization

☐

Resource Type

Technician

Capacity-Based

☐

Description

Cancel

Save & New

Save

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Salesforce Scheduler

- Schedulable resource add-on

AND

Salesforce Platform Starter license

Create a Service Territory for Facilities

Create a service territory to represent a facility in which service resources operate. For example, you can represent a hospital as a service territory. Later, you can assign providers who practice at that hospital as service territory members.

1. From the App Launcher, find and select **Salesforce Scheduler Setup**.

This app opens up multiple object tabs, including Service Territories, Service Resources, Operating Hours, and more.

2. Go to the Service Territories tab and click **New**.
3. Enter a name for your territory, such as a branch location or hospital name.
4. If your territory is part of a larger territory, select a parent territory.
5. Select operating hours for the territory, which indicate when appointments within the territory take place.



Note:

- When you use Shift Management, a service territory's operating hours are used only if you select the **Use service territory's operating hours with shifts** scheduling policy.
- Service territories ignore concurrent time slots. Therefore, select operating hours that include only non-concurrent time slots. Only service territory members can offer concurrent time slots.
- Resources use their territory's operating hours by default, but you can define different hours for resources.

6. To enable users to add members to the territory or associate it with appointments, select **Active**.
7. Enter an address.

This address is the location of the appointment as used in the location search in the appointment flow.
8. **Save** your changes.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Salesforce Scheduler is available for an extra cost in Lightning Experience.

USER PERMISSIONS

To create a service territory:

- Create, read, edit, and delete on Service Territories

Create a Service Territory Member

Providers are represented as service resources and facilities are represented as service territories. To associate a provider with a facility for scheduling, create a service territory member record.

There are a few ways to create service territory member records.

- On the Service Territory record (for a facility), click **Assign Service Resources**.
- On the Service Resource record (for a provider), click **Assign Service Territories**.
- On the Healthcare Practitioner Facility record, update the Service Territory Member field.



Note: Ensure that the Service Territory Member field is available on the Healthcare Practitioner Facility page layout.

Here's how to do it from the Service Territory record.

1. From the App Launcher, find and select **Salesforce Scheduler Setup**.

This app opens up multiple object tabs, including Service Territories, Service Resources, Operating Hours, and more.

2. Go to the Service Territories tab.
3. Open a service territory record, then click **Assign Service Resources**.
4. To select one or more service resources, click  next to each one.
5. Click **Next**.
6. For each of the selected service resources, select a Territory Type. The default is Primary.

The primary territory is typically the facility where the provider works most often—for instance, near their home branch. Secondary territories are facilities where providers can be assigned to appointments. A service resource can have only one primary service territory but can have multiple secondary service territories.

7. Set start dates for the service resources. Optionally, set end dates.
8. Save your work.



Note: To view all service territories that a service resource is a member of, see the Service Territories related list on their service resource record page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Salesforce Scheduler

- Schedulable resource add-on

AND

Salesforce Platform Starter license

Create Appointment Modes

A visit with a provider can take place over phone, video, or in person. To create an appointment mode, add the relevant appointment type picklist value.

 **Important:** To use the video visit feature, configuring Appointment Modes is required.

1. From Setup, click **Object Manager**.
2. Select **Work Type**.
3. Select **Fields & Relationships**, and then select **Default Appointment Type**.
4. In the Default Appointment Type Picklist Values section, click **New**.
5. Enter the picklist values, such as *phone*, *office*, or *video*. Each value goes on its own line.
6. Save your changes.

Lightning Design System provides utility icons that you can use on lightning pages. Salesforce Scheduler uses utility icons to show icons for appointment types. By default, the API name of a picklist value is the same as the picklist value. Salesforce Scheduler verifies whether the API name of a Default Appointment Type picklist value matches the name of a utility icon that Lightning Design System provides. If the names match, Salesforce Scheduler uses the icon with the same name. If the names don't match, Salesforce Scheduler uses the default lightning icon. See [Lightning Design System: Utility Icons](#).

To edit the icons for appointment types, edit the API names and then enter the names of utility icons that you want to use.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud.

Salesforce Scheduler is available for an additional cost in Lightning Experience.

USER PERMISSIONS

To use Salesforce Scheduler:

- Schedulable resource add-on

AND

Salesforce Platform Starter license

Assign Visit Types to Service Territories

Map each visit type (work type) to a service territory.

1. On a work type record page, go to the Service Territory Work Types related list.
If this related list isn't present, you can add it:
 - a. Click  and select **Edit Object**.
 - b. Click **Page Layouts**, then **Work Type Layout**.
 - c. On the palette, click **Related Lists**.
 - d. Drag **Service Territory Work Types** to the Related Lists section of the canvas.
 - e. Click **Save**. When you see the prompt to overwrite, click **Yes**.
 - f. Return to the work type record page and refresh the browser.
2. In the Service Territory Work Types related list, click **New**.
3. Select a service territory.
4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Salesforce Scheduler

- Schedulable resource add-on

AND

Salesforce Platform Starter license

Enable Shifts for Channel Support in Intelligent Appointment Management

Give providers the flexibility to take appointments from anywhere and define when they're available on video, in person, or by phone. Create shifts that vary daily or weekly.

1. Create engagement channel types. Engagement channel types define the ways in which a provider is available, such as in person or by phone.
 - a. From the App Launcher, find and select Engagement Channel Types.
 - b. Click New.
 - c. Enter a name for the engagement channel. For example, Phone.
 - d. Select a contact point type from the dropdown.
 - e. Under the Usage Type list, move Salesforce Scheduler to the Chosen list.
 - f. Select Active.
 - g. Save your changes.
2. Enable the Schedule Appointments Using Engagement Channels setting.
 - a. From Setup, in the Quick Find box, enter Salesforce Scheduler Settings, and then select Salesforce Scheduler Settings.
 - b. Turn on Schedule Appointments Using Engagement Channels
3. Add Channels to a Shift.
 - a. From the App Launcher, find and select Shifts.
 - b. Click  next to a shift, and then click Add channels.
 - c. Search for and select channels.
 - d. Save your changes.

In the Intelligent Appointment Management Console, the Call Center Agent or Care Provider Coordinator can now filter the provider's available appointment slots based on the channel type. For instance, they could filter to only see available video slots.

SEE ALSO:

[Salesforce Help: Engagement Channels](#)

[Salesforce Help: Manage Shifts in Salesforce Scheduler](#)

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud.

USER PERMISSIONS

To view, create, and update shifts:

- View, create, and edit on Shifts, Service Territories, Service Resources, and Service Territory Memberships

Create Call Center Agent and Care Coordinator Users

Create profiles for call center agents and care coordinators. People in these roles book appointments for patients in Intelligent Appointment Management. After you create the profiles, you create user records and assign permission sets.

1. Create profiles for call center agents.
 - a. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
 - b. Click **New Profile**.
 - c. Select an existing profile that is closely related to call center agent. For example, Standard User.
 - d. Enter a profile name. For example, *Call Center Agent*.
 - e. Click **Save**.
 - f. To create a profile for care coordinators, repeat these steps.
2. Give Read access to the Maximum Appointments field on the Time Slot object for *each* profile.
 - a. From the profile page, click **Object Settings**, then click **Time Slots**.
 - b. Click **Edit** and then select Read access on the Maximum Appointments field.
 - c. Save your changes.
3. Ensure that the profiles have access to the Person Account page layout and record type. Typically, the profile you cloned includes these assignments already.
 - a. From the profile page, click **Object Settings**, then click **Accounts**.
 - b. Verify and update the record type and page layout assignments.
 - c. Save your changes.
4. Create user records for your call center agents and care coordinators. Assign one of the profiles you created.
5. Assign permissions to the call center agents and care coordinators user records.
 - a. Assign these permission set licenses:
 - Data Pipelines Base User
 - Health Cloud Platform
 - OmniStudio User
 - b. Assign these permissions sets:
 - Data Pipelines Base User
 - Health Cloud Appointment Management
 - Health Cloud Foundation
 - Health Cloud Permission Set License
 - Health Cloud Standard
 - OmniStudio User

For reference, the default permission sets you assigned include these object permissions.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Salesforce Scheduler is available for an additional cost in Lightning Experience.

USER PERMISSIONS

To create user profiles:

- Manage Profiles and Permission Sets

To edit object permissions:

- View Setup and Configuration

Object Name	Access
Accounts	Read, Create
Appointment Reasons	Read
Appointment Reason Engagement Channel Type	Read
Appointment Topic Time Slots	Read
Care Provider Facility Specialties	Read
Care Provider Searchable Field	Read
Care Specialties	Read
Care Specialty Taxonomies	Read
Care Taxonomies	Read
Cases	Read, Create, Edit
Code Sets	Read
Contacts	Read
Documents	Read
Document Checklist Items	Read
Engagement Channel Types	Read
Healthcare Diagnoses	Read
Healthcare Facilities	Read
Healthcare Facility Networks	Read
Healthcare Payer Networks	Read
Healthcare Practitioner Facilities	Read, Create, Edit
Healthcare Practitioner Facility Appointments	Read, Create, Edit
Healthcare Procedures	Read
Healthcare Providers	Read
Healthcare Provider NPIs	Read
Healthcare Provider Specialties	Read
Healthcare Provider Taxonomies	Read
Member Plans	Read, Create, Edit
Omni Data Transformations	Read
Omni Data Transformation Items	Read
Omni Electronic Signature Templates	Read

Object Name	Access
Omni Processes	Read
Omni Process Compilations	Read
Omni Process Elements	Read
Omni Process Transient Data	Read
OmniScript Saved Sessions	Read
Omni UI Cards	Read
Operating Hours	Read
Service Appointments	Read, Create, Edit
Service Resources	Read
Service Territories	Read
Solutions	Read
Work Types	Read
Work Type Care Specialties	Read
Work Type Code Set Bundles	Read
Work Type Groups	Read

Enable Care Coordinators to Schedule Appointments for Patients

Make the Intelligent Appointment Management console available to call center operators or care coordinators by adding a tab to the account page layout.

- On a patient's Person Account record page, click  and select **Edit page**.
- In the editor, select the tab area with Related and Details tabs, then click **Add Tab**.
- To rename the newly added tab, select the tab.
 - Click the **Tab Label** field and select **Custom**.
 - Give the tab a descriptive name, such as *Make an Appointment*, and click **Done**.
- With the new tab selected, drag **Healthcare Appointment Scheduler** from the Components panel and drop it on the tab.

EDITIONS

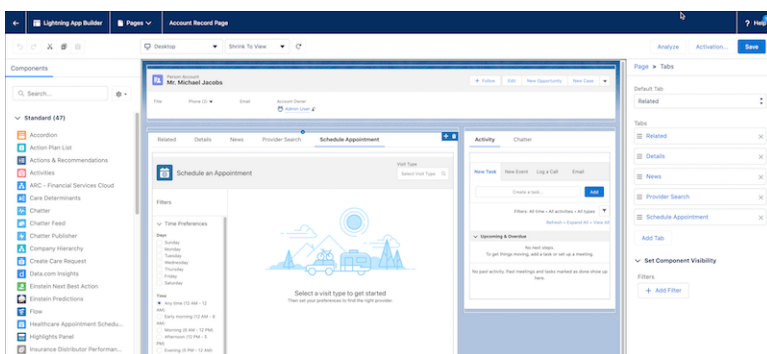
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

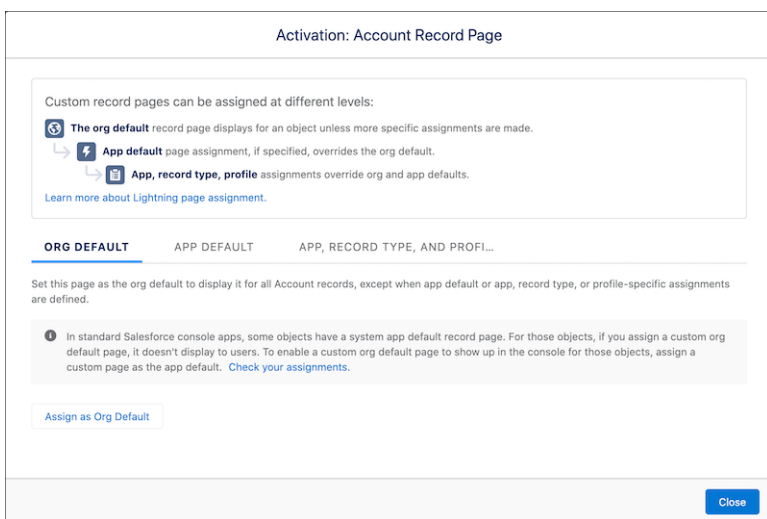
To use Health Cloud

- Health Cloud Foundation permission set



Now you can see the Healthcare Appointment Scheduler attributes.

5. Review Search Panel Fields and Advanced Search Fields and remove any fields you don't need.
6. Review Search Results Fields. These fields are shown in the provider's card. Remove any unnecessary fields.
7. If you don't want to show provider badges, clear **Show Provider Badge**.
8. Save your changes and click **Activation..**
9. Select **Assign as Org Default** on the ORG DEFAULT tab, then click **Next**, **Close**, and **Save**.



10. Return to the Person Account record page.
11. To display a patient's appointments, add a Service Appointments section to the Related List tab of the patient's Person Account record page layout.
 - a. On a patient's Person Account record page, click  and select **Edit object**.
 - b. Click **Page Layouts**, then click **Person Account Layout**.
 - c. Click **Related Lists** in the palette.
 - d. Drag **Service Appointments** from the palette into the Related Lists section of the canvas.
 - e. In the Related List section, clear the **New** button.
 - f. Click **Save**, then click **Yes** to overwrite.

Configure Intelligent Appointment Management Component

Configure the Intelligent Appointment Management console to make it easy to find the perfect appointment for a patient.

1. In Setup, in the Quick Find box, enter *Lightning App Builder*, then select **Lightning App Builder**.
2. Select the page that includes the Intelligent Appointment Management Console and click **Edit**.
3. Select the Healthcare Appointment Scheduler component to view the attributes.
4. Configure the Appointment Guidance Flow and Label.



Note: See Appointment Guidance for more information about configuring this feature.

5. To add new fields in the Search Panel Fields, Advanced Search Fields, or Search Results fields areas, select **Add Field**. Each time you click **Add Field** any new fields since the component was last updated are added. Click multiple times to see all available fields. The Add Field button will deactivate when all fields have been added.
6. Remove any fields that you don't want to display to users.
7. Select the Hide Advanced Search option to initially hide the advanced search options unless it is expanded by the user.
8. Set the Distance Unit that is used to search for appointments within a certain distance of the patient's address.
9. Select the Show Provider Badge option if you want to indicate which providers have been associated with this patient in the past.

SEE ALSO:

[Salesforce Help: Configure Appointment Guidance](#)

Show Assigned and Past Provider Badges

Often, a number of care providers and healthcare practitioners are involved in a patient's care. To easily schedule appointments with the required practitioner, such as the primary care physician, you must display assigned and past provider badges on the provider's card.

If you're bringing in patients from an external system, such as an EHR system, make sure you create an Intelligent Appointment Management URL Configuration. See [Connect to the External Scheduling System](#) on page 197.

1. Make sure Reciprocal Roles and Contact-Contact Relationship objects are set up. See [Set Up Reciprocal Roles and Relationships for Intelligent Appointment Management](#) on page 193.
2. From the App Launcher, select Healthcare Practitioner Facility, then go to the record associated with the Primary Care Physician.
 - a. Make sure the checkbox for Primary Care Physician is selected. See [Connect Healthcare Practitioners with Facilities](#) on page 191.
 - b. If you're using Salesforce Scheduler, make sure the provider is referenced in the Service Territory Member field.
3. From Setup, go to Intelligent Appointment Management Configuration, then add PCP or Primary Care Physician in the Assigned Provider Role field.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation

To edit Lightning Pages:

- Customize Application

To use Intelligent Appointment Management

- Health Cloud Appointment Management

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To provide access to features not covered under the Health Cloud Standard permission set:

- Health Cloud Permission Set License

4. Make sure you add the Healthcare Appointment Schedule component to the patient's Person Account page layout. See [Enable Care Coordinators to Schedule Appointments for Patients](#) on page 208.
5. Show assigned and past providers in the Appointments tab. The Past Provider badge automatically appears when the patient's medical data for the last year includes providers the patient has received care from.
 - a. From the App Launcher, find and select **Accounts** to list the Person Accounts that represent patients.
 - b. Open the record for a patient by clicking the name.
 - c. In the Appointments tab, select a visit type.
 - d. Select your preferences for the provider. Select the day and time when you want to schedule the appointment, the provider, their specialty, and the facility they're associated with.
 - e. Select **Search**.
Assigned and past providers show up in the search results.

Enable Patients to Schedule Their Own Appointments

Many patients and plan members prefer the control and convenience of booking their appointments online rather than working through a call center. Set up an Experience site to enable patients or their caregivers to find time slots and book appointments on their own, using a configurable flow powered by OmniStudio.

Self-service appointments require the OmniStudio package. OmniStudio provides interface components you can customize to enable users to book their own appointments through your Experience site.

1. [Set Up an Experience Site for Self-Service Appointment Management](#)

Add self-service appointment capability to an Experience Cloud site, then customize the appointment flow with OmniStudio.

2. [Add Fields to the Self-Service Intelligent Appointment Management Component](#)

Provider language and gender are two examples of fields that you can add to the self-service Intelligent Appointment Management component to give patients further choices when filtering providers.

3. [Confirm Self-Service Appointments by Email](#)

Provide patients with the most up-to-date information on appointments by sending emails when appointments are scheduled or canceled.

4. [Provide User-Friendly Appointment Reasons](#)

Give patients a set of easy-to-understand options to pick from when they're asked the reason for booking an appointment.

5. [Use Self-Scheduling Workflows on Your Experience Site](#)

Make it easier for patients to schedule appointments by using pre-built self-scheduling and canceling workflows, and adding them to your Experience Site pages.

6. [Migrate Intelligent Appointment Management Components to Another Org](#)

After you've had a look at what you can do with Intelligent Appointment Management, you can move the components to another existing Salesforce org within your organization.

7. [Required OmniStudio Components](#)

Check that the required components are in place in your Experience Cloud org to support self-service appointments.

8. [Configure the Self-Service Appointment Flow](#)

To customize the self-service appointment management flow, edit the steps of the healthCloudIAM OmniScripts.

9. [Add Support for Google Map Data](#)

By default, the main OmniScript for Self-Service Appointment Management accepts only ZIP codes for location data. You can add support for Google Map data.

SEE ALSO:

[OmniStudio for Health Cloud](#)

Set Up an Experience Site for Self-Service Appointment Management

Add self-service appointment capability to an Experience Cloud site, then customize the appointment flow with OmniStudio.

1. From Setup, in the Quick Find box, enter *Digital Experiences*, then select **Settings**.
2. Select **Enable Digital Experiences**.
3. Type a domain name and click **Check Availability**. If the domain name is available, click **Save**, **OK**, and **Open**.
4. From Setup, under **Digital Experiences**, click **All Sites**.
5. Select the Experience site you want to use or click **New** to create one.
If you're creating an Experience site, use the Customer Account Portal template.
6. In the Builder, click the Components icon and drag the Healthcare Appointment Scheduling Console component onto your screen.
7. Click **Publish**.
8. Assign Experience site permissions so your patients can access the external site.
 - a. Assign your Experience site users these permission sets:
 - Health Cloud for Community
 - Lightning Scheduler Resource
 - b. Assign your Experience site users these permission set licenses:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud for Communities

- Health Cloud For Community add-on license

AND

Customer Community or Customer Community Plus add-on license

- Health Cloud Platform
- Health Cloud for Community
- Salesforce Scheduler

See [Experience Cloud User System Permissions](#) for more about setting up Experience site users.

Add Fields to the Self-Service Intelligent Appointment Management Component

Provider language and gender are two examples of fields that you can add to the self-service Intelligent Appointment Management component to give patients further choices when filtering providers.

First, verify that your sharing settings for community users allow read access to the fields that you plan to add.

1. From Setup, in the Quick Find box, enter *Digital Experiences*, and select **Digital Experiences**.
2. Click **All Sites**.
3. Find the patient account portal site and click **Builder**.
4. In the Builder, find and click the Healthcare Appointment Scheduling Component on the page.
5. In the details tab, under Search Fields, select **Add Field**. Each time you click **Add Field** any new fields since the component was last updated are added. Click multiple times to see all available fields. The Add Field button deactivates when all fields have been added.
6. Remove any fields that you don't want to display to self-service users.
7. Select **Preview**.
8. Check that the newly-added fields appear at the end of the Filters list.
9. Click **Back to Builder**.
10. Click **Publish** to show the changes on your Experience site.

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud and Health Cloud for Community or Health Cloud Community Plus license

USER PERMISSIONS

To use Intelligent Appointment Management:

- Health Cloud Appointment Management

SEE ALSO:

[Salesforce Help: Salesforce Digital Experiences Builder](#)

Confirm Self-Service Appointments by Email

Provide patients with the most up-to-date information on appointments by sending emails when appointments are scheduled or canceled.

1. [Set Up Email Confirmations for Self-Service Appointments](#)
Let your patients know with an automated email that their appointment has been booked.
2. [Create an Email Template for Self-Service Cancellation](#)
Send your patients an automated email alert when their appointment has been canceled.
3. [Set Up a Flow for Automatic Email Confirmations](#)
Automatically send confirmation emails to your patients when a booking or cancellation happens.

Set Up Email Confirmations for Self-Service Appointments

Let your patients know with an automated email that their appointment has been booked.

1. From Setup, in the Quick Find box, enter *Email Templates*, then select **Classic Email Templates**.
2. Click **New**.
3. Give your template a name. For example, *Appointment Confirmation*.
4. Click **Edit HTML Version** and create the content for the email, then save.

Here's an example:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use self-service appointment scheduling:

- OmniStudio in Lightning Experience Patient

AND

AppointmentScheduling on Health Cloud

```
<html>
  <head>
    <meta http-equiv="Content-Type" content="text/html; charset=utf-8">
    <style type="text/css">
      a{
        color: #5e5e5e;
      }

      *{
        font-family: Verdana, Geneva, sans-serif;
        font-size: 16px;
      }
    </style>
  </head>

  <body leftmargin="0.5" topmargin="0" marginwidth="0" marginheight="0">
    <p style="font-size: 16px; margin: 1em 0 0 0;">Dear
    {!ServiceAppointment.CreatedBy},</p>
    <p style="font-size: 16px; margin: 1em 2 0 0;">We're confirming that your
    appointment is scheduled for {!ServiceAppointment.SchedStartTime}. <br/></p>
    <p style="font-size: 16px; margin: 1em 0 0 0;">Thanks,<br/>Salesforce Health
    Cloud<p>
    <p>
      
    </p>
  </body>
</html>
```

5. From Setup, in the Quick Find box, enter *Email Alerts*, then select **Email Alerts**.
6. Click **New**.
7. Give your email alert a name. For example, *Appointment Confirmation*.
8. Select *Service Appointment Owner* and *Record Creator* from **Available Recipients** and move them to **Assigned Recipients**, then save.

Now your patients get an automated email alerting them when their appointment has been booked.

Create an Email Template for Self-Service Cancellation

Send your patients an automated email alert when their appointment has been canceled.

1. From Setup, in the Quick Find box, enter *Email Templates*, then select **Classic Email Templates**.
2. Click **New**.
3. Give your template a name. For example, *Appointment Cancellation*.
4. Click **Edit HTML Version** and create the content for the email, then save.

Here's an example:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use self-service appointment scheduling:

- OmniStudio in Lightning Experience Patient

AND

AppointmentScheduling on Health Cloud

```
<html>
  <head>
    <meta http-equiv="Content-Type" content="text/html; charset=utf-8">
    <style type="text/css">
      a{
        color: #5e5e5e;
      }

      *{
        font-family: Verdana, Geneva, sans-serif;
        font-size: 16px;
      }
    </style>
  </head>

  <body leftmargin="0.5" topmargin="0" marginwidth="0" marginheight="0">
    <p style="font-size: 16px; margin: 1em 0 0 0;">Dear
    {!ServiceAppointment.CreatedBy},</p>
    <p style="font-size: 16px; margin: 1em 2 0 0;">We're confirming that you have
    canceled your appointment scheduled for {!ServiceAppointment.SchedStartTime}. <br/></p>
```

```

        <p style="font-size: 16px; margin: 1em 0 0;">Thanks,<br/>Salesforce Health
Cloud<p>
        <p>
            
        </p>
    </body>
</html>

```

5. From Setup, in the Quick Find box, enter *Email Alerts*, then select **Email Alerts**.
6. Click **New**.
7. Give your new email alert a name. For example, *Appointment Cancellation*.
8. Select *Service Appointment Owner* and *Record Creator* from **Available Recipients** and move them to **Assigned Recipients**, then save.

Now your patients get an automated email alerting them when their appointment has been canceled.

Set Up a Flow for Automatic Email Confirmations

Automatically send confirmation emails to your patients when a booking or cancellation happens.

1. Set up two classic email templates: one to send to the patient to confirm their appointment and another for the cancellation of their appointment.
2. Create an email alert for the Appointment Confirmation.
 - a. From Setup, in the Quick Find box, enter *Email Alerts*, then select **Email Alerts**.
 - b. Click **New Email Alert**.
 - c. Add a Description. We suggest *Appointment Confirmation*.
 - d. Add a Unique Name. We suggest *Appointment_Confirmation*.
 - e. Select the **Service Appointment** object.
 - f. Choose the Appointment Confirmation email template that you previously created.
 - g. In the Recipient Type search, select **Owner**, then add *Service Appointment Owner* to the Selected Recipients.
 - h. In the Recipient Type search, select **Creator**, then add *Record Creator* to the Selected Recipients.
 - i. Choose **Current User's Email Address** as the From Email.
Alternatively, set up a do-not-reply email address for this alert.
 - j. Save your work.
3. Create a record-triggered flow to automatically send an appointment confirmation email when the appointment is booked.
 - a. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
 - b. Click **New Flow**.
 - c. Select **Record-Triggered Flow**, then click **Create**.
 - d. Select **Service Appointment** as the object.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To create or change public email template folders:

- Manage Public Classic Email Templates

- e. Choose to trigger a flow when **A record is created**.
 - f. For Condition Requirements, select **All conditions are met**.
 - g. Add a Condition with these values:
 - Field: *SchedStartTime*
 - Operator: *Is Null*
 - Value: *\$GlobalConstant.False*
 - h. Add another condition with these values:
 - Field: *ContactID*
 - Operator: *Is Null*
 - Value: *\$GlobalConstant.False*
 - i. Add a Condition with these values:
 - Field: *StatusCategory*
 - Operator: *Equals*
 - Value: *Scheduled*
 - j. Optimize the Flow for **Actions and Related Records**.
 - k. Click **Done**.
 - l. Add an element. Choose **Send Email Alert**.
 - m. In the Action box, enter *Appointment Confirmation*.
 - n. Add a Label. We suggest *Send Confirmation Email*.
 - o. Add an API Name. We suggest *Send_Confirmation_Email*.
 - p. For Select Input Variables, choose *{ \$Record.ID }*.
 - q. Click **Done**
 - r. Save and activate the flow.
4. Create another record-triggered flow to automatically send an appointment cancellation email when the appointment is canceled. Follow the preceding steps and use these values:
- Condition:
 - Field: *SchedStartTime*
 - Operator: *Is Null*
 - Value: *\$GlobalConstant.False*
 - Condition:
 - Field: *ContactID*
 - Operator: *Is Null*
 - Value: *\$GlobalConstant.False*
 - Condition:
 - Field: *StatusCategory*
 - Operator: *Equals*

– Value: *Canceled*

- Action: *Appointment Cancellation*
- Label: *Send Cancellation Email*
- API Name: *Send_Cancellation_Email*

5. Enable email tracking.

The appointment confirmation email includes personal health information about the patient. We suggest tracking these emails to ensure they're received by the intended recipient.

Now your patients get an automated email alerting them when their appointment has been booked or canceled.

Provide User-Friendly Appointment Reasons

Give patients a set of easy-to-understand options to pick from when they're asked the reason for booking an appointment.

Appointment reasons are mapped to work types. When a patient selects a reason for their visit, the underlying work type is used to fetch available time slots.

For example, suppose a patient selects Annual Checkup as the reason for their visit. That reason maps to the work type called 30-minute office visit. That same 30-minute office visit work type can also map to additional reasons for the visit, such as follow-up appointment, diabetes checkup, or physical therapy.

Each reason for a visit maps to one work type. One work type can map to multiple reasons for a visit.

1. Create the appointment reason options.

- In Setup, go the Object Manager and click **Appointment Reason > Fields & Relationships > Appointment Reason**.
- In the Appointment Reason Picklist Values section, click **New** and enter your desired values in the text box, then save.
- To provide icons for appointment reasons, upload the icons to your Documents collection.

2. Map your appointment reasons to their corresponding work types.

- In the App Launcher, find and select **Appointment Reasons**.
- Create an Appointment Reason record.
- Specify the related work type for this appointment reason.

If you created different work types for new and established patients, specify the appropriate work type. If an established patient hasn't had a visit within the last three years, the patient is considered new. A new patient is offered a longer time slot.

- Save the record.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To update picklists:

- Customize Application

To create or update appointment reason records:

- Health Cloud Appointment Management permission set

AND

Edit on Appointment Reason

Use Self-Scheduling Workflows on Your Experience Site

Make it easier for patients to schedule appointments by using pre-built self-scheduling and canceling workflows, and adding them to your Experience Site pages.

1. [Set Up Static Resources for Appointment Reason Records](#)

Set up static resources to display the images used in FlexCards for Appointment Reasons. Static resources can be used only within your Salesforce org, so you can't host content here for other apps or websites.

2. [Handle Asynchronous Self-Service Requests](#)

Sometimes self-service appointments require a person to intervene. Set up an assignment process so that someone can resolve those cases.

3. [Set Organization-Wide Defaults for Self-Scheduling Workflows](#)

Set object permissions and control access to your data and records based on user types and profiles.

4. [Create Sharing Rules for Self-Scheduling Workflows](#)

Create sharing rules to manage access to appointment scheduling objects that have external access set to private.

5. [Enable Self-Scheduling Workflows for External Use](#)

Components in your org such as Visualforce pages or Apex callouts can access external URLs only if they're listed on the Remote Site Settings page. To enable access to Lightning Web Components, update the relevant remote site settings in your org.

6. [Create Pages on Your Experience Site](#)

The prebuilt workflows need container pages where they can run. Create Experience Site pages for the workflows that you need and drag the pre-built workflows onto these new pages.

Set Up Static Resources for Appointment Reason Records

Set up static resources to display the images used in FlexCards for Appointment Reasons. Static resources can be used only within your Salesforce org, so you can't host content here for other apps or websites.

1. From Setup, enter *OmniStudio* in the Quick Find box, then select **OmniStudio Settings**.
2. Turn on **Standard OmniStudio Runtime**.
3. From Setup, enter *Static Resources* in the Quick Find box, then select **Static Resources**.
4. Click **New**.
5. In the **Name** field, enter a name. For example, *AnnualPhysical*.
6. Next to **File**, click **Browse** and select the image.
7. Make sure **Cache Control** is set to *Public* and save your work.
8. To create a resource for each Appointment Reason record, repeat the previous four steps.
9. From the App Launcher, find and select **Appointment Reasons**.
10. Open the first Appointment Reason record. Click the dropdown on the record and select **Edit**.
11. Under Appointment Reason, set **Default Image** to the name of the corresponding static resource. For example, */resource/AnnualPhysical*.
12. To associate each Appointment Reason record with an image, repeat the previous two steps.
13. Save your work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use self-service appointment scheduling:

- OmniStudio in Lightning Experience Patient

AND

AppointmentScheduling on Health Cloud

Handle Asynchronous Self-Service Requests

Sometimes self-service appointments require a person to intervene. Set up an assignment process so that someone can resolve those cases.

For example, suppose a user who isn't registered with your Experience site books an appointment. Health Cloud doesn't have enough information to determine that patient's eligibility for benefits. You must alert a person to supply that information.

1. [Set Up Queues to Handle Self Service Cases](#)

When a user schedules an appointment, it may not be possible to automatically verify some information about the patient, such as their eligibility for services. Create queues to route these questions to a person for resolution.

2. [Set Up Automatic Case Assignment for Appointment Requests](#)

When a guest user schedules an appointment, you might not be able to automatically verify some information about them, such as their eligibility for services. Create queues to route these questions to a person for resolution.

Set Up Queues to Handle Self Service Cases

When a user schedules an appointment, it may not be possible to automatically verify some information about the patient, such as their eligibility for services. Create queues to route these questions to a person for resolution.

1. From Setup, in the Quick Find box, enter *Queues*, then select **Queues**.
2. Click **New**.
3. Give your queue a name. For example, *Patient Appointment Request Queue*.
4. Move the Case object from **Available Objects** to **Selected Objects** and save.
5. Click **New** to create another queue.
6. Give your queue a name. For example, *Benefit Verification Queue*.
7. Move the Case object from **Available Objects** to **Selected Objects** and save.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation permission set

Set Up Automatic Case Assignment for Appointment Requests

When a guest user schedules an appointment, you might not be able to automatically verify some information about them, such as their eligibility for services. Create queues to route these questions to a person for resolution.

1. From Setup, in the Quick Find box, enter *Case Assignment Rules*, then select **Case Assignment Rules**.
2. Click **New**.
3. Give the rule a name. For example, **Appointment Management Case Assignment Rule**.
4. Click **Save**, then click the rule you created.
5. Click **New** under **Rule Entries**.
6. Enter *1* for the **Sort Order**.
7. Use the dropdowns under **Field** to select **Case: Subject > Contains > Benefits Verification Request**.
8. Under **Select the user or queue to assign the case to**, select *Queue* and search for the Benefit Verification Request queue that you created.
9. If your organization has case teams to handle appointment management requests, specify them.
10. Click **Save**, then click **New** under **Rule Entries** again.
11. Enter *2* for the **Sort Order**.
12. Use the dropdowns under **Field** to select **Case: Subject > Contains > Appointment Scheduling Request**.
13. Under **Select the user or queue to assign the case to**, select *Queue* and search for the Appointment Scheduling Request queue that you created.
14. If your organization has case teams to handle appointment management requests, specify them, then save.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Health Cloud

- Health Cloud Foundation permission set

Set Organization-Wide Defaults for Self-Scheduling Workflows

Set object permissions and control access to your data and records based on user types and profiles.

1. From Setup, in the Quick Find box, enter *Sharing Settings*, then select **Sharing Settings**.
2. Click **Edit**.
3. In Organization-Wide Defaults, assign these permissions:

Object	Default External Access
Appointment Reason	Public Read Only
Care Provider Facility Specialty	Public Read Only
Care Provider Searchable Field	Public Read Only
Care Specialty	Public Read Only
Coverage Benefit	Public Read Only
Healthcare Practitioner Facility	Public Read/Write
Healthcare Provider	Public Read Only
Service Resource	Public Read Only
Service Territory	Public Read Only
Work Type	Public Read Only
DataRaptor Bulk Data	Public Read Only
Omni DataPack	Public Read Only
Omni Data Transformation	Public Read Only
Omni Electronic Signature Template	Public Read Only
Omni Process	Public Read Only
Omni Process Transient Data	Public Read Only
OmniScript Saved Session	Public Read Only
Omni UI Card	Public Read Only

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use self-service appointment scheduling:

- OmniStudio in Lightning Experience Patient

AND

AppointmentScheduling on Health Cloud

Create Sharing Rules for Self-Scheduling Workflows

Create sharing rules to manage access to appointment scheduling objects that have external access set to private.

1. From Setup, in the Quick Find box, enter *Security Sharing Settings*, then select **Security Sharing Settings**.
2. In the Account Sharing Rules section, click **New**.
Enter these details:
 - Label: *Account Sharing Settings*
 - Rule Name: *Account_Sharing_Settings*
 - Select your rule type: *Based on criteria*
 - Criteria Field: *Account Record Type*
 - Operator: *equals*
 - Value: *Business*
 - Share With: *Public Groups* and *All customer portal users*
3. In the Account Sharing Rules section, click **New** again.
Enter these details:
 - Label: *Account Sharing Settings Guest*
 - Rule Name: *Account_Sharing_Settings_Guest*
 - Select your rule type: **Guest user access, base on criteria**
 - Criteria Field: *Account Record Type*
 - Operator: *equals*
 - Value: *Business*
 - Share With: *Community Site Guest User*
4. Save your work.
5. From Setup, in the Quick Find box, enter *Digital Experiences*, then select **Settings**.
6. Under Sharing Sets, click **New**.
 - a. Move these profiles to the Selected Profiles list:
 - HRT Customer Community Plus User
 - HRT Customer Community User
 - b. Move these objects to the Selected Objects list:
 - Account
 - Service Appointment
7. In the Configure Access section, click **Set Up** next to Account.
Enter these details:
 - User: *Contact.Account*
 - Target Account: *Id*
 - Access Level: *Read/Write*

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use self-service appointment scheduling:

- OmniStudio in Lightning Experience Patient

AND

Appointment Scheduling on Health Cloud

8. Click **Update**.
9. In the Configure Access section, click **Set Up** next to Service Appointment.
Enter these details:
 - User: *Contact.Account*
 - Target Service Appointment: *Account*
 - Access Level: *Read/Write*
10. Click **Update** and save your work.

Enable Self-Scheduling Workflows for External Use

Components in your org such as Visualforce pages or Apex callouts can access external URLs only if they're listed on the Remote Site Settings page. To enable access to Lightning Web Components, update the relevant remote site settings in your org.

1. From the App Launcher, search for and select **FlexCards**.
2. Click **Warning**.
Write down the remote site setting URLs displayed in the warning and click **Close**.
3. From Setup, enter *Remote* in the Quick Find box, then select **Remote Site Settings**.
4. Click **Edit** next to **FlexCard**.
Replace the existing URL with either of the URLs that you copied from the warning.
5. Save your work.
6. Click **Edit** next to **Enable_LWC**.
Replace the existing URL with the other URL that you copied in the warning.
7. Save your work.

Create Pages on Your Experience Site

The prebuilt workflows need container pages where they can run. Create Experience Site pages for the workflows that you need and drag the pre-built workflows onto these new pages.

1. In your Experience Site, create pages with these URL names:

Workflow	URL
Self-scheduling	/schedule-appointment
Cancel Appointment	/my-appointments
View Benefits	/my-benefits

2. In each of these pages, navigate to Components. Under Process Components, drag the OmniScript onto the page.
3. In the OmniScript properties, enter these details:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use self-service appointment scheduling:

- OmniStudio in Lightning Experience Patient

AND

AppointmentScheduling on Health Cloud

USER PERMISSIONS

To use self-service appointment scheduling:

- OmniStudio in Lightning Experience Patient

AND

AppointmentScheduling on Health Cloud

Workflow	Type	SubType	Language
Self-Scheduling	healthCloudIAM	selfService	English
Cancel Appointment	healthCloudIAM	myAppointments	English
View Benefits	healthCloudIAM	viewBenefits	English

4. Click **Publish**.

Migrate Intelligent Appointment Management Components to Another Org

After you've had a look at what you can do with Intelligent Appointment Management, you can move the components to another existing Salesforce org within your organization.

Throughout this section, the source org is the Express org that you've requested from the Salesforce Success Community. The target org is the existing Salesforce org that you want to move the components to, on which you've installed OmniStudio or Vlocity Health. To see the complete list of components in Intelligent Appointment Management, see [Required OmniStudio Components](#).

- In the source org, from the App Launcher, open the OmniStudio app.
- Export the Intelligent Appointment Management OmniScripts.
 - Go to the OmniScripts page and enter *healthCloudIAM* in the search field.
 - Expand each healthCloudIAM OmniScript and check the box next to the highest version.
 - Click the **Export** icon, then click **Next** twice.
Ignore the warnings about the Apex classes.
 - On the Export DataPack page, enter *IAM OmniScripts Multipack* in the Name field and click **Done**.
- Export the Intelligent Appointment Management FlexCards.
 - Go to the OmniStudio FlexCards page and enter *HealthCloudIAM* in the search field.
 - Expand each HealthCloudIAM FlexCard and check the box next to the highest version.
 - Click the **Export** button, then click **Next** twice.
 - On the Export DataPack page, enter *IAM FlexCards Multipack* in the Name field and click **Done**.
- Export the Intelligent Appointment Management standalone Integration Procedures.
 - Go to the OmniStudio Integration Procedures page and enter *healthCloudIAM* in the search field.
 - Expand the healthCloudIAM/fetchInsurances Integration Procedure and check the box next to the highest version.
 - Click the **Export** icon, then click **Next** twice.
 - On the Export DataPack page, enter *IAM Integration Procedures Multipack* in the Name field and click **Done**.
- Export the Intelligent Appointment Management standalone DataRaptors.
 - Go to the OmniStudio DataRaptors page and enter *HealthCloudIAM* in the search field.
 - Check the boxes next to the HealthCloudIAMCreateMemberPlan and HealthCloudIAMExtractPayerAccounts DataRaptors.
 - Click the **Export** icon, then click **Next** twice.
 - On the Export DataPack page, enter *IAM DataRaptors Multipack* in the Name field and click **Done**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use OmniStudio

- OmniStudio Admin permission set

6. In the target org, from the App Launcher, open the OmniStudio app.
7. Import the Intelligent Appointment Management OmniScripts.
 - a. Go to the OmniScripts page.
 - b. Click the **Import** button, click **Browse**, and select the `IAM OmniScripts Multipack.json` file.
 - c. Click **Next** three times, wait for the import to complete, click **Activate Now**, click **Next** again, then click **Done**.
8. Import the Intelligent Appointment Management FlexCards.
 - a. Go to the OmniStudio FlexCards page.
 - b. Click the **Import** button, click **Upload Files**, and select the `IAM FlexCards Multipack.json` file.
 - c. Click **Next** three times, wait for the import to complete, click **Activate Now**, click **Next** again, then click **Done**.
9. Import the Intelligent Appointment Management standalone Integration Procedures.
 - a. Go to the OmniStudio Integration Procedures page.
 - b. Click the **Import** button, click **Browse**, and select the `IAM Integration Procedures Multipack.json` file.
 - c. Click **Next** three times, wait for the import to complete, click **Activate Now**, click **Next** again, then click **Done**.
10. Import the Intelligent Appointment Management standalone DataRaptors.
 - a. Go to the OmniStudio DataRaptors page.
 - b. Click the **Import** button, click **Browse**, and select the `IAM DataRaptors Multipack.json` file.
 - c. Click **Next** three times, wait for the import to complete, then click **Done**.
11. Deactivate and reactivate each FlexCard.
 - a. Go to the OmniStudio FlexCards page and enter `HealthCloudIAM` in the search field.
 - b. Expand the first HealthCloudIAM FlexCard and click the link for the highest version. The FlexCard opens in the designer. You must deactivate and reactivate the FlexCard in the designer, not on the FlexCards page. This procedure ensures that OmniScripts can reference the FlexCard.
 - c. Click **Deactivate**. When the deactivation process completes, click **Done**.
 - d. Click **Activate**. When the activation process completes, click **Done**.
If the [object Object] message appears in the Activating dialog, click **Close**, then click **Activate** again.
 - e. Repeat these steps for each HealthCloudIAM FlexCard.

 **Note:** Some FlexCards have dependencies on other FlexCards. If activation fails with a message that a different FlexCard isn't active, deactivate and reactivate the other FlexCard first.
12. Deactivate and reactivate each OmniScript.
 - a. Go to the OmniScripts page and enter `healthCloudIAM` in the search field.
 - b. Expand the first healthCloudIAM OmniScript.
 - c. For the highest version of the OmniScript, click the down arrow at the end of the row and select **Deactivate** from the menu.
 - d. For the highest version of the OmniScript, click the down arrow at the end of the row and select **Activate** from the menu.
Activation can take a few minutes. You can refresh the browser to verify that activation was successful.
 - e. Repeat these steps for each healthCloudIAM OmniScript.

Required OmniStudio Components

Check that the required components are in place in your Experience Cloud org to support self-service appointments.



Note: Migrate these core Salesforce components if you've created them in your trial org.

Static Resources

Assignment Rules

Queues

Public Groups

WorkFlow Rules

Email Alerts

Email Templates

Appointment Reasons

Work Type Care Specialties

Appointment Management OmniStudio Components

For the appointment booking part of the appointment flow to work, these OmniStudio components must be present in the org that provides the Experience Cloud site.

OmniScripts

healthCloudIAM/myAppointments

healthCloudIAM/selfService

healthCloudIAM/viewBenefits

Integration Procedures

GetMaps/AutoComplete

healthCloudIAM/bookAppointment

healthCloudIAM/channelSelection

healthCloudIAM/CreateGuestUser

healthCloudIAM/FetchProviderAndTimeSlots

healthCloudIAM/FetchProviderAndTimeSlotsFilter

healthCloudIAM/FetchServiceAppointments

healthCloudIAM/fetchSlotStatus

healthCloudIAM/FetchTimeSlots

healthCloudIAM/FetchTimeSlotsFilter

healthCloudIAM/IndividualFilterTimeSlots

healthCloudIAM/TransformBookAppointmentData

healthCloudIAM/TransformForNewPatient

healthCloudIAM/TransformIndividualProviderData

healthCloudIAM/TransformIndividualSlotsData

FlexCards

HealthCloudIAMAddNewInsurance
HealthCloudIAMAppointmentDetails
HealthCloudIAMAppointmentDetailsConfirmation
HealthCloudIAMBenefitsDetail
HealthCloudIAMCancelApptConfirmed
HealthCloudIAMCancelUpcomingAppointment
HealthCloudIAMChannelSelection
HealthCloudIAMDistanceFilter
HealthCloudIAMGuestAppointmentConfirmed
HealthCloudIAMInactiveBenefits
HealthCloudIAMInsuranceList
HealthCloudIAMNotAcceptingNewPatients
HealthCloudIAMPastAppointment
HealthCloudIAMPatientAppointmentConfirmed
HealthCloudIAMProviderExperience
HealthCloudIAMProviderList
HealthCloudIAMProviderTimeSlots
HealthCloudIAMReasonForVisit
HealthCloudIAMSelectNewSlot
HealthCloudIAMSingleProviderDetails
HealthCloudIAMSingleProviderTimeSlot
HealthCloudIAMViewActiveBenefits

DataRaptors

HealthCloudIAMAddReferralDetails
HealthCloudIAMCancelAppointmentParameters
HealthCloudIAMCreateCaseForInsurance
HealthCloudIAMCreateCaseForPortalUsers
HealthCloudIAMExtractAppointmentReason
HealthCloudIAMExtractChannel
HealthCloudIAMExtractCoverageBenefit
HealthCloudIAMExtractExternalDetails
HealthCloudIAMExtractFacilities
HealthCloudIAMExtractInsurance
HealthCloudIAMExtractMemberPlans
HealthCloudIAMExtractProviders
HealthCloudIAMExtractSchedulingSystem

HealthCloudIAMExtractServiceAppointments
HealthCloudIAMIdentifyMatchingSlot
HealthCloudIAMIndividualSlotsRequest
HealthCloudIAMTimeSlotFilterRequest
HealthCloudIAMTimeSlotRequest
HealthCloudIAMTimeSlotRequestForExperiencedPatient
HealthCloudIAMTimeSlotRequestForSoonerAppointment
HealthCloudIAMTransformBookAppointmentInput
HealthCloudIAMTransformCreatePatientInput
HealthCloudIAMTransformDataForBookAppointment
HealthCloudIAMTransformEHRParameters
HealthCloudIAMTransformIndividualProviderData
HealthCloudIAMTransformIndividualSearchResults
HealthCloudIAMTransformIndividualTimeZone
HealthCloudIAMTransformLSPParameters
HealthCloudIAMTransformProviderSearchFiltersInput
HealthCloudIAMTransformProviderSearchInput
HealthCloudIAMTransformProviderSearchMatchingSlot
HealthCloudIAMTransformProviderSearchSoonestAppointment
HealthCloudIAMTranformSlotStatusInput
HealthCloudIAMTransformSoonestAppointmentFilter
HealthCloudIAMTransformSoonestAppointmentMerge
HealthCloudIAMTransformTimeZone

Configure the Self-Service Appointment Flow

To customize the self-service appointment management flow, edit the steps of the healthCloudIAM OmniScripts.



Note: For the OmniScripts to run properly, records for all required Intelligent Appointment Management objects must be configured. In addition, Appointment Reason and Work Type Care Specialty records must be configured.

Schedule an Appointment

To edit the appointment management self-service flow, open the OmniStudio app, go to the OmniScripts page, expand the healthCloudIAM/selfService OmniScript, and open the highest version.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Component Name	Component Type	What It Does	What It Calls
SelectLocation	Step	Prompts the user for a location.	GetMaps_AutoComplete
CheckGuestUser	Set Values	Checks if the user has an existing Person Account. It also checks the user's time zone, their current time, and end of day time.	None
DRFetchUserDetails	DataRaptor Extract Action	Retrieves user details and records for appointment reason options.	HealthCloudAPIFetchUserDetails
ScheduleAppointmentOptions	Step	Displays a FlexCard with appointment options for the user.	None
MandateOptionSelection	Set Errors	Uses a formula to check that the user has selected an appointment reason so they can proceed with the flow.	None
SetSelectedWorkTypeeld	Set Values	Sets the appointment reason's work type ID and work type name.	None
SetAddressForProviderSearch	Set Values	Assigns the user's address to the provider search attributes.	None
DRFetchSchedulingSystem	DataRaptor Extract Action	Extracts the scheduling system and care specialty for the selected appointment reason.	HealthCloudAPIFetchSchedulingSystem
IPGetProviderAndSlots	Integration Procedure Action	Converts user input into attributes for the provider search functionality and uses the GetProviders API to fetch providers.	HealthCloudAPIFetchProviders
IPGetSlotsForProviders	Integration Procedure Action	Retrieves time slots for the selected providers and sorts providers in this order: assigned, past, and other providers. The component then merges these providers into a single list. It also converts the time slots into the provider's operating time zone, if mentioned. If not, the slots are converted to the user's browser time zone.	HealthCloudAPIFetchTimeSlots
SetCalendarDate	Set Values	Sets the calendar date as today along with the address entered by the user.	None
ScheduleProvider	Step	Displays a form with providers within a certain radius of the user's location along with filters to narrow the options.	None
CheckIfAcceptsNewPatient	Set Values	Sets a value to indicate if the provider is accepting new patients.	None
MandateSlotSelection	Set Errors	Uses a formula to check if the patient is new and the provider is accepting new patients so they can proceed with the flow.	None

Component Name	Component Type	What It Does	What It Calls	
NotAcceptingNewPatients	Step	Displays a message if the user is new and the provider isn't accepting any new patients at the moment.	None	
PlanFormIndividualProviderData	Integration Procedure Action	Separates the selected provider's data and availability information from the list of all available providers.	HealthCloudAPIFormIndividualProviderData	
PlanFormIndividualSlotsData	Integration Procedure Action	Runs when the user wants to see the next soonest appointment for a particular provider. The Integration Procedure fetches the earliest available appointment slots.	HealthCloudAPIFormIndividualSlotsData	
SetCalendarFiltervalue	Set Values	Sets values of the calendar date for the next soonest appointment available.	None	
ScheduleProviderIndividual	Step	Displays available slots to book an appointment for the selected provider.	None	
NoSlotSelected	Set Errors	Doesn't let the user proceed in the flow without selecting an appointment slot.	None	
SetSelectedSlotValues	Set Values	Assembles the data for the selected appointment slot.	None	
ExperienceWithProvider	Step	Displays options to indicate if the user has seen the provider in the last 3 years.	None	
CheckExperienceWithProvider	Set Errors	Doesn't let the user proceed in the flow without selecting if they've visited the provider in the last 3 years.	None	
SetWorkTypeeld	Set Values	If the user has seen the provider in the past 3 years, this component assigns the established work type ID, and name.	None	
DPFetchNewSchedulingSystem	DataRaptor Extract Action	Checks if the scheduling system is Salesforce or an external system.	HealthCloudAPIFetchNewSchedulingSystem	
SetCallBookAppointment	Set Values	Checks if the BookAppointment API is to be called. The API is called only when the scheduling system is Salesforce. The API isn't called for a user who has selected the EHR work type.	None	None
IPFetchSlotsForNewPatient	Integration Procedure Action	Uses the established work type ID to make an API call to find slots. Also checks if the selected slot is still available.	HealthCloudAPIFetchSlotsForNewPatient	
SlotNotAvailableForPatient	Step	Displays a message if the selected slot isn't available for a patient.	None	

Component Name	Component Type	What It Does	What It Calls
CollectGuestUserInfo	Step	If the selected slot is available, a form collects the guest username, email, and date of birth.	None
IPFetchInsurances	Integration Procedure Action	Retrieves insurance details	HealthCloudAPI.FetchInsurance
ExistingInsurance	Step	This step is optional. Displays a form for existing user to verify their insurance details.	None
AddInsurance	Step	This step is optional. Displays a form for new users to enter their insurance details.	None
Referral	Step	This step is optional. Displays a form for users to enter details if they've been referred to the provider.	None
IPCheckSelectedSlotStatus	Integration Procedure Action	Checks if the selected slot is still available.	HealthCloudAPI.FetchSlotStatus
SelectedSlotNotAvailable	Step	Displays a message if the selected slot isn't available.	None
IPTransformAllData	Integration Procedure Action	Transforms user selection data JSON into the appropriate structure so that it can be displayed to the user for review.	HealthCloudAPI.TransformAppointmentData
Review	Step	Displays the details of the selected appointment.	None
IPCreateGuestUser	Integration Procedure Action	If the flow is run by a guest user, then this Integration Procedure creates a Person Account record for the guest user.	HealthCloudAPI.CreateGuestUser
IPBookAppointment	Integration Procedure Action	Transforms user selection into a format that can be passed on to the bookAppointment remote method to book the appointment. Updates the referral data. If the user entered insurance details, a member plan record and a case record are created. Also creates a case record for guest users who select an external work type.	HealthCloudAPI.BookAppointment
AppointmentConfirmed	Step	Displays a confirmation message to an existing user that the appointment is booked.	None
NavigateToBenefits	Navigate Action	If the user clicks View Appointments on the confirmation screen, this component navigates them to the My Appointments page.	None
AppointmentConfirmedGuestUser	Step	Displays a confirmation message to a guest user that the appointment is booked.	None

Component Name	Component Type	What It Does	What It Calls
AppointmentFailed	Step	Displays a message if the process workflow terminates abruptly.	None
AppointmentConfirmedGuest	Step	If a guest user selects an external work type (EHR) then this confirmation is displayed after booking their appointment.	None
NavigateAction	Navigate Action	Navigates the user back to the Home page.	None

Cancel an Appointment

To edit the appointment cancellation self-service flow, open the OmniStudio app, go to the OmniScripts page, expand the healthCloudIAM/myAppointments OmniScript, and open the highest version.

Component Name	Component Type	What It Does	What It Calls
FetchAppointmentReason	DataRaptor Extract Action	Extracts the reason for the appointment.	HealthCloudIAMExtractAppointmentReason
SetValues	Set Values	Sets the Context ID for the logged in user, which is the business account ID associated with that user.	None
FetchServiceAppointments	Integration Procedure Action	Extracts past and upcoming appointments for the user.	healthCloudIAM_FetchServiceAppointments
Appointment_History	Step	Displays the past and upcoming appointments in a FlexCard.	None
Cancel_Appointment	Step	Confirms that the user wants to cancel the appointment.	None
CancelAppointmentParams	DataRaptor Extract Action	Retrieves all the appointment parameters from objects ServiceAppointment, CarePractnFacilityAppt, and Identifier.	HealthCloudIAMCancelAppointmentParameters
Check_IF_EHR_LS	Set Values	Fetches the values for sourceSystem and externalAppointmentId.	None
TransformParams_LS	DataRaptor Transform Action	If the appointment is on the Lightning Scheduler, then the appointment data is mapped to attribute values for the cancelAppointment API method.	HealthCloudIAMTransformLSParameters
TransformParams_EHR	DataRaptor Transform Action	If the appointment is on an external scheduling system, then the appointment data is mapped to attribute values for the cancelAppointment API method.	HealthCloudIAMTransformEHRParameters

Component Name	Component Type	What It Does	What It Calls
CancelAppointment	Remote Action	Calls the cancelAppointment method from <code>healthcloudext.AppointmentBookingSelfServiceWrapper</code> to cancel the selected appointment.	Remote Class: <code>healthcloudext.AppointmentBookingSelfServiceWrapper</code> Remote Method: <code>cancelAppointment</code>
AppointmentCancelled	Step	Displays a confirmation that the appointment is canceled.	None
NavigateAction	Navigate Action	Restarts the OmniScript and takes the user back to the list of past and remaining upcoming appointments.	None

View Your Benefits

To edit the benefits self-service flow, open the OmniStudio app, go to the OmniScripts page, expand the `healthCloudIAM/viewBenefits` OmniScript, and open the highest version.

Component Name	Component Type	What It Does	What It Calls
DR-GetMemberPlans_234	DataRaptor Extract Action	Retrieves the active and inactive insurance plans associated with the user's account.	<code>HealthCloudExt.MemberPlans</code>
Your_Benefits	Step	Displays the active and inactive insurance plans for the user.	None
DR-GetCoverageBenefit_234	DataRaptor Extract Action	Fetches the latest record from CoverageBenefit.	<code>HealthCloudExt.CoverageBenefit</code>
Benefit_Details	Step	Displays benefit details in a FlexCard.	None

Add Support for Google Map Data

By default, the main OmniScript for Self-Service Appointment Management accepts only ZIP codes for location data. You can add support for Google Map data.

To add support for Google Map data, you must obtain a Google Maps API Key from Google.

- Create a new version of the `healthCloudIAM/selfService` OmniScript.
 - In the source org, from the App Launcher, open the OmniStudio app.
 - Go to the OmniScripts page and enter `healthCloudIAM` in the search field.
 - Expand the `healthCloudIAM/selfService` OmniScript.
 - Click the link for the highest version.
The OmniScript opens in the OmniScript Designer.
 - Click **New Version**.
The Version value in the Header is incremented.
- In the Navigation Panel, click the Tree View icon.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use OmniStudio

- OmniStudio Admin permission set

The Tree View lets you view and select step subcomponents.

3. Edit the **SelectLocation** step.
 - a. Select the **SelectLocation** step.
 - b. In the Navigation Panel, expand the **SelectLocation** step.
 - c. Click **PatientZipCode**.
 - d. In the Number Properties panel, deselect **Active**.
 - e. In the Navigation Panel, click **Location**.
 - f. In the Type Ahead Block Properties panel, select **Active**.
 - g. In the Type Ahead Block Properties panel, scroll to the Google Maps Autocomplete section.
 - h. Enter your **Google Maps API Key**.
 - i. In the Navigation Panel, click **CheckCompleteAddress**.
 - j. In the Formula Properties panel, select **Active**.
 - k. In the Navigation Panel, click **CompleAddressMsg**.
 - l. In the Messaging Properties panel, select **Active**.
4. Edit the **ScheduleProvider** step.
 - a. Select the **ScheduleProvider** step.
 - b. In the Navigation Panel, expand the **ScheduleProvider** step.
 - c. Click **FilterPatientZipCode**.
 - d. In the Number Properties panel, deselect **Active**.
 - e. In the Navigation Panel, expand **MoreFilters**.
 - f. Click **SearchPatientLocation**.
 - g. In the Type Ahead Block Properties panel, select **Active**.
 - h. In the Type Ahead Block Properties panel, scroll to the Google Maps Autocomplete section.
 - i. Enter your **Google Maps API Key**.
 - j. In the Navigation Panel, click **CheckFilterAddress**.
 - k. In the Formula Properties panel, select **Active**.
 - l. In the Navigation Panel, click **ValidAddress**.
 - m. In the Messaging Properties panel, select **Active**.
5. Edit the **Apply Filter** button in the **ScheduleProvider** step.
 - a. In the Navigation Panel, click **IntegrationProcedureAction1**.

As an alternative, you can click the **Apply Filter** button in the step.
 - b. In the Integration Procedure Action Properties panel, next to the Integration Procedure field, click the icon to open the Integration Procedure.

The **healthCloudIAM-FetchProviderAndTimeSlotsFilter** Integration Procedure opens in the Integration Procedure Designer.
 - c. Select the **DRTransformProviderSearchInput** step.
 - d. In the DataRaptor Transform ActionProperties panel, next to the DataRaptor Interface field, click the icon to open the DataRaptor.

The HealthCloudIAMTransformProviderSearchFiltersInput DataRaptor opens in the DataRaptor Designer.

- e. Click **New Version**.
 - f. Go to the **Transforms** tab if you aren't already there.
 - g. Edit the `ScheduleProvider:FilterPatientZipCode` Input JSON Path and check **Is Disabled**.
 - h. Edit the `ScheduleProvider:MoreFilters:SearchPatientLocation-Block:FilterPatientZipCode` Input JSON Path and deselect **Is Disabled**.
 - i. Click **Activate**.
6. In the OmniScript Designer, edit the `IPGetProviderAndSlots` step.
- a. Select the **IPGetProviderAndSlots** step.
 - b. In the Integration Procedure Action Properties panel, next to the Integration Procedure field, click the icon to open the Integration Procedure.
- The healthCloudIAM-FetchProviderAndTimeSlots Integration Procedure opens in the Integration Procedure Designer.
- c. Select the **DRTransformProviderSearchInput** step.
 - d. In the DataRaptor Transform ActionProperties panel, next to the DataRaptor Interface field, click the icon to open the DataRaptor.
- The HealthCloudIAMTransformProviderSearchInput DataRaptor opens in the DataRaptor Designer.
- e. Click **New Version**.
 - f. Go to the **Formulas** tab.
 - g. Next to the `UpdatePatientZipCode` Formula Result Path, check **Is Disabled**.
 - h. Go to the **Transforms** tab.
 - i. In the Input JSON Path column, rename the **UpdatedPatientZipCode** field to `InputPatientZipCode`.
 - j. Click **Activate**.
7. In the OmniScript Designer, click **Activate Version**.

Appointment Guidance

Choosing the perfect appointment for a patient can be difficult, but logically walking through a flow that can take the guesswork out of it. Create a custom screen flow to launch in the Intelligent Appointment Management console that guides your call center operators or care coordinators when setting a patient appointment.

Considerations for Appointment Guidance Flow

The Appointment Guidance custom screen flow opens up a range of options for setting visit type, provider preferences, and engagement channel. There are important considerations to keep in mind when setting up the data so that you don't cause errors in the search function for providers and appointment slots.

Add Custom Fields to Appointment Guidance Flow

Appointment Guidance leads the call center agent through a screen flow to determine the correct visit type and provider for an appointment. Use custom fields in the flow to set the filter values in the provider preferences panel of the Intelligent Appointment Management console.

[Create an Appointment Guidance Flow](#)

Create a custom screen flow to guide call center agents through the process of selecting the correct visit type and provider for a patient's appointment. When an agent completes the appointment guidance process, the flow sets the visit type and field values for the Healthcare Appointment Scheduler component. Additionally, the variables in the flow are matched against Provider Search fields to set the provider preferences in the component.

[Appointment Guidance Flow Example](#)

Appointment Guidance is a custom created screen flow and the simplistic example below is provided to show the basic steps. The example flow shows how to retrieve data from the patient record if the Intelligent Appointment Management console is on the patient account page. Then the example shows how to create a screen with a simple yes and no question. Finally, it shows how to set a standard output variable in the flow to set provider preferences in the console.

[Configure Appointment Guidance](#)

Provide call center agents or schedulers with guidance for choosing the best provider, facility, and appointment slot for a patient. The Intelligent Appointment Management component includes the option to select a custom screen flow to use for Appointment Guidance.

Considerations for Appointment Guidance Flow

The Appointment Guidance custom screen flow opens up a range of options for setting visit type, provider preferences, and engagement channel. There are important considerations to keep in mind when setting up the data so that you don't cause errors in the search function for providers and appointment slots.

There are items to consider in setting up the data to not cause errors in running the search for providers and appointment slots. Also, the appropriate permissions need to be assigned to the call center agent to run the flow.

- The appointment for a patient is recorded in the Service Appointment object.
- The Work Type object is used to record the visit type.
- The Engagement Channel Work Type stores the channel of the appointment, such as in-person, phone, or video.
- If no visit type is selected in the Intelligent Appointment Management console, you can set the visit type in the flow but cannot set the channel
- If the visit type is selected in the Intelligent Appointment Management console and then the appointment guidance flow runs, then you can set the channel.
- If the engagement channel is invalid and the work type is correct, then the provider search will run automatically, but you will see an error.
- If the appointment guidance flow sets a channel for the visit type, but the data for channels is not set up, you will see an error message.

SEE ALSO:

[Salesforce Help: Configure Appointment Guidance](#)

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Add Custom Fields to Appointment Guidance Flow

Appointment Guidance leads the call center agent through a screen flow to determine the correct visit type and provider for an appointment. Use custom fields in the flow to set the filter values in the provider preferences panel of the Intelligent Appointment Management console.

Before completing this task, enable Provider Search and Intelligent Appointment Management. Also, create the custom fields for Provider Search on both the record and the Care Provider Searchable Field object.

1. Add the Care Provider Searchable Fields custom fields to the Healthcare Appointment Scheduler Component.
 - a. From Setup, in the Quick Find box, enter Lightning App Builder, and then select Lightning App Builder.
 - b. Select Edit next to the page that includes the Healthcare Appointment Scheduler component.
 - c. In the details tab, under Search Panel Fields, select Add Field. Each time you click Add Field any new fields since the component was last updated are added. Click multiple times to see all available fields. The Add Field button deactivates when all fields have been added.
 - d. Drag fields into the desired display order.
2. Save and Activate the Lightning page.
3. Create flow variables to output values to the provider preferences panel.
 - a. From Setup, in the Quick Find box, enter Flows, and select Flows.
 - b. Click New Flow.
 - c. Select Screen Flow, then click Create.
 - d. From the toolbox, click Manager.
 - e. Click New Resource.
 - f. For Resource Type, select Variable.
 - g. Enter an API name and Description for your variable.



Note: The API name of the flow variable must include only the field name, without the __c. For example if the Care Provider Searchable Field Name is ProviderTypeSync__c, you'd enter ProviderTypeSync.

4. Select the Data Type. Only Text, Picklist, and Multi-Select Picklist are supported. The flow sets the field's value in the provider preferences panel depending on the field types of the Care Provider Searchable Field and the flow variable.

Care Provider Searchable Field Type	Flow Variable Field Type	Result
Text	Text or Picklist	Value of the flow output is set in panel
Picklist	Text or Picklist	Value of the flow output is set in panel
Multi-Select Picklist	Text or Picklist	Multiple values are concatenated with ; for text
Multi-Select Picklist	Multi-Select Picklist	Iterate through values in flow to set values on the Multi-Select Picklist

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Intelligent Appointment Management:

- Health Cloud Manage Appointment

To open, edit, or create a flow

- Manage Flow

5. Click **Done**.

You can now create a custom flow to use for appointment guidance and include these custom fields. In that flow, you use these variables and assign values to them that will set the provider preferences filter values in the Intelligent Appointment Management console.

SEE ALSO:

[Salesforce Help: Use Custom Fields to Run Provider Search](#)

[Salesforce Help: Flow Resource: Variable](#)

[Salesforce Lightning Web Components Developer Guide: Supported Data Types in Flows](#)

Create an Appointment Guidance Flow

Create a custom screen flow to guide call center agents through the process of selecting the correct visit type and provider for a patient's appointment. When an agent completes the appointment guidance process, the flow sets the visit type and field values for the Healthcare Appointment Scheduler component. Additionally, the variables in the flow are matched against Provider Search fields to set the provider preferences in the component.

This documentation outlines how to build individual elements of a screen flow. Following these directions step by step won't build a usable flow. Instead, it provides guidance on the elements, variables, screens, and assignments you can use to design your own appointment guidance flow.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Click **New Flow**.
3. Select **Screen Flow**, then click **Create**.
4. Create a variable to input patient record information into the flow:
 - a. From the toolbox, click **Manager**.
 - b. Click **New Resource**.
 - c. For Resource Type, select **Variable**.
 - d. Input *recordId* for API Name.
 - e. In the **Data Type** field, select **Text**.
 - f. Select **Available for input**.
 - g. Save your work by clicking **Done**.
5. Assign *recordId* to a variable:
 - a. From the flow canvas, add an **Assignment** element.
 - b. Enter a label, for example Assign Record Id.
 - c. In the Variable field select the *recordId* variable you created.
 - d. In the Operator field select **Equals**.
 - e. In the Value field select Account from the Record (Single) Variables section, then select **Id**.
 - f. Save your work by clicking **Done**.
6. Get records for the Patient:
 - a. From the flow canvas, add a **Get Records** element.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To open, edit, or create a flow:

- Manage Flow

- b. Enter a label, for example Get Patient Record.
 - c. In the Object field select **Account**.
 - d. In the Filter Account Records Condition Requirements select **All Conditions are Met (AND)**.
 - e. In Field, type *Id*, then select **Id**.
 - f. In the Operator field select **Equals**.
 - g. In the Value field select *recordId* from the Variable section.
 - h. In How Many Records to Store select **Only the first record**.
 - i. In How to Store Record Data select **Automatically store all fields**.
 - j. Save your work by clicking **Done**.
7. Create a screen to ask a question:
 - a. In the flow Canvas, add a **Screen** Element.
 - b. Enter a Label. This label is for the name of the question, not the actual question. API name is automatically populated.
 - c. Create a question by clicking and dragging components to the screen. For example, add a Display Text component to display the question text such as "Is this appointment for an annual visit?". Add a Picklist component with a "Yes" and "No" choice for the call center agent to input the reply.
 - d. Save your work by clicking **Done**.
 - e. Repeat this step for each question in your flow.
8. Use records or answers from a screen to make a decision:
 - a. From the flow canvas, add a **Decision** element.
 - b. Enter a label, for example Provider Decision.
 - c. In the Outcome Details section use the fields retrieved from the record or the answers to the questions to create the different branches of the decision. For example, in the resource field you could retrieve the patient's gender from the patient record or ask for the patient's gender in a question. One outcome could be for the gender of female, another for male, and the Default Outcome could be if neither is selected in the patient's record.
 - d. Save your work by clicking **Done**.
 - e. Repeat steps to create additional decisions.
9. Create variables to output provider preferences at the conclusion of the flow:
 - a. From the toolbox, click **Manager**.
 - b. Click **New Resource**.
 - c. For Resource Type, select **Variable**.
 - d. Enter the Flow Output Variable Name listed in the table for API Name.

Table 2: Standard Fields for Use in Appointment Guidance Flow

Flow Output Variable Name	Provider Preference Field Name
ProviderName	Provider Name
FacilityName	Facility Name
Specialty	Specialty

VisitTypeID	VisitType
ProviderGender	Provider Gender
LanguagesSpoken	Language Spoken
Channel	Channel

- e. In the Data Type field, select the data type of the field.
- f. Select **Available for output**.
- g. Save your work by clicking **Done**.
- h. Repeat these steps for each output variable you plan to use to set filters in the provider preferences panel.

10. Assign values to output variables:

- a. From the flow canvas, add an **Assignment** element.
- b. Enter a label, for example Assign Provider Gender.
- c. In the Variable field select one of the output variables you created.
- d. In the Operator field select **Equals**.
- e. In the Value field, type in the value you want to use to set the filters in the provider preferences panel.
- f. Save your work by clicking **Done**.
- g. Repeat these steps for each output variable you plan to use to set filters in the provider preferences panel.

11. **Save** and **Activate** the flow.

12. Give call center agents and care coordinators access to the Appointment Guidance flow:

- a. From Setup, in the Quick Find box, enter *Flows*, and select **Flows**.
- b. Click ☐ next to your appointment guidance flow, then click **Edit Access**.
- c. Select **Override default behavior and restrict access to enabled profiles or permission sets**.
- d. Move the Call Center Agent and Care Coordinator profiles to the Enabled Profiles list.
- e. **Save** your work.

Open the patient record page in Lightning App Builder and select the Appointment Management component. In the appointment guidance section use the dropdown to select this screen flow.

Appointment Guidance Flow Example

Appointment Guidance is a custom created screen flow and the simplistic example below is provided to show the basic steps. The example flow shows how to retrieve data from the patient record if the Intelligent Appointment Management console is on the patient account page. Then the example shows how to create a screen with a simple yes and no question. Finally, it shows how to set a standard output variable in the flow to set provider preferences in the console.

For this example it's assumed that the Intelligent Appointment Management component is located on the patient's account record page. The Healthcare Provider record has provider gender field completed. Also, that there's a visit type record named Annual Visit.

The appointment guidance example flow is only for illustrative purposes. Following these instructions creates a working flow, but it must be customized to fit your use case.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Click **New Flow**.
3. Select **Screen Flow**, then click **Create**.
4. Create a variable to input patient record information into the flow:
 - a. From the toolbox, click **Manager**.
 - b. Click **New Resource**.
 - c. For Resource Type, select **Variable**.
 - d. Input *recordId* for API Name.
 - e. In the **Data Type** field, select **Text**.
 - f. Select **Available for input**.
 - g. Save your work by clicking **Done**.

5. Assign *recordId* to a variable:
 - a. From the flow canvas, add an **Assignment** element.
 - b. Enter a label, for example Assign Record Id.
 - c. In the Variable field select the *recordId* variable you created.
 - d. In the Operator field select **Equals**.
 - e. In the Value field select Account from the Record (Single) Variables section, then select **Id**.

EDITIONS

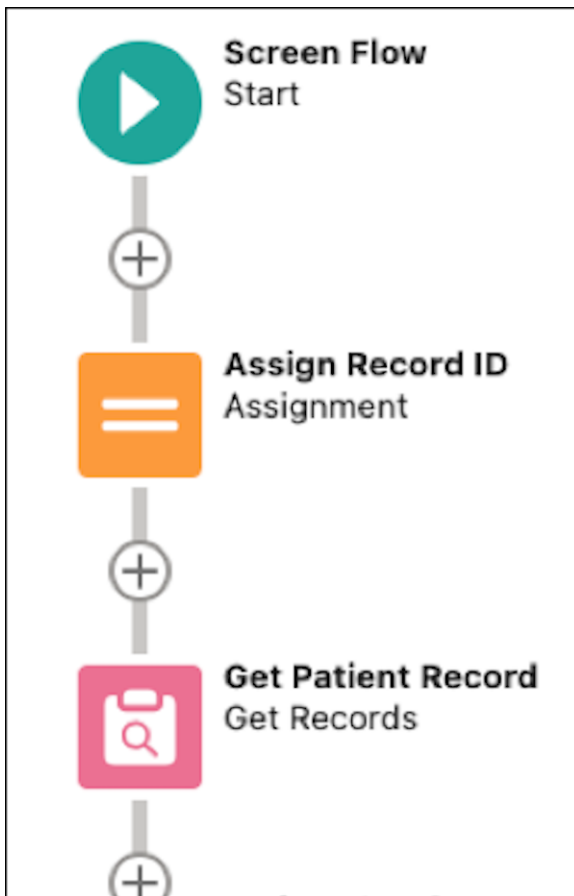
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To open, edit, or create a flow:

- Manage Flow

- f. Save your work by clicking **Done**.



6. Get records for the Patient:
- From the flow canvas, add a **Get Records** element.
 - Enter a label, for example Get Patient Record.
 - In the Object field select **Account**.
 - In the Filter Account Records Condition Requirements select **All Conditions are Met (AND)**.
 - In Field, type `Id`, then select **Id**.
 - In the Operator field select **Equals**.
 - In the Value field select `recordId` from the Variable section.
 - In How Many Records to Store select **Only the first record**.
 - In How to Store Record Data select **Automatically store all fields**.
 - Save your work by clicking **Done**.

Edit Get Records

Find Salesforce records and store their field values in flow variables.

Get Patient Record (Get_Patient_Record)

Get Records of This Object

Object
Account

Filter Account Records

Condition Requirements
All Conditions Are Met (AND)

Field	Operator	Value
RecordTypeId	Equals	recordId

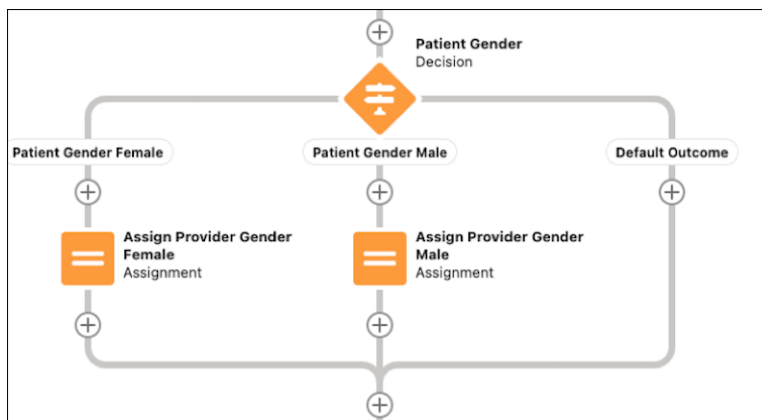
+ Add Condition

Sort Account Records

Sort Order
Not Sorted

⚠ If you store only the first record, filter by a unique field, such as ID.

7. Use patient record to make a decision:
 - a. From the flow canvas, add a **Decision** element.
 - b. Enter a label, for example Visit Type.
 - c. In the Outcome Details section use the fields retrieved from the record to create the different branches of the decision. For example, in the resource field you could retrieve the patient's gender from the patient record. One outcome could be for the gender of female, another for male, and the Default Outcome is when neither is selected in the patient's record.



Edit Decision

Patient Gender (Patient_Gender)

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

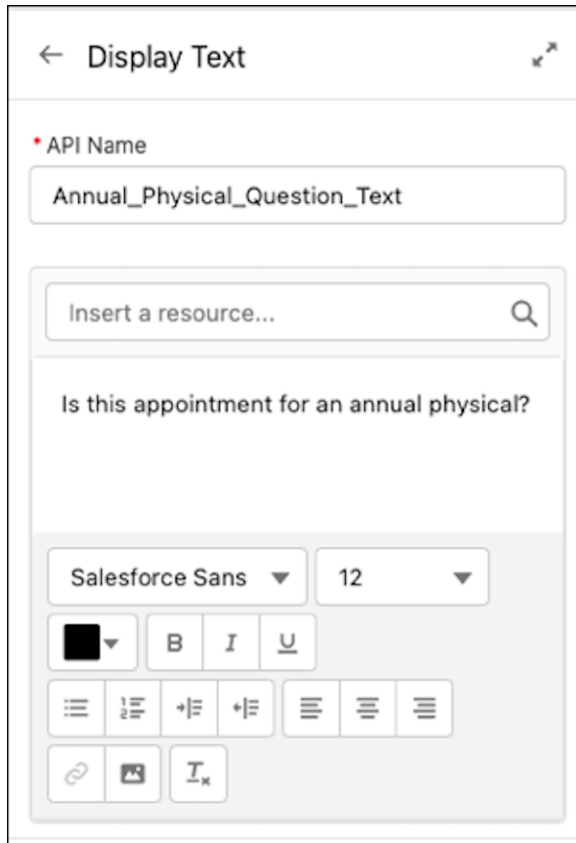
OUTCOME ORDER	OUTCOME DETAILS						
1	Label: Patient Gender Female Outcome API Name: Patient_Gender_Female Condition Requirements to Execute Outcome: All Conditions Are Met (AND) <table border="1"> <thead> <tr> <th>Resource</th> <th>Operator</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Account from Get_Patient_Record > Gender</td> <td>Equals</td> <td>Female</td> </tr> </tbody> </table>	Resource	Operator	Value	Account from Get_Patient_Record > Gender	Equals	Female
Resource	Operator	Value					
Account from Get_Patient_Record > Gender	Equals	Female					
2	Label: Patient Gender Male Outcome API Name: Patient_Gender_Male Condition Requirements to Execute Outcome: All Conditions Are Met (AND) <table border="1"> <thead> <tr> <th>Resource</th> <th>Operator</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Account from Get_Patient_Record > Gender</td> <td>Equals</td> <td>Male</td> </tr> </tbody> </table>	Resource	Operator	Value	Account from Get_Patient_Record > Gender	Equals	Male
Resource	Operator	Value					
Account from Get_Patient_Record > Gender	Equals	Male					
3	Label: Default Outcome Outcome API Name: Default Outcome Condition Requirements to Execute Outcome: All Conditions Are Met (AND)						

+ Add Condition

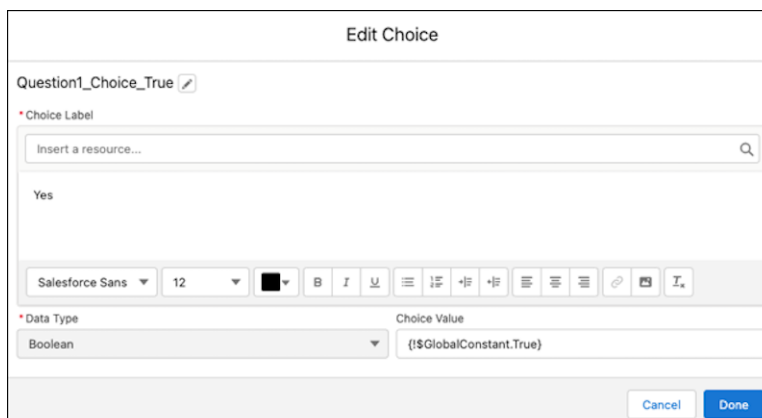
Cancel Done

- d. For this example, assign the provider gender based on the patient gender.
- e. Save your work by clicking **Done**.

8. Create a screen to ask a question:
 - a. In the flow Canvas, add a **Screen** Element.
 - b. Enter a Label. This label is for the name of the question, not the actual question. API name is automatically populated.
 - c. Create a question by clicking and dragging components to the screen.
 - d. Add a Display Text component to display the question text “Is this appointment for an annual visit?”.

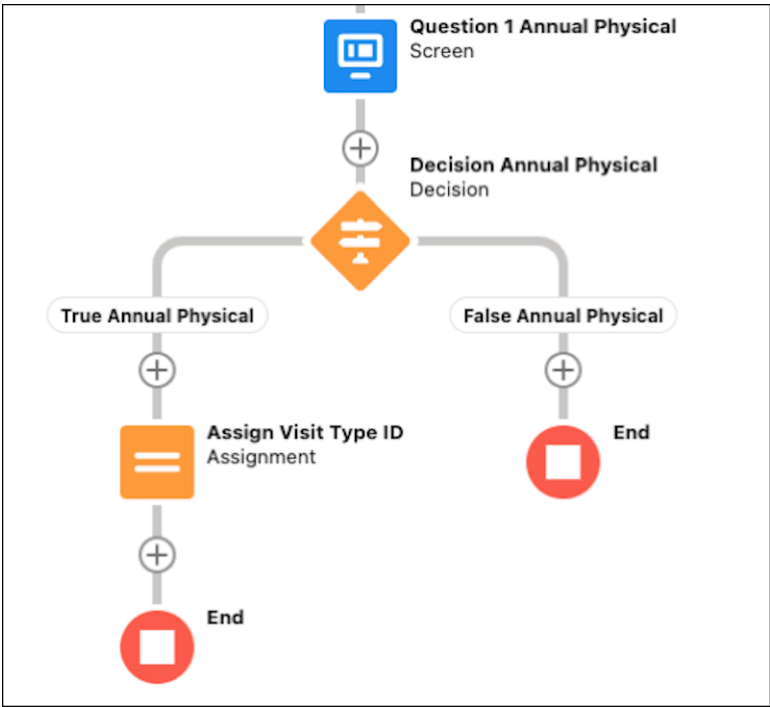


- e. Add a Picklist component with a “Yes” and “No” choice for the call center agent to input the reply.



- f. Save your work by clicking **Done**.
9. Use answers from a screen to make a decision:

- a. From the flow canvas, add a **Decision** element.
- b. Enter a label, for example Visit Type.
- c. In the Outcome Details section, use the fields retrieved from the answers to the screen flow questions to create the different branches of the decision. For example, if the patient answered “yes” to the question “Is this an annual physical?” then you’d assign the visit type of annual physical. In this example the value for the work type annual physical is hard coded by entering the record value.



10. Create variables to output provider preferences at the conclusion of the flow:
- a. From the toolbox, click **Manager**.
 - b. Click **New Resource**.
 - c. For Resource Type, select **Variable**.
 - d. Enter the Flow Output Variable Name listed in the table for API Name. For this example, we’d create VisitTypeId and ProviderGender.

Table 3: Standard Fields for Use in Appointment Guidance Flow

Flow Output Variable Name	Provider Preference Field Name
ProviderName	Provider Name
FacilityName	Facility Name
Specialty	Specialty
VisitTypeId	VisitType
ProviderGender	Provider Gender
LanguagesSpoken	Language Spoken
Channel	Channel

- e. In the Data Type field, select the data type of the field.
- f. Select **Available for output**.
- g. Save your work by clicking **Done**.
- h. Repeat these steps for each output variable you plan to use to set filters in the provider preferences panel.

11. Assign values to output variables:

- a. From the flow canvas, add an **Assignment** element.
- b. Enter a label, for example Assign Visit Type.
- c. In the Variable field select the VisitTypeId variable you created.
- d. In the Operator field select **Equals**.
- e. In the Value field, type in the value you want to use to set the filters in the provider preferences panel.
- f. Save your work by clicking **Done**.

12. Save and Activate the flow.

13. Give call center agents and care coordinators access to the Appointment Guidance flow:

- a. From Setup, in the Quick Find box, enter *Flows*, and select **Flows**.
- b. Click  next to your appointment guidance flow, then click **Edit Access**.
- c. Select **Override default behavior and restrict access to enabled profiles or permission sets**.
- d. Move the Call Center Agent and Care Coordinator profiles to the Enabled Profiles list.
- e. **Save** your work.

Configure Appointment Guidance

Provide call center agents or schedulers with guidance for choosing the best provider, facility, and appointment slot for a patient. The Intelligent Appointment Management component includes the option to select a custom screen flow to use for Appointment Guidance.

Before configuring appointment guidance, create the custom screen flow for Appointment Guidance. For more information see [Create an Appointment Guidance Flow](#).

1. From Setup, in the Quick Find box, enter *Lightning App Builder*, and then select **Lightning App Builder**.
2. Select **Edit** next to the page that includes the Healthcare Appointment Scheduler component.
3. Open the attributes panel by selecting the Healthcare Appointment Scheduler component.
4. In the field for Appointment Guidance Flow, select the custom appointment guidance screen flow that you created.
5. To automatically launch the flow when the page loads, select **Auto Launch Appointment Guidance**. Otherwise, call center agents visiting this page must click **Appointment Guidance**.

 **Note:** There's a separate feature that is set in the Work Type Code Set Bundle object that automatically launches another Flow after a visit type is selected. If the output of your Appointment Guidance flow is one such visit type, then there's the potential for an endless loop.

6. To change the label for launching appointment guidance, enter a new name in the Label for Launching Appointment Guidance field. The default is Appointment Guidance. This field accepts custom labels in the format `{ !$Label.customLabelName }`.
7. To include filter fields that are set by the custom Appointment Guidance flow and not already displayed on the provider preferences panel, select **Add Field** in the Search Panel Fields section.

 **Note:** Each time you click **Add Field** any new fields since the component was last updated are added. Click multiple times to see all available fields. The **Add Field** button deactivates when all fields have been added.

8. **Save** and **Activate** the page.

SEE ALSO:

[Salesforce Help: Configure Intelligent Appointment Management](#)

[Salesforce Help: Custom Labels](#)

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create and save Lightning pages in the Lightning App Builder:

- Customize Application

To view Lightning pages in the Lightning App Builder:

- View Setup and Configuration

Reduce Patient No-Shows with CRM Analytics Prediction

Intelligently highlight the days and times a patient is most likely to attend based on the history of similar people by using the CRM Analytics Prediction for Intelligent Appointment Management add-on. When you identify ideal appointment times up front, you increase the likelihood of patients showing up for their appointments, save your staff from spending time on coordinating reschedules, and maximize your health care providers' time.

Legal Disclaimer

CRM Analytics Prediction for Intelligent Appointment Management is solely intended to help you provide quality care to your patients by giving you insights about appointment scheduling and attendance for your patient population. It's not intended to be used for any

other purpose. For example, don't use this feature for any purposes related to healthcare reimbursement by health insurers, or for inferring health status or behaviors of patients or other care recipients.

Use CRM Analytics Prediction for Intelligent Appointment Management in compliance with the Health Insurance Portability and Accountability Act (HIPAA) and other health privacy laws. In particular, HIPAA contains a "minimum necessary" requirement that mandates what information a healthcare organization's employees and contractors can see. These individuals must only access the minimum amount of Protected Health Information (PHI) necessary to perform their job functions.

CRM Analytics Prediction for Intelligent Appointment Management may expose PHI for all patients within your organization. Only grant feature access to individuals who have a valid need to know the PHI of all individuals your organization treats. For example, limit access to organization staff members or personnel that are: (i) responsible for appointment scheduling and administration; and (ii) can see PHI for all individuals. It is your responsibility to determine which individuals within your organization can access this feature and then to set the appropriate permissions. As a default, this feature is unavailable to licensed Health Cloud users.

Get Started

1. [Assign Admin Permission Sets for CRM Analytics Prediction](#)

To support users with CRM Analytics Prediction, you need the CRM Analytics Plus Admin and the HealthCare Analytics Admin permission sets.

2. [Grant Schedulers Access to Appointment Time Predictions](#)

Assign the CRM Analytics Plus User permission set to all users responsible for scheduling appointments so that they can see the best times to schedule appointments.

3. [Grant the Integration User Access to Required Fields](#)

To create a prediction model for appointment recommendations, the Analytics Cloud Integration User profile requires read-only access to the Status Reason field in the Service Appointment object.

4. [Create a CRM Analytics App for Attendance Prediction](#)

To provide predictions for appointment management, you need a CRM Analytics App. This app is where Einstein calculates the patient's likelihood to attend.

5. [Examine Attendance Insights and Predictions](#)

Examine the insights and predictions that Einstein Discovery offers based on your Health Cloud dataset.

6. [Identify the Prediction ID](#)

Identify the prediction ID that's used in configuring Intelligent Appointment Management.

7. [Modify the Intelligent Appointment Management Configuration for Einstein Discovery](#)

To use Einstein Discovery predictions, add Attendance Threshold Percent and Best Time Slots Definition values to the Intelligent Appointment Management configuration.

8. [Update Appointment Prediction Model Records](#)

The CRM Analytics Prediction add-on uses Health Cloud records to create an appointment prediction model. The data model can use records up to 730 days old. To keep the model up to date, run a dataflow to refresh the model with new records.

Assign Admin Permission Sets for CRM Analytics Prediction

To support users with CRM Analytics Prediction, you need the CRM Analytics Plus Admin and the HealthCare Analytics Admin permission sets.

1. From Setup, in the **Quick Find** box, enter *Users*, and then select **Users**.
2. Select your own username.
3. In the Permission Set Assignments section, click **Edit Assignments**.
4. In Available Permission Sets, select **HealthCare Analytics Admin** and **CRM Analytics Plus Admin**, then click **Add**, and save your changes.
5. Repeat the above steps for any other admin users who support CRM Analytics Prediction.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Einstein Discovery

- Analytics for Healthcare

Grant Schedulers Access to Appointment Time Predictions

Assign the CRM Analytics Plus User permission set to all users responsible for scheduling appointments so that they can see the best times to schedule appointments.

1. From Setup, in the **Quick Find** box, enter *Users*, and then select **Users**.
2. Select a user.
3. In the Permission Set Assignments section, click **Edit Assignments**.
4. In Available Permission Sets, select **CRM Analytics Plus User**, and then click **Add**.
5. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Einstein Discovery

- CRM Analytics for Healthcare

Grant the Integration User Access to Required Fields

To create a prediction model for appointment recommendations, the Analytics Cloud Integration User profile requires read-only access to the Status Reason field in the Service Appointment object.

1. Go to Service Appointment on the Object Manager tab.
2. In Fields and Relationships, select **Status Reason**.
3. Click **Set Field-Level Security**.
4. Select the **Read-Only** checkbox for Analytics Cloud Integration User and then save your changes.
Selecting **Read-Only** auto-selects **Visible**, which indicates that the field can be both read and seen.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Einstein Discovery

- CRM Analytics for Healthcare

Create a CRM Analytics App for Attendance Prediction

To provide predictions for appointment management, you need a CRM Analytics App. This app is where Einstein calculates the patient's likelihood to attend.

Einstein Discovery needs a minimum of 400 service appointment records to build the prediction model. Import this data from the external scheduling system using the Data Loader. These records can be up to 730 days old from the day of the import. The status category for records of completed appointments must be Completed. For incomplete appointments, the status category must be Cannot Complete and the status reason must be No Show. To stay synchronized with the external scheduling system and to get more accurate predictions, ensure that the status of each service appointment in Health Cloud is up to date.

1. From Setup, in the Quick Find box, enter *Getting Started*, and then select **Getting Started**.
2. Click **Enable CRM Analytics**.
3. Click **Launch CRM Analytics**.
4. On the Welcome, Admin User! page, click **Create**, and then select **App**.
5. From Recommended Templates, select **Einstein Discovery for Healthcare Analytics**.
6. Review the information on the Einstein Discovery for Healthcare Analytics Details page.
7. On the Einstein Discovery for Healthcare Analytics - Pick answers to reuse page, select **Create a brand new app**, and then on the Einstein Discovery for Healthcare Analytics - Personalize page click **Looks good, next**.
All the fields that are used to make appointment attendance predictions are selected by default. To create a prediction model, at least two fields are required. The City, Country, State, and Zip Code fields come from the Account object in Salesforce.
8. Clear the fields that you don't want included in your model, and then click **Looks good, next**. Don't clear the Hours and Weekday fields.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Einstein Discovery

- CRM Analytics for Healthcare

9. Enter a name for your app, and then click **Create**.

SEE ALSO:

[Salesforce Help: Data Loader](#)

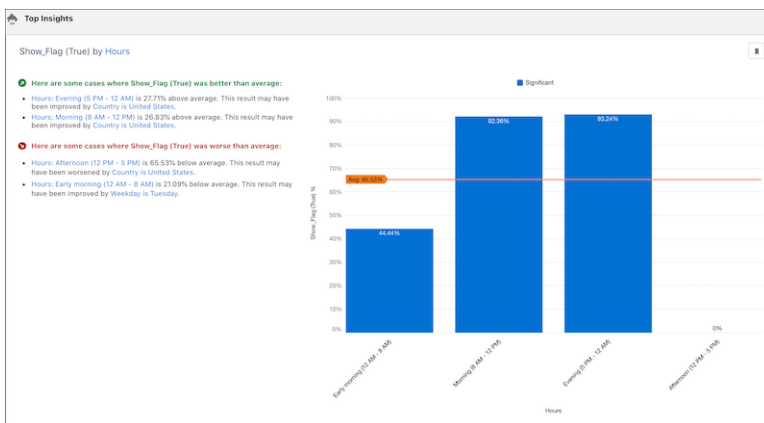
Examine Attendance Insights and Predictions

Examine the insights and predictions that Einstein Discovery offers based on your Health Cloud dataset.

1. In CRM Analytics, select your app from the Suggested For You or Your Analytics section.
2. In the new tab, open **STORIES**, and then select the story for your app.

A story visually represents a prediction model. The goal or outcome of the story is displayed at the top of the screen, followed by various insights that correlate to the different variables used in the analysis.

3. Examine the insights, predictions, and model using the Insights, Predictions, and Model tabs.



4. If necessary, customize the story, and then redeploy the model:
 - a. Click **Edit Story** on the top-right corner of the screen.
 - b. Make necessary changes to the story settings.
 - c. Click **Update Story**.
 - d. Add extra details for the story update, and then click **Update**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

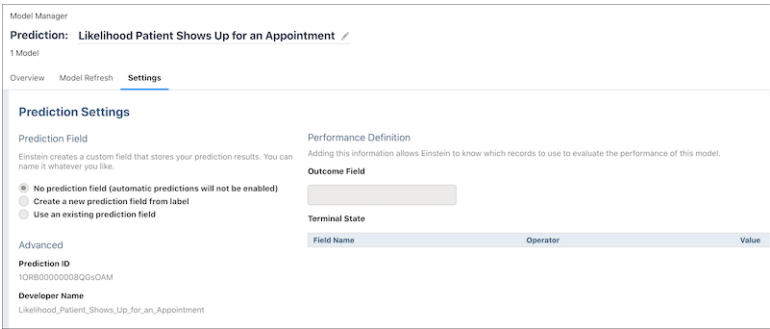
To use Einstein Discovery

- CRM Analytics for Healthcare

Identify the Prediction ID

Identify the prediction ID that’s used in configuring Intelligent Appointment Management.

- 1. In CRM Analytics Studio, click **Model Manager**.
- 2. In the Prediction Name column, select the prediction that was built for the app.
- 3. In the new tab, open **Settings**.
- 4. Make a note of the prediction ID.



EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

- To use Einstein Discovery
- CRM Analytics for Healthcare

Modify the Intelligent Appointment Management Configuration for Einstein Discovery

To use Einstein Discovery predictions, add Attendance Threshold Percent and Best Time Slots Definition values to the Intelligent Appointment Management configuration.

- 1. From Setup, in the Quick Find box, enter *Intelligent Appointment Management Configuration*, and then select **Intelligent Appointment Management Configuration**.
- 2. Edit the active Intelligent Appointment Management Configuration record.
- 3. Enter a number from 1 through 100 for the **Attendance Threshold Percent**.
The **Attendance Threshold Percent** is the optimum percentage of completed appointments. It's used to highlight preferred time slots based on attendance prediction from Einstein Discovery. For example, if you enter 50 as the **Attendance Threshold Percent**, time slots where the attendance probability is 50 or higher are highlighted.
- 4. Enter the prediction ID in the **Best Time Slots Definition** field.
- 5. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

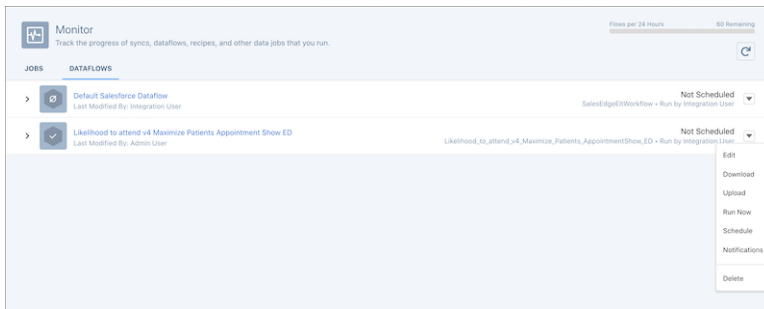
- To use Einstein Discovery
- CRM Analytics for Healthcare
- To use Health Cloud
- Health Cloud Foundation permission set

Update Appointment Prediction Model Records

The CRM Analytics Prediction add-on uses Health Cloud records to create an appointment prediction model. The data model can use records up to 730 days old. To keep the model up to date, run a dataflow to refresh the model with new records.

1. From the App Launcher, find and select **Analytics Studio**.
2. In the navigation tree, click **Data Manager**, then click **Manage Dataflows**.
3. Click the **DATAFLOWS** tab.
4. Identify the dataflow for your prediction model.

For example, Likelihood to Attend v4 Maximize Patients Appointment Show ED. Or something named more generic.



5. Click the dropdown menu for the dataflow and select one of these options.
 - Run Now: To source new records from Health Cloud right away.
 - Schedule: To run the dataflow later. To use time-based synchronization, specify your preferences using the **Schedule by** and **Start at** options. Otherwise, select **Event-based** and choose your event criteria, such as Salesforce local connection syncs.
6. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use Einstein Discovery

- CRM Analytics for Healthcare

Virtual Care

Healthcare is no longer confined to the four walls of a physical facility. With Virtual Care video visits, you can enable care from anywhere.

Transportation barriers, geographic barriers, mobility barriers, and limited appointment availability are significant obstacles to obtaining healthcare. Increase access to care by enabling Virtual Care between consumers and healthcare providers. Make Video Visits even more convenient for patients by providing self-service scheduling, automated appointment notifications, and easy access links to the video platform.

1. [Get Your Org Ready for Virtual Care](#)
Before you set up Virtual Care, enable and configure the required supporting features.
2. [Amazon Account Requirements](#)
Virtual Care uses Amazon EventBridge API Destinations to connect events from Amazon Chime SDK to Salesforce Platform Events. Use your own Amazon Account to set up Virtual Care.
3. [Virtual Care Availability by Country](#)
Virtual Care is available in specific countries.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and Video Calls Add-On License. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

4. [Enable Video Calls](#)
Enable Video Calls as your first step in setting up Virtual Care.
5. [Connect Amazon to Salesforce](#)
Create a connected app—a framework that enables an external application to integrate with Salesforce using APIs and standard protocols such as OAuth—to connect Amazon to Salesforce.
6. [Configure External Video Service](#)
Virtual Care integrates with Amazon Web Services (AWS) Chime SDK to offer your users an easy-to-use, feature-rich video platform.
7. [Create a Named Credential for Virtual Care](#)
Create a named credential to specify the URL of an AWS Chime callout endpoint and its required authentication parameters. Then specify the named credential as a callout endpoint to let Salesforce handle all authentication to AWS Chime.
8. [Add Video Appointment Types](#)
To differentiate video calls from other types of appointments, add Video picklist values to the Default Appointment Type Picklist.
9. [AWS Region Setting Guidelines for Health Cloud](#)
Virtual calls configuration now includes the ability to select multiple regions to meet your relevant security, data storage, and governmental requirements. We recommend using the provided region suggestions for the Winter '23 release of Health Cloud Virtual Care.
10. [Configure Video Visits](#)
Now that you have the AWS account setup and connection to Salesforce done you can configure the Video Visit utility. Input the appointment types that use the video feature, choose a transcription type, and provide the storage place for transcripts.
11. [Enable Transcription of Video Visits](#)
Video Calls use Amazon Transcribe or Amazon Transcribe Medical to provide real-time audio transcriptions. These text captions can be displayed in the video interface to improve accessibility.
12. [Add the Video Call Component to the App Utility Bar](#)
Make it easy for your users to join a video call by adding the video call component to the Salesforce utility bar.
13. [Add Users to a Multi-Participant Call](#)
Coordinate patient care among providers or discuss care with a patient's family members by allowing up to eight participants into a virtual call. To include Salesforce users, simply add them to service appointments. To add guest users, share the emailed meeting link.
14. [Check Patient Location for Appointments](#)
Check that a patient's location at the time of a virtual appointment matches with a care provider license jurisdiction.
15. [Virtual Care Self Service](#)
Make Video Visits even more convenient for patients by creating an Experience site with self-scheduling. Provide an intuitive video platform, automated appointment notifications, and easy access links for authenticated and guest users.

Get Your Org Ready for Virtual Care

USER PERMISSIONS

To use Health Cloud	Health Cloud Foundation permission set
To administer Health Cloud Video Call feature	Health Cloud Video Calls permission set
To administer Provider Search	Data Pipelines Base User
To administer Health Cloud Intelligent Appointment Management feature	Health Cloud Appointment Management
To administer OmniStudio	OmniStudio Admin

Before you set up Virtual Care, enable and configure the required supporting features.

1. Enable Person Accounts.
2. Assign the Health Cloud Foundation, Health Cloud Appointment Management, and Health Cloud Video Calls permission sets to the users or groups that represent your call center agents and care coordinators.
3. Download and install the OmniStudio package.
4. Enable and configure Provider Search.
5. Enable and configure Intelligent Appointment Management.
6. Set up and configure Salesforce Scheduler.
Intelligent Appointment Management does work with an external scheduling system, but Virtual Care requires Salesforce Scheduler.

SEE ALSO:

[Salesforce Help: Turn on Person Accounts in Health Cloud](#)

[Salesforce Help: Manage Permission Set Assignments](#)

[Salesforce Help: Install the OmniStudio Package for Health Cloud](#)

[Salesforce Help: Configure Provider Search to Help Patients Find Providers](#)

[Salesforce Help: Intelligent Appointment Management](#)

[Salesforce Help: Setup Salesforce Scheduler](#)

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and Video Calls Add-On license.

Salesforce Scheduler is available for an extra cost in Lightning Experience

Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

Amazon Account Requirements

Virtual Care uses Amazon EventBridge API Destinations to connect events from Amazon Chime SDK to Salesforce Platform Events. Use your own Amazon Account to set up Virtual Care.

The Amazon Chime SDK and Amazon Chime APIs provides the backend support for the video call feature in the telehealth session between provider and patient. Virtual Care closed captioning employs real-time streaming of audio to Amazon Transcribe Medical for processing the transcript and to record the results.

Ask the AWS administrator to follow these guidelines to set up the AWS account to implement Virtual Care:

- An AWS account dedicated to the Salesforce Virtual Care Console application workload
- An AWS administrator that can run an AWS CloudFormation template to create the necessary resources
- Access to the AWS Console
- Installation of the AWS Command Line Interface
- Creation of a Connected App with Salesforce Health Cloud

When Virtual Care is enabled the first time you'll see a confirmation screen. To enable Virtual Care, **Accept** the disclaimer.

The disclaimer says:

Virtual Care allows you to Bring Your Own Amazon Account to integrate with third-party services, infrastructure, and functionality from Amazon Web Services (the "BYOA AWS Services"). By enabling an integration with the BYOA AWS Services, you (and your organization, which you have the authority to bind) acknowledge and agree that:

1. The BYOA AWS Services are a Non-SFDC Application or Third-Party Application (as that term may be defined in the Main Services Agreement or Master Subscription Agreement, as applicable, between your organization and Salesforce ("MSA")), and your use of the BYOA AWS Services must comply with the applicable terms from either the AWS Service Terms (found here: <https://aws.amazon.com/service-terms/>) or your organization's separate agreement with AWS;
2. the integration with your BYOA AWS Services is not covered by your organization's MSA with Salesforce, including any security, privacy and/or data recovery measures; and
3. you and your organization are responsible for ensuring that your use of the BYOA AWS Services in conjunction with Virtual Care meets your organization's legal and compliance requirements.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and Video Calls Add-On license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

Virtual Care Availability by Country

Virtual Care is available in specific countries.

Virtual Care is available in these countries:

- Australia
- Brazil
- Canada (except Ontario)
- France
- Ireland
- Israel
- Japan
- Mexico

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Video Calls Add-On license.

- New Zealand
- Spain
- Switzerland
- United Kingdom
- United States

Enable Video Calls

Enable Video Calls as your first step in setting up Virtual Care.

Before you enable Video Calls, check that you have enabled and configured Provider Search, Intelligent Appointment Management, and Salesforce Scheduler. Also, check that OmniStudio is installed.

1. From Setup, in the Quick Find box, enter *Video Call*, and then select **Video Call Settings**.
2. On the Video Call Settings page, select **Enable** to turn on Video Calls.
3. The first time you enable Video Calls, you see a disclaimer. Click **Accept**.

 **Note:** Selecting **Decline** disables Video Calls.

You see a guided setup page that helps you set up the Video Calls feature.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and Video Calls Add-On license.

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To administer Video Calls

- Health Cloud Video Calls permission set

Connect Amazon to Salesforce

Create a connected app—a framework that enables an external application to integrate with Salesforce using APIs and standard protocols such as OAuth—to connect Amazon to Salesforce.

The Virtual Care solution uses Amazon EventBridge API Destinations to connect events from Chime SDK to Salesforce Platform Events. Within Amazon EventBridge, a connection to Salesforce using OAuth Username and Password is employed. The Consumer Key, Consumer Secret, Token Url, Username, and Password are required parameters to authorize posting events to Salesforce.

1. From Setup, in the Quick Find box, enter *Apps*, and select **App Manager**.
2. Click **New Connected App**.
3. Enter the connected app's name, which appears in the App Manager and on the App Launcher tile. We suggest using *Amazon EventBridge*.
4. Enter the API name. We suggest using *Amazon_EventBridge*.
5. Enter the contact email for Salesforce to use to contact you or your support team.
6. Leave the rest of the Basic Information section blank.
7. In the API (Enable OAuth Settings) section, select **Enable OAuth Settings**.
8. Enter *https://login.salesforce.com/services/oauth2/callback* as the Callback URL.
9. For the Selected OAuth Scopes, select **Manage user data via APIs(api)**.
10. Deselect **Require Secret for Refresh Token Flow**.
11. Save your changes.
12. Click **Continue**.
Some users see a screen that says changes can take up to 10 minutes to take effect and a warning about deleting a parent org. Move to the next screen by clicking **Continue**.
13. On the Connected App detail page, click **Manage Consumer Details**.
An email is triggered to verify your identity.
14. Copy the verification code from the email and click **Verify**.
Notice that the Consumer Key and Consumer Secret appear in the Connected App API descriptions. When running the Cloud Formation template, copy and paste this Consumer Key and Consumer Secret into the Amazon Web Services Console.
15. From Setup, in the Quick Find box, enter **Apps**, and select **Manage Connected Apps**.
16. Click **Edit** for the app you created.
17. For the IP Relaxation field, select **Relax IP restrictions**.
18. For Session Policies, choose a Timeout Value that works best for your business needs.
For testing purposes, select 24 hours to reduce errors and assist with troubleshooting. Remember to make the value more restrictive when deploying in production.
19. Save your changes.

SEE ALSO:

[Salesforce Help: Create a Connected App](#)

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and Video Calls Add-On license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To read, create, update, or delete connected apps

- Customize Application AND Modify all Data OR Manage Connected Apps

Configure External Video Service

Virtual Care integrates with Amazon Web Services (AWS) Chime SDK to offer your users an easy-to-use, feature-rich video platform.

AWS provides the AWS Partner Solution to help you get up and running. You must work with your AWS admin to complete the integration. The template is available at [Salesforce Health Cloud: Virtual Care on AWS - Partner Solution](#)

The [AWS Partner Solution Deployment Guide](#) includes detailed information about the architecture, security, and product used to create the virtual care video services. The AWS admin can find instructions in the Pre-Deployment section.

Suggestions for inputs into the AWS setup:

Table 4: AWS Setup Values

AWS Field	Input
Username	Salesforce admin username
Password	Salesforce admin password
Standard name	https://orgname.lightning.force.com
Endpoint URL	https://orgnamelightingforce.com/services/oauth2/token
Platform Event Endpoint	https://orgnamelightingforce.com/services/data/v50.0/objectServicePlatformEvent

The Service Account—AWS username is populated with Virtual Care User. Create this user by choosing a password.

After the Virtual care user is created, then create an access key. This access key includes a Client ID and Client secret. You use these values to create a Named Credential in Salesforce.

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud and Video Calls Add-On license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

Create a Named Credential for Virtual Care

Create a named credential to specify the URL of an AWS Chime callout endpoint and its required authentication parameters. Then specify the named credential as a callout endpoint to let Salesforce handle all authentication to AWS Chime.

The AWS Cloud Formation template creates a single Identity and Access Management (IAM) user with specific role and permissions defined by IAM policies. An IAM user is a resource (person or application) that can make AWS API requests using its credentials. Coordinate with the AWS admin who performed the AWS Cloud Formation setup to obtain the user's IAM access key and secret, as you need it when configuring the Salesforce Named Credential.

1. From Setup, in the Quick Find box, enter *Named Credentials*, then select **Named Credentials**.
2. Click  next to **New** and select **New Legacy**.



Important: In Winter '23, Salesforce introduced an improved named credential that is extensible and customizable. Virtual Care currently requires the Legacy Named Credential.

3. Enter a label.
4. In the URL field enter `https://service.chime.aws.amazon.com`.
5. Leave the **Certificate** field blank.
6. Select **Named Principal** as the identity type.
7. Select **AWS Signature Version 4** as the authentication protocol.
8. Enter the AWS access key ID created during AWS setup.
9. Enter the AWS secret access key created during AWS setup.
10. Enter the appropriate AWS region for Amazon Chime Meeting control from us-west-2, ap-southeast-1, eu-central-1, or us-east-1.
Choose the same region that the AWS admin chose when connecting AWS to Salesforce.
11. Enter *Amazon Chime* as the AWS service.
12. Ensure that the **Generate Authorization Header** is selected.
13. Save your changes.

SEE ALSO:

[Salesforce Help: Named Credentials](#)

[Salesforce Help: Define a Legacy Named Credential](#)

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud and Video Calls Add-On license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To view named credentials:

- View Setup and Configuration

To create, edit, or delete named credentials:

- Customize Applications

Add Video Appointment Types

To differentiate video calls from other types of appointments, add Video picklist values to the Default Appointment Type Picklist.

1. From Setup, in the Quick Find box, enter *video call*, and select **Video Call Configuration**.

2. To create a video call video configuration, click **New**.

3. Enter a Label name.

4. Enter an API name.

5. For Usage Type, choose **Chime**.

6. Enter the API name of the Experience Cloud Digital Experiences page that includes the video component.

7. Enter the Named Credential associated with your AWS Chime connection.

8. For Visit Region, choose the region your AWS admin used when setting up your AWS Chime connection.

9. For External Role Identifier, enter the AWS IAM Chime Role.

Coordinate with your AWS admin to find this value. The format of the value looks like this:
`arn:aws:iam:000000000000:role/SampleChimeRole`.

10. For Storage Bucket Name, choose the AWS Storage Bucket you set up for storing meeting transcripts.

11. For Speech Analysis Service type, choose **Transcribe Medical**.

12. For Video Call Appointment Type Value, type in one or more picklist values you added to the Default Appointment Type Picklist field, on the Service Appointment Object, to signify a video appointment type. Use semicolons to separate multiple values.

13. Save your changes.
- EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To administer video calls:
 - Video Calls User Permission

AWS Region Setting Guidelines for Health Cloud

Virtual calls configuration now includes the ability to select multiple regions to meet your relevant security, data storage, and governmental requirements. We recommend using the provided region suggestions for the Winter '23 release of Health Cloud Virtual Care.

Important: This article provides guidelines on potential AWS data region options that customers may use to configure their AWS Chime SDK meeting services in order to meet their specific use case or compliance needs. However, customers are solely responsible for ensuring that the setup, configuration, and usage of any AWS services meets their own legal and compliance requirements (including any customer agreement they have with AWS).

Amazon Chime SDK meetings have control regions and media regions. Control regions have an API endpoint that is used to create, update, and delete meetings. Media Regions host the actual meetings. Customers can configure their Amazon Chime SDK meeting control regions and media regions using the AWS Chime SDK meetings region options listed in the table. This information is inputted into the Video Visits Configuration.

Country	Control Region	Media Region
Australia	ap-southeast-1	ap-southeast-2
Spain	eu-central-1	eu-central-1 OR eu-west-1 OR eu-north-1

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and Video Calls Add-On license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom (excluding Northern Ireland), and the United States.

United Kingdom	eu-central-1	eu-central-1 OR eu-west-2
United States	us-east-1 OR us-west-2	us-east-1 OR us-west-1 or us-west-2

SEE ALSO:

[Salesforce Help: Configure Video Visits](#)

[External: Amazon Chime SDK Available Regions](#)

Configure Video Visits

Now that you have the AWS account setup and connection to Salesforce done you can configure the Video Visit utility. Input the appointment types that use the video feature, choose a transcription type, and provide the storage place for transcripts.

Before you can configure video calls, complete the steps to prepare your org for video visits, connect to Amazon Chime, and set up video appointment types.

1. From Setup, in the Quick Find box, enter *Video*, and select **Video Call Configuration**.
2. Create a video call configuration by clicking **New**.
3. Enter a Label name.
4. Enter an API name.
5. For Usage Type, choose **Chime**.
6. Enter the Experience Cloud API name for the page that includes the video component.
7. Enter the Named Credential associated with your AWS Chime connection.
8. For AWS Visit Region, choose the Control region used when setting up your AWS Chime connection.
9. For External Role Identifier, enter the AWS IAM Chime Role.
Coordinate with your AWS admin to retrieve this value. It has a format that is looks like this:
`arn:aws:iam::000000000000:role/SampleChimeUser`.
10. Leave the Storage Bucket name field blank, as it isn't used.
11. For Speech Analysis Service Type, select Transcribe Medical.
12. For Video Call Appointment Type Value, type in one or more picklist values that you added to the Default Appointment Type picklist field, on the Service Appointment object, to signify a video appointment. Use semicolons to separate multiple values.
13. For AWS Endpoint region, choose the Media region used when setting up your AWS Chime connection.
14. For AWS Video Waiting Room and Messaging region, choose the Messaging region used when setting up your AWS connection.
15. **Save** your changes.

SEE ALSO:

[Salesforce Help: AWS Region Setting Guidelines](#)

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and Video Calls Add-On license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To administer Video Calls:

- Health Cloud Video Calls

Enable Transcription of Video Visits

Video Calls use Amazon Transcribe or Amazon Transcribe Medical to provide real-time audio transcriptions. These text captions can be displayed in the video interface to improve accessibility.

This feature requires Amazon Transcribe, an AWS service that converts speech-to-text for many languages. Visit the [Amazon Transcribe](#) website for information and pricing. You pay-as-you-go based on the seconds of audio transcribed per month. Amazon Transcribe Medical, which accurately translated medical speech, is also supported, but only for US English.

1. From Setup, in the Quick Find box, enter *Video*, and then select **Video Call Configuration**.
2. Click **New Video Call Configuration** or **Edit** next to an existing configuration.
3. Skip the Storage Bucket Name field, it is currently not used.
4. Choose the Speech Analysis Service type.
Transcribe Medical currently is only supported for US English
5. Save your changes.

During the Video Visit click  to see real-time text-to-speech transcription shown at the bottom of the video interface.

Add the Video Call Component to the App Utility Bar

Make it easy for your users to join a video call by adding the video call component to the Salesforce utility bar.

1. From the Home tab in Setup, enter *App* in the Quick Find box, then select **App Manager**.
2. To add a utility bar to an existing app, click **Edit** in the dropdown menu next to your app.
3. Click the **Utility Items** tab and add the **Video Call** component.
4. Specify component and utility properties, like the height and width of the utility panel, and what label and icon to display in the utility bar.
5. Save your work.

SEE ALSO:

[Salesforce Help: Add a Utility Bar to Lightning Apps](#)

EDITIONS

Available in: **Unlimited** and **Enterprise** editions with Health Cloud and Video Call Add-On license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To administer Video Calls:

- Health Cloud Video Calls permission set

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud and Video Calls Add-On license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To manage apps:

- Customize Application

Add Users to a Multi-Participant Call

Coordinate patient care among providers or discuss care with a patient's family members by allowing up to eight participants into a virtual call. To include Salesforce users, simply add them to service appointments. To add guest users, share the emailed meeting link.

1. To add Salesforce users to a Virtual Call:
 - a. In App Launcher, find and select **Service Appointment**.
 - b. In the list view, select the service appointment record
 - c. Click the Related tab.
 - d. In the Assigned Resources related list, click **New**.
 - e. In the Service Resource field, add the user that you'd like to include.

 **Note:** The appointment shows in the user's My Appointments utility bar component. If additional notification is needed to let users know they've been added to an appointment set up an automation such as a chatter notification or email alert.
 - f. **Save** your work.
 - g. Repeat these steps to add more users to the appointment.
2. To add guest users to a Virtual Call, ask the patient to forward the appointment confirmation email to guests they want to invite. Multiple guest users can access the Virtual Care appointment using the same link.

SEE ALSO:

[Salesforce Help: Add the Video Call Component to the App Utility Bar](#)

Check Patient Location for Appointments

Check that a patient's location at the time of a virtual appointment matches with a care provider license jurisdiction.

To show only providers that can provide care in the user's location, set up a custom filter for licensing jurisdictions.

1. To store locations where the provider can practice Virtual Care, add a custom field to the Healthcare Provider Object.
 - a. From Setup, click **Object Manager**, then click **Healthcare Provider**
 - b. Open **Fields & Relationships** and click **New**.
 - c. Select the **Picklist (Multi-Select)** data type and click **Next**.
 - d. Enter the Field Label. For example, *Licensing State*.
 - e. Select **Enter values, with each value separated by a new line**.
 - f. Enter the jurisdictions where your providers can legally practice virtual care.

Depending on your location, you could enter all of your country's states and territories, or enter a few that apply to your providers.
 - g. Leave the Field Name as is and click **Next**.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and Video Calls add on license. Virtual Care is currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To add users to appointments:

- Health Cloud Appointment Management

To attend a video appointment as a moderator:

- Health Cloud Video Calls

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud and Video Calls Add-On license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To edit OmniScript:

- OmniStudio Admin permission set

- h. Set field-level security to allow users to update provider information, then click **Next**.
 - i. Leave the default page layout assignment as is and click **Save**.
- 2. Add a Licensing State custom field to the Care Provider Searchable Field object so that location is a searchable field.
 - a. In the Object Manager, click **Care Provider Searchable Field**.
 - b. Open **Fields & Relationships**, and click **New**.
 - c. Select the **Picklist (Multi-Select)** data type, and click **Next**.
 - d. Enter the Field Label. We suggest *Licensing State*.
 - e. Select **Enter values, with each value separated by a new line**.
 - f. Enter the jurisdictions where your providers can legally practice Virtual Care.
Enter a selection of jurisdictions that apply to your providers like California, Arizona, and New Mexico. Or, add all jurisdictions, such as every state in the United States.
 - g. Leave the Field Name as is and click **Next**.
 - h. Set field-level security to Read-Only for all users that need access to this field in Provider Search, then click **Next**.
 - i. Leave the default page layout assignment as is, then save your work.
- 3. Map the Licensing State field on Healthcare Provider object to the Licensing State PS field on Care Provider Search Field.
 - a. From Setup, in the Quick Find box, type *Care Provider Search*, and select **Care Provider Search Config**.
 - b. Click **New**.
 - c. Enter a label. We suggest *Licensing_State_Config*.
 - d. Select Healthcare Provider from the Mapped Object dropdown list.
 - e. In Source Field, add the Field Name of the field you added to the Healthcare Provider object. For example, *Licensing_State__c*.
 - f. In Target Field, add the Field Name of the field you added to the Care Provider Searchable Field object. For example, *Licensing_State_PS__c*.
 - g. Check **IsActive**.
 - h. Save your changes.
- 4. Edit the OmniScript to ask the user their location at the time of the appointment.
This strategy directly asks the user's location at the time of appointment. There are other programmatic approaches to determine location, but they're more complex.
 - a. From the App Launcher, find and select **OmniStudio**.
 - b. Go to the OmniScripts page and enter *healthCloudIAM* in the search field.
 - c. Expand the healthCloudIAM/selfService Omniscript and open the highest version.
 - d. Click **New Version**.
You're unable to edit a current activated version.
 - e. In the Build panel, expand **Groups**.
 - f. Drag the Step option above the Step named SelectLocation.
 - g. Enter a Field Label. For example, *Current State*

- h. Enter Instructions. For example, *Which state will you be located in at the time of your appointment?*
 - i. In the Build panel, expand **Inputs**.
 - j. Drag the Select component inside the step under the instructions.
 - k. In Select Properties, enter a Name. We suggest *CurrentStateValues*.
 - l. Select **Required**.
 - m. In Option Source type *\$Object*.
 - n. In Source Type, enter the Object and Field API names where the state multi-select picklist is located. The format is *ObjectName.FieldName*. For example, if you created the Licensed State field on the Healthcare Provider, enter *HealthcareProvider.Licensed_State_c*.
5. After the customer indicates the state where they are at the time of the appointment, we pass that value into the filter choices for Provider Search.
- a. From the App Launcher, find and select **OmniStudio Integration Procedures**.
 - b. Expand **healthCloudIAM/FetchProviderAndTimeSlots** and select the latest version.
 - c. Click the **DRTransformProviderSearchInput** step.
 - d. In the DataRaptor Transform Action Properties panel, open the DataRaptor by clicking the  next to the DataRaptor Interface field.
 - e. Click **Create New Version**.
 - f. Go to the **Transforms** tab.
 - g. Add a transform by clicking the + icon.
 - h. In the Output JSON Path, enter *ProviderSearchInput:CustomFilter*
 - i. In Output Data Type, select **List<Map>**.
 - j. Add another transform by clicking the .
 - k. In the Input JSON Path, enter the name of the step that was added to ask the user's location and the name of the element holding the current state value. Type *CurrentState:CurrentStateValues*.
 - l. In the Output JSON Path, enter *ProviderSearchInput:Licensing_State_PS__c*.
 - m. Save your work.
6. Now, update the applied filter in the ScheduleProvider step.
- a. Navigate back to the healthCloudIAM/selfService Omniscrypt.
 - b. Expand the ScheduleProvider step by clicking .
 - c. Click **Apply Filter**.
 - d. In the Properties panel on the Integration Procedure field, click the  to open the healthCloudIAM_FetchProviderandTimeSlotsFilter.
 - e. Select the **DRTransformProviderSearchInput** step.
 - f. In the DataRaptor Transform Action Properties panel, open the DataRaptor by clicking  next to the DataRaptor Interface field.
 - g. Click **Create New Version**.
 - h. Go to the **Transforms** tab.

- i. Add a Transform by clicking the .
 - j. In the Output JSON Path, enter `ProviderSearchInput:CustomFilter`.
 - k. In Output Data Type, select **List<Map>**.
 - l. Add another Transform by clicking .
 - m. In the Input JSON Path, enter the name of the step that was added to ask the user's location and the name of the element holding the current state value. For example, `CurrentState:CurrentStateValues`
 - n. In the Output JSON Path, enter `ProviderSearchInput:Licensing_State_PS__c`.
 - o. Save your work.
7. In the OmniScript Designer, click **Activate Version**.

SEE ALSO:

[Salesforce Help: Use Custom Fields to Run Provider Searches](#)

[Salesforce Help: OmniStudio](#)

[Salesforce Trailhead: OmniScripts](#)

Virtual Care Self Service

USER PERMISSIONS

To access Health Cloud objects:	Health Cloud Platform
To access Health Cloud objects for site users:	Health Cloud for Experience Cloud Sites
To administer Health Cloud site:	Health Cloud for Community
To administer Provider Search:	Health Cloud Provider Network Management
To edit OmniScripts:	OmniStudio Admin
To use OmniStudio:	OmniStudio User
To schedule appointments:	Health Cloud Appointment Management

Make Video Visits even more convenient for patients by creating an Experience site with self-scheduling. Provide an intuitive video platform, automated appointment notifications, and easy access links for authenticated and guest users.

Virtual Care Self-Service brings Provider Search, Intelligent Appointment Management, Salesforce Scheduler, and Video Visits features together with the power of OmniStudio and Digital Experiences to create an interactive interface for patients.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud, Video Calls Add-On license.

Health Cloud Customer Community or Health Cloud Customer Community Plus license

Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

1. [Get Your Org Ready for Video Visit Self-Service](#)

Video Visits Self-Service requires enabling OmniStudio, Provider Search, Intelligent Appointment Management, Salesforce Scheduler, and Video Visits. Check that all of these features are enabled and configured.

2. [Connect Appointment Reasons to Engagement Channel Types](#)

Create engagement channels, such as in-person, video, and phone, that service resources can add to their shifts and work types. For self-service video appointment scheduling it's necessary to create Engagement Channel Type records in addition to adding video to the Service Appointment default appointment.

3. [Set Up an Experience Site for Self-Service Video Visits](#)

Create an Experience Cloud site with self-service appointment and video visit capabilities so that your customers can self-schedule their video appointments.

4. [Give Video Self-Service Users Access to Your Experience Cloud Site](#)

Give Video Visits self-service users the profile, permission sets, and object access needed to scheduled appointments themselves.

5. [Set Up an Email Appointment Link for Guest Users](#)

Confirm a guest user's appointment with an automated email that includes a button to access your Experience Cloud site where they can access their video visit.

6. [Setup an Email Appointment Link for Authenticated Users](#)

Let your patients know with an automated email that their appointment is confirmed. Provide a convenient button in the email to access your Experience Cloud site.

Get Your Org Ready for Video Visit Self-Service

Video Visits Self-Service requires enabling OmniStudio, Provider Search, Intelligent Appointment Management, Salesforce Scheduler, and Video Visits. Check that all of these features are enabled and configured.

1. Download and Install the OmniStudio Package
2. Enable OmniStudio.
 - a. From Setup, in the Quick Find box, enter *OmniStudio*, and then select **OmniStudio Settings**.
 - b. Enable **Standard OmniStudio RunTime**.
3. Enable Provider Search.
 - a. From Setup, in the Quick Find box, enter *Provider Search*, and then select **Provider Search Settings**.
 - b. Enable Provider Search and complete all required setup steps.
4. Enable Patient Appointment Management Scheduling.
 - a. From Setup, in the Quick Find box, enter *Intelligent Appointment*, and then select **Intelligent Appointment Management Settings**.
 - b. Enable Patient Appointment Scheduling and complete all setup steps.
5. Enable Salesforce Scheduler.
 - a. From Setup, in the Quick Find box, enter *Salesforce Scheduler*, and then select **Salesforce Scheduler Settings**.
 - b. **Enable** Salesforce Scheduler for Health Cloud. Follow the steps to configure Intelligent Appointment Management using Salesforce Scheduler.
6. Enable Video Calls.
 - a. In Setup, in the Quick Find box, enter *Video Call*, and then select **Video Call Settings**.
 - b. Enable Video Calls and accept the agreement.

SEE ALSO:

[Salesforce Help: OmniStudio](#)

[Salesforce Help: Configure Provider Search to Help Patients Find Providers](#)

[Salesforce Help: Intelligent Appointment Management](#)

[Salesforce Help: Setup Salesforce Scheduler](#)

[Salesforce Help: Enable Video Calls](#)

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud and the Video Calls Add-On.

Health Cloud Community or Health Cloud Community Plus license

Salesforce Scheduler is available for an extra cost in Lightning Experience

Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To administer Provider Search:

- Data Pipelines Base User

To administer Video Call feature:

- Health Cloud Video Calls permission set

To edit OmniScripts:

- OmniStudio Admin

To schedule appointments:

- Health Cloud Appointment Management

Connect Appointment Reasons to Engagement Channel Types

Create engagement channels, such as in-person, video, and phone, that service resources can add to their shifts and work types. For self-service video appointment scheduling it's necessary to create Engagement Channel Type records in addition to adding video to the Service Appointment default appointment.

1. Create a Video Engagement Channel Type
 - a. From the App Launcher, click **Engagement Channel Types**
 - b. Click **New**.
 - c. Enter *video* for Name.
 - d. Choose Video for Contact Point Type.
 - e. Check **Is Active**.
 - f. Choose Video as Usage Type.
 - g. Choose Video as Contact Point.
 - h. **Save** your work.
2. Create Appointment Reason Engagement Channel Type junction record.
 - a. From the App Launcher, click **Appointment Reason Engagement Channel Type**
 - b. Click **New**.
 - c. Enter *video* for Name.
 - d. Select an Appointment Reason that you would like to offer a Video Visit.
 - e. Select Video as the Engagement Channel Type.
 - f. Select the Default Work Type associated with this appointment.
 - g. It's optional, but you can select a Work Type to use for Established Patients.
 - h. **Save** your work.

SEE ALSO:

[Salesforce Help: Engagement Channels](#)

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud, Video Calls add-on license, and Health Cloud Customer Community or Health Cloud Customer Community Plus license.

Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To administer Video Call feature:

- Health Cloud Video Calls permission set

To schedule appointments:

- Health Cloud Appointment Management

Set Up an Experience Site for Self-Service Video Visits

Create an Experience Cloud site with self-service appointment and video visit capabilities so that your customers can self-schedule their video appointments.

Digital Experiences must be enabled to complete these steps.

1. From Setup, under **Digital Experiences**, click **All Sites**.
2. Click **Builder** next to an existing site or click **New** to create a site.
 - a. Select the **Customer Account Portal Template**.
 - b. Enter the **Name**. We suggest *Patients*.
 - c. Enter the **URL**. We suggest *patients*.
 - d. Click **Create**.
 - e. Click **Builder**.
3. In the Builder navigation bar, click the dropdown next to the page name.
4. Click **New Page**.

Use a **Standard** page with **Flexible Layout** and create four pages with these attributes.

Page Name	URL	API Name	Page Access
Schedule Appointment	/schedule-appointment	Schedule_Appointment	Public
My Appointments	/my-appointments	My Appointments	Site Default Setting:Requires Login
My Benefits	/my-benefits	My_Benefits	Public
Video Visits	/videoCall	VideoCall	Public



Note: The Builder appends the API name you enter with `__c` so that your API names use the appropriate format. For example, if you enter *Schedule_Appointment*, the API name for the page is *Schedule_Appointment__c*.

5. Add the **OmniScript** component to the Schedule Appointment, My Appointments, and My Benefits pages and configure as shown in the tables.

1. Schedule Appointment OmniScript	Value
Type	healthCloudIAM
SubType	selfService
Theme	lightning
Display	Display OmniScript on page
Button Variant	brand

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud

Video Visits require the Video Calls add-on license and Health Cloud Customer Community or Health Cloud Customer Community Plus license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To access Health Cloud objects for site users:

- Health Cloud for Experience Cloud Sites

To administer Health Cloud site:

- Health Cloud for Community

To administer Video Call feature:

- Health Cloud Video Calls permission set

My Appointment OmniScript	Value
Type	healthCloudIAM
SubType	myAppointments
Theme	lightning
Display	Display OmniScript on page
Button Variant	brand

My Benefits OmniScript	Value
Type	healthCloudIAM
SubType	viewBenefits
Theme	lightning
Display	Display OmniScript on page
Button Variant	brand

6. On the Video Visit page, add the **Video Call** component.
7. **Publish** the Experience site.
8. Navigate to the Administration Workspace and add profiles and permission sets.
 - a. In Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
 - b. Select **Workspaces** next to the patient's Experience site.
 - c. Click the Administration tile.
 - d. Click **Members**.
 - e. Add the System Administrator profiles to the **Selected Profiles**.
 - f. Add the Health Cloud Admin, Health Cloud Permission Set License, and Health Cloud Standard permission sets to the **Selected Permission Sets**.
 - g. **Save** your work.
9. On the Administration panel, click **Settings** and **Activate** the Experience site.

SEE ALSO:

[Salesforce Help: Experience Cloud](#)

[Salesforce Help: OmniStudio](#)

Give Video Self-Service Users Access to Your Experience Cloud Site

USER PERMISSIONS

To access Health Cloud objects:	Health Cloud Platform
To access Health Cloud objects for site users:	Health Cloud for Experience Cloud Sites
To administer Health Cloud site:	Health Cloud for Community
To administer Provider Search:	Health Cloud Provider Network Management
To edit OmniScripts:	OmniStudio Admin
To use OmniStudio:	OmniStudio User
To schedule appointments:	Health Cloud Appointment Management

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud, Video Calls Add-On license, and Health Cloud Customer Community or Health Cloud Customer Community Plus license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

Give Video Visits self-service users the profile, permission sets, and object access needed to scheduled appointments themselves.

Create the necessary profile, permissions, and access to show your community users available appointment slots and allow them to schedule an appointment.

[Create Permission Sets for Video Visit Self-Service Users](#)

Video Visit self-service users require access to objects and fields to schedule calls. Create a permission set to provide this access to these users.

[Create a Profile for Video Visit Self-Service Users](#)

Create a profile to which you can assign the necessary permission sets, and object CRUD permissions required to schedule video visits.

[Verify Video Visit Self-Service Licenses and Permissions for Admins](#)

Video Visit Self-Service requires that admins are assigned OmniStudio and Health Cloud Community or Health Cloud Community Plus licenses and specific Health Cloud and Patient Appointment Scheduling permissions.

[Add Portal Users for Video Visit Self-Service Experience Site](#)

To allow a patient portal to schedule and attend video visits, assign them a license, profile, and permissions.

Create Permission Sets for Video Visit Self-Service Users

Video Visit self-service users require access to objects and fields to schedule calls. Create a permission set to provide this access to these users.

The custom profile for the Video Visit user must be created first for the Customer Community or Customer Community Plus user. Then the profile is available to assign these permissions.

1. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
2. Next to the **HRT Customer Community Plus User**, click **Edit**.
For the Customer Community User, use the HRT Customer Community User profile.
3. Grant the user the following Standard Object Permissions.

1. Object Name	Basic Access
Accounts	Read, Create
Appointment Reasons	Read
Appointment Reason Engagement Channel Type	Read
Appointment Topic Time Slots	Read
Care Provider Facility Specialties	Read
Care Provider Searchable Field	Read
Care Specialties	Read
Care Specialty Taxonomies	Read
Care Taxonomies	Read
Cases	Read, Create, Edit
Code Sets	Read
Contacts	Read
Documents	Read
Document Checklist Items	Read
Engagement Channel Types	Read
Healthcare Diagnoses	Read
Healthcare Facilities	Read
Healthcare Facility Networks	Read
Healthcare Payer Networks	Read
Healthcare Practitioner Facilities	Read, Create, Edit
Healthcare Practitioner Facility Appointments	Read, Create, Edit
Healthcare Procedures	Read

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

Video Visits require the Video Calls add on license and Health Cloud Customer Community or Health Cloud Customer Community Plus license

USER PERMISSIONS

To access Health Cloud objects for site users:

- Health Cloud for Experience Cloud Sites

To administer Health Cloud site:

- HealthCloud for Community

Healthcare Providers	Read
Healthcare Provider NPIs	Read
Healthcare Provider Specialties	Read
Healthcare Provider Taxonomies	Read
Member Plans	Read, Create, Edit
Omni Data Transformations	Read
Omni Data Transformation Items	Read
Omni Electronic Signature Templates	Read
Omni Processes	Read
Omni Process Compilations	Read
Omni Process Elements	Read
Omni Process Transient Data	Read
OmniScript Saved Sessions	Read
Omni UI Cards	Read
Operating Hours	Read
Service Appointments	Read, Create, Edit
Service Resources	Read
Service Territories	Read
Solutions	Read
Work Types	Read
Work Type Care Specialties	Read
Work Type Code Set Bundles	Read
Work Type Groups	Read

4. On the Profiles page, click the HRT Customer Community Plus user again. In Field-Level Security, ensure that all fields for the objects listed in the preceding table have **Read Access**. For the Time Slot object, also assign **Edit Access**.
This option isn't available to the Customer Community User Profile.
5. In the Enabled Apex Class Access section, click **Edit** and add all Available Apex Classes to Enabled Apex Classes.
6. **Save** your work.

Create a Profile for Video Visit Self-Service Users

Create a profile to which you can assign the necessary permission sets, and object CRUD permissions required to schedule video visits.

These steps are similar to setting up a Health Cloud Community user, with any differences explained in an info note.

1. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
2. Next to the **Customer Community Plus User**, click **Clone**.
For the Customer Community User, clone the Customer Community User Profile.
3. Name the profile. We suggest *HRT Customer Community Plus User*.
4. **Edit** the cloned profile.
5. In the **Administrative permissions** section, select **Manage Health Cloud**, **Select Files from Salesforce**, and **Share Files with People in Experience Cloud Sites**.
These options aren't available to the Customer Community User Profile.
6. In the **General User Permissions** section, select **View Content in Portals**.
This option isn't available to the Customer Community User Profile.
7. Grant the user the following Standard Object Permissions.

1. Object Name	Basic Access
Accounts	Read, Create
Appointment Reasons	Read
Appointment Reason Engagement Channel Type	Read
Appointment Topic Time Slots	Read
Care Provider Facility Specialties	Read
Care Provider Searchable Field	Read
Care Specialties	Read
Care Specialty Taxonomies	Read
Care Taxonomies	Read
Cases	Read, Create, Edit
Code Sets	Read
Contacts	Read
Documents	Read
Document Checklist Items	Read
Engagement Channel Types	Read
Healthcare Diagnoses	Read

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

Video Visits require the Video Calls add on license and Health Cloud Customer Community or Health Cloud Customer Community Plus license

USER PERMISSIONS

To access Health Cloud objects for site users:

- Health Cloud for Experience Cloud Sites

To administer Health Cloud site:

- HealthCloud for Community

Healthcare Facilities	Read
Healthcare Facility Networks	Read
Healthcare Payer Networks	Read
Healthcare Practitioner Facilities	Read, Create, Edit
Healthcare Practitioner Facility Appointments	Read, Create, Edit
Healthcare Procedures	Read
Healthcare Providers	Read
Healthcare Provider NPIs	Read
Healthcare Provider Specialties	Read
Healthcare Provider Taxonomies	Read
Member Plans	Read, Create, Edit
Omni Data Transformations	Read
Omni Data Transformation Items	Read
Omni Electronic Signature Templates	Read
Omni Processes	Read
Omni Process Compilations	Read
Omni Process Elements	Read
Omni Process Transient Data	Read
OmniScript Saved Sessions	Read
Omni UI Cards	Read
Operating Hours	Read
Service Appointments	Read, Create, Edit
Service Resources	Read
Service Territories	Read
Solutions	Read
Work Types	Read
Work Type Care Specialties	Read
Work Type Code Set Bundles	Read
Work Type Groups	Read

8. For Custom Object Permissions, grant the user Read access to DataRaptor Bulk Data.

9. **Save** your work.
10. On the Profiles page, click the HRT Customer Community Plus user again. In Field-Level Security, ensure that all fields for the objects listed in the preceding table have **Read Access**. For the Time Slot object, also assign **Edit Access**.
This option isn't available to the Customer Community User Profile.
11. In the Enabled Apex Class Access section, click **Edit** and add all Available Apex Classes to Enabled Apex Classes.
12. **Save** your work.
13. Navigate to the Administration Workspace and add the HRT Customer Community Plus profile .
 - a. In Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
 - b. Select **Workspaces** next to the patient's Experience site.
 - c. Click the Administration tile.
 - d. Click **Members**.
 - e. Add the HRT Customer Community User and System Administrator profiles to the **Selected Profiles**.
 - f. **Save** your work.

Verify Video Visit Self-Service Licenses and Permissions for Admins

Video Visit Self-Service requires that admins are assigned OmniStudio and Health Cloud Community or Health Cloud Community Plus licenses and specific Health Cloud and Patient Appointment Scheduling permissions.

Verify that you have the necessary licenses and permissions required to set up Video Visit Self-Service.

1. From Setup, in the Quick Find box, enter *Company Information*, and then select **Company Information**.
2. Confirm that the admin user has these Permission Set Licenses:
 - a. Health Cloud for Experience Cloud Sites
 - b. Health Cloud Platform
 - c. Health Cloud Provider Network Management
 - d. HealthCloud for Community
 - e. OmniStudio
 - f. OmniStudio User
 - g. Salesforce Scheduler
3. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
4. Confirm that the admin user has these permissions:
 - a. Health Cloud Appointment Management
 - b. Health Cloud Self-Service
 - c. Health Cloud Foundation
 - d. Health Cloud Video Calls
 - e. Health Cloud Video Calls for Experience Cloud
 - f. OmniStudio Admin

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

Video Visits require the Video Calls add on license and Health Cloud Customer Community or Health Cloud Customer Community Plus license

USER PERMISSIONS

To view company information:

- View Setup and Configuration

To assign permission sets:

- Assign Permission Sets

Add Portal Users for Video Visit Self-Service Experience Site

To allow a patient portal to schedule and attend video visits, assign them a license, profile, and permissions.

1. On the person account record, click the actions dropdown and select **Enable Customer User**. This creates a Salesforce user record with some details prepopulated.
2. Click  to access Setup.
3. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
4. Find the User record that you just created and click **Edit**.
5. Enter required fields, such as First Name, Last Name, Email, and Username.
6. For **Role**, select an appropriate role for a community user.
7. For **User License**, select Customer Community.
8. For **Profile**, select HRT Customer Community Plus User.
Use HRT Customer Community Profile for a Customer Community user.
9. Select **Generate new password and notify user immediately** to send the user an email with their login information.

If you opt to notify the user immediately, but the user isn't a member of any active site, Salesforce doesn't send the email. Alternatively, you can send a welcome email with the login information by selecting the Send welcome email option when you activate a site.
10. **Save** your work.
11. On the User screen, scroll to **Permission Set Assignments**.
12. Click **Edit Assignments**.
13. Assign these permission sets:
 - a. Health Cloud Foundation
 - b. Health Cloud Appointment Self-Service
 - c. HRT Customer Community Plus User or HRT Customer Community User
 - d. Benefit Verification for Experience Cloud Sites
 - e. Salesforce Scheduler Resource
 - f. OmniStudio User
14. **Save** your work.
15. In the Permission Set License Assignments related list, verify that you see these licenses:
 - Health Cloud for Experience Cloud Sites
 - Health Cloud Platform
 - OmniStudio User

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud

Video Visits require the Video Calls add-on license and Health Cloud Customer Community or Health Cloud Customer Community Plus license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

To access Health Cloud objects for site users:

- Health Cloud for Experience Cloud Sites

To administer Health Cloud site:

- Health Cloud for Community

To administer Video Call feature:

- Health Cloud Video Calls permission set

Set Up an Email Appointment Link for Guest Users

Confirm a guest user's appointment with an automated email that includes a button to access your Experience Cloud site where they can access their video visit.

1. Set up the button in the email template to connect to your Experience site page where guest users fill out the Video Visits intake form.
 - a. From Setup, in the Quick Find box, enter *Email Templates*, then select **Classic Email Templates**.
 - b. Click **Scheduled Video Call Details for Unauthenticated Users**.
 - c. Click **Edit HTML Version**.
 - d. At the end of the html, look for

```
class="button"href=https://orgname.force.com/vcquests/s/?videocallinfo={!ServiceAppointment.AppointmentBookingInfoURL}"".
```

Replace *orgname* with your org name.

You can find your org name in the url when logged on to Salesforce.

- e. Save your work.
2. Create an email alert for the Appointment Confirmation.
 - a. From Setup, in the Quick Find box, enter *Email Alerts*, then select **Email Alerts**.
 - b. Click **New Email Alert**.
 - c. Add a Description. We suggest *Guest Appointment Confirmation*.
 - d. Add a Unique Name. We suggest *Guest_Appointment_Confirmation*.
 - e. Select the **Service Appointment** object.
 - f. Choose the Appointment Confirmation for Unauthorized Users email template that you previously edited.
 - g. For Recipient Type, choose Service Appointment Owner and Record Created as Selected Recipients.
 - h. Choose Current User's Email Address as the From Email.
Alternatively, set up a do-not-reply email address for this alert.
 - i. Save your work.
3. Create a record-triggered flow to automatically send an appointment confirmation email when the appointment is booked.
 - a. From Setup, in the Quick Find box, enter *flows*, and then select **Flows**.
 - b. Click **New Flow**.
 - c. Select **Record-Triggered Flow**, then click **Create**.

EDITIONS

Available in: Available in: **Enterprise** and **Unlimited** editions with Health Cloud and Video Calls Add-On License. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

Configure Video Calls feature:

- Video Calls permission set

To enable email tracking

- Customize applications

- d. Select **Service Appointment** as the object.
 - e. Choose to trigger a flow when **A record is created**.
 - f. For Condition Requirements, select **All conditions are met**.
 - g. Add a Condition with these values:
 - Field: *SchedStartTime*
 - Operator: *Is Null*
 - Value: *\$GlobalConstant.False*
 - h. Add another condition with these values:
 - Field: *ContactID*
 - Operator: *Is Null*
 - Value: *\$GlobalConstant.False*
 - i. Optimize the Flow for **Actions and Related Records**.
 - j. Click **Done**.
 - k. Add an element. Choose **Send Email Alert**.
 - l. In the Action box, enter *Guest.Appointment Confirmation*.
 - m. Add a Label. We suggest *Send Guest Confirmation Email*.
 - n. Add an API Name. We suggest *Send_Guest Confirmation_Email*.
 - o. For Select Input Variables, choose *{ \$Record.ID }*.
 - p. Click **Done**
 - q. Save and activate the flow.
4. To add a scheduled path and send an appointment reminder, create a version of the appointment confirmation flow. These steps create a flow that sends an email one day before the scheduled appointment.
- a. From Setup, in the Quick Find box, enter *flows*, and then select **Flows**.
 - b. Click the label of the flow that you built for appointment confirmation.
 - c. Click **Save As**.
 - d. Click the **A New Flow** tab.
 - e. Add a name for Flow Label. We suggest *Send Email for Appointment Reminder*.
 - f. Use the default Flow API Name.
 - g. Save your work.
 - h. Click the Start button to expand. Then click **Add Scheduled Paths**.
 - i. Enter a name for Path Label. We suggest *One Day Prior To Start*.
 - j. Use the default API Name.
 - k. For Time Source, select **ServiceAppointment:ScheduledStart**.
 - l. For Offset Number, select *1*.
 - m. For Offset Option, select *Days Before*
 - n. In Advanced Options for Batch Size, enter *200*.

- o. Click **Done**.
- p. Save and activate your flow.

5. Enable email tracking.

The appointment confirmation email will include personal health information about the patient. Tracking these emails is suggested to ensure they are received by the intended recipient.

SEE ALSO:

[Salesforce Help: Email Alert Actions](#)

[Salesforce Help: Enable Email Tracking](#)

Setup an Email Appointment Link for Authenticated Users

Let your patients know with an automated email that their appointment is confirmed. Provide a convenient button in the email to access your Experience Cloud site.

1. Edit the button in the email template so the link connects to your Experience site login page.
 - a. From Setup, in the Quick Find box, enter *Email Templates*, then select **Classic Email Templates**.
 - b. Click the **Scheduled Video Call Details for Authenticated Users** email template.
 - c. Click **Edit HTML Version**.
 - d. At the end of the html, look for `class="button"href=[PORTAL_URL]"`. Replace the `[PORTAL_URL]` with the URL of your Experience site login page.
 - e. Save your work.
2. Next, create an email alert for the appointment confirmation.
 - a. From Setup, in the Quick Find box, enter *Email Alerts*, then select **Email Alerts**.
 - b. Click **New Email Alert**.
 - c. Add a Description. We suggest *Appointment Confirmation*.
 - d. Add a Unique Name. We suggest *Appointment_Confirmation*.
 - e. Select the **Service Appointment** object.
 - f. Select the **Scheduled Video Call Details for Authenticated Users** email template you edited.
 - g. For Recipient Type, choose **Service Appointment Owner and Record Created as Selected Recipients**.
 - h. For From Email Address, choose **Current User's Email Address**.
Alternatively, set up a do-not-reply email address for this alert.
 - i. Save your work.
3. Create a record-triggered flow to automatically send an appointment confirmation email when the appointment is booked.
 - a. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows** under Process Automation.
 - b. Click **New Flow**.
 - c. Select **Record-Triggered Flow**, then click **Create**.

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud and Video Calls Add-On license. Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

USER PERMISSIONS

Configure Video Calls feature

- Video Calls permission set

Provide user access to Video Calls on Experience Cloud site

- Video Calls for Experience Cloud permission set

To enable email tracking

- Customize Application

- d. Select **Service Appointment** as the object.
 - e. Choose to trigger a flow when **A record is created**.
 - f. For Condition Requirements, select **All conditions are met**.
 - g. Add a Condition with these values:
 - Field: *SchedStartTime*
 - Operator: *Is Null*
 - Value: *\$GlobalConstant.False*
 - h. Add another condition with these values:
 - Field: *ContactID*
 - Operator: *Is Null*
 - Value: *\$GlobalConstant.False*
 - i. For When to Run the Flow for Updated Records select *Only when a record is updated to meet the condition requirements*.
 - j. Optimize the Flow for **Actions and Related Records**.
 - k. Click **Done**.
 - l. Add the element **Send Email Alert**.
 - m. In the Action box type the name of the email alert, for example *Appointment Confirmation*.
 - n. Add a Label. We suggest *Send Confirmation Email*.
 - o. Add an API Name. We suggest *Send_Confirmation_Email*.
 - p. For Select Input Variables, choose *{ \$Record.ID }*.
 - q. Click **Done**
 - r. Save and activate the flow.
4. To add a scheduled path and send an appointment reminder, create a version of the appointment confirmation flow. These steps create a flow that sends an email one day before the scheduled appointment.
 - a. From Setup, in the Quick Find box, enter *flows*, and then select **Flows**.
 - b. Click the label of the flow that you built for appointment confirmation.
 - c. Click **Save As**.
 - d. Click the **A New Flow** tab.
 - e. Add a name for Flow Label. We suggest *Send Email for Appointment Reminder*.
 - f. Use the default Flow API Name.
 - g. Save your work.
 - h. Click the Start button to expand. Then click **Add Scheduled Paths**.
 - i. Enter a name for Path Label. We suggest *One Day Prior To Start*.
 - j. Use the default API Name.
 - k. For Time Source, select **ServiceAppointment:ScheduledStart**.
 - l. For Offset Number, select *1*.
 - m. For Offset Option, select *Days Before*.

- n. In Advanced Options for Batch Size, enter *200*.
 - o. Click **Done**.
 - p. Save and activate your flow.
- 5. Enable email tracking.

The appointment confirmation email will include personal health information about the patient. Tracking these emails is suggested to ensure they are received by the intended recipient.

SEE ALSO:

[Salesforce Help: Email Alert Actions](#)

[Salesforce Help: Enable Email Tracking](#)

Medication Management and Medication Review

Improve patients' medication regimen and reduce medication-related errors with Medication Management and Medication Review. Capture standardized information related to medication with the help of Medication Review. Use Medication Management to perform medication reconciliation of patients' medication list and detect potential drug-to-drug interactions.

[RxNorm Terms and Information](#)

Health Cloud Medication Management and Medication Review are not intended for use by, and should not be used by, organizations: (i) located in; or (ii) otherwise engaged in the provision of medical, healthcare, disease treatment or management, health benefits, research or similar services within, jurisdictions other than the United States, Australia, Canada, and the United Kingdom (excluding Northern Ireland).

[Medication Review](#)

A patient's medications list may consist of a long list of prescription medicines and non-prescription medications from different sources. Medication Review helps providers and care coordinators optimize, review, and efficiently manage the patient's medication list.

[Medication Management](#)

Medication Management is a Health Cloud add-on product that helps providers and care coordinators manage the medication regimen of their patients, helping to improve patient safety and reduce healthcare costs.

RxNorm Terms and Information

Health Cloud Medication Management and Medication Review are not intended for use by, and should not be used by, organizations: (i) located in; or (ii) otherwise engaged in the provision of medical, healthcare, disease treatment or management, health benefits, research or similar services within, jurisdictions other than the United States, Australia, Canada, and the United Kingdom (excluding Northern Ireland).

Health Cloud Medication Management and Medication Review are solely intended to help you provide quality services to patients or plan members by giving you capabilities to track and keep records of medications they take. It is not intended to be used for any other purpose. For example, do not use Health Medication Management for any purposes related to the reimbursement: (1) by Medicare, Medicaid, other United States federal or state health programs, or private health insurers, or any other country's national or private health insurance program(s); of (2) the direct costs of any prescription medications, pharmaceutical drugs, or controlled substances.

Use Health Cloud Medication Management and/or Medication Review in compliance with all applicable healthcare and privacy laws (including US HIPAA where applicable). It is your responsibility to: (i) determine which individuals within your organization can access

Health Cloud Medication Management; and (ii) set the appropriate permissions consistent with your organization's use case and related compliance obligations.

About RxNorm and NLM

For customers in the United States, RxNorm provides a normalized naming system for generic and branded drugs in the U.S. and tools for supporting semantic interoperability between drug terminologies and medication knowledge base systems. RxNorm is produced by, and provided courtesy of, the U.S. National Library of Medicine (NLM).

This product uses publicly available data provided courtesy of the U.S. National Library of Medicine, National Institutes of Health, Department of Health and Human Services; NLM is not responsible for the product and does not endorse or recommend this or any other product.

About RxNorm Interaction API

For customers in the United States, NLM's RxNorm Interaction API is a web service for accessing drug-drug interactions. The Interaction API uses two sources for its drug interaction information - ONCHigh and DrugBank. When Health Cloud Medication Management is enabled, your use of the Interaction API is subject to the NLM's Terms of Service, found [here](#).

Medication Review

A patient's medications list may consist of a long list of prescription medicines and non-prescription medications from different sources. Medication Review helps providers and care coordinators optimize, review, and efficiently manage the patient's medication list.

[Supporting Medication Review](#)

Health Cloud offers Medication Review as a Lightning component that you can configure on Person Account record pages for your clinicians to use. When you use it with the built-in flow that's integrated with RxNorm, this component makes it easier for your clinicians to record medication-related information, with fewer errors.

[Objects Used in Medication Review](#)

Medication Review uses objects from the Health Cloud clinical data model to store medication-related information. The Clinical data model must be enabled for your org if you want to use Medication Review.

[Enable Medication Review and Assign Permissions to Users](#)

Before your clinicians can start using Medication Review, you must enable the features and assign the required permissions to your users.

[Configure Patient Medication Manager](#)

Add the Patient Medication Manager Lightning component to person account record pages so that your clinicians can start using Medication Review. You can choose which fields appear in the component. You can also select a custom flow for adding medications instead of the default Add Patient Medication flow.

Create a Custom Flow to Add Medications

Provide additional flexibility for your clinicians to add medications by using a custom flow instead of the built-in Add Patient Medication flow. Depending on your business needs, you can set up a custom flow and associate it with the Patient Medication Manager lightning component.

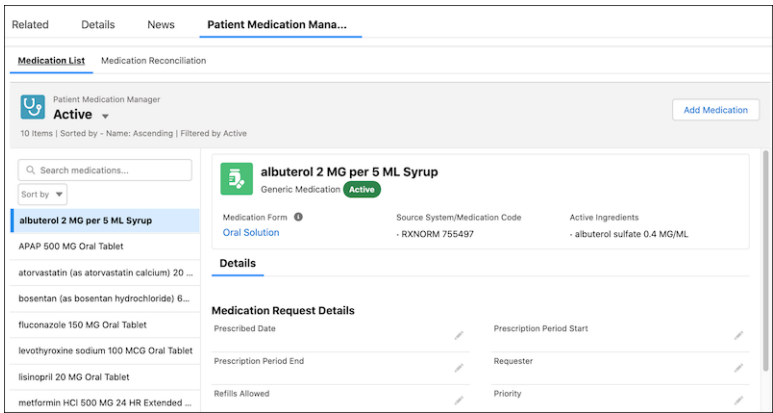
SEE ALSO:

- Salesforce Help: Medication Review
- Salesforce Help: Medication Management
- Health Cloud Developer Guide: Medication Management Data Model

Supporting Medication Review

Health Cloud offers Medication Review as a Lightning component that you can configure on Person Account record pages for your clinicians to use. When you use it with the built-in flow that’s integrated with RxNorm, this component makes it easier for your clinicians to record medication-related information, with fewer errors.

Patient Medication Manager



The Patient Medication Manager lightning component gives your clinicians a comprehensive list view of a patient's medications. This list view makes it easier for a trained eye to spot conflicting medications, which helps to reduce medication-related errors. Your clinicians can select a medication from this list to view details. Viewing the data in a single list view enables your clinicians to quickly review and update medications without navigating multiple records and objects.

RxNorm Integration

Add Medication

Search

metFORMIN / pioglitazone

Brand Name Medication (4)

Generic Medication (4)

Medications found: 4

☐ metformin HCl 850 mg and pioglitazone (as pioglitazone hydrochloride) 15 MG Oral Tablet

☐ metformin hydrochloride 1000 MG / pioglitazone 15 MG 24 HR Extended Release Oral Tablet

☐ metformin hydrochloride 1000 MG / pioglitazone 30 MG 24 HR Extended Release Oral Tablet

☐ metformin hydrochloride 500 MG / pioglitazone 15 MG Oral Tablet

Next

The Add Medication flow in the Patient Medication Manager lightning component is integrated with [RxNorm](#) to bring in standardized medication data from the U.S. National Library of Medicine. Your clinician just has to search for a medication based on its name or ingredients, select a medication from the results, and then enter the patient-specific prescription. Our flow takes care of everything else behind the scenes, like creating different types of records and saving medication-specific details from RxNorm. This flow reduces the amount of information a clinician has to manually enter, thus reducing medication issues caused by typing errors.

Objects Used in Medication Review

Medication Review uses objects from the Health Cloud clinical data model to store medication-related information. The Clinical data model must be enabled for your org if you want to use Medication Review.

Here’s the list of objects that Medication Review uses and the required permissions for your clinicians.

Object	Purpose	Access
Account	- Create business accounts for medication manufacturers - View person account records for patients	- Create - Read
Code Set	Create code set records by using data imported by	- Create - Read

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Purpose	Access
	RxNorm to represent Medication codes Find and add appropriate code sets to medication-related records	
Code Set Bundle	- Create code set bundle records using data imported by RxNorm to represent Medication codes - Find and add appropriate code set bundles to medication-related records	- Create - Read
Drug Display Terms	Display medications in the Medication List	
Medication	Create medication records using data imported by RxNorm	- Create - Read
Medication Dispense	Create medication dispense records by using the data entered by the clinician in the Medication Dispense Details section	- Create - Read - Update
Medicinal Ingredient	Specify ingredients of medications using data imported by RxNorm	- Create - Read
Medication Request	Create medication request records by using the data entered by the clinician in the Medication Request Details section	- Create - Read - Update
Medication Statement	Create medication statement records by using the data entered by the clinician in the Additional Details section	- Create - Read - Update
Medication Statement Detail	Create medication statement detail records by using the data entered by the clinician in the Additional Details section	- Create - Read - Update
Patient Medication Dosage	Create Patient Medication Dosage records by using the data entered by the clinician in the Dosage Details section	- Create - Read - Update

These objects also reference other objects in the Clinical data model. For instance, Patient Medication Dosage references Activity Timing, and Medication Statement references Care Observation.

 Note:

- Make sure that you add all the appropriate code set and code set bundle values in your org for your clinicians. These code sets and code set bundles are required to enter medication-related information for their patients.
- Make sure you have Read and View All access to the Drug Display Terms object. Access to this object is required to add medications in the Patient Medication Manager.

SEE ALSO:

[Health Cloud Developer Guide: Medication Management Data Model](#)[Health Cloud Developer Guide: Clinical Data Model](#)

Enable Medication Review and Assign Permissions to Users

Before your clinicians can start using Medication Review, you must enable the features and assign the required permissions to your users.

Prerequisite: Ensure that the Clinical data model is enabled.

1. From Setup, in the Quick Find box, enter *Medication Management and Medication Review Settings*, and then select **Medication Management and Medication Review Settings**.
2. Select the checkbox to acknowledge the Medication Review terms of use, and set Medication Review to **Enabled**.
3. Assign the Health Cloud Foundation permission set to your users to give them access to the Medication Review feature.

Now that you've enabled Medication Review and assigned the permissions, add the Lightning component to the relevant pages for your clinicians to use.

SEE ALSO:

[Health Cloud Developer Guide: Clinical Data Model](#)[Salesforce Help: Configure Patient Medication Manager for Medication Management](#)

Configure Patient Medication Manager

Add the Patient Medication Manager Lightning component to person account record pages so that your clinicians can start using Medication Review. You can choose which fields appear in the component. You can also select a custom flow for adding medications instead of the default Add Patient Medication flow.

Make sure this component is added to Person Account record pages, such as the Patient page in Health Cloud - Lightning Console.

Patient Medication Manager isn't compatible with Business Account record pages, even if you can place the component on them.

1. Open a Person Account record page in the Lightning App Builder in one of these ways:
 - (Recommended.) On the page in your org, select **Edit Page** from the **Setup** menu.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To enable Medication Review

- Customize Application

To assign permission sets

- Assign Permission Sets
- View Setup and Configuration

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To configure the component:

- Customize Application

- From Setup, go to Account in the Object Manager and select **Lightning Record Pages**. Then, select the appropriate Person Account record page and click **Edit**.
 - From Setup, in the Quick Find box, find **Lightning App Builder**. Then click **Edit** for the appropriate Person Account record page.
2. Place the Patient Medication Manager component on your page layout.
 3. Select the component you placed on your page layout to bring up its properties.
 4. Select a flow from the Add Medication Flow dropdown. You can select the default Add Patient Medication flow or a compatible custom flow that you configured.
 5. Click **Select** in these sections and choose the fields you want to include:
 - Medication Request Fields
 - Medication Dispense Fields
 - Patient Medication Dosage Fields
 - Medication Statement Fields
 6. Sort the selected fields as required, and then click **OK**.
 7. When you're done, save your configuration and activate your page.

That's it! Your users can start using Medication Review now. No additional configuration is required to enable the RxNorm integration.

Create a Custom Flow to Add Medications

Provide additional flexibility for your clinicians to add medications by using a custom flow instead of the built-in Add Patient Medication flow. Depending on your business needs, you can set up a custom flow and associate it with the Patient Medication Manager lightning component.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Design and create a flow to suit your clinician's needs.
3. To ensure your flow is compatible with the Patient Medication Manager lightning component, add an input variable called *recordId* for Person Account records.
4. Go to the Lightning App Builder from the Person Account record page. On the Patient Medication Manager component, select the custom flow from the Add Medication Flow dropdown menu.

Now, when your clinicians start adding a medication, the custom flow is triggered instead of the built-in flow.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To associate the custom flow to the component:

- Read permission on Account object

Medication Management

Medication Management is a Health Cloud add-on product that helps providers and care coordinators manage the medication regimen of their patients, helping to improve patient safety and reduce healthcare costs.



Note: You must set up and configure Medication Review before working with the Medication Management add-on.

With Medication Management, your users can perform medication reconciliation and medication therapy review to improve care quality, safety, and patient experience.

- Medication Reconciliation helps providers and care coordinators reconcile their patients' medications, stay informed about any potential drug-to-drug interactions, and add relevant recommendations during transitions of care.

- Medication Therapy Management helps healthcare providers and pharmacists to optimize a patient's medication regimen for the best possible therapeutic outcomes and to prevent expensive drug-related problems. Medication therapy reviews are either comprehensive or targeted.

[Medication Reconciliation](#)

Medication reconciliation is a comprehensive evaluation of a patient's medication regimen achieved by comparing the patient's current and previous medication lists. The process helps to ensure health benefits and safety by identifying if the patient is taking new medications, using non-prescription drugs, or has changed previous medications.

[Medication Therapy Management](#)

Medication Therapy Management offers a range of services to help patients optimize their medication regimen for the best possible therapeutic outcomes, reduced medication-related adverse events, and minimized healthcare costs.

[Medication Management Data Model](#)

The Medication Management add-on enables the Medication Management data model. The FHIR R4-aligned Clinical data model must be enabled, and the Medication Review feature configured, if you want to use the Medication Management add-on.

[Enable Medication Management and Assign Permissions to Users](#)

Enable Medication Management and assign the required permission sets so that providers and care coordinators can perform reconciliations of their patients' medication regimen and medication therapy reviews.

[Configure Patient Medication Manager for Medication Management](#)

Add the Patient Medication Manager Lightning component to person account record pages—such as the Patient page in Health Cloud - Lightning Console—so that your clinicians can start using Medication Management.

[Configure the Notes Tab in the Patient Medication Manager](#)

Enable care coordinators and providers to capture notes for each medication in the Patient Medication Manager.

[Create Care Programs for Medication Therapy Review](#)

Use Health Cloud's Care Program feature to create a care program for medication therapy reviews for the corresponding year. Pharmacists can conduct comprehensive and targeted medication reviews for patients who meet eligibility criteria and are enrolled in the care program.

[Configure Reasons for Care Program Opt-Out](#)

Help your pharmacists record the reasons why their patients opted out of a medication therapy management care program. Patients can temporarily or permanently opt-out at any time, so it's important to understand and track the reason why.

[Understand and Customize the Medication Therapy Review Flow](#)

The built-in Start Medication Therapy Review flow helps streamline the initiation process of comprehensive and targeted medication reviews by determining the patient's cognitive status based on their health conditions.

[Create Predefined Tasks for Medication Therapy Management](#)

Help your pharmacists to effortlessly recommend to-do list items to their patients during medication therapy reviews. You can set up predefined, patient-specific tasks for addressing healthcare issues that pharmacists can assign to patients.

SEE ALSO:

[Salesforce Help: Medication Review](#)

[Salesforce Help: Medication Management](#)

[Health Cloud Developer Guide: Medication Management Data Model](#)

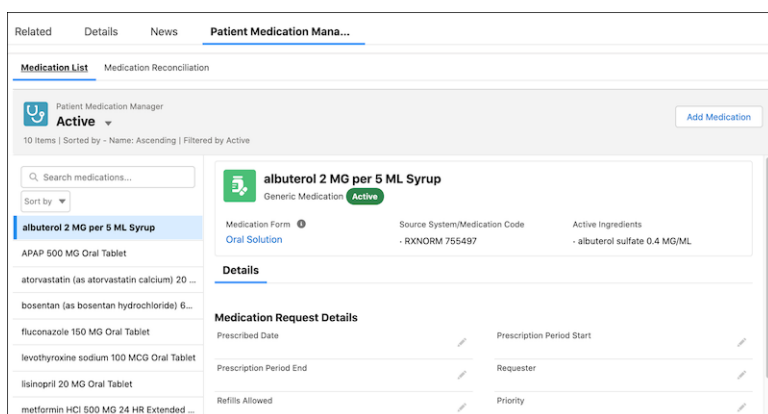
Medication Reconciliation

Medication reconciliation is a comprehensive evaluation of a patient's medication regimen achieved by comparing the patient's current and previous medication lists. The process helps to ensure health benefits and safety by identifying if the patient is taking new medications, using non-prescription drugs, or has changed previous medications.

Now, let's see how Health Cloud helps your users handle all aspects of a medication reconciliation and conduct reviews with ease.

- The Patient Medication Manager lightning component enables your providers and care coordinators to easily identify an accurate list of the patient's medications, including drug name, dosage, frequency, route, and more. With these details in hand, your users can quickly spot and avoid medication errors such as omissions, duplications, and incorrect dosages.
- Based on your user's review of the medication list, they can add medication recommendations and detailed notes to guide patients. They can also add recommendations when there's a discrepancy that could lead to adverse drug interactions, a need to change dosage and instruction of medication, and more.
- The seamless integration with RxNorm keeps your providers and care coordinators informed about any potential drug-to-drug interactions when they're performing a medication reconciliation. With timely information on the interacting ingredients and their severity, your users can establish a safe medication regimen for their patients.

Patient Medication Manager



Medication Therapy Management

Medication Therapy Management offers a range of services to help patients optimize their medication regimen for the best possible therapeutic outcomes, reduced medication-related adverse events, and minimized healthcare costs.

The Medication Therapy Management program includes two review types:

- **Comprehensive Medication Review**

A yearly, all-inclusive review of an enrolled patient. The structured and extensive evaluation process thoroughly analyzes all of a patient's active medications and relevant medical conditions. Patients are assigned to-do lists with action items to help improve their health outcomes.

- **Targeted Medication Review**

A focused review that identifies actual or potential problems with specific medications in the patient's medication regimen. The review's ongoing monitoring approach is a cost-effective option that helps to identify and proactively prevent or resolve medication issues. Targeted Medication Review can be conducted quarterly or whenever required, such as when a patient is discharged from a hospital, or if a health issue is identified.

Patients are enrolled in a Medication Therapy Management program based on eligibility criteria such as count and cost of their medications, chronic diseases, and more. Enrolled patients can opt out of the program at any time.

Medication Therapy Management works seamlessly with other Health Cloud features to conduct effective reviews.

- Use the Care Programs feature to create a program for enrolling patients that is specific to medication therapy review.
- When combined with the Patient Medication Manager lightning component, the built-in Start Medication Therapy Review flow makes the review initiation process seamless. Everything from identifying the patient's cognitive status and health conditions causing the impairment to gathering information from the surrogate decision maker, is easy to record.
- Medication therapy management integrates with the Care Plan, Care Plan Activity, Care Plan Template, and Action Plan Template Assignment objects for smooth management of patient's to-do lists. Simply configure a set of tasks for each healthcare issue and your users can directly assign these predefined tasks to patients.
- RxNorm helps in detecting potential drug-to-drug interactions in a patient's medication regimen. By quickly identifying such errors, your users can help improve patient safety and overall health.
- Use Data Processing Engine or Business Rules Engine to define the eligibility rules for the medication therapy management program.
- Use Document Template Designer to create a document template for the comprehensive medication review summary report.

Patient Medication Manager

The screenshot displays the 'Patient Medication Manager' interface. At the top, there's a tab for 'Comprehensive Medication Review' which is highlighted with an orange box. Below this, the 'Comprehensive Medication Review' section shows a dropdown menu with 'CMR-InProgress-2022-07-29' selected. To the right are 'Cancel' and 'Mark as Complete' buttons. Below this is a summary row with fields for Status (In Progress), Start Date (7/29/2022, 12:51 PM), End Date, and Conducted By (Admin User). A 'Surrogate Decision Maker ID' field is also present. Below the summary is a tabbed interface with 'Medication Review' selected. Under this tab, there's a list of medications. One medication, 'Lipitor 10 MG Oral Tablet', is shown with a status of 'Active'. Below the medication list, there's a 'Details' section for the selected medication. At the bottom, there's a status bar indicating 'Medication review complete'.

Medication Management Data Model

The Medication Management add-on enables the Medication Management data model. The FHIR R4-aligned Clinical data model must be enabled, and the Medication Review feature configured, if you want to use the Medication Management add-on.

Medication Management data model includes objects to help your users perform medication reconciliation and medication therapy reviews when you have the Medication Management add-on.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Medication Management Add-On license

Object	Purpose	Access
Medication Reconciliation	Create medication reconciliation records when your clinician starts a reconciliation from the Medication Reconciliation tab.	• Create • Read • Update • Delete
Medication Reconciliation Recommendation	Create medication reconciliation recommendation records by using the data entered by the clinician in the Medication Reconciliation tab.	• Create • Read • Update • Delete
Medication Reconciliation Statement Recommendation	Create medication reconciliation statement recommendation records by using the data entered by the clinician in the Medication Reconciliation tab.	• Create • Read • Update • Delete
Medication Therapy Review	Create medication therapy review records by using the data entered by the clinician in the Comprehensive Medication Review and Targeted Medication Review tabs.	• Create • Read • Update • Delete
Medication Therapy Statement Review	Create medication therapy statement review records by using the data entered by the clinician in the Comprehensive Medication Review and Targeted Medication Review tabs.	• Create • Read • Update • Delete
Medication Therapy Statement Review Issue	Create medication therapy statement review issue records by using the data entered by the clinician in the Comprehensive Medication Review and Targeted Medication Review tabs.	• Create • Read • Update • Delete

SEE ALSO:

[Health Cloud Developer Guide: Medication Management Data Model](#)

[Health Cloud Developer Guide: Clinical Data Model](#)

Enable Medication Management and Assign Permissions to Users

Enable Medication Management and assign the required permission sets so that providers and care coordinators can perform reconciliations of their patients' medication regimen and medication therapy reviews.

Prerequisite: Ensure that the FHIR R4-aligned Clinical data model is enabled.

1. From Setup, in the Quick Find box, enter *Medication Management and Medication Review Settings*, and then select **Medication Management and Medication Review Settings**.
2. Select the checkbox to acknowledge the Medication Management terms of use, and then set Medication Management to **Enabled**.



Note: Enable Medication Review before enabling Medication Management.

3. Set To-Do Lists to **Enabled**.

This setting enables the Care Plan, Care Plan Activity, Care Plan Template, and Action Plan Template Assignment objects and lets your users assign to-do lists to their patients during comprehensive medication reviews.

4. Depending on your organization's needs:
 - a. Assign the Medication Reconciliation for Medication Management permission set to your users to give them access to Medication Reconciliation.
 - b. Assign the Medication Therapy Review for Medication Management permission set to your users to give them access to Medication Therapy Management.

Now that you've enabled Medication Management and assigned the necessary permissions, add the Lightning component to the relevant pages for your providers and care coordinators to use.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Medication Management Add-On license

USER PERMISSIONS

To enable Medication Management

- Customize Application

To assign permission sets

- Assign Permission Sets
- View Setup and Configuration

Configure Patient Medication Manager for Medication Management

Add the Patient Medication Manager Lightning component to person account record pages—such as the Patient page in Health Cloud - Lightning Console—so that your clinicians can start using Medication Management.

Based on your organization's needs, choose to show medication reconciliation, medication therapy management, or both sections.



Note: Patient Medication Manager isn't compatible with business account record pages, even if you can place the component on them.

1. Open a person account record page in the Lightning App Builder in one of these ways:
 - (Recommended.) On the page in your org, select **Edit Page** from the **Setup** menu.
 - From Setup, go to Account in the Object Manager and select **Lightning Record Pages**. Then, select the appropriate person account record page and click **Edit**.
 - From Setup, in the Quick Find box, find **Lightning App Builder**. Then click **Edit** for the appropriate person account record page.
2. Place the Patient Medication Manager component on your page layout.
3. Select the component you placed on your page layout to bring up its properties.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Medication Management Add-On license

USER PERMISSIONS

To configure the component:

- Customize Application

4. Select the tabs you want to view in the Patient Medication Manager.
 - For Medication Reconciliation, choose Yes or No next to Show Medication List, Show Medication Reconciliation, and Show Drug Interaction.
 - For Medication Therapy Management, choose Yes or No next to Show Medication List, Show Comprehensive Medication Review, and Show Targeted Medication Review.
 5. Select the fields to include in the Patient Medication Manager.
 - For Medication Reconciliation, click **Select** in the Medication Reconciliation Recommendation Fields and Previous Recommendation Fields sections and choose fields.
 - For Medication Therapy Management, click **Select** in the Medication Therapy Statement Review Fields, Clinical Detected Issue Fields, and Clinical Detected Issue Detail Fields sections and choose fields.
-  **Note:** Ensure that you've already selected fields from the Medication Request Fields, Medication Dispense Fields, Patient Medication Dosage Fields, and Medication Statement Fields sections when configuring the component for Medication Review.
6. Sort the selected fields as required, and then click **OK**.
 7. When you're done, save your configuration and activate your page.

That's it! You don't need to perform any extra setup for RxNorm. Your users can now start using Medication Management to perform medication reconciliation and medication therapy review.

Configure the Notes Tab in the Patient Medication Manager

Enable care coordinators and providers to capture notes for each medication in the Patient Medication Manager.

1. From Setup, in the Quick Find box, enter *Notes Settings* and, then select **Notes Settings**.
2. Select the checkbox for Enable Notes.
3. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Medication Management Add-On license

USER PERMISSIONS

To configure the Notes tab

- Perform medication reconciliation with Medication Management

Create Care Programs for Medication Therapy Review

Use Health Cloud's Care Program feature to create a care program for medication therapy reviews for the corresponding year. Pharmacists can conduct comprehensive and targeted medication reviews for patients who meet eligibility criteria and are enrolled in the care program.

1. From the App Launcher, find and select Care Programs.
2. Click **New**.
3. Enter the name, start date, and other important details about the medication therapy management care program.
4. Save your changes.

Next, go to Care Program Enrollee and create records for patients who are eligible and enrolled in the care program.



Note: If eligibility rules are set up for the care program using Data Processing Engine or Business Rules Engine, patients are auto-enrolled and care program enrollee records are auto-created.

Configure Reasons for Care Program Opt-Out

Help your pharmacists record the reasons why their patients opted out of a medication therapy management care program. Patients can temporarily or permanently opt-out at any time, so it's important to understand and track the reason why.

Depending on your organization's business needs, configure appropriate opt-out reasons.

1. From Setup, open the Object Manager, and go to the Care Program Enrollee object.
2. Under Fields & Relationships, click **Opt Out Reason Type**.
3. Click **New** in the Opt Out Reason Type Picklist Values section.
4. Enter a list of reasons that suit your needs. Enter each value on its own line.
5. Save your changes.

Now, when a patient opts out from the program, your pharmacists can go to the corresponding Care Program Enrollee record and select one of the defined reasons from the Opt Out Reason Type picklist.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Medication Management Add-On license

USER PERMISSIONS

To create care program and care program enrollee records:

- Create and Edit on Care Program and Care Program Enrollee objects

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Medication Management Add-On license

USER PERMISSIONS

To configure the opt-out reasons:

- Create and Edit on Care Program Enrollee object

Understand and Customize the Medication Therapy Review Flow

The built-in Start Medication Therapy Review flow helps streamline the initiation process of comprehensive and targeted medication reviews by determining the patient's cognitive status based on their health conditions.

Using the flow, your pharmacists can:

- View the list of health conditions causing a patient's cognitive impairment
- Provide details of the patient's surrogate decision maker
- Indicate if the patient is at a long-term care facility during the review
- Specify the review type for a targeted medication review

With all these details handy, pharmacists can focus on the review of the patient's medications and medical concerns. Provide additional flexibility for your pharmacists by customizing the flow depending on your business needs.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Go to the Start Medication Therapy Review flow.
3. Update the elements and attributes, as necessary.
4. Save your changes.

Now, when your pharmacists start a medication therapy review from the Patient Medication Manager lightning component, the updated flow is triggered instead of the built-in flow.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Medication Management Add-On license

USER PERMISSIONS

To customize the flow:

- Medication Therapy Review for Medication Management permission set

Create Predefined Tasks for Medication Therapy Management

Help your pharmacists to effortlessly recommend to-do list items to their patients during medication therapy reviews. You can set up predefined, patient-specific tasks for addressing healthcare issues that pharmacists can assign to patients.

This preconfiguration helps to save your pharmacist's time and enforces care standards to improve healthcare outcomes. Also, with patients being active partners in their healthcare, there's improved patient engagement, self-care, and satisfaction.



Note: Make sure you enable the To-do Lists settings from the Medication Management and Medication Review Settings page. This setting enables the Care Plan, Care Plan Activity, Care Plan Template, and Action Plan Template Assignment objects to help you create predefined tasks.

Patient-specific tasks can cover medical, lifestyle, behavioral, or other aspects. Just be sure they all aim to resolve the patient's problem and help achieve health goals.

1. For each issue (health or non-health) that patients face, configure a care plan template, publish it, and save your changes. For example, create one for High Blood Pressure and one for Diabetes.
2. Create a corresponding action plan template.
 - a. Set the Action Plan Type as *Industries* and Target Object as *Care Plan*. Also, select **Let users add items to action plans**.
 - b. Define issue-specific tasks and add them to the action plan template.
 - c. Publish the action plan template and save your changes.
3. Create an action plan template assignment to associate the care plan template and action plan template.
 - a. Select the care plan template that you created from the Associated Object list.
 - b. Select the action plan template that you created from the Action Plan Template Version list.
 - c. Save your changes.



Note: If you don't publish the care plan template and action plan template, your users can't use any of the related predefined tasks.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Medication Management Add-On license

USER PERMISSIONS

To configure care plan templates:

- Create and Edit on Care Plan Template object

To configure action plan templates:

- Create and Edit on Action Plan Template object

To configure action plan template assignments:

- Create and Edit on Action Plan Template Assignment object

Advanced Therapy Management

Advanced Therapy Management in Health Cloud supports slot management and scheduling across multiple territories in a single place, to help users easily search for and book appointments across multiple sites.

In the healthcare industry, advanced therapy refers to an innovative medical practice that uses genetics and biomarker information to manufacture personalized medication for patients with rare illnesses. The therapy involves multiple steps that are typically performed in different locations.

For example, in cell and gene therapy, the procedure involves:

- Apheresis—A biosample is collected from a patient.
- Manufacturing—The biosample is treated in a cell lab, where cells are isolated, genetically engineered, and grown.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

- **Infusion**—The genetically treated biosample is introduced back into the patient's body to help eliminate abnormal and mutated genes that cause illness.

Personalized medicine requires smooth workflows and process integration across provider and pharmaceutical industries. Health Cloud's Advanced Therapy Management solution offers slot management and capacity configuration capabilities, so that admins can configure availability of resources at their assigned territories, and create and publish slots accordingly. Advanced Therapy Management's Multi-Step Scheduling brings together data about different sites, resources, and appointment slots in one place.

[Learn About Multi-Step Scheduling](#)

Advanced Therapy Management's Multi-Step Scheduling feature enables users to book appointment slots for all the steps of a procedure at one time. Service territory relationships streamline the search by providing information about affiliated territories where consecutive work types are performed.

[Learn About the Advanced Therapy Management Licenses](#)

Before getting started with Advanced Therapy Management and Multi-Step Scheduling, ensure that your org has the appropriate add-on licenses. The Advanced Therapy Management permissions and licenses are included as part of the Health Cloud license and the Health Cloud for Life Sciences license, which new Life Sciences customers (starting in Winter '23) can purchase. Both new and existing Health Cloud customers must purchase the Asset Scheduler Add-On License to use Multi-Step Scheduling. Customers can also purchase an add-on license to enroll an additional 500 patients into advanced therapies.

[Create Profiles for Advanced Therapy Management Users](#)

Users with different roles work on different aspects of Advanced Therapy Management. The user who searches for slots with the help of Multi-Step Scheduling creates the booking request. An internal user then reviews and confirms the booking. Based on your organization's roles and personas, set up profiles for users who book slots and users who confirm the requests.

[Create Internal and External Users for Advanced Therapy Management](#)

Create users and assign them the Advanced Therapy Management profiles that you created.

[Assign Permission Sets and Permission Set Licenses To Your Advanced Therapy Management Users](#)

Help users manage slots with Advanced Therapy Management by assigning them the required permission sets and permission set licenses.

[Enable Salesforce Scheduler for Health Cloud Admin Settings](#)

Define the availabilities of service resources for work at a service territory by associating shifts with work types. To do this, you must first enable the Salesforce Scheduler for Health Cloud admin settings.

[Add the Appointment Slots Lightning Component to a Record Page](#)

Enable users to view and manage their scheduled and canceled appointments, and create new ones, by adding the Appointment Slots Lightning component to a record page. You can configure the Appointment Slots Lightning component on the record page of an Account, Case, Opportunity, or Care Program Enrollee object.

[Configure Scheduling Policies for Advanced Therapy Management](#)

Make it easy for multi-step scheduling users to find and book appropriate slots. Configure time slot intervals to determine the intervals in which each appointment starts. Also enable Salesforce Scheduler to use service territory member's shifts to search for slots.

[Considerations for Defining Availability of Slots](#)

Get to know about the advantages and disadvantages of using time slots versus shifts to define the availability of appointment slots.

[Turn on Field-Level Security for Time Slots](#)

Help users seamlessly search for slots by enabling the field-level security settings for the Maximum Appointment field in the Time Slot object. This setting is required for Health Cloud's internal APIs to fetch results for available slots.

[Set Up Data For Advanced Therapy Management in Your Org](#)

Empower users to schedule appointments easily across multiple sites. To use Multi-Step Scheduling effectively, you must set up the required data for all objects in Advanced Therapy Management's data model.

What Is Partial Rescheduling in Advanced Therapy?

Unlike a complete reschedule, partial reschedule cancels slots downstream from the work types you start with, and creates appointments in the existing service appointment group.

Visibility for Buttons in Appointment Slot Component

The visibility of the Book New Slots, Reschedule Slots, and Cancel Slots buttons in Advanced Therapy Management is determined by the status of the related service appointment group and the individual service appointments in the group.

Add a Quick Action Button to Confirm Booking Slots in Advanced Therapy Management

To confirm booking requests, configure a quick action button on the highlights panel of a record page. You can configure the quick action button on the record pages of the Account, Case, Opportunity, and Care Program Enrollee objects.

How Are Slot Results Optimized in Advanced Therapy Management?

To offer the most optimized search results for available appointment slots, Advanced Therapy Management's Multi-Step Scheduling filters slot results through a combination of internal and external checks.

Keep Track of the Total Number of Patients Enrolled in Advanced Therapies

You can easily track the total number of enrollees in advanced therapies. This helps plan for enrollee count upgrades to accommodate increasing enrollees in advanced therapies. Usage-based entitlement details provide more information about the enrollee count that you can use for billing purposes.

Learn About Multi-Step Scheduling

Advanced Therapy Management's Multi-Step Scheduling feature enables users to book appointment slots for all the steps of a procedure at one time. Service territory relationships streamline the search by providing information about affiliated territories where consecutive work types are performed.

Admins can also configure shifts of service resources assigned to a service territory for a work type (work procedure step). Multi-Step Scheduling collates all of this data on two new tabs: Schedule Appointments and Reschedule Appointments. When users conduct basic and advanced searches, they view available time slots for all work types configured as per the time required to complete each work type. Users can then book their preferred slots for all work types, and reschedule and cancel appointments as well.

You can use Multi-Step Scheduling both in the context of Health Cloud and with other clouds.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

Learn About the Advanced Therapy Management Licenses

Before getting started with Advanced Therapy Management and Multi-Step Scheduling, ensure that your org has the appropriate add-on licenses. The Advanced Therapy Management permissions and licenses are included as part of the Health Cloud license and the Health Cloud for Life Sciences license, which new Life Sciences customers (starting in Winter '23) can purchase. Both new and existing Health Cloud customers must purchase the Asset Scheduler Add-On License to use Multi-Step Scheduling. Customers can also purchase an add-on license to enroll an additional 500 patients into advanced therapies.

Let's go through the list of licenses.

Health Cloud for Life Sciences

Starting in Winter '23, new Life Sciences customers can purchase Health Cloud for Life Sciences. Health Cloud for Life Sciences includes the Advanced Therapy Management permissions and

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

licenses, including the Multi-Step Scheduling user license, the Multi-Step Scheduling platform license, and the Enrollee Count Limit 500 platform license definition, which provides a limit of 500 enrollees in advanced therapies.

Advanced Therapy Management - Patients (500)

Health Cloud also offers an add-on called the Advanced Therapy Management - Patients (500) license. This license provides an additional capacity of 500 enrollees who you can enroll in advanced therapies. Both orgs that use the Health Cloud product and orgs that use Health Cloud for Life Sciences can purchase this add-on license to get additional enrollment capacity.

Asset Scheduler Add-On License

Advanced Therapy Management is powered by Salesforce Scheduler. To use Multi-Step Scheduling, users must purchase the Asset Scheduler Add-On License for each asset assigned to a service territory. This license extends existing functionality so that you can schedule an appointment with an asset, such as a service resource assigned to a service territory where an advanced therapy procedure is held. For more information, contact your Salesforce representative.

SEE ALSO:

[Salesforce Help: Health Cloud for Life Sciences](#)

Create Profiles for Advanced Therapy Management Users

Users with different roles work on different aspects of Advanced Therapy Management. The user who searches for slots with the help of Multi-Step Scheduling creates the booking request. An internal user then reviews and confirms the booking. Based on your organization's roles and personas, set up profiles for users who book slots and users who confirm the requests.

In bio pharmaceutical companies that conduct advanced therapies, qualified treatment center (QTC) coordinators manage slot bookings and submit requests for scheduling appointments for care program enrollees. The gene therapy coordinators (GTC) then review and confirm the booking requests so that appointments are booked for the various work procedure steps.

1. From Setup, in the Quick Find box, enter *Profiles*, and select **Profiles**.
2. Click **New Profile**.
3. For Existing Profile, select **Standard User**.
4. Add a profile name for the user who creates the booking request. For example, *QTC Coordinator*.
5. Save your changes.

Repeat the steps to create the profile for the user who confirms the request. For example, for advanced therapy users, create a GTC profile.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To create profiles:

- Manage Profiles and Permission Sets

Create Internal and External Users for Advanced Therapy Management

Create users and assign them the Advanced Therapy Management profiles that you created.

1. From Setup, in the Quick Find box, enter *Users*, and select **Users**.
2. Click **New User**.
3. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. For User License, select **Salesforce**.
5. For Profile, select the profile you created. For example, for treatment center coordinator, select *QTC coordinator*.
6. Save your changes.

Add another user for the profile that confirms the booking.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

To create, edit, and delete Health Cloud data:

- Health Cloud Foundation perm set

OR

Manage Health Cloud

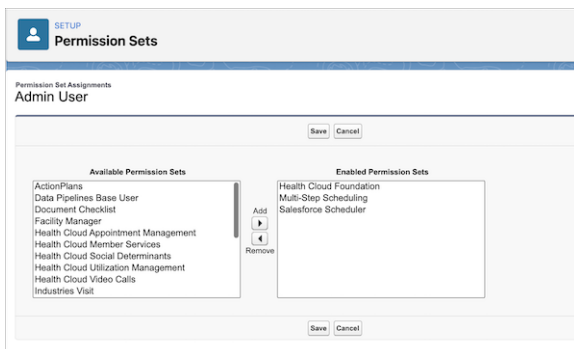
To create users:

- Manage Internal Users

Assign Permission Sets and Permission Set Licenses To Your Advanced Therapy Management Users

Help users manage slots with Advanced Therapy Management by assigning them the required permission sets and permission set licenses.

1. From Setup, in the Quick Find box, enter *Users*, and select **Users**
2. Select the appropriate user.
3. In the Permission Set License Assignment related list, and click **Edit Assignment**.
4. Select these permission set licenses:
 - a. Health Cloud Platform
 - b. Multi-Step Scheduling
 - c. Salesforce Scheduler
5. Click **Save**.
6. In the Permission Set Assignments related list, click **Edit Assignment**.
7. Move the following permission sets to the Enabled Permission Sets list.
 - a. Health Cloud Foundation
 - b. Multi-Step Scheduling
 - c. Salesforce Scheduler



8. Save your work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

To create, edit, and delete Health Cloud data:

- Health Cloud Foundation perm set

OR

Manage Health Cloud

Enable Salesforce Scheduler for Health Cloud Admin Settings

Define the availabilities of service resources for work at a service territory by associating shifts with work types. To do this, you must first enable the Salesforce Scheduler for Health Cloud admin settings.

1. From Setup, in the Quick Find box, enter *Salesforce Scheduler*, and then select *Salesforce Scheduler Settings*.
2. Enable **Salesforce Scheduler for Health Cloud**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

To create, edit, and delete Health Cloud data:

- Health Cloud Foundation perm set

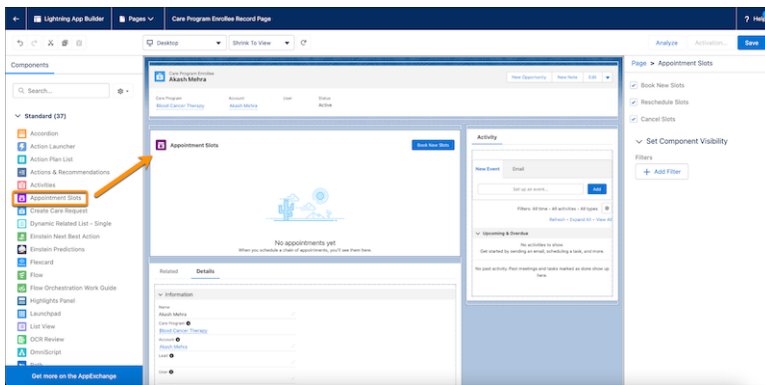
OR

Manage Health Cloud

Add the Appointment Slots Lightning Component to a Record Page

Enable users to view and manage their scheduled and canceled appointments, and create new ones, by adding the Appointment Slots Lightning component to a record page. You can configure the Appointment Slots Lightning component on the record page of an Account, Case, Opportunity, or Care Program Enrollee object.

1. Go to the record page where you want to add the Lightning component.
2. Select  and then select **Edit Page**.
3. In Lightning App Builder, drag the Appointment Slots component onto an editable part of the page.



4. In the Properties pane, select **Book New Slots**, **Reschedule Slots**, and **Cancel Slots**.
5. Save and activate your changes.
6. Assign as the org default.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

Configure Scheduling Policies for Advanced Therapy Management

Make it easy for multi-step scheduling users to find and book appropriate slots. Configure time slot intervals to determine the intervals in which each appointment starts. Also enable Salesforce Scheduler to use service territory member's shifts to search for slots.

1. From Setup, in the Quick Find box, enter *Scheduling*, and then select **Scheduling Policies**.
2. Click **Edit** next to Default Appointment Scheduling Policy.
3. In Appointment Start Time Interval, select the appropriate time interval for appointment slots, in minutes. For example, select **60** to set one-hour time intervals between appointment start times.
4. Choose how you want to configure the availability of slots.
 - a. To configure availability with only shift records, enable **Use service territory member's shift**. Disable **Use service territory's operating hours with shifts** and **Enforce Account's Visiting Hours**.
 - b. To configure availability with shift records and the time slots for the operating hours at a service territory, enable **Use service territory member's shift** and **Use service territory's operating hours with shifts**. Disable **Enforce Account's Visiting Hours**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To edit the default scheduling policies:

- Asset Scheduler add-on license

- c. To configure availability with only time slots, disable **Use service territory member's shift** and **Use service territory's operating hours with shifts**. Make sure you assign time slots to work types.

5. Save your changes.

SEE ALSO:

[Salesforce Help: Scheduling Policy Rules in Salesforce Scheduler](#)

[Salesforce Help: Determine Appointment Time Slots with Shifts](#)

Considerations for Defining Availability of Slots

Get to know about the advantages and disadvantages of using time slots versus shifts to define the availability of appointment slots.

There are two ways in which you can define availability for work types at a service territory: time slots and shifts. Let's look at the advantages and disadvantages of each of these methods of defining availability.

Time Slots

Time slots are created for service territories as a whole. All work types assigned to a service territory are performed in the same time slots.

Advantage: Time slots are active for a long period. For example, if a work type involves a vaccination drive with follow-up doses every 6 months, you can create time slots that last the entire period.

Disadvantage: Time slots are the same for all work types performed at a service territory. For example, if you have both apheresis and manufacturing being performed at the same hospital, their time slots are always at the same time.

Shifts

Shifts are created for work types.

Advantage: You can define separate shifts for different work types. For example, even if apheresis and manufacturing are performed at the same hospital, they can have different slots based on their shifts.

Disadvantage: Shifts can't be used for extended periods of time. Recurring shifts can help you define availability for up to 3 months, but not beyond that time period.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

Turn on Field-Level Security for Time Slots

Help users seamlessly search for slots by enabling the field-level security settings for the Maximum Appointment field in the Time Slot object. This setting is required for Health Cloud's internal APIs to fetch results for available slots.

 **Note:** You must enable the field-level security settings irrespective of whether you want to use the Shift object or Time Slot object to define availability of slots.

Explore the complete list of field-level security settings for Salesforce Scheduler objects [here](#).

1. From the object management settings for Time Slot, click **Fields & Relationships**.
2. Click **Maximum Appointments** and then select **Set Field-Level Security**.
3. Go to the profile you set up for Multi-Step Scheduling user and mark **Visible**.
4. Save your changes.

SEE ALSO:

[Salesforce Help: Field-Level Security \(FLS\) Permissions Checklist](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To set field-level security:

- Manage Profiles and Permission Sets

AND

Customize Application

Set Up Data For Advanced Therapy Management in Your Org

Empower users to schedule appointments easily across multiple sites. To use Multi-Step Scheduling effectively, you must set up the required data for all objects in Advanced Therapy Management's data model.

Let's first get a sense of the Advanced Therapy Management objects and what they store. Check out the [Advanced Therapy Management data model diagram](#) in the Health Cloud Developer Guide.

A work procedure stores information about a process, such as a program or a therapy, and is performed at a service territory, defined as the parent service territory. Each work procedure comprises steps, represented by a work type record. When a work type is associated with a work procedure, it's referred to as a work procedure step.

Work types are performed by services resources at a service territory, defined as child service territory.

Service resources are modeled as assets and assigned to a territory as a service territory member.

You can define the shift for a service territory member. You can also define a shift for a service

territory member assigned to a particular work type through the shift work topic record. When you set up the availability of the service resources, you can book available slots for a work type. Service territory relationships help users book appointments for affiliated sites.

Let's walk through an example of a bio pharmaceutical company offering advanced therapy. Charles Green, a patient diagnosed with a rare blood disease, is enrolled in a Gene Therapy Care Program that offers an advanced therapy treatment called Cell and Gene Therapy (CGT). Cell and Gene Therapy is performed at Goodly Healthification Cell and Gene Therapy Center (parent service territory).

The Cell and Gene Therapy work procedure has three steps: apheresis, manufacturing, and infusion, each of which is performed at a different service territory.

Apheresis CGT is performed at Goodly Healthification Apheresis Center by Apheresis Medical Staff, modeled as an asset. Shifts are defined for the Apheresis Medical Staff, assigned as a service territory member. After shift records are created, slots are available for booking.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

Site-to-site relationships (service territory relationship) help the qualified treatment center (QTC) coordinator book appointments for manufacturing and infusion as well, as they can easily view the slots available for the next steps.

Let's look at what each object stores.

Table 5: Advanced Therapy Management Objects

Object	Description	Example
Work Procedure	Represents information about a procedure or process that's part of a program, such as a care program in Health Cloud.	Cell and Gene Therapy
Work Type	Represents a type of work to be performed.	Apheresis CGT
Work Procedure Step	Represents information about the work type that's a part of a work procedure.	Apheresis CGT, Cell and Gene Therapy
Work Type Extension	Represents additional information about a work type.	The icon URL for the work type.
Service Territory	Represents a geographic or functional region in which work is performed. This can refer to an organization where a work procedure or a work procedure step is performed.	Goodly Healthification Apheresis Center
Service Resource	Represents an asset engaged for work. This can be a meeting room, equipment, or the medical staff assigned to the hospital.	Apheresis Medical Staff
Service Territory Relationship	Represents site-to-site relationships between service territories based on work types performed.	If Apheresis CGT is held at Goodly Healthification Apheresis Center, the next work type (Manufacturing CGT) should always be held at Goodly Healthification Manufacturing Center.
Service Territory Work Type	Represents the relationship between a service territory and a work type for Salesforce Scheduler appointments. This object stores information about whether slots have been published.	Apheresis CGT at Goodly Healthification Apheresis Center
Service Territory Member	Represents a service resource who can be assigned in a service territory.	Goodly Healthification Apheresis Medical Staff (service resource) assigned to Goodly Healthification Apheresis Center (service territory) as an asset
Shifts	Represents a service resource's shift.	Availability of a service resource who is assigned to a particular service territory.
Shift Work Topic	Represents a service resource's shift availability for a particular work type.	Availability of a resource assigned to a service territory for a particular work type.

1. [Set Up a Work Procedure for Advanced Therapy Management](#)
A *work procedure* stores information about an overall process, and can include several tasks, whose details are stored in *work procedure steps*. In Advanced Therapy Management, a work procedure can represent a particular kind of treatment or therapy, involving steps or tasks such as apheresis or infusion.
2. [Set Up a Work Type for Advanced Therapy Management](#)
A work type represents a template for a task to be performed. In Advanced Therapy It stores information about operating hours, estimated duration, and unit of duration. In Advanced Therapy Management, a work type represents treatment steps such as apheresis or infusion. A work type can be associated with a work procedure to create a work procedure step record.
3. [Set Up Operating Hours for Work Types and Service Territories](#)
Configure operating hours to represent the hours during which a work type or a service territory is available.
4. [Set Up a Work Procedure Step](#)
A *work procedure step* brings together information about a work type and a work procedure. A work procedure step is similar to a work type, but stores information about a step or task only in the context of a work procedure. Work procedure steps also store information about the sequence of steps in a work procedure and time required for each step to be completed.
5. [Set Up a Work Type Extension](#)
Add additional information about work types using the work type extension field. For example, use the Icon URL field to upload an icon for a work type.
6. [Set Up a Service Territory for Advanced Therapy Management](#)
A service territory is a location or region where a work is performed by a service resource. In Advanced Therapy Management, service territories are the locations where a work procedure, such as Cell and Gene Therapy, takes place.
7. [Set Up a Service Resource for Advanced Therapy Management](#)
A *service resource* is an agent or crew that performs a work type at a service territory. A service resource can also refer to a particular meeting room, facility, or even an asset assigned to a service territory. In Advanced Therapy Management, service resources are medical staff modeled as an asset at a service territory where a work type, such as apheresis, is performed.
8. [Set Up a Service Territory Relationship in Advanced Therapy Management](#)
Help Multi-Step Scheduling users narrow down their searches by establishing site-to-site relationships for service territories where consecutive work procedure steps are performed.
9. [Add a Service Territory Member To a Service Territory Record](#)
Configure records for service territory members assigned to a service territory. In Advanced Therapy Management, work procedure steps like apheresis are performed by medical staff at a particular hospital. To represent the medical staff, configure service territory members who are service resources assigned to a work type at a service territory.
10. [Set Up Shifts For Services Resources in Advanced Therapy Management](#)
To make appointment slots available for booking through Multi-Step Scheduling, configure shifts for service resources assigned to a service territory. For example, in Advanced Therapy Management, medical staff assigned to a hospital operate in shifts that determine the availability of appointment slots.
11. [Set Up a Shift Work Topic For Shifts in Advanced Therapy Management](#)
Configure the availability of a service resource assigned to a service territory for a particular work type.
12. [Set Up a Service Territory Work Type For Advanced Therapy Management](#)
To indicate that slots are published (available for booking) for particular work procedure steps, configure a relationship between service territories and work types performed at the service territories.

SEE ALSO:

[Salesforce Help: How Work Types, Work Type Groups, and Service Territories Work Together](#)

Set Up a Work Procedure for Advanced Therapy Management

A *work procedure* stores information about an overall process, and can include several tasks, whose details are stored in *work procedure steps*. In Advanced Therapy Management, a work procedure can represent a particular kind of treatment or therapy, involving steps or tasks such as apheresis or infusion.

Make sure you create a care program for the therapy program.

1. From the App Launcher, find and select **Work Procedure**.
2. Click **New**.
3. Add the name of the work procedure in the Work Procedure Name field. For example, Cell and Gene Therapy.
4. Add a description.
5. For Reference Record, select the object associated with the work procedure. For example, the care program associated with cell and gene therapy.

New Work Procedure

Information

Work Procedure Name

Cell and Gene Therapy

Description

The work procedure associated with the cell and gene therapy care program.

Reference Record

Cell and Gene Therapy Care Program

6. Save your changes.

SEE ALSO:

[Salesforce Help: Create a Care Program](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set
- OR
- Manage Multi-Step Scheduling features

Set Up a Work Type for Advanced Therapy Management

A work type represents a template for a task to be performed. In Advanced Therapy It stores information about operating hours, estimated duration, and unit of duration. In Advanced Therapy Management, a work type represents treatment steps such as apheresis or infusion. A work type can be associated with a work procedure to create a work procedure step record.

- 1. From the App Launcher, find and select **Work Type**.
- 2. Click **New**.
- 3. Add the name of the work type. For example, *Apheresis CGT*.
- 4. Add a description.
- 5. Select the operating hours during which a work type is operational.
- 6. Add the duration of the work type, and the unit in which the duration is measured. For example, if apheresis takes place over four hours, the Estimated Duration is *4*, and the Duration Type is *Hours*.

New Work Type

Description

Work Type Name

Apheresis - CGT

Description

Operating Hours

CGT OP

Estimated Duration

4.00

Duration Type

Hours

Block Time Before Appointment

Block Time Before Unit

Cancel

Save & New

Save

- 7. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To create Work Type records:

- Create, Read, Edit, Delete on Work Type records

Set Up Operating Hours for Work Types and Service Territories

Configure operating hours to represent the hours during which a work type or a service territory is available.

1. From the App Launcher, find and select **Operating Hours**.
2. Click **New**.
3. Add a name and description for the operating hours specific to your work type or service territory.
4. Select the time zone for the work type or service territory.
5. Set up time slots for work types.



Note: Set up Service Appointment Windows only if you want to use operating hours' time slots to define the availability of slots. Time slots can be used with or without shift records.

- To use operating hours (time slots) along with shifts, enable **Use service territory member's shift** and **Use service territory's operating hours with shifts** in Scheduling Policies.
- To only use operating hours (time slots), disable **Use service territory member's shift** and **Use service territory's operating hours with shifts** in Scheduling Policies. Make sure you assign time slots to work types.

- a. Under Set Service Appointment Windows, click **Add Row**

- b. Select a day and add start and end times for the time slot.
 - c. Add work types that are operational in the service appointment windows.
6. Save your changes.

SEE ALSO:

[Salesforce Help: Set Up Operating Hours in Salesforce Scheduler](#)

[Salesforce Help: Configure Scheduling Policies for Advanced Therapy Management](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set
- OR
- Manage Multi-Step Scheduling features

Set Up a Work Procedure Step

A *work procedure step* brings together information about a work type and a work procedure. A work procedure step is similar to a work type, but stores information about a step or task only in the context of a work procedure. Work procedure steps also store information about the sequence of steps in a work procedure and time required for each step to be completed.

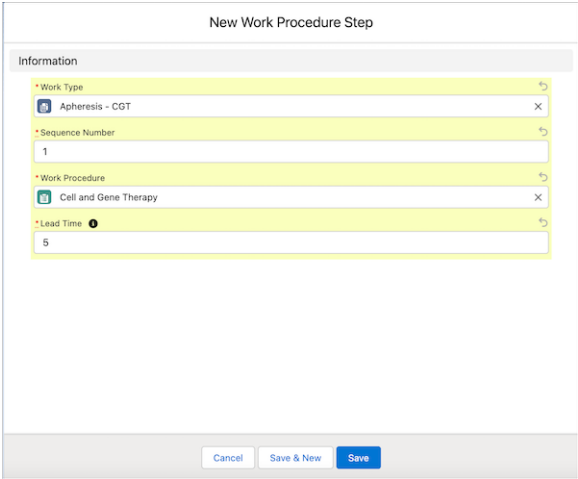
In Advanced Therapy Management, a work procedure step refers to a work type associated with a work procedure, such as apheresis or infusion that's part of a cell and gene therapy.

1. From the App Launcher, find and select **Work Procedure Steps**.
2. Click **New**.
3. Select the work type associated with the work procedure step. For example, Apheresis CGT for Cell and Gene Therapy.
4. Enter a sequence number for the work procedure step. For example, apheresis is 1, manufacturing is 2, and infusion is 3.

If you don't see Sequence Number on the Work Procedure Steps record, go to the object management settings for Work Procedure Step. Select Page Layouts, and then select Work Procedure Step Layout. Drag and drop the Sequence Number field on an editable part of the page.

5. Select the work procedure associated with the work procedure step.
6. In Lead Time, enter the number of days required to complete the work procedure step.

 **Note:** Lead Time is always in units of days.



7. Save your changes.

Repeat the process for each step (work type) in a work procedure.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set
- OR
- Manage Multi-Step Scheduling features

Set Up a Work Type Extension

Add additional information about work types using the work type extension field. For example, use the Icon URL field to upload an icon for a work type.

1. From the App Launcher, find and select **Work Type Extension**.
2. Click **New**.
3. Select the work type for which you want to upload an icon.
4. Enter the URL of the image representing the work type.
5. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set
- OR
- Manage Multi-Step Scheduling features

Set Up a Service Territory for Advanced Therapy Management

A service territory is a location or region where a work is performed by a service resource. In Advanced Therapy Management, service territories are the locations where a work procedure, such as Cell and Gene Therapy, takes place.

Set up operating hours to represent the hours in which the service territory is active.

1. First create a parent service territory for the work procedure organization where the work procedure is performed. Then, create service territories for the locations where work procedure steps such as apheresis, manufacturing, and infusion are performed.
1. From the App Launcher, find and select **Service Territories**.
2. Click **New**.
3. Enter a name for the service territory. For example, Goodly Healthification Cell and Gene Therapy Center.
4. Select the hours during which the service territory is operational.
5. Select **Active**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To create Service Territory records:

- Create, Read, Edit, Delete on Service Territory records

The screenshot shows the 'New Service Territory' form. The 'Name' field is highlighted in yellow and contains 'Goody Healthification Cell and Gene Therapy Center'. The 'Parent Territory' field has a search icon and the text 'Search Service Territories...'. The 'Operating Hours' field is highlighted in yellow and contains 'Operating Hours - CGT'. The 'Active' field is highlighted in yellow and has a checked checkbox. The 'Address' section includes a 'Search Address' field with a search icon, an 'Address' text area, and fields for 'City', 'State/Province', 'Zip/Postal Code', and 'Country'.

6. Click **Save & New**.
7. Enter a name for the service territory. For example, Goodly Healthification Apheresis Center.
8. Select the parent service territory to indicate where the work procedure is performed. Select a parent service territory only if you're creating service territories for work types.
9. Select the hours during which the service territory is operational.
10. Select **Active**.
11. Save your changes.

SEE ALSO:

[Salesforce Help: Set Up Service Territories in Salesforce Scheduler](#)

Set Up a Service Resource for Advanced Therapy Management

A *service resource* is an agent or crew that performs a work type at a service territory. A service resource can also refer to a particular meeting room, facility, or even an asset assigned to a service territory. In Advanced Therapy Management, service resources are medical staff modeled as an asset at a service territory where a work type, such as apheresis, is performed.

First create a record for the asset, and then create a service resource with the associated asset.

1. From the App Launcher, find and select **Assets**.
2. Click **New**.
3. Add a name for the asset. For example, *Goody Healthification Apheresis Asset*.
4. Associate the asset with an account. For example, select the account of the service territory.
5. Save your changes.
6. From the App Launcher, find and select **Service Resource**.
7. Click **New**.
8. Add a name for the service resource. For example, *Goody Healthification Apheresis Medical Staff*.
9. Select the asset you created in the previous steps.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To create Service Resource records:

- Create, Read, Edit, Delete on Service Resource records

10. In Resource Type, select **Asset**.

11. Select **Active**.

12. Save your changes.

Repeat the steps to create assets and service resources for each work procedure step that is performed at a service territory.

SEE ALSO:

[Salesforce Help: Set Up Service Resources in Salesforce Scheduler](#)

Set Up a Service Territory Relationship in Advanced Therapy Management

Help Multi-Step Scheduling users narrow down their searches by establishing site-to-site relationships for service territories where consecutive work procedure steps are performed.

For example, if apheresis is held at Goodly Healthification Apheresis Center, the next work procedure step—manufacturing—is at Goodly Healthification Manufacturing Center.

1. From the App Launcher, find and select **Service Territory Relationships**.
2. Click **New**.
3. Select a service territory. For example, select the service territory associated with work type apheresis, *Goodly Healthification Apheresis Center*.
4. Select the work type associated with the selected service territory. In our example, *Apheresis CGT*.
5. Select the service territory to establish a site-to-site relationship for the next work type with. In our example, select the service territory where the manufacturing work type is performed, Goodly Healthification Manufacturing Center.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

New Service Territory Relationship

Information

Service Territory Relationship

* Related Service Territory

Goodyly Healthification Manufacturing Center

* Service Territory

Goodyly Healthification Apheresis Center

* Work Type

Apheresis CGT

6. Save your changes.

Add a Service Territory Member To a Service Territory Record

Configure records for service territory members assigned to a service territory. In Advanced Therapy Management, work procedure steps like apheresis are performed by medical staff at a particular hospital. To represent the medical staff, configure service territory members who are service resources assigned to a work type at a service territory.

1. From the App Launcher, find and select **Service Territories**.
2. Select the Service Territory record for which you want to add a service territory member.
3. In the Related tab, under Service Territory Member, click **New**.
4. Select the service resource modeled as an asset in a service territory. For example, Goodyly Healthification Apheresis Medical Staff.
5. The service territory is preselected. For example, Goodyly Healthification Infusion Center.
6. For Territory Type, select Primary.
7. Under Duration, select a start date and an end date, to indicate the date range during which the resource is a member of the service territory.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To create Service Territory Member records:

- Create, Read, Edit, Delete on Service Territory Member records

New Service Territory Member

Information

Member Number

• Service Resource

Goody Healthification Apheresis Medical Staff X

• Service Territory

Goody Healthification Apheresis Center X

• Territory Type

Primary

Address

Search Address

Address

City State/Province

Zip/Postal Code Country

Operating Hours

Search Operating Hours...

Role

--None--

Duration

• Start Date

Date Time

8/1/2022 12:00 PM

End Date

Date Time

12/31/2022 12:00 PM

Cancel Save & New Save

8. Save your changes.

Set Up Shifts For Services Resources in Advanced Therapy Management

To make appointment slots available for booking through Multi-Step Scheduling, configure shifts for service resources assigned to a service territory. For example, in Advanced Therapy Management, medical staff assigned to a hospital operate in shifts that determine the availability of appointment slots.

To associate a shift with a work type, enable Salesforce Scheduler for Health Cloud admin settings.

1. From the App Launcher, find and select **Shifts**.
2. Click **New**.
3. Enter start and end times for the shift.



Note: If you're creating recurring shifts, the start time and the end time must be 24 hours or less.

4. For Status, select **Confirmed**.
5. Select the service resource for whom you're configuring the shift.



Note: The service territory member associated with this service resource must have membership dates that overlap with the dates for the shift.

6. Select the work type for this shift.
7. For Time Slot Type, select **Normal**.
8. For Type, select **Recurring**.

If you don't see Type on the Shift record, go to the object management settings for Shift. Click Page Layouts and select Shift Layout. Drag and drop the Type field on an editable part of the page.

9. Select whether you want the recurring shifts to be daily, monthly, or weekly.
 - a. For daily occurrence, select the number of days it repeats. Select the date until which the shifts are expected to continue or the number of times it's expected to continue.
 - b. For weekly occurrence, select the frequency with which it repeats and the days on which it repeats. Select the date until which the shifts are expected to continue or the number of times it's expected to continue.
 - c. For monthly occurrence, select the frequency with which it repeats. Choose if the shift occurs on a particular day every week, or on a specific date. Finally, select the date until which the shifts are expected to continue or the number of times it's expected to continue.
10. Save your changes.

SEE ALSO:

[Salesforce Help: Manage Shifts in Salesforce Scheduler](#)

[Salesforce Help: Enable Salesforce Scheduler for Health Cloud Admin Settings](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set
- OR
- Manage Multi-Step Scheduling features

Set Up a Shift Work Topic For Shifts in Advanced Therapy Management

Configure the availability of a service resource assigned to a service territory for a particular work type.

1. From the App Launcher, find and select **Shifts**.
2. Select the shift record associated with the service territory you set up.
3. From the Related tab, go to Shift Work Topic, and click **New**.
If you don't see Shift Work Topic in the Related tab, go to the Object Manager in Setup and select Shifts. Click Page Layouts and select Shift Layout. Drag the Shift Work Topic field onto the page under Related Lists, and save your changes.
4. The shift created for a service resource assigned to a service territory is preselected.
5. Select **All Topics Supported**.
6. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set
- OR
- Manage Multi-Step Scheduling features

Set Up a Service Territory Work Type For Advanced Therapy Management

To indicate that slots are published (available for booking) for particular work procedure steps, configure a relationship between service territories and work types performed at the service territories.

Slots are published when you create records in the Shift object for the selected service territory and work type. For instance, if shifts have been created for the medical staff for apheresis work type at an apheresis center, you can create a service territory work type and indicate that slots have been published.

1. From the App Launcher, find and select **Service Territories**.
2. Select the appropriate Service Territory record.
3. In the Related tab, Under Service Territory Work Type, click **New**.
4. Add a work type. For example, add Apheresis CGT.
5. The associated service territory where you want to publish slots is preselected. In our example, Goodly Healthification Apheresis Center.
6. If there are Shift records for the service resource assigned to the service territory, select **Slot Published**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set
- OR
- Manage Multi-Step Scheduling features

New Service Territory Work Type

Description

Slot Published

Details

Service Territory: Goody Healthification Apheresis Center

Work Type: Apheresis CGT

7. Save your changes

What Is Partial Rescheduling in Advanced Therapy?

Unlike a complete reschedule, partial reschedule cancels slots downstream from the work types you start with, and creates appointments in the existing service appointment group.

Partial reschedule starts with the work type to reschedule; appointments for subsequent work types are rescheduled accordingly based on the defined lead time.



Note: The lead time restriction doesn't apply for the work type that precedes the work type being rescheduled.

Let's look at an example. Initially, you have apheresis booked on December 1, manufacturing on December 4, and infusion on December 7. Each work type has a lead time of two days because it takes two days to move the biosample from one service territory to another. Unfortunately, there's a delay while transporting the biosample from the apheresis center to the manufacturing site, so you must reschedule the appointment for the manufacturing work type. Because of the required lead time, you're required to reschedule the infusion work type as well.

In partial rescheduling, you select December 8 as the new slot date for manufacturing, and infusion is automatically rescheduled to December 10.

Partial rescheduling also accommodates scenarios in which the treatment center coordinator wants to move up an appointment due to criticality of the patient's medical condition. Partial rescheduling lets you disregard the lead time restriction for the preceding work type.

Let's go back to the example, where apheresis was booked on December 1, manufacturing on December 4, and infusion on December 7. The condition of the patient is now critical, so the engineered biosample is transported overnight from the manufacturing lab to the infusion service territory. Using partial rescheduling, the treatment center coordinator can disregard the lead time of the preceding work type (manufacturing) and reschedule the appointment for the infusion work type from December 7 to December 5.

Partial Reschedule Versus Full Reschedule

While with complete reschedule, you can create a series of appointments, with Partial Reschedule you can select a work type in the middle of an appointment series and rebook slots downstream for each work type that follows.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

Partial Reschedule Versus Full Reschedule

While with complete reschedule, you can create a series of appointments, with Partial Reschedule you can select a work type in the middle of an appointment series and rebook slots downstream for each work type that follows.

Let’s look at the differences between full chain reschedule and partial reschedule.

Full Reschedule	Partial Reschedule
You can reschedule slots only from the first work type.	You can reschedule slots starting from any work type except the first.
Creates two service appointment groups.	Uses the same service appointment group.
The status of the existing service appointment group is “Rescheduled”, and status of the new service appointment group is “Awaiting Approval.”	The status of the service appointment group remains the same, that is, “Awaiting Approval.”
Reschedules all appointments in a series.	Reschedules one or more appointments in a series.

SEE ALSO:

[Salesforce Help: Partially Reschedule Appointment Slots for an Advanced Therapy](#)

Visibility for Buttons in Appointment Slot Component

The visibility of the Book New Slots, Reschedule Slots, and Cancel Slots buttons in Advanced Therapy Management is determined by the status of the related service appointment group and the individual service appointments in the group.

At any point in time, there’s only one service appointment group that is active, which means the appointment is in progress.

Book New Slots

The Book New Slots button is visible on the Care Program Enrollee record pages when no service appointment groups are booked, and when there’s an inactive service appointment group with a Canceled or Rescheduled status. The button is also visible on the record pages of the Case, Account, and Opportunity objects.

 **Note:** The Book New Slots button is visible only when the care program enrollee’s status is Active. When the care program enrollee’s status is Inactive, the button is disabled.

Reschedule Slots and Cancel Slots

The Reschedule Slot and Cancel Slot buttons are visible on the service appointment group only if the service appointment group status is Awaiting Approval, None, or Scheduled.

Here are some scenarios that affect the visibility of the Book New Slots, Reschedule Slots, and Cancel Slots buttons:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

EDITIONS

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Scenario	Service Appointment Group (Active or InActive)	Visibility of Book New Slots button	Visibility of Reschedule Slots button	Visibility of Cancel Slots button
The Appointment Slot tab is empty because there are no service appointment groups.	Inactive or Not applicable	Visible	Hidden	Hidden
The QTC coordinator books slots and creates a service appointment group. Each service appointment's status is set to "None", and the service appointment group status is "Awaiting Approval".	Active	Hidden	Visible	Visible
The GTC coordinator approves the booking and the status of the service appointment group is "Scheduled".	Active	Hidden	Visible	Visible
The QTC coordinator opts for partial rescheduling. The statuses of the deleted slots are "Canceled" and newly rescheduled slots are "None." The service appointment group status is still "Awaiting Approval."	Active	Hidden	Visible	Visible
The QTC coordinator opts for full chain rescheduling and creates a service appointment group, with the statuses of all service appointments as "None," and service appointment group status set to "Awaiting Approval." The original service appointment group status is "Rescheduled" (inactive), but the new group is active.	Active	Hidden	Visible	Visible

Scenario	Service Appointment Group (Active or InActive)	Visibility of Book New Slots button	Visibility of Reschedule Slots button	Visibility of Cancel Slots button
The QTC coordinator cancels the service appointment group. The statuses of both the service appointment group and all service appointments are "Canceled."	Inactive	Visible	Hidden	Hidden

Add a Quick Action Button to Confirm Booking Slots in Advanced Therapy Management

To confirm booking requests, configure a quick action button on the highlights panel of a record page. You can configure the quick action button on the record pages of the Account, Case, Opportunity, and Care Program Enrollee objects.

When users submit a request for booking appointment slots, the appointments are submitted for approval. Health Cloud's automated and customizable Confirm Booking Request Salesforce Flow enables internal users like gene therapy coordinators to approve the request. To help gene therapy coordinators quickly access the flow, add the quick action button on the record page of a Care Program Enrollee object.

- From the object management settings for Care Program Enrollee, click **Buttons, Links, and Actions**.
- Click **New Action**, and enter these values:
 - For Action Type, select **Flow**.
 - For Flow, select **Confirm Booking Request**.
 - For Standard Label Type, select **None**.
 - For Label, enter *Confirm Booking Request*.
 - The Name field is auto-populated based on the Label field. Leave it as is.

- Save your work.
- Add the new action button to the Care Program Enrollee page layout.
 - From the object management settings for Care Program Enrollees, select **Page Layouts**.
 - Select **Care Program Enrollee Layout**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

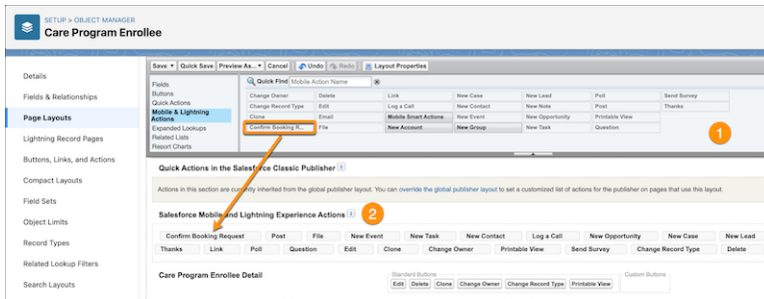
To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

- c. If the buttons in the Salesforce Mobile and Lightning Experience Actions section aren't visible, click **override the predefined actions**.
- d. Drag the Confirm Booking Request action from Mobile and Lightning Actions (1) to the Salesforce Mobile and Lightning Experience Actions section (2).



5. Save your changes.

SEE ALSO:

[Salesforce Help: Confirm Slot Booking Request](#)

How Are Slot Results Optimized in Advanced Therapy Management?

To offer the most optimized search results for available appointment slots, Advanced Therapy Management's Multi-Step Scheduling filters slot results through a combination of internal and external checks.

Multi-Step Scheduling is built on top of Lightning Scheduler APIs to efficiently retrieve search results. Using a number of search criteria, such as date ranges, lead time, service territory relationships, restrictions on the number of work types and locations, Multi-Step Scheduling provides the most optimal slot results for your appointments.

External Checks

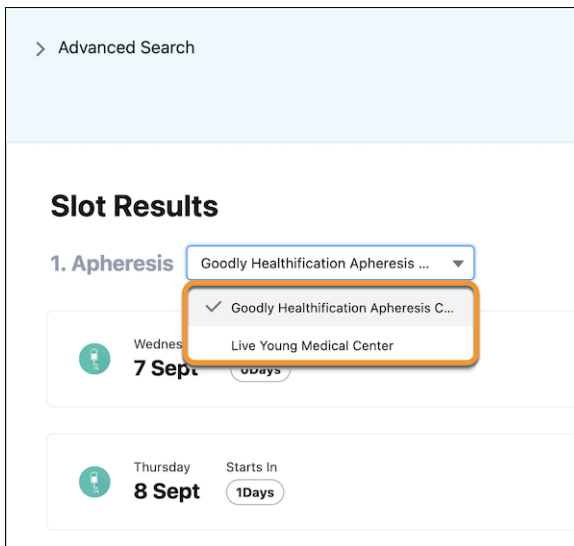
- For each work type that's part of a work procedure, we optimize slot results using a given date range for the work type. In the Schedule Appointments tab, under basic search, you can select a work type and its start and end dates. Only the slots that fall in the selected date range are retrieved.
- Slot results are also filtered by the work type's lead time. Lead time refers to the time required to complete a work type in days. For example, if the lead time for apheresis is 20, the next work type, that is, manufacturing can only be scheduled after 20 days or more. Accordingly, slot results are filtered by the availability of the manufacturing work type at an interval of 20 days or more.
- Service territory relationships defined for each work type also help filter the slot results. A service territory relationship sets up site-to-site mappings that determine the locations where subsequent work types are performed. For example, if apheresis is performed at Goodly Healthification Apheresis Center, you can set up a service territory relationship so that the next step of manufacturing takes place at Goodly Healthification Manufacturing Center. Similarly, you can create another service territory relationship between Goodly Healthification Manufacturing Center and Goodly Healthification Infusion Center where infusion is performed. Service territory relationships help users find slots based on the locations where work types are performed.
- Slots results are filtered through search criteria restrictions set up for work types and their corresponding locations. In the Schedule Appointments tab, under advanced search, you can search up to 5 work types, and select 3 locations for each work type. These restrictions help reduce the available slot results so that you can select the most optimal slot chain.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

- In the Schedule Appointments tab, you can view search results for one service territory for a work type at a time. For example, if apheresis is performed at Goodly Healthification Apheresis Center and Live Young Medical Center, you can select the service territory for which you want to view the slot results.



- Slot results are optimized by the work procedure organization the service territories are part of. In the search results, you can view slots results for only those service territories that are affiliated to a work procedure organization, that is, a parent service territory.

Internal Check

The slot formation logic uses an internal check to find the most optimal results for the slot chain. Slot formation starts from the work type with the least number of available appointment slots. For example, if apheresis and infusion both have 1000 available slots, and manufacturing has only 3, the slot formation logic picks manufacturing as the starting point, and creates the permutations accordingly. This logic minimizes duplication of effort, as incomplete slot chain permutations are eliminated right at the start.

All the checks help reduce the number of available slots and optimize the search to offer the most appropriate slots.

Keep Track of the Total Number of Patients Enrolled in Advanced Therapies

You can easily track the total number of enrollees in advanced therapies. This helps plan for enrollee count upgrades to accommodate increasing enrollees in advanced therapies. Usage-based entitlement details provide more information about the enrollee count that you can use for billing purposes.

1. To view the total number of enrollees in advanced therapies:
 - a. From Setup, in the Quick Find box, enter *Multi-Step Scheduling*, and select **Multi-Step Scheduling Settings**.
 - b. Go to the Utilization Count tab.
View the current number of care program enrollees in advanced therapies.
2. To view usage-based entitlements:
 - a. From Setup, in the Quick Find box, enter *Company Information*, and select **Company Information**.
 - b. Go to Usage-Based Entitlements.
 - c. View Health Cloud: Maximum Care Program Enrollees in Advanced Therapy to track the Allowance and Amount Used fields.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences and the Asset Scheduler Add-On license

USER PERMISSIONS

To access Multi-Step Scheduling features:

- Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

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.

When you bring a patient into a home health service or enroll a patient in a program, putting the patient's information to use can be a disjointed, frustrating experience. 75 percent of all medical communication occurs via faxes, from which someone typically has to manually grab the information and put it in the right place. Fixing a prescription form or referral that's been assigned to the wrong patient is more work than it ought to be.

Retyping patient data from a fax or PDF into multiple systems just won't do. Whether you're a case manager receiving an enrollment form by fax or email, or tracking down required information such as financial, benefits and proof of residency, every minute you save on document intake helps get the patient the services they need faster.

For information about setting up Intelligent Document Automation for your users, see [Document Automation](#).

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

Intelligent Document Reader

Use optical character recognition to automatically extract data with Amazon Textract using your AWS account. Specify the document type that can be associated with the form, upload the form, and map the form's fields to a Salesforce object's fields. For example, you can specify that a patient's birth date in a referral form must be stored in the Birthdate field of the patient's Contact record. The extracted information can be used to create or update record fields, or to verify data that's already in the org. For example, you can check a person's birth date against the birth date in their scanned passport.

For more information, see [Intelligent Document Reader](#).

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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.



Note: To use Intelligent Form Reader features with your AWS account, use Intelligent Document Reader. For more information, see [Intelligent Document Reader](#) on page 330.

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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

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 document type and tell us what kind of form it is.

Where is the uploaded file stored?

When a user uploads a file that has information to be scan, a received document record is created. An uploaded file can be related to multiple received documents, but a received document can be associated with only one content document. When a user goes back to a file and selects other pages to scan, a new received document record is created. If you delete a file from a received document record, you must also delete the associated OCR document scan result record.

Where are you storing the form data?

Associate a document 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.

Document Generation in Health Cloud

USER PERMISSIONS

To use document generation:	DocGen Designer
To use runtime:	DocGen Runtime
To use runtime in a customer community:	DocGen Runtime CC
To use OmniStudio:	OmniStudio User
To administer OmniStudio:	OmniStudio Admin

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Document Generation for Industries Add On.

With Document Generation, you can generate intake forms, contracts, reports, non-disclosure agreements, and more.

Salesforce Industries Document Generation is a solution that enables users to create documents from predefined, customized templates. It merges text-based files, such as Microsoft® Word or PowerPoint®, with other data sources to create a range of customized documents, including contracts, proposals, quotes, and reports. The available output formats include .docx, .pptx, and .pdf.

To use Document Generation with Health Cloud, follow the post-install steps for OmniStudio and create the permission sets for document generation. For details, see [Post-Install Steps for Foundation Document Generation Summer '22](#).

Manage Patient or Member Care to Improve Outcomes

A care plan gives the healthcare team a history of the patient and the progress or challenges related to their health. Care plans can have any number of problems, goals, and tasks that you can track from the person's tab in the console. You can also manage the associated team of professional and personal caregivers from a care plan.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Care Management

Get Oriented	 - Get to know how care plans can break a patient's care into focused, manageable units • Health Cloud Care Plans • Care Coordination Basics
Data Models	 - Explore the Health Cloud data models and objects that support care management • Care Management
	 • Clinical Data Model and Care Coordination

Get to Know the Components of a Health Cloud Care Management

Householding Map	 - Get a comprehensive view of the patients' household relationships. • Manage a Patient or Member's Relationships
Timelines and Life Events	 - Track your patients' health with timeline and life events. • Monitor Health Events Over Time • Manage Life Events
Social Determinants of Health	 - Capture critical social and environmental factors like homelessness and low income as barriers in the care of your patients or members. • Set Up Social Determinants to Assist High-Risk Patients and Members
Surveys and Assessments	 - Gather information that helps you manage your patients' or members' health more efficiently. • Provide Assessments for Gathering Information
	 • Get Started with Salesforce Surveys
Consent Management	 - Associate consent documents with a care program. • Consent Management for Health Cloud
	 • Add Consent Documents to a Care Plan

Set Up and Manage 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.

[Create Roles for Care Team Members](#)

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

[Customize Care Team Roles](#)

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

[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.

[Multiple 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. All care plans for a given person appear in a condensed view within the console, allowing easy access to the underlying problems, goals, and tasks.

[Enable Care Coordinators to Create Multiple 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.

[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.

[Enable Care Teams to Track Gaps](#)

Health Cloud helps care providers identify and track 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.

[Customize Tasks](#)

Customize the task types, priority, and status fields on the New Task page. Edit to reflect the kinds of tasks care coordinators most often assign, and use rating terminology specific to your organization.

[Care Plan Templates Help Simplify Onboarding](#)

Take the "work" out of workflows with care plan templates that let care coordinators create customized care plans with just a few clicks. Coordinators can add problems, goals, and tasks in bulk to a care plan. Predefined care plan templates reduce the time spent to create a care plan and enforce standards of care that improve healthcare outcomes.

[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.

[Supporting Clinical Data in Health Cloud](#)

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 Clinical Data Model and FHIR](#)

The Clinical data model is built to align with the Fast Healthcare Interoperability Resources (FHIR) specification, which is an open API standard for the exchange of healthcare information. The FHIR standard is defined by Health Level 7 (HL7), the organization that also defined the HL7 messaging standard.

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

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Create Roles for Care Team Members

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

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.

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.

Health Cloud uses two roles, *Care Coordinator* and *Patient*, during patient conversion, and they 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.

 **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. Assign the "Manage Users" user permission to the users who will be handling the care team roles.
You can do this one by one for individual users, or use profiles for multiple users.
- 2. From Setup, in the Quick Find box, enter `Case Team Roles`, and then select **Case Team Roles**.
- 3. Click **New**.
- 4. Enter a name for the role.
- 5. From the `Case Access` picklist, select the role's level of access to cases. Access levels are:

Access Level	Description
Read/Write	User can view and edit the record and add associated records, notes, and attachments to it.
Read Only	User can view the record and add associated records to it. The user can't edit the record or add notes or attachments.
Private	User can't access the record.

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

EDITIONS

Available in: Lightning Experience
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

- To set up case teams for care teams:
- Customize Application
- AND
- Manage Users
- To add team members:
- Edit on cases

7. 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.
8. Save your changes.

SEE ALSO:

[Salesforce Help: Create Case Team Roles](#)
[Customize Care Team Roles](#)
[Salesforce Help: Create Case Team Roles](#)
[Customize Care Team Roles](#)

Customize Care Team Roles

The roles that people have in the healthcare world are incredibly varied. So you have 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.

1. From Setup, in the Quick Find box, enter **Custom Metadata**, then select **Custom Metadata Types**.
2. Select **Manage Records**, next to **Health Cloud Setting**.
3. Select the label you want to change and click **Clone**.
For example, **Careplan Role Care Coordinator** or **Careplan Role Patient**.
4. Modify the Setting Value field to reflect your customized role name, and select **Active**.
When you activate your customized role name, it deactivates the original setting.
5. Save your changes.



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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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.

Multiple 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. All care plans for a given person appear in a condensed view within the console, allowing easy access to the underlying problems, goals, and tasks.

A primary care plan is created for every new patient or member 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.

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 a 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 person'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.

Enable Care Coordinators to Create Multiple 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**.

 **Note:** If you disable the Multiple Care Plans checkbox, there are no triggers blocking the creation of multiple care plans. It simply changes what you see in the console. You no longer have the option to create a new care plan from Patient Navigation and you can only see the one care plan record. We don't recommend enabling and disabling the checkbox multiple times as it can cause issues with data.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 work with people who have varying needs and concerns. Using custom metadata, you can create many types of care plans that care coordinators can employ to provide customized patients or members care. The first step is to create a case page layout and corresponding record type.

 **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, if you have cloned permission sets, you 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Add a Case Page Layout

To create a care plan record type, first create a case page layout.

1. From the object management settings for Cases, go to Case Page Layouts.
2. Click **New**.
3. In the Existing Page Layout picklist, select **CarePlan Layout**.
4. Add a page layout name. For example, CarePlanforDiabetes.
Don't use blank spaces in the name.

5. Save your changes.

Add a Care Plan Record Type

1. From the object management settings for Cases, go to Record Types.
2. Click **New**.
3. In the Existing Record Type picklist, select **CarePlan**.
4. For Record Type Label, use the name you used for Page Layout Name.
5. Record Type Name is autofilled. Keep it as is.
6. In the Support Process picklist, select **Healthcare**.
7. Add a description for the care plan record type.
8. Select the checkbox for Active.
9. Select **Make Available** for all profiles and click **Next**.
10. In Apply one layout to all profiles, select the page layout that you created.
11. Save your work.



Note: Make sure at least one care plan record type is enabled and active to avoid potential configuration errors.

Create a Custom Metadata Type

Create a custom metadata type for the care plan record type that you created.

1. From Setup, in the Quick Find box, enter *Custom*, and then select **Custom Metadata Types**.
2. Click **Manage Records** next to Care Plan Record Type and click **New**.
3. Enter a label name.
The label is name of care plan record type. Use the name you used for Record Type Label.
4. Care Plan Record Type Name is autofilled. Keep it as is.
5. (Optional). For Record Type Namespace, enter your namespace.
6. For Case Record Type Name, enter the same name as your Record Type Label.
7. Select the checkbox for Active.
8. Select the checkbox for Default.

You can have more than one active default care plan record type. When there are multiple care plan record types, their first letters are compared. If they differ, then the label whose first letter comes earlier in the alphabet appears as the default in the picklist. When a default isn't specified or the user can't access the record type, the record is converted using the delivered default record type.

9. Save your work.

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 the fields don't match or the current user doesn't have access to that record type, the default record type is used.

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 default FieldSet for Problems.

1. From Setup, open the Object Manager, and click the custom object whose actions you want to manage, and then go to Field Sets.
2. 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 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.

 **Note:** If you choose to add custom values in the Category picklist of Care Plan Problem, you need to replicate those values in the Category picklist in Care Plan Template Problem as well. If the value sets of these two picklists aren't in sync, you get an error when you create a care plan problem using a template with a custom category value.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Enable Care Teams to Track Gaps

Health Cloud helps care providers identify and track 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**.
3. On the Card View dropdown page, click **New**.
4. Create a Care Gaps item in the dropdown menu by entering the following into the fields shown:

Name	Enter a name for the entry, such as <i>Care Gaps</i> .
Category Label	Enter the name of the custom label for the parent category that contains the child menu navigation items, such as <i>Engagement</i> .
Category Name	Name of the parent category that contains child menu navigation items, such as <i>Engagement</i>
Default Subtab	When selected, the related subtab appears by default in the Health Cloud console.
URL Parameter	(Optional) Add more URL parameters to the existing Visualforce page or URL to open the new tab. URL parameter format key=value,key2=value
Tab Type	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.
Subcategory Name	Name of the child category in the menu list, such as <i>Care Gaps</i> .
Subcategory Label	Customized label for the name of the child category in the menu list, such as Tab_Care_Gaps. 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.
Subtab Sort Order	Indicates the order in which this tab appears in the console when it's been selected as a default tab.
Page Type	Specify the page type as <i>VFpage</i> .
URL	Enter this URL to access the page <i>/apex/HealthCloudGA__HcCareGapsPage</i> .

5. Save your settings.
6. Add Care Gaps record type to the required user profiles. From the **Users > Profiles** menu item, select an appropriate user profile.
7. 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**.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

8. Assign the Care Gap record type and page layout to the profile.

For example, in the case section of the Profiles page, navigate to Record Types and Page Layout Assignments. For the CareGap record type, select the CareGap page layout assignment and the Assigned Record Types checkbox.

9. 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](#)

[Show Data Sources with Custom Icons](#)

Customize Tasks

Customize the task types, priority, and status fields on the New Task page. Edit to reflect the kinds of tasks care coordinators most often assign, and use rating terminology specific to your organization.

[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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create or change custom fields:

- Customize Application

New Task: Care Plan Task

Task Information

* Subject
Test blood sugar 3 times a day

TaskType
--None--
✓ --None--
Uncategorized
Administrative
Other
Clinical

Create recurring series or tasks
☐

Category
--None--

Description Information

Comments

1. From the object management settings for Activity, go to Fields & Relationships.
2. Click **TaskType**.
3. In the 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 TaskType picklist.
6. Save your changes.
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 the object management settings for Task, go to Fields & Relationships.
2. Click **Priority**.
3. To add a value to the Task Priority Picklist Values 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 the object management settings for Task, go to Fields & Relationships.
2. Click **Status**.
3. To add a value to the Task Status Picklist Values 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

1. From the object management settings for Tasks, go to **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. The **Field Set Name** is autopopulated. Keep it as is.
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. Save your work.
7. Add fields by dragging them from the object palette 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; the vertical order indicates the order of how the fields render on pages.

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.



Note: The Experience Cloud Task List displays a maximum of five fields, regardless of how many you add to the field set.

8. Remove a field by dragging the element back to the object palette, or click the  icon next to the element.
9. Mark a field required by double-clicking the element or click its wrench icon () and selecting the `Required` checkbox.
10. Save your work.

When you're finished creating the new field set to use in place of either the HcCarePlanTaskFields or HC Task List field set, update the configuration settings for Task field sets in Health Cloud Settings.

SEE ALSO:

[Manage Health Cloud Settings](#)

[Manage Health Cloud Settings](#)

Care Plan Templates Help Simplify Onboarding

Take the “work” out of workflows with care plan templates that let care coordinators create customized care plans with just a few clicks. Coordinators can add problems, goals, and tasks in bulk to a care plan. Predefined care plan templates reduce the time spent to create a care plan and enforce standards of care that improve healthcare outcomes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

1. [Create a Care Plan Template](#)

You can use care plan templates to create standardized and reusable care plans, and add template problems, goals, and tasks for specific health needs.

2. [Create a Care Plan Template Problem](#)

Care plan template problems are health diagnoses, such as high blood pressure or diabetes, that can be reused for different patients. Care coordinators can use care plan template problems to provide standardized care across similar problems and patients. You can create a care plan template problem to use in your care plan template.

3. [Create a Care Plan Template Goal](#)

Care plan template goals are common health targets that care coordinators can reuse in different care plans. Care coordinators can add predefined goals to a patient's care plan, saving time and effort. For example, a care plan template goal for patients with type 2 diabetes is Dietary Changes, with details of low-sugar meal plans. You can create a care plan template goal to use in your care plan template or template problem.

4. [Create a Care Plan Template Task](#)

Tasks are actionable steps a patient can take to achieve a goal and overcome a problem. For a type 2 diabetes patient, a task could be testing blood sugar levels weekly. Each task is assigned to a care team member who makes sure the patient completes the care plan tasks. With a care plan template task, you can easily add predefined tasks for a specific problem to a patient's care plan. You can create a care plan template task to use in your care plan template, template problem, or template goal.

5. [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 that reads, extracts, and loads data from comma-separated values (CSV) files or from a database connection.

Create a Care Plan Template

You can use care plan templates to create standardized and reusable care plans, and add template problems, goals, and tasks for specific health needs.

To create a care plan template along with its associated problems, goals, and tasks, use the Care Plan Templates tab. 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:

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

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. If you try to use a blank care plan template to create a care plan, you'll get a validation error. 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

Care plan template problems are health diagnoses, such as high blood pressure or diabetes, that can be reused for different patients. Care coordinators can use care plan template problems to provide standardized care across similar problems and patients. You can create a care plan template problem to use in your care plan template.

Create a template problem for a specific care plan template, directly from that template's related list. You can also create a custom Care Plan Template Problems tab 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.

1. If you're creating a template problem for a specific template directly, go to that record's related list. And then click **New** for Care Plan Template Problems.

If you've created a custom Care Plan Template Problems tab, go to App Launcher, select the Care Plan Template Problems tab, and click **New**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create, update, or delete a care plan template

- Create, Read, Edit, and Delete on Care Plan Template

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

2. Enter the following:

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

3. Click **Save**. The new template problem opens in a new tab.

Create a Care Plan Template Goal

Care plan template goals are common health targets that care coordinators can reuse in different care plans. Care coordinators can add predefined goals to a patient's care plan, saving time and effort. For example, a care plan template goal for patients with type 2 diabetes is Dietary Changes, with details of low-sugar meal plans. You can create a care plan template goal to use in your care plan template or template problem.

Create a template goal for a specific care plan template, directly from that template's related list. You can also create a custom Care Plan Template Goals tab and add the tab to the Health Cloud custom apps. You can include any additional fields you need to the Care Plan Template Goals object's page layout.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

1. 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.
If you've created a custom Care Plan Template Goals tab, go to App Launcher, select the Care Plan Template Goals tab, and click **New**.
2. Provide the information that makes up the care plan goal template.

Field	Description
Care Plan Template Goal Name	Name of the goal associated with the care plan template.
Description	Provide a brief description of the template and its intended use.
Active	Select to activate this care plan goal and make it available to apply to a patient or member.

Field	Description
Sort Order	Indicates the vertical order in which this goal appears within the list of goals.
Priority	The priority of the care plan goal such as low, normal, or high.
Care Plan Template	Name of the care plan template this goal is related to. Don't select values for both Care Plan Template and Template Problem lookups in the same template goal. 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 either of these lookups.
Template Problem	Name of the template problem this goal is related to. Don't select values for both Template Problem and Care Plan Template lookups in the same template goal. 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 either of these lookups.
Category	Indicates the category of goals the template goal belongs to.

3. Click **Save**. The new template goal opens in a new tab.

Create a Care Plan Template Task

Tasks are actionable steps a patient can take to achieve a goal and overcome a problem. For a type 2 diabetes patient, a task could be testing blood sugar levels weekly. Each task is assigned to a care team member who makes sure the patient completes the care plan tasks. With a care plan template task, you can easily add predefined tasks for a specific problem to a patient's care plan. You can create a care plan template task to use in your care plan template, template problem, or template goal.

Create a template task for a specific care plan template, directly from that template's related list. You can also create a custom Care Plan Template Tasks tab and add the tab to the Health Cloud custom apps. You can include any additional fields you need to the Care Plan Template Tasks object's page layout.

1. 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.

If you've created a custom Care Plan Template Tasks tab, go to App Launcher, select the Care Plan Template Tasks tab, and click **New**.

2. Enter the following:

Field	Description
Care Plan Template Task Name	Name of the task associated with care plan template.
Subject	The subject or name of the task.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Field	Description
Active	Select to activate this care plan task and make it available to apply to a patient or member.
Assigned To	Name of the person who's assigned to the task.
Care Plan Template	Name of the care plan template 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.
Care Plan Template Problem	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.
Care Plan Template Goal	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.
Priority	The priority of the care plan task such as low, normal, or high.
Description	A description of the task.
Sort Order	Indicates the order in which tasks are sorted in the list of tasks.
Status	The status of the care plan task such as in progress, complete, or new.
Offset	The number of days to add as an offset date. Tasks that have an offset date add the assigned number of days to the task start date. For example, if the care plan start date is December 9 and a task offset is +7 days, the task's due date is December 16.

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 that reads, extracts, and loads data from comma-separated values (CSV) files or from a database connection.

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 this order:

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 user name 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To access the page to download Data Loader:

- Modify All Data

To use Data Loader:

- API Enabled

AND

The appropriate user permission for the operation you are doing, for example, Create on accounts to insert new accounts

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 the object management settings for cases, go to Case Page Layouts and click **CarePlan Layout**.
2. Click **Mobile & Lightning Actions** and drag the **Apply Care Plan Template** button (1) into the Salesforce Mobile and Lightning Experience Actions area (2).

To make Mobile & Lightning Actions writable, click **override the predefined actions**.

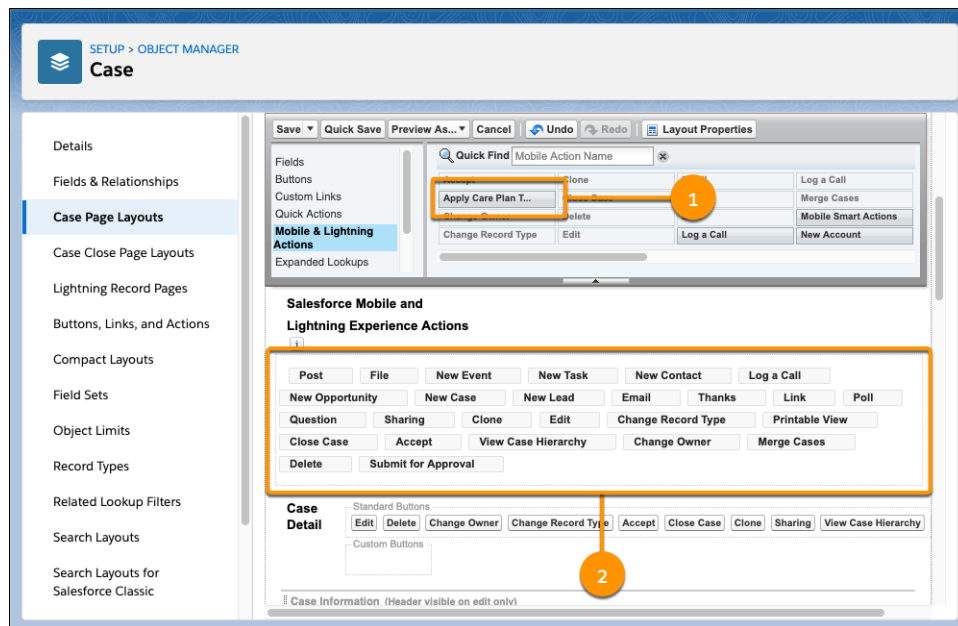
 **Note:** If you want to see the new button directly on the page header, you must place it at the top-left corner of the Salesforce Mobile and Lightning Experience Actions area.

3. Click **Save**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Supporting Clinical Data in Health Cloud

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.

Health Cloud has two data models that support storing clinical data.

- **The packaged EHR data model:** A set of custom objects that are part of the Health Cloud managed package.
- **The Clinical data model:** A set of standard objects built on the Salesforce platform.

The EHR data model and the Clinical data model are built to align with the Fast Healthcare Interoperability Resources (FHIR) specification. These data models support 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.

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).

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 give 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 a record type of Case. 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.

Problem

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.

Goal

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 or problem on the care plan, or even directly to the care plan itself.

Custom objects in the EHR Data Model

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. Data is replicated into these custom objects from EHR or other clinical systems with read-only access. And because this data in Health Cloud is view only, the source system remains the system of record. The packaged EHR data model is succeeded by the standard objects in the newer Clinical data model, which is built to align with a newer version of FHIR. So we recommend that you build your integration using the standard objects in the Clinical data model.

Standard objects in the Clinical data model

Similar to the packaged EHR data model, these standard objects hold patient data that comes from external EHR source systems. For example, `HealthCondition` represents detailed information about conditions, problems, and diagnoses recognized by a clinician. Objects in this data model are built to align with FHIR R4, specifically FHIR v4.0.1. All clinical data related feature development

in Health Cloud is to be built on these objects, not the older objects in the packaged EHR data model. So we recommend that you build your integration using the standard objects in the Clinical data model.

 Note:

- Starting with the Winter '23 release, new customers won't be able to create records in the packaged EHR objects that have counterpart standard objects in the FHIR R4-aligned data model.
- All future development in Health Cloud will be built on the FHIR R4-aligned data model. The packaged objects in the EHR data model won't be used for future development.

SEE ALSO:

[Salesforce Help: Patient Care with Health Cloud](#)

[Developer Guide: Care Management Objects](#)

[Salesforce Help: Person Accounts](#)

[Developer Guide: Clinical Data Model](#)

[Developer Guide: EHR Data Model](#)

[Developer Guide: Working With Electronic Health Records](#)

[Salesforce Help: Patient Care with Health Cloud](#)

[Developer Guide: Care Management Objects](#)

The Clinical Data Model and FHIR

The Clinical data model is built to align with the Fast Healthcare Interoperability Resources (FHIR) specification, which is an open API standard for the exchange of healthcare information. The FHIR standard is defined by Health Level 7 (HL7), the organization that also defined the HL7 messaging standard.

The Clinical data model is the successor to the older packaged EHR data model. The standard objects in the Clinical data model store all sorts of clinical data, including conditions, medications, encounters, immunizations, procedures, and so on. The Health Cloud implementation of FHIR aligns with FHIR v4.0.1.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

The FHIR-Aligned Clinical Data Model

Health Cloud's new clinical data model maps closely to FHIR R4 specification, but with a few minor differences.

- The new clinical data model supports most of the FHIR R4 attributes, except certain instances that aren't relevant for the typical Health Cloud user.
- Entities like Identifier and Code Set have more attributes than their FHIR R4 counterparts. These extra fields increase data usability across the Salesforce platform and support specific needs of certain features in Health Cloud.
- FHIR R4 typically defines zero-to-one, zero-to-many, one-to-one, or one-to-many values for each attribute. However, the Salesforce platform doesn't support one-to-many and zero-to-many values for a field, except in multi-select picklists. Instead, Salesforce uses child objects that can create multiple records that all reference the same parent record to achieve this type of logical zero/one-to-many values. For instance, an encounter can have multiple providers participating in it. To support this scenario, Salesforce has the Clinical Encounter Provider child object. This child object has records representing each provider in an encounter, and each of these records reference the record of the encounter that these providers were a part of.

Differences Between the Packaged EHR Data Model and the Clinical Data Model

The older EHR data model differs from the FHIR-aligned Clinical data model in six significant ways.

- The EHR data model is based on FHIR R1 standards, while the new clinical data model is based on the latest FHIR release, FHIR R4. The new clinical model is backwards compatible. Also, many resources in FHIR R4 have reached a normative stage of development, which means that the FHIR R4 standard is now stable and can be widely adopted.
- The EHR data model is built on the Health Cloud managed package, while the new clinical data model is built entirely on the core Salesforce platform with standard objects.
- In the packaged EHR data model, almost all EHR entities have a Lookup to Account. To share data related to a patient, the user needs separate access to EHR records belonging to that patient. In the FHIR-aligned clinical data model, entities have a Master-Detail relationship to the Account record, which allows multiple sharing settings for child entities without the use of extra permissions.
- The existing EHR data model doesn't support Code Set resources as defined by FHIR standards. Data related to these resources was captured as plain text fields, making it difficult to upsert patient data. The FHIR-aligned Clinical data model uses the Code Set and Code Set Bundle objects that can store codes, which makes it easy to upsert patient data.
- The EHR data model has a highly denormalized structure, which can lead to data inconsistency because the same data is stored in multiple records. When data is inconsistent, updating and upserting data become more expensive. By contrast, there's less data overlap with the new clinical data model because it uses references to store data.
- The records in the packaged EHR data model are view only, which means that only the external source system can be the source of truth. But the Clinical data model doesn't have this restriction, so that Health Cloud can be a source of truth.

SEE ALSO:

[Developer Guide: Clinical Data Model](#)

[Developer Guide: Mapping FHIR R4 to Salesforce Standard Objects](#)

[Understand Which FHIR Objects Need Custom Report Types](#)

Orchestrate Patient Care with Integrated Care Management

Integrated Care Management helps your care managers create enhanced care plans and coordinate care more efficiently for their patients. The feature's integration with Discovery Framework (Assessments) gives care managers recommendations when they create care plans. And because Integrated Care Management is built over the OmniStudio framework, you have greater flexibility to customize the feature to your organization's requirements.

User Interface

Integrated Care Management's user interface is built using a FlexCard, `IndustriesHCCarePlanManager`, that you can place on a person account record page. This FlexCard and its child cards display a list of a patient's care plans, their case numbers, statuses, and start dates. Users can use the **Create Care Plan** button to launch an OmniScript flow that lets them create care plans and gives them problem, goal, and intervention recommendations for those care plans.

Reusable Templates and Problem Goal Intervention Libraries

Integrated Care Management lets you create a library of definitions for problems, goals, and interventions that you can use to create reusable care plan templates. These templates help your care managers quickly create care plans for common scenarios, without having to manually create every section of the care plan from scratch. Reusable care plan templates and the PGI library also help you reduce the number of records you use in your org, with the added advantage of enhancing data consistency across records.

Integrated Care Management Data Model

Integrated Care Management uses a data model that’s FHIR R4 and USCDI-aligned to store its data and make it interoperable.

Integrated Care Management and the Discovery Framework

You can author assessments in the discovery framework that your care managers can use to collect information from their patients. When a care manager uses these completed assessments to create a care plan, Integrated Care Management gives them recommendations for what components they can add to that care plan. These recommendations can be problems, goals, or interventions. The recommendations that users see are based on how you map each assessment question and their response options to items in your PGI (Problem Goal Intervention) library. In addition to mapping responses, you also have to set up a decision table to process how those recommendations are mapped to responses.

Enable Integrated Care Management

Before your users can start using Integrated Care Management, you have to enable the feature and some other settings first.

Define a Problem Goal Intervention Library

Setting up a reusable Problem Goal Intervention (PGI) library helps you reduce the number of duplicate records in your org and maintain a certain level of data consistency across similar records. Definitions in this library are used in care plan templates and are instantiated to their corresponding care plan components when users use those templates. A PGI library consists of problem definitions, goal definitions, and action plan templates.

Define Care Plan Templates

Define reusable care plan templates using the definitions you that you set up in your PGI library. These templates determine the hierarchical structure of the care plans instantiated from them. Your users use these templates when they create care plans to add the problems, goals, and interventions they need.

Get Your Org Ready to Use the Discovery Framework

Health Cloud Assessments uses the power of Discovery Framework and OmniStudio to build complex questionnaires. To use Assessments, you must first install the OmniStudio managed package, enable Discovery Framework, configure sharing and permissions, and place the Assessments component on a patient record page.

Set Up Assessments and Recommendations

To give your users recommendations when they create care plans, first create an assessment that they can use to gather information from patients. Then, map the questions and their responses to appropriate recommendations. And finally, set up a decision table to process that mapping.

Add the Integrated Care Management UI to the Patient Page

To let your users use Integrated Care Management, add the `IndustriesHCCarePlanManager` FlexCard to a person account record page.

Integrated Care Management Data Model

Integrated Care Management uses a data model that’s FHIR R4 and USCDI-aligned to store its data and make it interoperable.

Care Plan

Here’s the set of objects used in instantiated care plans and the level of access your users need for them.

Object	Purpose	Required Access
Care Plan	The high-level record that represents a care plan.	Read

EDITIONS

- Available in: Lightning Experience
- Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Purpose	Required Access
		• Create • Edit • View All
Care Plan Detail	The junction that associates a care plan to its related records. Its primary use is to connect a care plan to the Health Condition (problem) that it addresses.	• Read • Create • Edit • View All
Case	The case record that a care plan is created against.	• Read • Create • Edit • View All
Health Condition	A problem that a care plan is created to address.	• Read • Create • Edit • View All
Health Condition Detail	Additional details related to a condition, such as the conditions site and laterality on the patient's body.	• Read • Create • Edit • View All
Goal Assignment	A goal that a care plan is intended to achieve.	• Read • Create • Edit • View All
Goal Assignment Detail	The junction that connects a goal to its parent problem.	• Read • Create • Edit • View All
Action Plan	A group of related intervention tasks in a care plan. An action plan is attached to a problem, goal, or care plan.	• Read • Create • Edit • View All

Object	Purpose	Required Access
Action Plan Item	A child record of an action plan representing each of its interventions. These records reference Task.	• Read • Create • Edit • View All
Task	An intervention task in a care plan that's meant to achieve a goal, resolve a problem, or act on a care plan.	• Read • Create • Edit • View All

Care Plan Templates

Here's the set of objects you use to define the hierarchical structure of care plan templates and the level of access your users need for them.

Object	Purpose	Required Access
Care Plan Template	The template for the high-level care plan.	• Read • View All
Care Plan Template Problem	The template for problems attached to a care plan. These problems can be defined with or without goals. If the problem has no child goal, this template references a problem definition in the PGI library. If the problem has a child goal, this template references a problem goal definition junction.	• Read • View All
Care Plan Template Goal	The template for goals attached directly to a care plan. This template references a goal definition in the PGI library.	• Read • View All
Problem Goal Definition	The junction that associates a parent problem to its child goal.	• Read • View All
Action Plan Template Assignment	The junction that associates an action plan template to its associated goal, problem, or care plan.	• Read • View All

Problem Goal Intervention Library

Here's the set of objects that you use to define a PGI library for your users and the level of access users need for them.

Object	Purpose	Required Access
Problem Definition	The definition record for a problem that's instantiated by Integrated Care Management as a Health Condition record.	• Read • View All
Goal Definition	The definition record for a goal that's instantiated by Integrated Care Management as a Goal Assignment record.	• Read • View All
Action Plan Template	The definition record for a set of intervention tasks that's instantiated by Integrated Care Management as an Action Plan record with its associated Action Plan Item and Task records.	• Read • View All
Action Plan Template Item	A child record of an action plan template representing each of its interventions. These records are instantiated by Integrated Care Management as Action Plan Item records.	• Read • View All

In addition to these objects, Integrated Care Management also uses the objects in the Discovery Framework data model to support Assessments and recommendations.

SEE ALSO:

[Industries Common Resources Developer Guide: Discovery Framework Standard Objects](#)

Integrated Care Management and the Discovery Framework

You can author assessments in the discovery framework that your care managers can use to collect information from their patients. When a care manager uses these completed assessments to create a care plan, Integrated Care Management gives them recommendations for what components they can add to that care plan. These recommendations can be problems, goals, or interventions. The recommendations that users see are based on how you map each assessment question and their response options to items in your PGI (Problem Goal Intervention) library. In addition to mapping responses, you also have to set up a decision table to process how those recommendations are mapped to responses.

Here's the typical workflow for how Assessments and the Discovery Framework fit into Integrated Care Management.

1. The admin creates an assessment with single-select or multi-select type questions.
2. The admin maps the response options in those assessment questions to the corresponding recommendations they provide for care plans.
3. The admin sets up a decision table to process assessment responses based on how those responses are mapped to recommendations.
4. The care manager uses the assessment questionnaire to gather information from a patient.
5. The care manager uses the assessment to create a care plan.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

6. Integrated Care Management gives the care manager problem, goal, and intervention recommendations based on the responses in that assessment.

 Note:

- For an assessment to be compatible with Integrated Care Management, its questions must be of the types single-select or multi-select. The response options for those questions must be under 255 characters as well.
- While it's possible to map an assessment response to a follow-up assessment the patient should take, our default UI doesn't display this recommendation anywhere.

Enable Integrated Care Management

Before your users can start using Integrated Care Management, you have to enable the feature and some other settings first.

Prerequisites: To enable Integrated Care Management, you must first enable the FHIR R4-aligned Clinical Data Model, install the OmniStudio managed package, and enable OmniStudio runtime in your org.

1. From Setup, enter *Integrated Care Management Settings* in the Quick Find box, and then select **Integrated Care Management Settings**.
2. Enable the **Enhanced Care Plans** setting.
3. If you want Goal Assignment records to be automatically shared with its parent records, like Care Plan, enable the **Automatic Sharing for Goal Assignment Records** setting.

SEE ALSO:

[Health Cloud Developer Guide: Clinical Data Model](#)
[OmniStudio for Health Cloud](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To configure and enable features

- Health Cloud Admin permission set

Define a Problem Goal Intervention Library

Setting up a reusable Problem Goal Intervention (PGI) library helps you reduce the number of duplicate records in your org and maintain a certain level of data consistency across similar records. Definitions in this library are used in care plan templates and are instantiated to their corresponding care plan components when users use those templates. A PGI library consists of problem definitions, goal definitions, and action plan templates.



Note: We recommend restricting write and edit access on the library to just the admins to help your org maintain the library's data integrity.

1. [Create a Problem Definition](#)

Problem definitions instantiate to problems when templates that use them are used to create care plans. You can record commonly used information in these definitions, such as ICD codes, names, descriptions, and so on. This information is copied over to Health Condition records when they're instantiated.

2. [Create a Goal Definition](#)

Goal definitions instantiate to goals when templates that use them are used to create care plans. You can record commonly used information in these definitions, such as names, descriptions, and categories. This information is copied over to Goal Assignment records when they're instantiated.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

3. [Create an Action Plan Template](#)

Action Plan Templates instantiate to action plans and their interventions when templates that use them are used to create care plans. You can record commonly used information in these definitions, such as the name, priority, duration, and so on. This information is copied over to Action Plan, Action Plan Item, and Task records when they're instantiated.

Create a Problem Definition

Problem definitions instantiate to problems when templates that use them are used to create care plans. You can record commonly used information in these definitions, such as ICD codes, names, descriptions, and so on. This information is copied over to Health Condition records when they're instantiated.

1. From the App Launcher, find and select **Problem Definitions**.
2. Click **New**.
3. Enter a name and description.
This information is copied to the Problem Name and Problem Description fields on Health Condition.
4. Select a priority for this problem.
This information can be modified by users at the instance record level for their individual situations. You don't have to worry about those changes reflecting across all records instantiated from the library.
5. Select a code set or code set bundle representing an ICD code in the **Code** field.
This reference is copied over to the Condition Code field on Health Condition.
6. Select **Problem List Item** in the **Category** field.
7. Select **Health Condition** in the **Usage Type** field.
8. Select **Active**.
9. Save your problem definition.

Next, let's define a goal definition.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create problem definitions

- Create access for Problem Definition

To edit problem definitions

- Edit access for Problem Definition

To Delete problem definitions

- Delete access for Problem Definition

Create a Goal Definition

Goal definitions instantiate to goals when templates that use them are used to create care plans. You can record commonly used information in these definitions, such as names, descriptions, and categories. This information is copied over to Goal Assignment records when they're instantiated.

1. From the App Launcher, find and select **Goal Definitions**.

2. Click **New**.

3. Enter a name and description.

4. Set the status to **Active**.

5. Select a category for the goal.

By default, this picklist has no values. You have to define category values for this picklist in the Object Manager first.

6. Save your goal definition.

Next, let's define an action plan.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create goal definitions

- Create access for Goal Definition

To edit goal definitions

- Edit access for Goal Definition

To Delete goal definitions

- Delete access for Goal Definition

Create an Action Plan Template

Action Plan Templates instantiate to action plans and their interventions when templates that use them are used to create care plans. You can record commonly used information in these definitions, such as the name, priority, duration, and so on. This information is copied over to Action Plan, Action Plan Item, and Task records when they're instantiated.

1. From the App Launcher, find and select **Action Plan Templates**.

2. Enter a name and description for the action plan template.

These values are copied over as the name and description of action plans instantiated from this template.

3. If you want to let users add more interventions to action plans created from this template, select **Let users add items to action plans**.

Selecting this option helps care managers add interventions to an existing care plan and its action plan.

4. Select **Industries** as the action plan type.

5. Select a target object based on the type of interventions you're defining in the action plan.

- For interventions at the goal level, select **Goal Assignment**.
- For interventions at the problem level, select **Health Condition**.
- For interventions at the care plan level, select **Care Plan**.

6. Click **Save**.

7. Now that you've created the base for an action plan template, let's add some interventions to it.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create an action plan template

- Create access for Action Plan Template and Action Plan Template Item

To create an intervention

- Create access for Task

a. Click **New Task**.

b. Enter a subject.

This value is the name of the intervention that is instantiated in the corresponding Task record.

c. Set the priority to **High**, **Normal**, or **Low**.

d. Enter the number of days that the intervention is meant to be completed in.

The due date for the intervention is calculated by adding this value to the date and time when the action plan is instantiated.

e. If the intervention you're defining is a mandatory action, select **Required**.

If this intervention is meant to be a prerequisite for another intervention, then it has to be marked as required.

f. If the intervention you're defining has prerequisite interventions, select them in the Prerequisites section.

g. In the Task assignment section, select **Action Plan Creator**.

Selecting this options ensures that all the interventions generated from this action plan are by default assigned to the care manager who created the action plan.

h. If necessary, set an appropriate time in the Reminder section.

i. Save your work.

8. After you add all the necessary interventions to the action plan template, click **Publish Template** and click **Publish**.

That's it; your PGI library is now set up! Next, let's create care plan templates.

Define Care Plan Templates

Define reusable care plan templates using the definitions you that you set up in your PGI library. These templates determine the hierarchical structure of the care plans instantiated from them. Your users use these templates when they create care plans to add the problems, goals, and interventions they need.

You can add interventions at the goal level, problem level, or directly at the care plan level. Similarly, you can add goals at the problem level or directly at the care plan level. However, you can add problems only at the care plan level.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

1. [Create Care Plan Templates](#)

A Care Plan Template record acts as the top-level parent that houses all the problems, goals, and interventions under it.

2. [Add Problems with Goals to a Care Plan Template](#)

You can add problems with goals to a care plan template by creating problem-goal junction records. A problem-goal junction associates a parent problem definition with its child goal definition. These junction records are then referenced in Care Plan Template Problem records.

3. [Add Problems Without Goals to a Care Plan Template](#)

You can add problems without goals to a care plan template by creating Care Plan Template Problem records. This Care Plan Template Problem record references the appropriate Care Plan Template and Problem Definition records in it.

4. [Add Goals Without Problems to a Care Plan Template](#)

You can add goals without problems to a care plan template by creating a Care Plan Template Goal record. This Care Plan Template Goal record references the appropriate Care Plan Template and Goal Definition records in it.

5. [Add Interventions to a Care Plan Template](#)

You can add interventions to your care plan template by creating an Action Plan Template Assignment record. This record references an action plan template with the required interventions and the problem, goal, or care plan template where they're required.

Create Care Plan Templates

A Care Plan Template record acts as the top-level parent that houses all the problems, goals, and interventions under it.

1. From the App Launcher, find and select **Care Plan Templates**.



Warning: If you haven't hidden the Health Cloud managed package's Care Plan Template object in your org, ensure that the one you've selected here is the right one. You can verify your selection by inspecting the page URL to see if it says `HealthCloudGA__CarePlanTemplate__c` or `CarePlanTemplate`. Integrated Care Management uses the latter one.

2. Click **New**.
3. Enter a name, description, and status for the care plan template.
4. Save your template.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create a care plan template

- Create access for Care Plan Template

To edit a care plan template

- Edit access for Care Plan Template

Add Problems with Goals to a Care Plan Template

You can add problems with goals to a care plan template by creating problem-goal junction records. A problem-goal junction associates a parent problem definition with its child goal definition. These junction records are then referenced in Care Plan Template Problem records.

1. Create a problem-goal junction.
 - a. From the App Launcher, find and select **Problem Goal Definitions**.
 - b. Click **New**.
 - c. In the **Problem Definition** field, select the parent problem definition from your PGI library.
 - d. In the **Goal Definition** field, select the child goal definition from your PGI library.
 - e. Save your work.
2. Create a Care Plan Template Problem record.
 - a. From the App Launcher, find and select **Care Plan Template Problems**.
 - b. Click **New**.
 - c. In the **Care Plan Template** field, select the care plan template that you want to add the problem and its goal to.
 - d. In the **Problem Definition** field, set the reference to **Problem Goal Definition** and select the problem-goal junction you created.
 - e. Enter a sequence number.
This value is used to determine how the problems in your care plan are sorted.
 - f. Set the priority as **High**, **Medium**, or **Low**.
 - g. Save your template.

Add Problems Without Goals to a Care Plan Template

You can add problems without goals to a care plan template by creating Care Plan Template Problem records. This Care Plan Template Problem record references the appropriate Care Plan Template and Problem Definition records in it.

1. From the App Launcher, find and select **Care Plan Template Problems**.
2. Click **New**.
3. In the **Care Plan Template** field, select the care plan template that you want to add the problem to.
4. In the **Problem Definition** field, select a problem definition from your PGI library.
5. Enter a sequence number.
This value is used to determine how the problems in your care plan are sorted.
6. Set the priority as **High**, **Medium**, or **Low**.
7. Save your template.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create a problem template

- Create access for Care Plan Template Problem

To edit a problem template

- Edit access for Care Plan Template Problem

To create a problem goal definition

- Create access for Problem Goal Definition

To edit a problem goal definition

- Edit access for Problem Goal Definition

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create a problem template

- Create access for Care Plan Template Problem

To edit a problem template

- Edit access for Care Plan Template Problem

Add Goals Without Problems to a Care Plan Template

You can add goals without problems to a care plan template by creating a Care Plan Template Goal record. This Care Plan Template Goal record references the appropriate Care Plan Template and Goal Definition records in it.

1. From the App Launcher, find and select **Care Plan Template Goals**.
2. Click **New**.
3. In the **Care Plan Template** field, select the care plan template that you want to add the goal to.
4. In the **Goal Definition** field, select a goal definition from your PGI library.
5. Set the priority as **High**, **Medium**, or **Low**.
6. Save your template.

Add Interventions to a Care Plan Template

You can add interventions to your care plan template by creating an Action Plan Template Assignment record. This record references an action plan template with the required interventions and the problem, goal, or care plan template where they're required.

1. From the App Launcher, find and select **Action Plan Template Assignments**.
2. Click **New**.
3. In the **Associated Object** field, select a problem definition, goal definition, or care plan template where you want to add interventions.
4. In the **Action Plan Template Version** field, select the action plan template with the interventions you want to add to your template.
5. Save your assignment.

That's it; you've now created a care plan template with problems, goals, and interventions.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create a goal template

- Create access for Care Plan Template Goal

To edit a goal template

- Edit access for Care Plan Template Goal

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To assign an action plan template

- Create access for Action Plan Template Assignment

To edit an action plan template assignment

- Edit access for Action Plan Template Assignment

Get Your Org Ready to Use the Discovery Framework

Health Cloud Assessments uses the power of Discovery Framework and OmniStudio to build complex questionnaires. To use Assessments, you must first install the OmniStudio managed package, enable Discovery Framework, configure sharing and permissions, and place the Assessments component on a patient record page.

1. [Install OmniStudio, Enable Assessments, and Update Sharing Settings](#) on page 399.
2. [Give users access to Assessments](#).
3. [Add the Assessment Component to the Patient Page](#) on page 404

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Set Up Assessments and Recommendations

To give your users recommendations when they create care plans, first create an assessment that they can use to gather information from patients. Then, map the questions and their responses to appropriate recommendations. And finally, set up a decision table to process that mapping.

1. [Create an Assessment](#)

Care managers use assessments to gather information from patients. For an assessment to be compatible with Integrated Care Management, its questions must be of the type single-select or multi-select, and the responses for those questions must be under 255 characters.

2. [Map Responses to Recommendations](#)

To map assessment question response options to their corresponding recommendations, use the Assessment Question Response Recommendation object.

3. [Set Up a Decision Table](#)

Integrated Care Management uses Decision Tables to process how assessment question responses and recommendations are mapped. Setting up the decision table must be the last step in your data setup for Integrated Care Management. If you map more responses and recommendations after you've set up a decision table, that decision table must then be refreshed.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Create an Assessment

Care managers use assessments to gather information from patients. For an assessment to be compatible with Integrated Care Management, its questions must be of the type single-select or multi-select, and the responses for those questions must be under 255 characters.

To learn how to create an assessment, see [Create an Assessment with Discovery Framework](#).

After creating assessments with questions, next we map their questions and responses to recommendations.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create an OmniScript:

- OmniStudio Admin permission set

Create, Read, Edit, and Delete access for Assessment Question

Map Responses to Recommendations

To map assessment question response options to their corresponding recommendations, use the Assessment Question Response Recommendation object.

1. From the App Launcher, find and select **Assessment Question Response Recommendations**.
2. Click **New**.
3. In the **Assessment Question Version** field, select the question whose response you're mapping a recommendation to.
4. In the **Omni Process** field, select the assessment that the question belongs to.
5. In the **Recommendation Reference** field, select an appropriate recommendation.

If the recommendation is a problem, select a Problem Definition record. If the recommendation is a goal, select a Goal Definition record. If the recommendation is a set of intervention tasks, select an Action Plan Template record. Or if the recommendation is another assessment that the patient should take, select an Omni Process record.

6. In the **Text Response** field, enter the response that the recommendation is mapped to.

Repeat these steps for every response in every question that you have in your assessment. After you're done, you create a decision table.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To map responses

- Create, Read, Edit, and Delete access for Assessment Question Response Recommendation

Set Up a Decision Table

Integrated Care Management uses Decision Tables to process how assessment question responses and recommendations are mapped. Setting up the decision table must be the last step in your data setup for Integrated Care Management. If you map more responses and recommendations after you've set up a decision table, that decision table must then be refreshed.

1. From Setup, enter *Decision Tables* in the Quick Find box, and then select **Decision Tables**.
2. Click **New**.
3. Enter a name, API name, and description for the decision table.
The API name can contain only underscores and alphanumeric characters, and must be unique in your org for this entity. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts for package installations.
4. In the Source Object field, select **Assessment Question Response Recommendation**.
5. Click **Next**.
6. In the **Assessment Question Version ID** row, select **Input** in the **Us As** field, **Equals** in the **Operator** field, and **None** in the **Sort Order** field.
7. In the **Omni Process ID** row, select **Input** in the **Us As** field, **Equals** in the **Operator** field, and **None** in the **Sort Order** field.
8. In the **Text Response** row, select **Input** in the **Us As** field, **Equals** in the **Operator** field, and **None** in the **Sort Order** field.
9. In the **Recommendation Reference ID** row, select **Output** in the **Us As** field and **None** in the **Sort Order** field.
10. Click **Next**.
11. Set the conditions and custom logic to **All conditions are met (AND)**.
12. Save your decision table.

That's it; you're done. If you map more responses and recommendations after the decision table is set up, go back to the decision table and click **Refresh**.

To learn more about Decision Tables, see [Decision Table](#),

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create, edit, and activate a decision table:

- System Administrator profile

Add the Integrated Care Management UI to the Patient Page

To let your users use Integrated Care Management, add the `IndustriesHCCarePlanManager` FlexCard to a person account record page.

While you can place this FlexCard on any person account record page, we recommend using the Patient page.

1. Open a person account record page in the Lightning App builder.
2. Place the FlexCard component at an appropriate spot on your page layout.
 **Tip:** We recommend creating a dedicated tab on your page for this FlexCard and placing it inside that tab.
3. Select the FlexCard component you placed on the page.
4. In the component properties pane, enter `IndustriesHCCarePlanManager` in the **Flexcard Name** field.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To modify pages

- Customize Application

5. In the **Decision Table Name** field, enter the API name of your response recommendations decision table.
6. Save and activate the page.

Care Coordination for Slack

Improve patient outcomes and reduce healthcare costs by using the Care Coordination for Slack app to alert your care coordinators about updates to their patients' health records.

Set up dedicated critical notifications channels that make higher priority updates easier to find. Use the out-of-the-box Health Cloud notification flows or clone and configure them to set up your own custom notifications.

Limitations

- The Care Coordination for Slack app only works if you're using the Care Plans feature from the Health Cloud managed package.
- Notifications for updates related to a patient's health records are sent only if the patient has at least one active care plan.
- Notifications are only sent to care coordinators who are assigned the role of Care Coordinator on a patient's active care teams.

[Types of Notifications in Care Coordination for Slack](#)

Care coordinators receive Slack notifications when certain patient records are created or updated. Most notifications are delivered to the Care Coordination for Slack app in its Messages tab. However, to make sure that your care coordinators aren't overwhelmed with notifications, we're also introducing the concept of Critical Notifications.

[Create and Assign a Care Coordination for Slack Permission Set to Users](#)

You and your users need a permission set with the Connect Salesforce with Slack system permission to use Care Coordination for Slack. Because we don't ship a permission set with that permission out-of-the-box, you have to create a custom permission set and assign it to your users and yourself.

[Enable Care Coordination for Slack](#)

Before your users can use the Care Coordination for Slack app, you must integrate Slack with Salesforce and enable the app.

[Clone and Activate Flows for the Care Coordination for Slack App](#)

The provided flows for the Care Coordination for Slack app aren't activated by default. Clone and activate the flows for the types of notifications your care coordinators need.

[Custom Notifications in Care Coordination for Slack](#)

In addition to the notifications included with Care Coordination for Slack, you can also configure custom notifications for any object that references patients. Configure custom notifications by creating a custom notification type and then cloning and modifying an out-of-the-box notification flow.

[Create Critical Notifications Channels](#)

To ensure that you don't overwhelm your care coordinators with notifications, set up critical notifications channels where they only get specific types of notifications.

Types of Notifications in Care Coordination for Slack

Care coordinators receive Slack notifications when certain patient records are created or updated. Most notifications are delivered to the Care Coordination for Slack app in its Messages tab. However, to make sure that your care coordinators aren't overwhelmed with notifications, we're also introducing the concept of Critical Notifications.

Critical notifications are for changes that are of a higher value to your care coordinators. For instance, a care coordinator is likely to be more concerned about a new allergy that's recorded for their patient than perhaps a new care determinant.

You can set up dedicated channels for each of your care coordinators. However, you can only create a single critical notifications channel for each user. And you don't have to worry about data security—only the care coordinator who you created the channel for can see the contents of that channel. No other user in your organization can see the notifications sent to someone else's critical notifications channel—not even the admin.



Note: If you don't set up a critical notifications channel for a care coordinator, that care coordinator doesn't get notified when critical updates happen in their patients' health records.

Notifications are sent to your users using autolaunch flows. Here are the notifications we support by default.

Notification Type	Trigger Condition	Classification	Flow Name
Updated Care Plan	The status of a case record, with the Care Plan record type, is changed to Escalated.	Regular	Notify Care Coordinators of Care Plan Updates
New Care Determinant	A new care determinant record is created	Regular	Notify Care Coordinators of New Care Determinant
New Allergy Intolerance	New allergy intolerance record is created	Critical	Send Critical Notifications for New Allergy Intolerance
New Health Condition	New health condition record is created	Critical	Send Critical Notifications for New Health Condition

To send more types of notifications to your care coordinators, configure your own custom notifications.



Note: Notifications are classified as regular or critical at the org level. You can't classify a notification as regular for one care coordinator and critical for another. Consult with your stakeholders before you create custom notifications and classify them as regular or critical.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions of Health Cloud

Create and Assign a Care Coordination for Slack Permission Set to Users

You and your users need a permission set with the Connect Salesforce with Slack system permission to use Care Coordination for Slack. Because we don't ship a permission set with that permission out-of-the-box, you have to create a custom permission set and assign it to your users and yourself.

1. In Salesforce, from Setup, enter *Permission Sets* in the Quick Find box and then select **Permission Sets**.
2. Click **New**.
3. Enter a label, API name, and description for your permission set and save it.
4. Click **System Permissions**.
5. Click **Edit**.
6. Find and select the **Connect Salesforce with Slack** system permission and save your change.
7. Click **Save** on the confirmation screen.
8. Click **Manage Assignments**.
9. Click **Add Assignments**.
10. Select all your care coordinator users and yourself, and assign the permission set.
11. Click **Done**.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions of Health Cloud

USER PERMISSIONS

To manage permissions

- Manage Profiles and Permission Sets

Health Cloud Admin permission set

Enable Care Coordination for Slack

Before your users can use the Care Coordination for Slack app, you must integrate Slack with Salesforce and enable the app.

1. Integrate Slack with Salesforce.
 - a. In Salesforce, from Setup, enter *Slack* in the Quick Find box, and then select **Initial Slack Setup**.
 - b. Select the option to Integrate Slack and Salesforce.
 - c. Review and accept the terms and conditions.**Important:** You can't withdraw your acceptance, so be sure to thoroughly review the terms and conditions before accepting.
2. Enable the Care Coordination for Slack app in your Salesforce org.
 - a. In the Quick Find box, enter *Care Coordination for Slack Settings*, and select **Care Coordination for Slack Settings**.
 - b. Enable **Care Coordination for Slack**.
3. Go to [this page](#) and install the Care Coordination for Slack app in your organization's workspace.

To receive notifications on Slack, a user's Slack user profiles must be connected with their Salesforce IDs. Ask your users to click **Connect** from the Home tab in the Care Coordination for Slack app.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions of Health Cloud

USER PERMISSIONS

To configure and enable features

- Health Cloud Admin permission set

Clone and Activate Flows for the Care Coordination for Slack App

The provided flows for the Care Coordination for Slack app aren't activated by default. Clone and activate the flows for the types of notifications your care coordinators need.

Available flows and notification types:

Notification Type	Classification	Flow Name
Updated Care Plan	Regular	Notify Care Coordinators of Care Plan Updates
New Care Determinant	Regular	Notify Care Coordinators of New Care Determinant
New Allergy Intolerance	Critical	Send Critical Notifications for New Allergy Intolerance
New Health Condition	Critical	Send Critical Notifications for New Health Condition

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions of Health Cloud

USER PERMISSIONS

To configure and enable features

- Health Cloud Admin permission set

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Open one of the provided notification flows.
3. Click **Save As** and select **A New Flow**.
4. Enter a label, API name, and description for the cloned flow.
5. Save the cloned flow.
6. Activate your new flow.

Repeat these steps for all the notification flows you need for your organization.

Custom Notifications in Care Coordination for Slack

In addition to the notifications included with Care Coordination for Slack, you can also configure custom notifications for any object that references patients. Configure custom notifications by creating a custom notification type and then cloning and modifying an out-of-the-box notification flow.

 **Important:** When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft, and/or Apple. Salesforce isn't responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

1. [Create a Custom Notification Type](#)
Custom notification types define the text your users see when they get a notification of that type. They also create custom action elements in the Flow Builder to send the right notifications to Slack.
2. [Clone and Configure Custom Notification Flows](#)
Cloning our out-of-the-box flows saves you the trouble of designing new flows from scratch. Open one of our regular or critical notification flows in the Flow Builder, clone it, and modify the clone's object, trigger condition, fields, and actions as necessary.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions of Health Cloud

Create a Custom Notification Type

Custom notification types define the text your users see when they get a notification of that type. They also create custom action elements in the Flow Builder to send the right notifications to Slack.

1. From Setup, in the Quick Find box, enter *Custom Notifications*, and then select **Custom Notifications**.
2. Click **New**.
3. Select **Slack** and click **Next**.
4. Enter a name, API name, and description for the notification type.
5. Find and select the object the notification is about and click **Next**.

 **Note:** You can't create custom notifications for the Task object.

6. Find and select `healthcloud__caremgmt` and click **Next**.
7. Design the UI for your custom notification. You can add a title, body, and up to three buttons.

 **Tip:** We recommend using merge fields to mention the name of the patient in either the title or body so that your care coordinators can easily identify who the notification is about. Learn more about merge fields [here](#).

8. Click **Done**.

Use your custom notification type in a notification flow.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions of Health Cloud

USER PERMISSIONS

To create a custom notification type

- Health Cloud Admin permission set

Clone and Configure Custom Notification Flows

Cloning our out-of-the-box flows saves you the trouble of designing new flows from scratch. Open one of our regular or critical notification flows in the Flow Builder, clone it, and modify the clone's object, trigger condition, fields, and actions as necessary.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Select one of the default notifications flows. Find a list of flows [here](#).
3. Edit the Start element.
 - a. In the Select Object section, change the default object to the object you need custom notifications for.
 - b. In the Configure Trigger section, select the action that triggers the flow and sends notifications.
 - c. (Optional) In the Set Entry Conditions section, specify the record-level changes that trigger notifications.
 - d. Click **Done**.
4. If the API name of the field that references patients is different across the new object and the default object, edit the Retrieve Care Coordinators subflow element.
 - a. In the Set Input Values section, set the `PatientID` field's value as `{!$Record.FieldApiName}`. Replace the `FieldApiName` part with the API name of the field on the new object that references patients.
 - b. Click **Done**.
5. Open Edit View for the Send Slack Notifications action element and note down the default values for the `Recipient IDs` and `Record ID` fields.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions of Health Cloud

USER PERMISSIONS

To configure flows

- Health Cloud Admin permission set

6. Add an Action element after the Send Slack Notifications action element.
 - a. Find and select the action with the same name as the new custom notification type you created earlier.
 - b. Enter a label, API name, and description for the new action element.
 - c. In the Set Input Values section, replicate the default values you noted down earlier in the `Recipient IDs` and `Record ID` fields.
 - d. Click **Done**.
7. Delete the default Send Slack Notifications action element.
8. To clone the flow, click **Save As** and select **A New Flow**.
9. Enter a label, API name, and description for the new flow and click **Save**.
10. And finally, activate your new flow.

And that's it; you're done creating your custom notification!

Create Critical Notifications Channels

To ensure that you don't overwhelm your care coordinators with notifications, set up critical notifications channels where they only get specific types of notifications.

Prerequisites:

- Care Coordination for Slack is enabled in your Salesforce org.
- The Care Coordination for Slack app is installed in your organization's Slack workspace.
- The user you're creating a channel for is part of that workspace.
- The user's Slack user profile is connected to their Salesforce ID.
- The user doesn't already have a critical notifications channel.

1. From Setup, in the Quick Find box, enter *Care Coordination for Slack Settings*, and then select **Care Coordination for Slack Settings**.
2. Click **Create Channel**.
3. Select a care coordinator and click **Next**.
4. Enter a name for the channel and click **Next**.

If you previously tried to create a channel for this user and the flow failed, you can't enter a new name for the channel. The flow bypasses the step where you enter the channel name and tries to add your user to the channel that was originally created for them.

5. Click **Done**.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions of Health Cloud

USER PERMISSIONS

To configure and enable features

- Health Cloud Admin permission set

Unified Health Scoring

Unified Health Scoring gives your users a holistic view of their patients' health profiles. Using this feature, you can define a unified health profile for your organization that shows your users everything concerning their patients' health. You can also configure contextual actions that prompt your users to intervene based on a patient's score. This multidimensional view together with contextual prompts help your users plan their interventions better for improved health outcomes, greater patient engagement, and reduced healthcare costs.

What You Get

Here's what you get with Unified Health Scoring:

- Three metadata types
 - Score Category: Defines the different categories and subcategories of a unified health profile.
 - Score Range Classification: Defines and classifies the score ranges of a category or subcategory.
 - Score Category Calculated Insight: Maps a score category or subcategory to its calculated insight in Data Cloud. Don't worry, we'll talk about how Data Cloud fits into the picture in a bit.
- Three standard objects
 - Health Score: Stores the score information for patients.
 - Health Score Action Log: Records the log of actions triggered from the Dynamic Actions for Unified Health Scoring component.
 - Action Visibility: Assists in defining contextual visibility rules for actions in the Dynamic Actions for Unified Health Scoring component.
- Three lightning components
 - Score Details for Unified Health Scoring: Displays the historical score trends for a patient's unified health profile and its subcategories. This information is also displayed as graphs.
 - Score List for Unified Health Scoring: Displays a list of patients with score changes in the last fifteen or thirty days and the degree of their score change.
 - Dynamic Actions for Unified Health Scoring: Displays a set of contextual actions your users can take based on the visibility rules you define for them.
- Two connect APIs
 - Score Synchronization API: Updates score information in Health Score with the latest information processed by calculated insights in Data Cloud.
 - Synchronization Status API: Displays the status of a synchronization request.

Integration with Data Cloud

While Unified Health Scoring can render score information in an easy-to-interpret user interface, it can't calculate that score information for you. That's where Data Cloud comes in. You can export a patient's health records to Data Cloud and use the Calculated Insights feature in Data Cloud to process those records and derive scores. You can then import those scores back into Health Score object in Health Cloud. This integration allows you to define custom logic to derive scores using the data crunching capabilities of CDP.

If you prefer not to use Data Cloud, you can always use custom solutions to derive health scores. But be sure to import those scores into the Health Score object.

 **Important:** The use of certain sensitive data such as age, gender identity, or race, as well as others in the calculation of a Unified Health Score may introduce bias into your scores and predictions. We suggest you select these attributes thoughtfully, consistent with your organization's best practices for bias mitigation.

[Unified Health Scoring Data Model and Permissions](#)

The Unified Health Scoring license gives you access to a set of objects, metadata types, and permissions that the feature requires.

[Integrate Data Cloud with Unified Health Scoring](#)

While Unified Health Scoring can display a patient's score information and historical score trends in a user-friendly interface, it doesn't calculate those scores for you. Use Data Cloud to aggregate a patient's related records and derive the required scores.

Unified Health Profile

A unified health profile is the holistic view of a patient that covers the different aspects of their health and healthcare. This multidimensional view is achieved by defining a parent category for your profile and then defining all the subcategories that contribute to its performance.

Define a Unified Health Profile

To define a unified health profile, create its score category, classify score ranges, and define subcategories. If you use Data Cloud to calculate scores, also map its category and subcategories to their calculated insights in Data Cloud.

Configure the Unified Health Scoring Components

Your users interact with Unified Health Scoring using its three lightning components. The Score Detail for Unified Health Scoring component shows users the detailed score breakdown of a patient's unified health profile. The Score List for Unified Health Scoring component shows your users a list of their patients with their current and previous scores and the degree of score change. The Dynamic Actions for Unified Health Scoring component prompts your users to take action when certain conditions are met.

Customize Action Logs

Actions triggered from the Dynamic Actions for Unified Health Scoring component is logged in the Health Score Action Log object. You can customize the information logged in this object using the `IUnifiedHealthScore` Apex interface in a custom Apex class.

Configure an Actions Timeline

Use the Enhanced Timeline component to visually represent your users' healthcare interventions with their patients or members chronologically.

Unified Health Scoring Data Model and Permissions

The Unified Health Scoring license gives you access to a set of objects, metadata types, and permissions that the feature requires.

Objects

Unified Health Scoring uses these objects.

Object	Purpose	Required Access
Health Score	Stores the scores for a specified category for a patient.	• Read • Create • Edit • View All
Health Score Action Log	Logs the actions triggered from the Dynamic Actions for Unified Health Score lightning component.	• Read • Create • View All
Action Visibility	Enables admins to connect patients to any related healthcare records in Health Cloud so that the visibility rules for contextual actions can be	• Read • Create • View All

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

Object	Purpose	Required Access
	configured based on those records.	

Metadata Types

Unified Health Scoring uses these metadata types. Score Category is the parent, and Score Range Classification and Score Category Calculated Insight are its children.

Object	Purpose
Score Category	Defines the score category and subcategories for a unified health profile.
Score Range Classification	Defines how different ranges of scores are classified for a score category or subcategory. This metadata type is a subset of Health Score.
Score Category Calculated Insight	Defines how score categories and subcategories are mapped to their counterpart calculated insights in Data Cloud. This metadata type is a subset of Health Score.

Permissions

Users need these permissions to use Unified Health Scoring.

- **Permission Set License:** Unified Health Scoring
- **Permission Set:** Unified Health Scoring

Integrate Data Cloud with Unified Health Scoring

While Unified Health Scoring can display a patient's score information and historical score trends in a user-friendly interface, it doesn't calculate those scores for you. Use Data Cloud to aggregate a patient's related records and derive the required scores.

 **Note:** You can use Unified Health Score without using Data Cloud, but you have to provide a custom solution that derives scores and imports those scores into the Health Score object.

Data Cloud uses data streams to pull information from Health Cloud and store that information in custom data model objects. You can then use Calculated Insights in Data Cloud to aggregate that information and derive scores. And finally, use the Score Synchronization API to retrieve those scores from Data Cloud and insert them into Health Cloud. But we'll talk about that last part later.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

1. [Connect Your Health Cloud and Data Cloud Orgs](#)

To get started with your Data Cloud integration, set up a Data Cloud instance. Then, use the Salesforce CRM connector to connect Data Cloud to Health Cloud.

2. [Configure Permissions for Data Cloud](#)

Configure the Data Cloud Salesforce Connector Integration permission set so that Data Cloud can access your Health Cloud data.

3. [Set Up Data Streams and Data Model Objects with the Unified Health Scoring Data Kit](#)

Use the Unified Health Scoring data kit to quickly add data streams and custom data model objects to your org. These data streams and data model objects collect data from Health Cloud and store them in Data Cloud. This information is then used to run Calculated Insights and derive scores.

4. [Set Up Data Streams and Custom Data Model Objects Manually](#)

If the Unified Health Scoring data kit doesn't have a data stream you need, or if you'd prefer not to use the data kit, you can configure your own data streams and custom data model objects manually.

5. [Set Up Calculated Insights](#)

Calculated insights use the data stored in data model objects to run aggregates and derive scores. You can use either SQL queries or the Calculated Insights Builder to configure the score derivation logic.

SEE ALSO:

[Customer Data Platform: Build a Customer Data Platform with Customer Data Platform](#)

Connect Your Health Cloud and Data Cloud Orgs

To get started with your Data Cloud integration, set up a Data Cloud instance. Then, use the Salesforce CRM connector to connect Data Cloud to Health Cloud.

1. In Customer Data Cloud Setup, select **Setup Home**.

2. Click **Get Started**.

This takes a couple of minutes. Keep an eye on the screen to know when you're done.

3. In Customer Data Cloud Setup, select **Salesforce CRM**.

4. Click **Connect** for the Salesforce org with your Health Cloud implementation.

Your Health Cloud and Data Cloud orgs are now connected. Next, update the Customer Data Cloud connector permission set.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To manage Data Cloud

- Customer Data Cloud Admin permission set

Configure Permissions for Data Cloud

Configure the Data Cloud Salesforce Connector Integration permission set so that Data Cloud can access your Health Cloud data.

1. From Setup, enter *Permission Sets* in the Quick Find box, and then select **Permission Sets**.

2. Find and select **Data Cloud Salesforce Connector Integration**.

3. Click **System Permissions**.

4. Click **Edit**.

5. Find and select **Manage Health Cloud**, **Manage Health Cloud Financial Data**, **Manage Health Cloud Utilization Management**, and **Perform medication reconciliation with Medication Management**.

6. Save your changes.

7. Click **Permission Set Overview**.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To manage permissions

- Manage Profiles and Permission Sets

Health Cloud Admin permission set

8. Click **Object Settings**.
9. Find a Health Cloud object that you want to use for score calculation in Data Cloud and select it.
10. Click **Edit**.
11. In Object Permissions, select **Read** and **View All**.
12. In Field Permissions, select **Read Access** for the fields you have to use for your calculation.
13. Save your changes.
14. Update object and field permissions for every Health Cloud object you plan to use for your score calculations.

 **Note:** You don't have to assign this permission set to any users.

Now that the required permissions are configured, you can set up your data streams.

Set Up Data Streams and Data Model Objects with the Unified Health Scoring Data Kit

Use the Unified Health Scoring data kit to quickly add data streams and custom data model objects to your org. These data streams and data model objects collect data from Health Cloud and store them in Data Cloud. This information is then used to run Calculated Insights and derive scores.

1. In Customer Data Cloud Setup, click **Salesforce CRM**.
2. In the Standard Data Bundles section, click the **Menu** icon next to **Salesforce CDP CRM Unified Health Scoring** and click **Install**.
3. Select **Install for All Users** and click **Install**.
Wait for us to finish the installation. It takes a couple of minutes.
4. Click **Done** when the screen says that the installation is complete.

That's it, you're done! Verify that the data streams you want were installed by going to the Data Streams page from the App Launcher and inspecting the list of data streams in your org.

Here's the list of objects that we create data streams for with the Unified Health Scoring data kit:

- Account
- Activity Timing
- Allergy Intolerance
- Care Barrier
- Care Barrier Determinant
- Care Barrier Type
- Care Benefit Verify Request
- Care Benefit Verify Settings
- Care Determinant
- Care Diagnosis
- Care Metric Target
- Care Observation
- Care Observation Component
- Care Performer

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud, Data Cloud, and Unified Health Scoring Add-On license

USER PERMISSIONS

To manage Data Cloud

- Customer Data Cloud Admin permission set

- Care Preauth
- Care Preauth Items
- Care Program
- Care Program Campaign
- Care Program Eligibility Rule
- Care Program Enrollee
- Care Program Enrollee Product
- Care Program Enrollment Card
- Care Program Goal
- Care Program Healthcare Provider
- Care Program Product
- Care Program Provider
- Care Program Team Member
- Care Provider Facility Specialty
- Care Registered Device
- Care Request Drug
- Care Request Extension
- Care Request Item
- Care Request Reviewer
- Care System Field Mapping
- Care Request
- Clinical Alert
- Clinical Encounter
- Clinical Encounter Diagnosis
- Clinical Encounter Facility
- Clinical Encounter Identifier
- Clinical Encounter Provider
- Clinical Encounter Reason
- Clinical Encounter Service Request
- Clinical Service Request
- Clinical Service Request Detail
- Coverage Benefit
- Coverage Benefit Item
- Diagnostic Summary
- Health Care Diagnosis
- Health Care Procedure
- Health Condition
- Health Condition Detail
- Health Score
- Healthcare Facility

- Healthcare Practitioner Facility
- Healthcare Provider
- Identifier
- Medication
- Medication Dispense
- Medication Reconciliation
- Medication Reconciliation Statement Recommendations
- Medication Request
- Medication Statement
- Medication Statement Detail
- Medication Reconciliation Recommendation
- Member Plan
- Patient Health Reaction
- Patient Immunization
- Patient Medical Procedure
- Patient Medical Procedure Detail
- Patient Medication Dosage
- Person Language
- Person Name
- Plan Benefit
- Plan Benefit Item
- Purchaser Plan
- Purchaser Plan Associations
- Score Category
- Score Range Classification

Set Up Data Streams and Custom Data Model Objects Manually

If the Unified Health Scoring data kit doesn't have a data stream you need, or if you'd prefer not to use the data kit, you can configure your own data streams and custom data model objects manually.

1. In the App Launcher, find and select **Data Streams**.
2. Click **New**.
3. Select **Salesforce CRM** and click **Next**.
4. Click **All Objects**, select an object to create a data stream for, and click **Next**.
You can only select objects with Read and View All access in the Salesforce Connector Integration permission set.
5. Select the fields you need in the data stream and click **Next**.
You can only select fields with Read access in the Salesforce Connector Integration permission set.
6. Deploy your data stream.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To manage Data Cloud

- Customer Data Cloud Admin permission set

7. After a data stream is created, go to its record page, and click **Start Data Mapping**.
8. Click **Select Objects**, then click **Custom Data Model**.
9. Click **New Custom Object**.
10. Select the fields for your custom data model object and click **Save**.

You only see the fields you selected for your data stream here.

Wait for the system to map the fields in your data stream to the fields in your custom data model. This might take a couple of minutes.

11. Review the mapped fields and click **Save**.
12. Repeat these steps for each object needed for your calculations.

Now that your data streams and data model objects are set up, you can configure your calculated insights.

Set Up Calculated Insights

Calculated insights use the data stored in data model objects to run aggregates and derive scores. You can use either SQL queries or the Calculated Insights Builder to configure the score derivation logic.

You must wait approximately 30-60 minutes after setting up a data stream and data model object before you can configure a calculated insight.

1. In the App Launcher, find and select **Calculated Insights**.
2. Click **New**.
3. Choose how you want to create your insights and click **Next**.

To learn how to configure calculated insights, see [Data Cloud help](#).

 **Important:** Ensure that you define a measure and dimension for your calculated insight. The measure is the derived score value and the dimension is a reference to the patient record. When you define these attributes, fields are created in that insight to store their values. If you use the Calculate Insights Builder, you define the measure and dimension attributes on the Aggregate element.

That's it! You're done configuring Data Cloud for Unified Health Scoring.

 **Tip:** Make a note of the API names of the different calculated insights you set up and their measure and dimension fields. You need this information at a later stage to map score categories to their calculated insights.

SEE ALSO:

[Customer Data Platform: Calculated Insights](#)

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To manage Data Cloud

- Customer Data Cloud Admin permission set

Unified Health Profile

A unified health profile is the holistic view of a patient that covers the different aspects of their health and healthcare. This multidimensional view is achieved by defining a parent category for your profile and then defining all the subcategories that contribute to its performance.

A unified health profile is comprised of the following:

- **Score Category:** The primary theme of a unified health profile. A score category is at the top level of a unified health profile.
- **Score Range Classification:** The interpretations of different ranges of a category's or subcategory's scores. You can classify multiple score ranges for a category.
- **Subcategory:** The components that together form the parent category or theme of a unified health profile. These subcategories are structurally the same as a score category because they're defined using the same metadata type. But subcategories have parent categories, and score categories don't. A unified health profile's score category can have up to two levels of subcategories, and each category or subcategory can have up to three subcategories under it.

 **Note:** The scores of subcategories don't roll up to the score of a parent category. Scores for all categories levels are derived by their associated calculated insights in Data Cloud. If you need scores for subcategories to roll up to higher levels, you have to explicitly configure your score calculation logic to function that way.

If you use Data Cloud as your score calculation system, you also have mappings that connect categories and subcategories to their associated calculated insights.

 **Important:** The use of certain sensitive data such as age, gender identity, or race, as well as others in the calculation of a Unified Health Score may introduce bias into your scores and predictions. We suggest you select these attributes thoughtfully, consistent with your organization's best practices for bias mitigation.

Define a Unified Health Profile

To define a unified health profile, create its score category, classify score ranges, and define subcategories. If you use Data Cloud to calculate scores, also map its category and subcategories to their calculated insights in Data Cloud.

 **Important:** The use of certain sensitive data such as age, gender identity, or race, as well as others in the calculation of a Unified Health Score may introduce bias into your scores and predictions. We suggest you select these attributes thoughtfully, consistent with your organization's best practices for bias mitigation.

1. [Create a Score Category](#)

Create a score category for your unified health profile using the Score Category metadata in Setup.

2. [Classify Score Ranges](#)

After you create a score category or subcategory, classify how its score ranges are interpreted. This classification helps your users quickly identify if a score is 'great' or 'concerning'. Consult with your subject matter experts when you decide how to classify different ranges for each type of category.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To define a unified health profile

- Unified Health Scoring Permission Set

AND

Unified Health Scoring Permission Set License

3. [Create Subcategories](#)

Subcategories add depth to a unified health profile by adding information about a score's subcomponents. You define subcategories using the same Score Category metadata you use to define a score category for your unified health profile. The only difference is that subcategories have a value in their Parent Category field.

4. [Map Categories to Calculated Insights](#)

To run the Score Synchronization API, you have to map score categories to their corresponding calculated insights in Data Cloud. This step isn't required if you don't use Data Cloud or the Score Synchronization API.

Create a Score Category

Create a score category for your unified health profile using the Score Category metadata in Setup.

1. From Setup, enter *Unified Health Scoring Settings* in the Quick Find box, and then select **Unified Health Scoring Settings**.
2. Click **Add Score Category**.
3. Enter a name and description for the category. This is the name for your unified health profile.



Tip: We recommend adding the word *Score* at the end of your category's name.

4. Enter the URL for an image to use it as the icon for the category and click **Done**.

Next, you classify the different score ranges for your category.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To define a unified health profile

- Unified Health Scoring Permission Set

Unified Health Scoring Permission Set License

Classify Score Ranges

After you create a score category or subcategory, classify how its score ranges are interpreted. This classification helps your users quickly identify if a score is 'great' or 'concerning'. Consult with your subject matter experts when you decide how to classify different ranges for each type of category.

1. From Setup, enter *Unified Health Scoring Settings* in the Quick Find box, and then select **Unified Health Scoring Settings**.
2. Select the score category to classify score ranges for.

You can only see top-level score categories on this screen. If you're trying to classify score ranges for a subcategory, open its parent category and then navigate to the subcategory from there.

3. Click **Add Classification**.
4. Enter a classification name.
This name helps users interpret scores.
5. Select a color code for your range.



Tip: Be mindful of cultural differences when you choose a color code. Different colors mean different things in different cultures.

6. Enter a start and end value for your range and click **Done**.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To define a unified health profile

- Unified Health Scoring Permission Set

Unified Health Scoring Permission Set License

Ensure that the ranges you define don't overlap with each other or leave any gaps.

7. Repeat these steps until you've classified the full range of a category. Make sure that ranges don't overlap and that you don't have any gaps.

Your unified health profile is technically complete at this point. However, we strongly recommend defining a few subcategories to give it more depth.

Create Subcategories

Subcategories add depth to a unified health profile by adding information about a score's subcomponents. You define subcategories using the same Score Category metadata you use to define a score category for your unified health profile. The only difference is that subcategories have a value in their Parent Category field.

You define subcategories using the same Score Category metadata you use to define a score category for your unified health profile. The only difference is that subcategories have a value in their Parent Category field.

1. From Setup, enter *Unified Health Scoring Settings* in the Quick Find box, and then select **Unified Health Scoring Settings**.
2. Select the score category to define subcategories for.
You can only see top-level score categories on this screen. If you're trying to create a subcategory for a subcategory, open its parent category and navigate to the subcategory.
3. Click **Add Subcategory**.
4. Enter a name, description, and icon URL.
5. Click **Done**.
6. Classify score ranges and create subcategories for your subcategory the same way you did for its parent category.



Note: You can create up to two levels of subcategories for the top-level score category. This means that your top-level category can have a subcategory, and that subcategory can have a subcategory too.

7. Repeat these steps until you've created two more subcategories.



Note: The Score Details for Unified Health Scoring lightning component only displays three subcategories for a category. You can create additional subcategories, but your users won't see them.

Now that you're done defining your unified health profile, the next step is to map it to a calculated insight in Data Cloud. This step is required only if you use Data Cloud as your score derivation solution.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To define a unified health profile

- Unified Health Scoring Permission Set

Unified Health Scoring Permission Set License

Map Categories to Calculated Insights

To run the Score Synchronization API, you have to map score categories to their corresponding calculated insights in Data Cloud. This step isn't required if you don't use Data Cloud or the Score Synchronization API.

1. From Setup, enter *Unified Health Scoring Settings* in the Quick Find box, and then select **Unified Health Scoring Settings**.

2. Select the score category you have to map a calculated insight for.

You can only see top-level score categories on this screen. To map a subcategory, open its parent category and navigate to the subcategory.

3. Click **Map Calculated Insights**.



Tip: Now's a good time to pull up the API names you noted down as part of the [Set Up Calculated Insights](#) instructions.

4. In the **Insight Name** field, enter the API name of the corresponding calculated insight.
5. In the **Insight Score Field Name** field, enter the API name of the score field you created as the measure of the calculated insight.
6. In the **Insight Subject Field Name** field, enter the API name of the patient lookup you created as the dimension of the calculated insight.
7. If you created a field in your calculated insight to capture score dates, enter that field's API name in the **Insight Date Field Name** field.
8. Click **Done**.
9. Repeat these steps for each score category you've defined.

And that's it! Your score categories are now compatible with Data Cloud and the Score Synchronization API.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To define a unified health profile

- Unified Health Scoring Permission Set

Unified Health Scoring Permission Set License

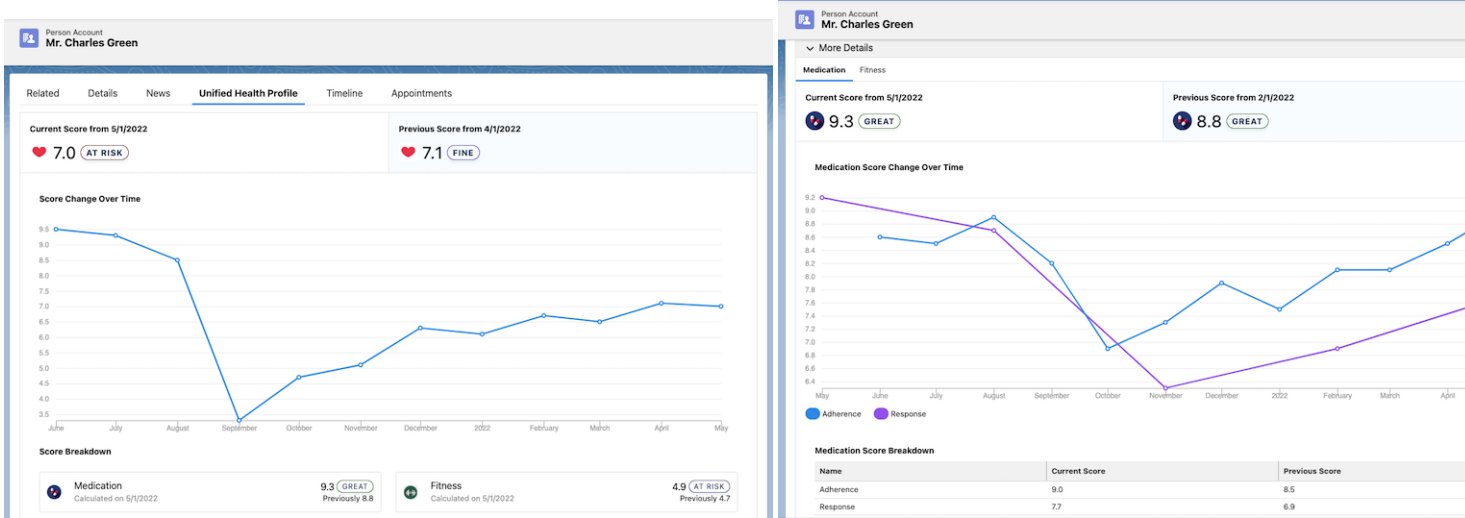
Configure the Unified Health Scoring Components

Your users interact with Unified Health Scoring using its three lightning components. The Score Detail for Unified Health Scoring component shows users the detailed score breakdown of a patient's unified health profile. The Score List for Unified Health Scoring component shows your users a list of their patients with their current and previous scores and the degree of score change. The Dynamic Actions for Unified Health Scoring component prompts your users to take action when certain conditions are met.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

Score Details for Unified Health Scoring



This component displays the detailed score information of a patient’s unified health profile. Your users see this information:

- Current score and its date
- Previous score and its date
- A graph that shows score change over time (up to the last 12 scores)
- Current score, its date, previous score, and its date for up to three subcategories
- A graph that shows the score change over time for sub-subcategories.

You can place this component on Account, Contact, and Lead record pages.

Score List for Unified Health Scoring

Health
Health score changes in the last 15 Days

Scored Subjects: 5

Search subjects...

Name	Current Score	Current Score Date	Previous Score	Previous Score Date	Score Change Percent
1 Shavna Green	6.3	07/03/2022	5.6	07/02/2022	12.5
2 Kim Anderson	6.8	07/03/2022	6.1	07/01/2022	11.48
3 Ken Shinomiya	8.2	07/03/2022	8.8	07/01/2022	-6.82
4 Charles Green	7.7	07/03/2022	7.5	07/01/2022	2.67
5 Arjun Rajan	8.9	07/03/2022	9.1	06/30/2022	-2.2

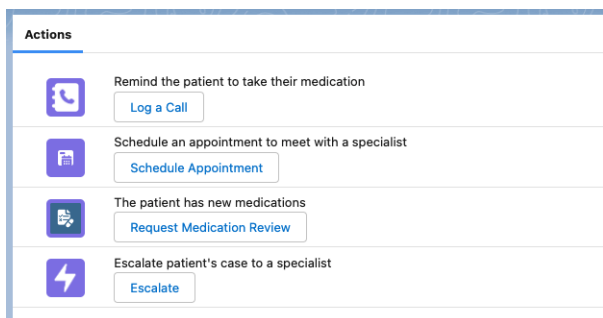
This component gives your users a filterable list view of their patients. Users can filter this list to show patients with score changes in the last fifteen or thirty days. The component includes these columns:

- Name
- Current Score
- Current Date
- Previous Score
- Previous Score Date
- Score Change Percent

You can place this component on home and app pages.

Note: Both the Score Details and Score List components work in the context of a specific score category. While the Score Details component only works with top-level categories, the Score List component can use any category.

Dynamic Actions for Unified Health Scoring



This component suggests contextual actions to your users when certain conditions are met for their patients or related records. It's up to you to decide what actions your users see under what conditions on this component. You can use the default actions available for the record page you place this component on, or you can define your own custom quick actions. The descriptions for those actions are displayed as the captions for prompts, so word those descriptions thoughtfully. Actions triggered from this component are logged in the Health Score Action Log object.

You can place this component on Account, Contact, or Lead record pages. You can also use information in related records to define your visibility rules. Add a custom lookup on Account, Contact, or Lead that references the Action Visibility object. Then, add custom lookups on Action Visibility that references the objects with the related information you need. However, with this approach, you might have to add a large number of lookups for certain types of information. For instance, if you're configuring visibility based on a patient's observation values, you need a large number of lookups to Care Observation on Action Visibility. A cleaner, but more sophisticated approach is to add a single data field on Action Visibility for a type of information, and have a data processing system determine its value. Whichever approach you choose, you can set up triggers and processes in your org to automatically create the required Action Visibility records and relate them to the appropriate patient records.

1. [Enable Score History Tracking](#)
To support tracking score history, enable history tracking for the Score and Date field in Health Score. The Score Details for Unified Health Scoring component can't plot the score change over time graph without tracking score history.
2. [Configure the Score Details for Unified Health Scoring Component](#)
Place the Score Details for Unified Health Scoring component on an Account, Lead, or Contact record page. Then, configure the component to select the score category that sets its score context.
3. [Configure the Score List for Unified Health Scoring Component](#)
Place the Score List for Unified Health Scoring component on app or home pages. Then, configure the component to select the score category that sets its score context.
4. [Configure the Dynamic Actions for Unified Health Scoring Component](#)
Place the Dynamic Actions for Unified Health Scoring component on an Account, Lead, or Contact record page. Then, configure actions and their visibility rules.

Enable Score History Tracking

To support tracking score history, enable history tracking for the Score and Date field in Health Score. The Score Details for Unified Health Scoring component can't plot the score change over time graph without tracking score history.

1. From the Object Manager, enter *Health Score* in the Quick Find box, and then select **Health Score**.
2. Click **Fields & Relationships**.
3. Click **Set History Tracking**.
4. Select **Score and Date** and save your changes.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To enable history tracking:

- Customize Application

Configure the Score Details for Unified Health Scoring Component

Place the Score Details for Unified Health Scoring component on an Account, Lead, or Contact record page. Then, configure the component to select the score category that sets its score context.

1. In the Lightning App Builder, open or create an Account, Contact, or Lead record page.
2. Place the **Score Details for Unified Health Scoring** component at an appropriate spot.
3. Select the component.
4. In the Score Category field, select a score category.



Tip: We recommend creating a tab to place this component in.

5. Save your changes.

If you need to display multiple unified health profiles, add this component to the same page multiple times. Select the appropriate category for each instance of the component.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To update pages

- Health Cloud Admin permission set

AND

Customize Application

Configure the Score List for Unified Health Scoring Component

Place the Score List for Unified Health Scoring component on app or home pages. Then, configure the component to select the score category that sets its score context.

1. In the Lightning App Builder, open or create an app page or home page.
2. Place the **Score List for Unified Health Scoring** component on the page.
3. Select the component.
4. In the Score Category field, select a score category.
5. Save your changes.

If you need to display lists for multiple score categories, add this component to the same page multiple times. Select the required categories for each instance of the component.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To update pages

- Health Cloud Admin permission set

Customize Application

Configure the Dynamic Actions for Unified Health Scoring Component

Place the Dynamic Actions for Unified Health Scoring component on an Account, Lead, or Contact record page. Then, configure actions and their visibility rules.

For example, you could configure an action to give a patient a call when their Medication Adherence score falls below certain levels.

1. In the Lightning App Builder, open or create an Account, Contact, or Lead record page.
2. Place the **Dynamic Actions for Unified Health Scoring** component on the page.
3. Select the component.
4. Click **Add Action**.
You see the actions that are available for the object type. If you want more actions, create a custom Quick Action.
5. In the Actions field, select an action.
6. Click **Add Filter**.
7. Define the logic that determines whether an action is visible or not.
8. Click **Done**.
9. To include more filters, click **Add Filter** again.
10. When you're finished adding filters for the action, click **Done**.
11. When you're finished adding required actions in the component, save your changes.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To update pages

- Health Cloud Admin

SEE ALSO:

[Extend Salesforce with Clicks, Not Code: Quick Actions](#)

Customize Action Logs

Actions triggered from the Dynamic Actions for Unified Health Scoring component is logged in the Health Score Action Log object. You can customize the information logged in this object using the `IUnifiedHealthScore` Apex interface in a custom Apex class.

1. In the Developer Console, select **File > New > Apex Class**
2. Change the public class to a global class.
3. Implement this Apex interface in the global class:

```
global interface IUnifiedHealthScore{
    Boolean saveActionDetail(Map<String, String> request);
}
```

4. Insert your custom query after the `saveActionDetail()` function to determine what information is logged in Health Score Action Log.
For instance, you could add custom code to store scores and score categories in your logs.
5. Save your apex class and test it.

[Capture Scores and Score Categories in the Action Log](#)

The action history logged in Health Score Action Log doesn't include score information by default. Use this custom Apex code with our Apex interface to capture score information in your logs.

Capture Scores and Score Categories in the Action Log

The action history logged in Health Score Action Log doesn't include score information by default. Use this custom Apex code with our Apex interface to capture score information in your logs.

Custom Code

```
global class ApexClassForCustomLogs implements
healthcloudext.IUnifiedHealthScore{//IMPORTANT: replace CustomActionLog with the name the
Apex class
```

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To define, edit, delete, set security and set version settings for Apex classes:

- Author Apex

To run Apex tests

- View Setup and Configuration

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

```

public Boolean saveActionDetail(Map<String, String> request){
    try {
        String aSubject = request.get('subjectId');
        List<HealthScore> aHealthScore = [select CurrentScore from HealthScore where
SubjectId=:aSubject and ScoreCategoryId='0gzRN00000001drYAA'];
        //IMPORTANT: Replace 0gzRN00000001drYAA with the Id of your score category.
        List<HealthScoreActionLog> acctList = new List<HealthScoreActionLog>();
        HealthScoreActionLog aHealthScoreActionLog = new HealthScoreActionLog(
            ActionDescription=request.get('actionDescription'),
            ActionIconUrl=request.get('actionIconUrl'),
            ActionLabel=request.get('actionLabel'),
            ActionName=request.get('actionName'),
            ActionStatus=request.get('actionStatus'),
            PerformedById=request.get('performedById'),
            SubjectId=request.get('subjectId'),
            ActionDate=datetime.now(),
            Score=aHealthScore[0].CurrentScore,
            ScoreCategoryId='0gzRN00000001drYAA'//IMPORTANT: Replace 0gzRN00000001drYAA
with the Id of your score category.
        );
        acctList.add(aHealthScoreActionLog);
        Database.SaveResult[] srList = Database.insert(acctList, false);
        for (Database.SaveResult sr : srList) {
            if (sr.isSuccess()) {
                // Operation was successful, so get the ID of the record that was processed
                System.debug('Successfully inserted account. HealthScoreActionLog ID: ' +
sr.getId());
            }
            else {
                // Operation failed, so get all errors
                for(Database.Error err : sr.getErrors()) {
                    System.debug('The following error has occurred.');
```

 **Important:** Ensure that you replace the category ID in this sample code with the ID of the category that you want to log score information for. You can find the IDs of your score categories by either inspecting a category page's URL, or you can run this query in the Developer Console Query Editor: `Select Id, CategoryName from ScoreCategory`.

And that's it! Using this sample code, your action logs now also mention the specified score category and its score value at the time the action was triggered.

Configure an Actions Timeline

Use the Enhanced Timeline component to visually represent your users' healthcare interventions with their patients or members chronologically.

The chronological view, together with the score history graph on the Score Details for Unified Health Scoring component, helps users understand how their interventions affect a patient or member's health. Configure this view by creating a timeline for the Account object with the Health Score Action Log object as the related object.

1. Enable Enhanced Timeline and create a timeline configuration.

For Timeline Object Name, select Account. For Related Object, select Health Score Action Log.

2. Add the new timeline to an Account record page.

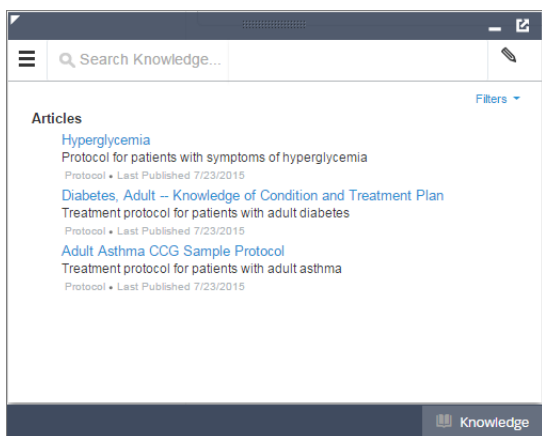
For the best experience, we recommend placing the timeline next to the Score Details for Unified Health Scoring component.

Provide Easy Access to Protocols and Articles

Salesforce Knowledge enables you to 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.



On using the Knowledge One widget, articles can be accessed from the console footer, and care coordinators can do the following:

- 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 care coordinator has permission and the correct license.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Unified Health Scoring Add-On license

USER PERMISSIONS

To configure a Timeline

- Read and Edit access for objects you're including on the Timeline

To add the Timeline component to a record page

- Health Cloud Admin permission set

Customize Application

Edit access for the page layout of the object to which you're adding the component

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

Article 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 on your profile photo and then click **Settings**.
2. Under My Personal Information, select **Advanced User Details** and click **Edit**.
3. Select **Knowledge User**.
4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To set up Salesforce Knowledge, and create article types:

- Customize Application AND Manage Salesforce Knowledge

Create Article Types

Article 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.

Before creating the article that contains a protocol, the author has to select 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:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create, edit, or delete article types:

- Customize Application AND Manage Salesforce Knowledge

Field	Description
Label	A name used to refer to the article type in any user interface pages.
Plural Label	The plural name of the object. If you create a tab for this object, this name is used for the tab.
Gender	If it's 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.
Starts with a vowel sound	If it is appropriate for your organization's default language, check if your label must be preceded by "an" instead of "a".
Object Name	(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.
Description	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.
Track Field History	(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 primary article and any translations.
Deployment Status	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.

Make sure you're a Knowledge User and that you don't have any existing custom objects named Knowledge.

1. From Setup, in the Quick Find box, enter `Knowledge`, and 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. To select your general settings, click **Edit**.

a. To enable care coordinators and internal users to edit articles without going to the Article Management tab, select `Allow users to create and edit articles from the Articles 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. 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To enable Salesforce Knowledge:

- Customize Application

12. Optionally, select the option to Allow agents to create an article from a reply.
This lets users turn a helpful answer into an article.
 - Select the default article type.
 - 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. Save your changes.
For more information on setting up Salesforce Knowledge, see the Salesforce Knowledge Implementation Guide or search Salesforce Help.

Provide Assessments and Surveys for Gathering Information and Feedback

Improve quality of care by gathering information that helps you manage your patients’ or members’ health more efficiently. Whether it’s an industry standard screener or a member feedback survey, you have the information you need.

Assessments vs Surveys

Both Assessments and Salesforce Surveys for Health Cloud help you to improve care management by gathering feedback from patients and members. Review this comparison to learn more about the foundation and capabilities of each feature, so that you can decide which solution best meets your needs.

Provide Assessments to Analyze a Patient’s Health

Health Cloud Assessments use the power of Discovery Framework and OmniStudio to build more complex questionnaire paths. Assessments are designed to be administered by a healthcare professional over the phone or in person.

Provide Surveys for Gathering Feedback

Health Cloud Surveys help you create easy-to-use forms, such as pre-surgery surveys or member satisfaction surveys, for collecting feedback from your patients and members,

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud.

Assessments vs Surveys

Both Assessments and Salesforce Surveys for Health Cloud help you to improve care management by gathering feedback from patients and members. Review this comparison to learn more about the foundation and capabilities of each feature, so that you can decide which solution best meets your needs.

	Assessments	Salesforce Surveys for Health Cloud
Primary use case	Detailed intake and assessment of patients and members to drive engagement and improve quality of care. For example, a care transition assessment to ensure coordinated and safe	Collecting feedback from patients and members after an interaction. For example, a post-surgery survey to determine patient satisfaction.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

	Assessments	Salesforce Surveys for Health Cloud
	care after discharge from inpatient care.	
Powered by	Discovery Framework and OmniStudio	Salesforce standard objects
Formatting flexibility	Full power of OmniStudio can be applied	Can control page formatting and backgrounds
Branching	Powerful branching logic within OmniScript	Inter-page branching is supported, but not branching within a page
Read/Write from Salesforce data	High - OmniScript can be used for complex read/writes	Medium - Uses the Data Mapper
Administration	Administered by care coordinator over the phone or in person	Sent to the patient/member using email
Question sets	Yes	No
Question version management	Yes	No
Updating a question updates all associated Assessments	Yes	No
Scoring	Yes	No

SEE ALSO:

[Salesforce Help: Distribute Surveys](#)

Provide Assessments to Analyze a Patient's Health

Health Cloud Assessments use the power of Discovery Framework and OmniStudio to build more complex questionnaire paths. Assessments are designed to be administered by a healthcare professional over the phone or in person.

[Get Your Org Ready to Use Assessments](#)

To enable Assessments, you must install OmniStudio, enable Discovery Framework, and update sharing settings.

[Give Users Access to Assessments](#)

Create a permission set that enables users to view and complete an assessment.

[Create an Assessment with Discovery Framework](#)

The Assessment Component shows assessments created using the Discovery Framework. Create an assessment form using an OmniScript in the OmniStudio Designer.

[Enable Assessment OmniScripts](#)

The Assessment component uses OmniStudio OmniScripts to display the assessment questions. When a new OmniScript is added, the Lightning Component bundle must be generated in order to display in the Assessment component.

[Add the Assessment Component to the Patient Page](#)

To enable your care coordinators or call center agents to use the Assessment component, add it to the Patient's record page.

EDITIONS

Available in: **Enterprise** and **Unlimited** editions with Health Cloud

Get Your Org Ready to Use Assessments

To enable Assessments, you must install OmniStudio, enable Discovery Framework, and update sharing settings.

OmniStudio and Discovery Framework are included with Health Cloud, but require some setup.

1. Download and Install OmniStudio.
Every OmniStudio release has its own download link.
 - a. Go to the [OmniStudio release summary documentation](#) for a link to the current managed package installer.
 - b. Download and Install the OmniStudio Package.
2. Enable Discovery Framework.
 - a. From Setup, in the Quick Find box, enter *Discovery Framework*, and then select **General Settings**.
 - b. Turn on **Discovery Framework**.
3. Update Sharing Settings.
 - a. From Setup, in the Quick Find box, enter *Sharing Settings*, and then select **Sharing Settings**.
 - b. In the Organization-Wide Defaults section, click **Edit**.
 - c. Update the **Default Internal Access** for these objects:

Object	Default Internal Access Setting
Assessment Question	Public Read Only
Assessment Question Set	Public Read Only
Assessment Question Response	Controlled by Parent
Assessment Question Response Recommendation (Used in Integrated Care Management)	Controlled by Parent
Omni Process	Public Read Only

- d. **Save** your work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

USER PERMISSIONS

To use Assessments:

- Industries Assessment Permission Set License

To install OmniStudio package:

- Download AppExchange Packages

To enable OmniStudio:

- Customize Application

To change Sharing Settings:

- Manage Sharing

Give Users Access to Assessments

Create a permission set that enables users to view and complete an assessment.

1. From Setup, enter *Company Information* in the Quick Find box, then select **Company Information**.
2. In Permission Set Licenses, Click **Industries Assessment**
3. Click **Assign Users**.
4. Select the users who have to use assessments, then click **Assign**.
5. Save your work.
6. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission sets**.
7. Click **New**.
8. Enter a Label, for example *Assessments Care Coordinators Perm Set*.
9. **Save** your work.
10. Click **Object Settings** and assign permissions as shown in the table.

Object Name	Access Level
Assessments	Read, Create, Edit, and Delete
Assessment Questions	Read
Assessment Question Responses	Read, Create, Edit, and Delete
Assessment Question Response Recommendations (Used in Integrated Care Management)	Read
Assessment Question Sets	Read
Assessment Question Versions	Read
Omni Process Elements	Read
Omni Processes	Read, Create, Edit, and Delete
OmniScript Saved Sessions	Read, Create, Edit, and Delete

11. Return to the Permission Set Overview, then click **System Permissions**.
12. Click **Edit**.
13. Select **Discovery Framework Platform User** to grant access to Discovery Framework specific objects and fields.
14. Save your work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

USER PERMISSIONS

To create permission sets:

- Manage Profiles and Permission Sets

To assign permission sets:

- Assign Permission Sets

15. Return to the Permission Set Overview, then click **Manage Assignments**.

16. Click **Add Assignment**.

17. Select the users who have to use Assessments.

18. Click **Next**.

19. Click **Assign**.

20. Save your work.

Verify that your new permission set and these related permission sets are assigned to your users.

- OmniStudio User
- Health Cloud Permission Set License
- Health Cloud Standard
- Health Cloud Foundation

Create an Assessment with Discovery Framework

The Assessment Component shows assessments created using the Discovery Framework. Create an assessment form using an OmniScript in the OmniStudio Designer.

1. Create an Assessment Question Set.

a. From the App Launcher, find and select **Assessment Question Sets**.

b. Click **New**.

c. Enter the name of the question set.

Use the name of the overall assessment as the name of the assessment question set. For example, Mental Health Assessment.

d. Enter the developer name.

The Developer Name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts for package installations.

e. Save your work.

2. Create Assessment Questions.

a. From the App Launcher, find and select **Assessment Questions**.

b. Click **New**.

c. Enter the Name, Developer Name, Question Text, and Data Type for the question.

d. To make this question the active version, select **Active**.

e. When you create a question, the data type that you select corresponds to an OmniScript element that you can add to the OmniScript structure. See the [Supported Data Types for Questions](#).

f. Choose the Assessment Question Set for this question.

To associate the question with other Assessment Question Sets, use the Assessment Question Assignments related list on the Assessment Question detail page.

g. **Save** your work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

USER PERMISSIONS

To create an OmniScript:

- OmniStudio Admin permission set

AND

Create, Read, Edit, and Delete access to Assessment Question

h. Repeat these steps for each assessment question.

3. Create a Form.

a. On the Assessment Questions list view, click **Select Questions**.

b. In the OmniScript Details section, enter the name of the assessment.

c. Enter the Type of assessment.

The Type and Sub Type of an OmniScript give it its unique identity. Only one active OmniScript has the same Type, Sub Type, and Language at any time. Though not required, it's recommended that an OmniScript's Type starts with a lower case letter.

d. Enter the Sub Type of the assessment.

e. Find the questions you created by selecting the Question

Set.

f. To add more steps, click **Add Step**.

g. Edit the name of the step.

h. Drag each question into a Step.

Steps correspond to the questions in your form. You can group multiple questions in a single step. You can also create multiple steps in a single form.

i. Select **Build OmniScript**.

This operation creates an OmniScript that's of type Discovery Framework for the form, and then opens the OmniScript in the OmniScript Designer on a new tab.

4. Use OmniScript Designer to customize the assessment further if needed.

5. On the designer header, click **Preview** to test the form.

6. On the designer header, click **Activate Version** when you're ready to deploy.

7. Navigate to the Assessment component on the Patient page. Check that the assessment appears in the **All** tab.

SEE ALSO:

[Salesforce Help: Work with Discovery Framework](#)

[Salesforce Help: OmniScript Designer Overview](#)

[Industries Common Resources Developer Guide: Discovery Framework Standard Objects](#)

Enable Assessment OmniScripts

The Assessment component uses OmniStudio OmniScripts to display the assessment questions. When a new OmniScript is added, the Lightning Component bundle must be generated in order to display in the Assessment component.

The OmniStudio package must be installed to complete this task.

 **Important:** This process will need to be repeated each a time a new assessment OmniScript is added.

1. Disable Standard OmniStudio Runtime.



Warning: OmniStudio Runtime only needs to be temporarily disabled and can be enabled again after if it is used by other features.

- a. From Setup, enter *OmniStudio Settings* in the Quick Find box, then select **OmniStudio Settings**.
 - b. **Disable** Standard OmniStudio Runtime.
2. Toggle the activation of the Assessment OmniScripts.
 - a. In the App Launcher, select **OmniStudio**.
 - b. Select **OmniScripts**.
 - c. For each OmniScript, click dropdown arrow, select **Deactivate**
 - d. Select dropdown arrow again and select **Activate**.
 - e. Click **Ok**.
 3. Enable Standard OmniStudio Runtime
 - a. From Setup, enter *OmniStudio Settings* in the Quick Find box, then select **OmniStudio Settings**.
 - b. **Enable** Standard OmniStudio Runtime.

Return to Assessment Component on record page and open assessments.

EDITIONS

Available in: **Unlimited** and **Enterprise** editions with Health Cloud

USER PERMISSIONS

To access OmniStudio settings

- OmniStudio User

Add the Assessment Component to the Patient Page

To enable your care coordinators or call center agents to use the Assessment component, add it to the Patient's record page.

1. From Setup, enter *App Builder* in the Quick Find box, then select **Lightning App Builder**.
2. Select **Edit** next to the patient record page.
3. In the components side bar, choose **Assessment** and drag it onto the page.
Consider creating a custom Tab labeled *Assessment* in the main area of the page for the Assessment component.
4. Edit the Tab Labels, as needed.
5. Select the **Assessment Fields** to display on the Assessment card.
6. Select the **OmniScript Saved Session Fields** and **OmniProcess Fields** to display on the Assessment card.
7. Click **Save** when you're done editing the page.
8. To give your users access to the app page you must activate it.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

USER PERMISSIONS

To add a component in App Builder:

- Edit access for the page layout of the object where you're adding the component

Provide Surveys for Gathering Feedback

Health Cloud Surveys help you create easy-to-use forms, such as pre-surgery surveys or member satisfaction surveys, for collecting feedback from your patients and members,

Customize questions and answers for your surveys 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 surveys you can send to that person. With a single click, the email invitation is on its way. When the survey participant clicks the survey link within the email, they can log into the site and complete the questions.

See all surveys you have sent to a person, along with survey status, date sent, responses, and other details on the Patient Surveys tab.

 **Note:** With Health Cloud, you have unlimited survey responses.

[Enable Surveys](#)

Enable your care coordinators to create surveys.

[Give Users Access to Health Cloud Surveys](#)

Enable care coordinators to send surveys to patients and other care team members.

[Set Feedback Survey Permissions](#)

To enable users to use surveys, provide permission sets and site member access to the survey-related objects.

[Send Survey Invitations to Patients](#)

Invite patients to participate in a survey by sending them a link in an email. Create that email using an email template.

[Create Email Invitations for Surveys](#)

Create a Survey Email Branding configuration to customize the email that patients or members receive when care coordinators invite them to take a survey.

[Update Sharing Settings for Surveys](#)

Authorize participants to participate in surveys when they're invited to do so.

SEE ALSO:

[Salesforce Feedback Management](#)

[Salesforce Feedback Management](#)

Enable Surveys

Enable your care coordinators to create surveys.

Add users to a site. A user must be a member of one or more sites to participate in surveys.

1. Configure Health Cloud to support surveys.
 - a. From Setup, in the Quick Find box, enter *Survey Settings*, and then select **Survey Settings**.
 - b. Turn on Surveys.
 - c. Select the default community for creating public survey invitations.
 - d. To allow survey owners to manage the responses of users, enable **Survey Owners Can Manage Responses**.
2. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To enable Surveys:

- Customize Applications

Give Users Access to Health Cloud Surveys

Enable care coordinators to send surveys to patients and other care team members.

1. Give your users access to surveys by adding a subtab in the patient record.
 - a. From Setup, in the Quick Find box, enter *Custom Settings*, and then select **Custom Settings**.
 - b. Click **Manage** next to Card View Dropdown.
 - c. Create an item in your Patient Card view by clicking **New**.

Enter values as follows:

Name

Name of the parent category that contains child menu navigation items. Enter a name, such as *Surveys*.

Category Label

Choose a label. You can use the same value as the **Category Name**.

Category Name

If you have many 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. For example, *Engagement*.

Default Subtab

Select **Default Subtab** if you want this item on all dropdowns you create in Health Cloud.

URL Parameter

Leave blank.

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Tab Type

Enter *Subtab*.

Subcategory Name

Enter a name for the clickable link that opens the page or tab. Use the same value you chose for the Name field.

Subcategory Label

Choose a label, preceded by *Tab_*. Use the same value you chose for Subcategory Name. For example: *Tab_Survey*

Subtab Sort Order

Enter a numerical value to indicate where on the list this item appears. Higher numbers appear lower on the list.

Page Type

Enter *VFPage*.

URL

Enter */apex/HealthCloudGA__HcSurveyPage*.

Set Feedback Survey Permissions

To enable users to use surveys, provide permission sets and site member access to the survey-related objects.

1. To find the list of delivered permission sets, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
2. Clone **Health Cloud Admin** and enter a new name for the cloned permission set.
3. From **Object Settings** of the cloned permission set, give the admin permission set the ability to create and distribute assessments.

Surveys

Read

Survey Invitations

Read, Create, Edit, Delete

Survey Responses

No Access

4. Save your changes.
Make sure to assign the cloned permission set to your users.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To configure Surveys:

- Read, Create, Edit, and Delete access on Surveys, Survey Invitations, Survey Responses, and Survey Subjects

Send Survey Invitations to Patients

Invite patients to participate in a survey by sending them a link in an email. Create that email using an email template.

1. In Setup, find the admin permission set you want to edit, by entering *Permission Sets* in the **Quick Find** box, then selecting **Permission Sets**.
2. Assign these permissions to the profiles that administer surveys
 - a. Read for the Surveys object.
 - b. Read, Create, Edit, and Delete for the Survey Invitations object.
3. Next, 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.
5. Assign these permissions to the Customer Community Plus profile:
 - a. Read for the Surveys object.
 - b. Read for the Survey Invitations object.
 - c. Create, Read, and Update for the Survey Responses object.

Create Email Invitations for Surveys

Create a Survey Email Branding configuration to customize the email that patients or members receive when care coordinators invite them to take a survey.

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.

~~DefaultName~~	~~Metadata~~	~~FromEmailAddress~~	~~Subject~~	~~Body~~
Example	Example	example@example.com	Questions for you	Please answer these important questions!

2. To include images in your email, add two more columns to your CSV file.

~~FooterImageId~~	~~HeaderImageId~~
ID of a content asset for the bottom of your email	ID of a content asset for the top of your email

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To view Setup and Configuration for Surveys:

- Read, Create, Edit, and Delete on Surveys, Survey Invitations, Survey Responses, and Survey Subjects

To give end users the ability to read and respond to surveys:

- Read on Surveys, Survey Invitations

AND

Read and Create on Survey Responses

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To generate email invitations on surveys:

- Read on Surveys

AND

Create and Read on Survey Invitations

 **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](#)
- [Data Loader](#)
- [Create Asset Files](#)

Update Sharing Settings for Surveys

Authorize participants to participate in surveys when they're invited to do so.

- 1. From Setup, enter *Sharing Settings* in the **Quick Find** box, then select **Sharing Settings**.
- 2. Configure the sharing settings for surveys and survey invitations.

Settings	Default Internal Access	Description
Survey	Private	Only participants with a link to the survey can access it.
Survey Invitation	Private	Only participants with a survey invitation can open the survey.

- 3. If the participant isn't already a member of your Health Cloud site, add them.
External users can only view Health Cloud surveys from within a site.
 - a. To add the participant to the site, open their care plan and select the Care Team tab and select **Add Care Team Member**.
 - b. Enter the participant'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

EDITIONS

Available in: Lightning Experience
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To configure Surveys:

- Read, Create, Edit, and Delete on Surveys, Survey Invitations, Survey Responses, and Survey Subjects

To give end users the ability to read and respond to surveys:

- Customer Community + License
AND
Read on Survey Invitations
AND
Read and Create on Survey Responses

Crisis Support Center Management

Empower counselors to swiftly respond to a crisis using a simplified intake flow that records details about the client and the interaction. Users can also capture notes, track the client's interaction history, create and share Knowledge articles, and share provider details.

Crisis Support Center Management uses these Salesforce components to deliver crisis support services:

Intake Flow and Engagement Interaction

Capture client information and engagement details including call participants, engagement topics, call duration, and more.

Notes

Quickly jot down call details and observations, and capture a call summary.

Timeline

Provides an interactive view of a client's complete interaction history. Users can also create new records directly.

Provider Search

Find providers based on criteria such as location and specialty, and share those details with clients.

Knowledge

Search for and create informative Knowledge articles to share with clients.

Action Launcher

Provides easy access to quick actions and assessments that are configured for the Crisis Support Center Management app.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

[Assign Permission Sets and Permission Set Licenses for Users](#)

Provide crisis center counselors, volunteers, and managers with the permissions and licenses required to use the Crisis Support Center Management app.

[Enable Crisis Support Center Management](#)

To use Crisis Support Center Management, first enable the app in your org.

[Set Up Open CTI for Crisis Support Center Management](#)

Integrate the Crisis Support Center Management app with Open Computer Telephony Integration (CTI) so that crisis center counselors can receive calls directly in Salesforce.

[Intake Flow and Engagement Interaction for Crisis Support Center Management](#)

When a crisis center counselor accepts a call using Open CTI Softphone integrated with the Crisis Support Center Management app, the intake flow automatically opens in the Engagement Interaction tab. The counselor can capture client details and associate the client with an existing account or create a new one. The details of the interaction are stored in Engagement Interaction, Engagement Attendee, and the Engagement Topic records.

[Enable and Configure Notes for Crisis Support Center Management](#)

Enable Notes so that counselors can capture observations and details that the client shares, and record a summary after a call has ended. Then, add the Notes related list to the Case page layout using the page layout editor.

[Enable Enhanced Timeline for Crisis Support Center Management App](#)

Enable Timeline for Crisis Support Center Management to give users a chronological view of a client's interaction history. Timeline is an interactive component that displays past engagements, engagement topics, and cases. Users can also create and update records.

Enable Provider Search for Crisis Support Center Management

Enable Provider Search so that crisis center counselors can search for relevant providers for clients, directly in the Crisis Support Center Management app. Then, ensure that data about practitioners, facilities, and their relationships is set up correctly.

Enable Users to Create Knowledge Articles for Crisis Support Center Management

Authorize experienced crisis center managers, crisis center counselors, and behavioral specialists to create Knowledge articles to share with clients. For example, clients may benefit from an article that explains how to deal with an anxiety attack.

Configure Assessments for Crisis Support Center Management

Assessments help counselors gain a better understanding of a client's risk. Export the assessment sample OmniScripts from a Health Cloud trial org and import them into your Salesforce org using Workbench. Then, enter the correct OmniProcessID and activate the scripts.

Action Launcher for Crisis Support Center Management

Help crisis center counselors to quickly launch commonly-used assessments, processes and workflows so that they can provide uninterrupted crisis support services without having to navigate to other pages. Configure frequently-used assessments and actions, and pin them to the Action Launcher component for easy access.

Assign Permission Sets and Permission Set Licenses for Users

Provide crisis center counselors, volunteers, and managers with the permissions and licenses required to use the Crisis Support Center Management app.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
2. Select the appropriate user.
3. In the Permission Set License Assignments related list, click **Edit Assignments**.
4. Select these permission set licenses.
 - a. Health Cloud Crisis Support Center Management
 - b. Health Cloud Platform
 - c. OmniStudio User
5. Save your work.
6. In the Permission Set Assignments related list, click **Edit Assignments**.
7. Move these permission sets to the Enabled Permission Sets list.
 - a. Health Cloud Crisis Support Center Management App
 - b. Health Cloud Foundation
 - c. Knowledge LSF Permission Set
 - d. OmniStudio User
8. Save your work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Crisis Support Center Management app

- Manage Crisis Support Center Management App

Enable Crisis Support Center Management

To use Crisis Support Center Management, first enable the app in your org.

1. From Setup, in the Quick Find box, enter *Crisis Support Center Management App Settings*, and then select **Crisis Support Center Management App Settings**.
2. Enable **Crisis Support Center Management App**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Crisis Support Center Management app

- Manage Crisis Support Center Management App

Set Up Open CTI for Crisis Support Center Management

Integrate the Crisis Support Center Management app with Open Computer Telephony Integration (CTI) so that crisis center counselors can receive calls directly in Salesforce.

Open CTI is a JavaScript API that displays CTI functionality in a browser, so there's no need to install CTI adapters.

Here's how the integration works:

- When a client calls the crisis center, the telephony system collects the client's data such as account number.
- To retrieve client records, the CTI adapter passes this collected data to Salesforce via web services.
- The results of the search are sent to the CTI adapters.
- The CTI Adapter sends HTTP requests via Salesforce Open CTI to update the softphone status.

[Configure Open CTI for Crisis Support Center Management](#)

Import a definition file, add directory numbers, and customize the softphone layout for your Open CTI.

[Add the CTI Softphone to Crisis Support Center Management](#)

Make the CTI Softphone easily accessible to users by adding it to the Crisis Support Center Management app.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Configure Open CTI for Crisis Support Center Management

Import a definition file, add directory numbers, and customize the softphone layout for your Open CTI.

First, [create a call center definition file](#) to support your CTI adapter.

1. From Setup, in the Quick Find box, enter *Call Centers*, and then click **Call Centers**.
2. Click **Import** to bring in details from a [Call Center Definition File](#).
3. [Add a Crisis Support Center Management user](#) to the crisis center. In Call Center Users, click **Manage Call Center Users** to add the crisis center user.
4. Add a crisis center [directory number](#).
5. [Customize the softphone layout](#) for your crisis center. Click **Edit** next to Standard Softphone Layout to make your changes.

SEE ALSO:

[Developer Guide: Get Started with Open CTI](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Crisis Support Center Management app

- Manage Crisis Support Center Management App

To add users to a call center

- Manage Call Centers

To import call center definition files

- Customize Application

Add the CTI Softphone to Crisis Support Center Management

Make the CTI Softphone easily accessible to users by adding it to the Crisis Support Center Management app.

1. From Setup, in the Quick Find box, enter *App Manager*, and then click **App Manager**.
2. Next to Crisis Support Center Management, click , and then click **Edit**.
3. In App Settings, click **Utility Items (Desktop Only)**.
4. Click **Add Utility Item**.
5. In the search bar, enter *Open CTI Softphone*, and then click **Open CTI Softphone**.
6. Configure the properties as required and save your changes.
7. Go to User Profiles, and make sure the Crisis Support Center Management user's profile is in the Selected column.
8. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Crisis Support Center Management app

- Manage Crisis Support Center Management App

To add users to a call center

- Manage Call Centers

To import call center definition files

- Customize Application

Intake Flow and Engagement Interaction for Crisis Support Center Management

When a crisis center counselor accepts a call using Open CTI Softphone integrated with the Crisis Support Center Management app, the intake flow automatically opens in the Engagement Interaction tab. The counselor can capture client details and associate the client with an existing account or create a new one. The details of the interaction are stored in Engagement Interaction, Engagement Attendee, and the Engagement Topic records.

 **Note:** If you don't use Open CTI Softphone, counselors can create an Engagement Interaction record to trigger the intake flow.

[Get to Know the OmniStudio Components Related to Intake Flow](#)

The intake flow in Crisis Support Center Management is built using OmniStudio components that combine to provide a smooth and swift client intake process.

Get to Know the OmniStudio Components Related to Intake Flow

The intake flow in Crisis Support Center Management is built using OmniStudio components that combine to provide a smooth and swift client intake process.

The flow includes these components.

OmniStudio Component	Name	Use
OmniScript	IntakeFlow/Flow1	Captures client details and associates the client with an account.
FlexCard	ListAccounts	Displays account details in a single row including name, phone, birthdate, and address.
FlexCard	ParentFlexCard	Displays a list of account details including name, phone, birthdate, and address.
DataRaptor	GetPersonAccount	Retrieves accounts that are associated with the phone number recorded during the intake flow.
DataRaptor	CreateAccount	Creates a new person account when there is no existing account associated with a phone number.
DataRaptor	CreateAttendees	Creates engagement attendee records.
DataRaptor	CreateCaseAccount	Creates a case record that looks up the selected account.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

OmniStudio Component	Name	Use
DataRaptor	GetAllAccounts	Retrieves accounts that match the criteria when users search for an account by name.
DataRaptor	UpdateEngagement	Updates an engagement interaction record.
DataRaptor	CreateCaseOnSelection	Creates a case when an account is selected.
DataRaptor	CreateAttendeesOnSelection	Creates an engagement attendees record when an account is selected.
DataRaptor	CreateEngagementInteractionOnSelection	Creates an engagement interaction record when an account is selected.
Integration Procedure	PaginationAccount	Shows more account records when no record is selected.
Integration Procedure	SelectedPagination	Shows more account records when records are selected.
Integration Procedure	VerifyEngagementInteraction	Checks if an engagement interaction is already verified.
DataRaptor	ChecksVerified	Retrieves IsVerified field from the EngagementInteraction object.

Enable and Configure Notes for Crisis Support Center Management

Enable Notes so that counselors can capture observations and details that the client shares, and record a summary after a call has ended. Then, add the Notes related list to the Case page layout using the page layout editor.

1. From Setup, in the Quick Find box, enter *Notes Settings*, then select **Notes Settings**.
2. Select **Enable Notes**.
3. Save your work.
4. From Setup, go to the **Object Manager** tab.
5. Click **Case**, and then select **Case Page Layout**.
6. Click **Case Layout**.
7. Drag the Notes related list onto the page layout.
8. Save your changes.

SEE ALSO:

[Salesforce Help: Set Up Notes](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Crisis Support Center Management app

- Manage Crisis Support Center Management App

Enable Enhanced Timeline for Crisis Support Center Management App

Enable Timeline for Crisis Support Center Management to give users a chronological view of a client's interaction history. Timeline is an interactive component that displays past engagements, engagement topics, and cases. Users can also create and update records.

1. From Setup, in the Quick Find box, enter *Timeline*, and then select **Timeline**.
2. Enable **Timeline Configuration**.



Note: Remember to deactivate the current timeline before activating a new timeline.

You can customize the timeline to meet your unique needs.

SEE ALSO:

[Salesforce Help: Provide Holistic Patient Care with Enhanced Timeline](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Crisis Support Center Management app

- Manage Crisis Support Center Management App

Enable Provider Search for Crisis Support Center Management

Enable Provider Search so that crisis center counselors can search for relevant providers for clients, directly in the Crisis Support Center Management app. Then, ensure that data about practitioners, facilities, and their relationships is set up correctly.

1. From Setup, in the Quick Find box, enter Provider Search, and then select Provider Search Settings.
2. Enable **Provider Search**.
3. Follow the guided setup steps to set up Provider Search. For more details, see [Set Up Data for Provider Search](#).

SEE ALSO:

[Salesforce Help: Configure Provider Search to Help People Find Providers](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Crisis Support Center Management app

- Manage Crisis Support Center Management App

Enable Users to Create Knowledge Articles for Crisis Support Center Management

Authorize experienced crisis center managers, crisis center counselors, and behavioral specialists to create Knowledge articles to share with clients. For example, clients may benefit from an article that explains how to deal with an anxiety attack.

Follow the Service Setup Assistant to add users who can create knowledge articles.

1. From Setup, in the Quick Find box, enter *Service Setup Assistant*, and then select **Service Setup Assistant**.
2. Click **View All**.
3. Find and select **Knowledge Setup**.
4. Click **Start**.
5. Select the users who will create knowledge articles.
6. Add a data category group and data group.
7. Click **Finish**.

SEE ALSO:

[Salesforce Help: Set Up Lightning Knowledge with a Guided Setup Flow](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Crisis Support Center Management app

- Manage Crisis Support Center Management App

Configure Assessments for Crisis Support Center Management

Assessments help counselors gain a better understanding of a client's risk. Export the assessment sample OmniScripts from a Health Cloud trial org and import them into your Salesforce org using Workbench. Then, enter the correct OmniProcessID and activate the scripts.

Before you export, import, and activate the OmniScripts, make sure that you install OmniStudio, and enable OmniStudio Metadata, Discovery Framework, and Import and Export settings.

To install OmniStudio and enable Discovery Framework, see [Get Your Org Ready to Use Assessments](#).

To enable Import and Export settings, see [Configure Import or Export Settings](#).

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

[Export the Assessment Template OmniScripts from a Trial Org](#)

When you configure assessments for Crisis Support Center Management, your first task is to export the assessment sample OmniScripts from a Health Cloud trial org using Workbench. Create a package.xml file with the standards and types defined, and the version of API for the request. Use this file to retrieve the component attributes.

[Deploy the Assessment Template OmniScripts Using Workbench](#)

Now that you've exported the assessment sample OmniScripts from the Health Cloud trial org, your next task is to deploy the scripts to your Salesforce org using Workbench.

[Activate the Assessment Template OmniScripts](#)

After you deploy the assessment samples, activate the OmniScripts in your Salesforce org so that counselors can use the assessments to gain a better understanding of their clients.

Make Assessments Available to Crisis Support Center Management Users

Grant users the required access and permissions to use assessments. Configure an Action Launcher deployment with assessments and place the component in a case record page. Add the Assessments related list to the Case page layout so counselors can quickly find completed and ongoing assessments associated with a case.

Export the Assessment Template OmniScripts from a Trial Org

When you configure assessments for Crisis Support Center Management, your first task is to export the assessment sample OmniScripts from a Health Cloud trial org using Workbench. Create a package.xml file with the standards and types defined, and the version of API for the request. Use this file to retrieve the component attributes.

1. [Sign up here](#) for a free Health Cloud trial org.
2. Prepare an XML file with the standards and types defined, and the version of API for the request. Here's a sample file that you can use.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>HealthCareCSCM_MSA_CopingStrategiesBottom</members>
    <members>HealthCareCSCM_MSA_CopingStrategies</members>
    <members>HealthCareCSCM_MSA_CopingStrategiesParent</members>
    <members>HealthCareCSCM_MSA_WarningSignParent</members>
    <members>HealthCareCSCM_MSA_WarningSign</members>
    <members>HealthCareCSCM_MSA_DistractionsParent</members>
    <members>HealthCareCSCM_MSA_Distractions</members>
    <members>HealthCareCSCM_MSA_MySupportsParent</members>
    <members>HealthCareCSCM_MSA_MySupports</members>
    <members>HealthCareCSCM_MSA_MYPSParent</members>
    <members>HealthCareCSCM_MSA_MYPS</members>
    <members>HealthCareCSCM_MSA_MSEParent</members>
    <members>HealthCareCSCM_MSA_MSE</members>
    <members>HealthCareCSCM_Intake_MentalStatus</members>
    <members>HealthCareCSCM_Intake_MainConcern</members>
    <members>HealthCareCSCM_Intake_IsTransgender</members>
    <members>HealthCareCSCM_Intake_isSudicial</members>
    <members>HealthCareCSCM_Intake_Gender</members>
    <members>HealthCareCSCM_IR_isThereAnyPastThoughtAboutKilling</members>
    <members>HealthCareCSCM_IR_isThereIntentToAct</members>
    <members>HealthCareCSCM_IR_MindsetStatus</members>
    <members>HealthCareCSCM_IR_isSelfHarmPlanWorkedOut</members>
    <members>HealthCareCSCM_IR_isThereAPlan</members>
    <name>AssessmentQuestion</name>
  </types>
  <types>
    <members>HealthCareCSCMJSONToPDF_1</members>
    <members>HCCSCMGetAssessmentIdForIntake_1</members>
    <members>HCCSCMGetAssessmentIdForMSA_1</members>
    <members>emailExtractRaptor_1</members>
    <members>GetAssessmentIdForIRA_1</members>
  </types>
</Package>
```

```

<name>OmniDataTransform</name>
</types>
  <types>
    <members>HealthCareCSCMIRA_Prefill_Procedure_1</members>
    <members>HealthCareCSCM_MSAPrefill_Procedure_1</members>
    <members>HealthCareCSCMIntake_Prefill_Procedure_1</members>
    <members>HealthCareCSCM_MSAResponseFormat_Procedure_1</members>
    <name>OmniIntegrationProcedure</name>
  </types>
  <types>
    <members>HealthCloudCSCM_Intake_English_1</members>
    <members>HealthCloudCSCM_ImmediateRiskAssessment_English_1</members>
    <members>HealthCloudCSCM_MentalStatusAssessment_English_1</members>
    <name>OmniScript</name>
  </types>
  <version>56.0</version>
</Package>

```

3. Log into [Workbench](#) using the trial org credentials.
4. From the dropdown menu that appears under the **migration** tab, click **Retrieve**.
5. Click **Choose file** and select the package.xml file you created.
6. Click **Next**, then **Retrieve**.
7. After the retrieval is completed, click **Download ZIP File**. The file is saved in your local default download's folder.

Deploy the Assessment Template OmniScripts Using Workbench

Now that you've exported the assessment sample OmniScripts from the Health Cloud trial org, your next task is to deploy the scripts to your Salesforce org using Workbench.

1. On [Workbench](#), log in to your Salesforce org.
2. From the dropdown menu that appears under the **migration** tab, click **Deploy**.
3. Click **Choose file** and select the downloaded ZIP file.
4. Select **Check Only** and **Rollback On Error**. Selecting **Check Only** simply checks whether the deployment would be successful instead of making permanent changes to your org.
5. Click **Next**, then **Deploy**.
6. If the deployment is validated, repeat steps 4 and 5. This time, select only **Rollback on Error**.
7. Click **Next**, then **Deploy**. The assessment sample OmniScripts are now deployed to your org.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

Activate the Assessment Template OmniScripts

After you deploy the assessment samples, activate the OmniScripts in your Salesforce org so that counselors can use the assessments to gain a better understanding of their clients.

1. From the App Launcher, find and select **OmniStudio**.
2. From the navigation menu, select **OmniScripts**.
3. Locate and open the OmniScripts that you’ve deployed. Note down the record ID of each of these scripts.
 - HealthCloudCSCM/ImmediateRiskAssessment
 - HealthCloudCSCM/Intake

You can find the record ID of the OmniScript in the URL. For example, if the URL of HealthCloudCSCM/ImmediateRiskAssessment is “https://<your domain>URL/lightning/cmp/omnistudio__OmniDesignerAuraWrapper?c__recordId=0jN5i000000LbeYEAS&uid=1681161638761”, then the record ID of this OmniScript is 0jN5i000000LbeYEAS.

4. From the navigation menu, select **OmniStudio DataRaptors**.
5. Locate and open **GetAssessmentIdForIRA**.
6. To change the field values, click **Deactivate**.
7. In the **Extract** tab, replace the value of the **OmniProcessId** field with the record ID of the HealthCloudCSCM/ImmediateRiskAssessment

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

Required Permission (Optional)	Version Number	Description
	1	

d

=

ContextId

ProcessId

=

'0jNB000000LSSjMAO'

ORDER BY

LastModifiedDate DESC

LIMIT

1

8. Click **Activate**.
9. Repeat steps 5 through 8 for **HCCSCMGetAssessmentIdForIntake**, using the record ID of **HealthCloudCSCM/Intake**.

Make Assessments Available to Crisis Support Center Management Users

Grant users the required access and permissions to use assessments. Configure an Action Launcher deployment with assessments and place the component in a case record page. Add the Assessments related list to the Case page layout so counselors can quickly find completed and ongoing assessments associated with a case.

To assign users and create a permission set, see [Give Users Access to Assessments](#).

To configure an action launcher deployment with assessments and other frequently used actions, see [Configure an Action Launcher Deployment in Crisis Support Center Management](#).

To add the Assessments related list to the Case page layout using the page layout editor, follow these steps.

1. From Setup, go to the **Object Manager** tab.
2. Click **Case**, and then select **Case Page Layout**.
3. Click **Case Layout**.
4. Drag the Assessments related list onto the page layout.
5. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

USER PERMISSIONS

To use the Crisis Support Center Management app

- Manage Crisis Support Center Management App

Action Launcher for Crisis Support Center Management

Help crisis center counselors to quickly launch commonly-used assessments, processes and workflows so that they can provide uninterrupted crisis support services without having to navigate to other pages. Configure frequently-used assessments and actions, and pin them to the Action Launcher component for easy access.

[Configure an Action Launcher Deployment in Crisis Support Center Management](#)

Add quick actions, flows, and OmniScripts to an Action Launcher in the Crisis Support Center Management app. Then, make the component available to users by adding it to a Lightning record page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Configure an Action Launcher Deployment in Crisis Support Center Management

Add quick actions, flows, and OmniScripts to an Action Launcher in the Crisis Support Center Management app. Then, make the component available to users by adding it to a Lightning record page.

1. From Setup, in the Quick Find box, enter *Action Launcher*, and then click **Action Launcher**.
2. Enter a label for your deployment. The API name is auto-updated.
3. Select both **Flows and quick actions**, and **OmniScripts**. Click **Next**.
4. To show the actions in the Crisis Support Center Management, select Case as the object, and click **Next**.
5. Select frequently-used actions to pin to the Action Launcher component.
6. Save your changes.
7. From the App Launcher, go to Crisis Support Center Management and open a case record in Lightning App Builder.
8. In the Properties pane, in the Action Launcher Deployment field, add the deployment you configured.
9. Activate and save your changes.

SEE ALSO:

[Salesforce Help: Create an Action Launcher Deployment](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Crisis Support Center Management app

- Manage Crisis Support Center Management App

Manage Your Network of Providers

Find and manage provider partners and support efficient recruiting, credentialing, contracting, and self-service within a single cloud platform.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Provider Network Management

Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

 **Note:** New customers from March 15, 2022 who are using the OmniStudio processes of Provider Network Management require the OmniStudio Foundation package and licenses. Existing customers using Provider Network Management require the Vlocity Health and Insurance package and licenses.

Get Oriented	 Create a robust and easily manageable provider system of record. • Health Cloud Provider Relationships and Search • Learn About the Provider Data Model • Health Cloud for Payers • Deliver Great Patient Care with Health Cloud
Data Models	 Get to know the Health Cloud data models and objects that help you manage your network of providers. • Provider Network Management
Provider Search and Provider Relationship Management	 Connect patients, members, and providers. • Help Patients to Connect with Providers
Provider Network Management	 Create a robust and manageable provider system of record. • Get to Know Provider Network Management

Set Up and Manage Your Provider Network

[Get to Know Provider Network Management](#)

Recruiting providers and adding and managing them in provider group or payer network is a lengthy, time consuming process. And the manual nature of this process has always been a pain point in the industry. Optimizing this process is essential to increasing provider satisfaction rates and improving patient outcomes. That's where Health Cloud comes in.

[Provider Network Management Permission Set](#)

The Health Cloud Provider Network Management permission set grants access to provider management objects so users can manage recruiting, credentialing, networking, and contracting.

[Provider Network Management for Site Users](#)

Give site users access to Provider Network Management to help them easily manage their provider networks and contract payment terms.

[Provider Network Management Data Model](#)

The provider network management data model provides standard objects and record types for provider data. This data includes the provider application, credentialing, and contract payment terms.

[How Provider Network Management Works](#)

Provider Network Management in Health Cloud enables payers and provider groups to easily enroll providers, construct effective provider networks, and retain top healthcare talent. Provider Network Management supports a range of contract types, network models, and provider relationships.

[What Provider Network Management Includes](#)

Provider Network Management provides an efficient recruiting, credentialing, networking, and contracting experience. This system helps to reduce provider onboarding time while increasing engagement, satisfaction, and operational efficiency.

Get to Know Provider Network Management

Recruiting providers and adding and managing them in provider group or payer network is a lengthy, time consuming process. And the manual nature of this process has always been a pain point in the industry. Optimizing this process is essential to increasing provider satisfaction rates and improving patient outcomes. That's where Health Cloud comes in.

Health Cloud is a system of engagement for managing payers' and providers' networks and associated contracts. The results are improved access to care, patient experience, provider satisfaction rates, and operational efficiency. Provider Network Management in Health Cloud is an add-on product that simplifies and automates the management and association of provider networks and contracts.



Note: Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

With the help of compliant contracts and outcome-based networks, Provider Network Management:

- Strengthens provider relationships and increases provider satisfaction rates through a transparent network and contract management process.
- Helps build provider networks to maximize patient outcomes and ensure best care by accredited providers.
- Automates and optimizes the network and contract process using guided workflows.
- In combination with Analytics, guides the recruitment specialist identify the right provider for a given payer in a given region or location.
- Helps the Payer team run through all the steps of the recruitment, credentialing, network participation, and contracting by providing the right guidance at each step.
- Runs validations to ensure that the provider is given the correct contract.

Overall, Provider Network Management helps to quickly enable full contract, provider, and network setup.

SEE ALSO:

[Health Cloud Developer Guide: Provider Network Management](#)

[Vlocity Provider Network Management Application](#)

Provider Network Management Permission Set

The Health Cloud Provider Network Management permission set grants access to provider management objects so users can manage recruiting, credentialing, networking, and contracting.

To use the Provider Network Management features of Health Cloud, assign both the Provider Network Management permission set and the Health Cloud Foundation permission set to your users.



Note: Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

The Health Cloud Provider Network Management permission set gives users Read/Create/Edit/Delete access to data in these objects:

- Application Case
- Individual Application
- Insurance Policy
- Person Employment
- Provider Network Tier
- Provider Network Contract
- Care Fee Schedule Item
- Fee Schedule Definition
- Contract Payment Agreement
- Standard Care Fee Agreement
- Categorized Care Fee Agreement
- Capitation Care Fee Agreement
- Shared Saving Payment Agreement
- Percentile Care Fee Agreement
- Bundled Care Fee Agreement
- Preventive Care Agreement

The Health Cloud Provider Network Management Add On license also adds new fields to these objects, which are included in the Health Cloud Foundation permission set:

- Business License
- Care Provider Adverse Action
- Person Education

SEE ALSO:

[Assign Health Cloud Permission Sets and Permission Set Licenses](#)

Provider Network Management for Site Users

Give site users access to Provider Network Management to help them easily manage their provider networks and contract payment terms.

 **Note:** Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

Site users need these permissions to access all Provider Network Management features:

- Health Cloud for Experience Cloud Sites permission set license
- Provider Network Management for Experience Cloud Sites permission set
- Use Provider Network Management via Experience Cloud sites user permission

Within Provider Network Management, site users are guided through these processes:

- Recruiting — The provider receives a link inviting them to join a network. Clicking the link takes them to the site, where they're provisioned to enter their information as a part of the application.
- Credentialing — The provider uses the site to enter the information needed for credential verification.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Provider Network Management Data Model

The provider network management data model provides standard objects and record types for provider data. This data includes the provider application, credentialing, and contract payment terms.

With Provider Network Management in Health Cloud, providers can apply to join a network. Credentialing specialists can then validate information such as the education qualifications, certifications, and employment history to enroll providers into the network. Contracting specialists can then define appropriate payment terms for contracts associated with provider networks.



Note: Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

The provider network management 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 provider application and credentialing data.

Provider Network Management includes these objects:

Application Case

A junction object that associates a case with a provider's application.

Bundled Care Fee Agreement

Represents the payment terms for contracts of Bundled Care Fee Agreement.

Business License

Represents the licenses of a provider applying for enrollment.

Capitation Care Fee Agreement

Represents the payment terms for contracts of Capitation Care Fee Agreement type.

Care Fee Schedule Item

Represents procedure level fees for a fee schedule definition.

Care Provider Adverse Action

Represents any adverse actions against the provider, such as malpractice lawsuits or revoked licenses.

Care Specialty Taxonomy

Represents a static list of specialty taxonomy codes.

Care Taxonomy

Represents a static list of taxonomy codes.

Categorized Care Fee Agreement

Represents the payment terms for contracts of Categorized Care Fee Agreement type.

Contract Payment Agreement

Represents information about the contract payment agreement associated with a contract.

Fee Schedule Definition

Represents fee schedule information for contracts of Standard Care Fee Agreement types.

Healthcare Payer Network

Represents different networks in your organization.

Healthcare Facility Network

Represents the network a facility is a part of, and the providers at that facility within the network.

Individual Application

Represents an application form submitted by a provider.

Insurance policy

Represents the type of insurance policy associated with the provider.

Percentile Based Care Fee Agreement

Represents the payment terms for contracts of Percentile Based Care Fee Agreement type.

Person Education

Represents information about educational qualifications of a provider applying for enrollment.

Person Employment

Represents information about employment history of a provider applying for enrollment.

Preventive Care Fee Agreement

Represents the payment terms for contracts of Preventive Care Fee Agreement type.

Provider Network Contract

Represents a network participation bound by a contract.

Provider Network Tier

Represents the tier a network belongs to.

Shared Saving Payment Agreement

Represents the payment terms for contracts of Shared Saving Payment Agreement type.

Standard Care Fee Agreement

Represents the payment terms for contracts of Standard Care Fee Agreement type.

For detailed data model documentation, see the [Health Cloud Developer Guide: Provider Network Management](#).

How Provider Network Management Works

Provider Network Management in Health Cloud enables payers and provider groups to easily enroll providers, construct effective provider networks, and retain top healthcare talent. Provider Network Management supports a range of contract types, network models, and provider relationships.



Note: Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

Here's a high-level overview of how a provider becomes a part of a payer network:

1. Payer network management team runs an analysis on the provider directory to identify the current and potential providers in the network.
2. Payer recruiting team creates a marketing campaign or event to automate outreach and attract interested providers to increase participation. Provider receives campaign or attends events and registers.
3. Payer recruiting team receives a lead, initiates the recruiting process, and sends the application to the provider. Provider completes the online application using the provider portal.
4. Payer credentialing team reviews application data for credentialing compliance and approves the application. The team then discusses the terms and needs along with key issues such as prior authorizations, reimbursements, claims processing, rates, and disputes. The team then creates and sends the contract.
5. Provider receives and signs the physician's contract agreement (sometimes after negotiation).
6. Payer contracting team sends the final signed contract along with provider directory information, claims process, payment schedule, and other onboarding materials to providers. This team internally sends the information to the network management team.
7. Payer network management team activates the provider and initiates their onboarding. Guided workflows and automation replace manual processes to ensure effective records storage, retrieval, and retention, while also allowing for provider engagement in critical moments.

8. As a member of the provider network, the provider partners with the health plan to deliver world class care to their members. They stay connected with the payer through ongoing outreach campaigns, portals, and personalized provider service. Payer network management team continues to measure network adequacy.

What Provider Network Management Includes

Provider Network Management provides an efficient recruiting, credentialing, networking, and contracting experience. This system helps to reduce provider onboarding time while increasing engagement, satisfaction, and operational efficiency.

Provider Network Management includes various features.

Provider Recruitment

Provider recruitment, the first step in managing provider networks, involves assessing providers of all types for inclusion into a network. With Provider Network Management, the goal is to efficiently enable payers or provider groups to customize recruitment campaigns and workflows to segment and assess provider candidates quickly.

Provider Credentialing

Providers must complete the credentialing process to ensure they meet a certain set of standards to be a part of the practitioner panel of the provider network.

Network Participations

Network participations record providers or provider groups who participate in a network. Putting together a network participation for a provider or provider group is the logical next step to onboarding them into your organization's network.

Provider Network Contract Management

Contract management plays a significant role in provider networks. An effective contract management system ensures that contracts have the right payments, providers are held accountable for care outcomes, and clinicians work towards qualitative, patient-centric care. It involves defining appropriate, agreed-upon payment terms so that payers, providers, and provider groups can focus on care coordination and health management.

Provider Recruitment

Provider recruitment, the first step in managing provider networks, involves assessing providers of all types for inclusion into a network. With Provider Network Management, the goal is to efficiently enable payers or provider groups to customize recruitment campaigns and workflows to segment and assess provider candidates quickly.

Using Health Cloud, the recruiting teams of payers or provider groups initiate a recruitment workflow. This workflow creates an application and portal login for the provider. Providers can then easily log into the provider portal to complete their application before proceeding to the next step, credentialing.

The recruitment process in Health Cloud enables you to:

Digitize Provider Registration

Providers can join a network and register on a payer or provider group website with a digital registration form.

Streamline Provider Leads

Recruiters can set up and manage recruiting campaigns and territories across lines of business and channels. They can create provider leads tied to campaigns and optimize results by segmenting them based on high-priority network needs.

Provide a Guided Provider Recruiting Experience

Recruiting specialists can use guided workflows to cater to providers in different segments. They can assess candidates and guide them through a process specific to the campaign, event attendance, channel, and personal interest. Recruiters can then initiate a recruitment workflow for providers that are a good fit.

 **Note:** For a complete description of the provider recruitment feature, see [Vlocity Provider Network Management Overview](#).

Provider Credentialing

Providers must complete the credentialing process to ensure they meet a certain set of standards to be a part of the practitioner panel of the provider network.

Though the credentialing process is considered one of the biggest bottlenecks of recruiting providers, Health Cloud helps provider groups and payers to seamlessly collect credential data in the self-service application.

Credentials are used to designate the professional qualifications required by providers to advise and treat patients. Credentials broadly encompass all the licenses, certifications, education, practice standards, and registrations a provider is required to have. Each provider network can customize the exact credentialing requirements.

Provider Network Management helps to:

Streamline Enrollment to Credentialing

Credential specialists can digitize the process and easily customize the provider application content to meet the needs of any organization. They can capture provider applications with integrated credential verification and validation rules for mandatory information. This digitization minimizes manual data entry and shortens the enrollment and onboarding time. Credential specialists can also easily track the progress of the provider's application from a single dashboard.

Ensure Up-to-Date Credentialing Data

Credential specialists can use our extended data model to capture all aspects of provider education to allow for comprehensive verification. The data model captures work history, regulatory action, malpractice insurance, specialty, board certification, and award data.

 **Note:** For a complete description of the provider credentialing feature, see [Vlocity Provider Network Management Overview](#).

Network Participations

Network participations record providers or provider groups who participate in a network. Putting together a network participation for a provider or provider group is the logical next step to onboarding them into your organization's network.

 **Note:** Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

The guided workflows included with Provider Network Management help to effectively associate provider groups and their practitioners with a network. Provider Network Management also enables provider groups to organize their providers into specific tiers to create the network participation. These workflows help your users to easily associate the providers with a unique set of contracts and health plans.

For example, as a large national health plan, Cumulus Health Plans carries multiple networks, including an HMO, a PPO, and various Medicare offerings. As a final step in the contracting process, the contracting specialist must designate which network participation the new provider joins.

Network participations include these key components:

- Participating provider
- Network that the provider is participating in
- Location of practice that's covered by the network
- Contract that binds the provider, network, and location together
- Period the network participation is active for

Both individual practitioners and provider groups can be participants in network participations.

Network Participation in Health Cloud

Health Cloud provides a Lightning component that helps your users view and register network participations for the providers that they onboard. Records created by this component are stored in the Healthcare Facility Network object. If a contract is specified for the network participation, then an additional record is created in the Provider Network Contract object as well.

Configure the Network Participation Component

Add the Network Participation Lightning component on appropriate record pages for your users. Using this component, your users can register network participation for the providers that they bring into their network.

Network Participation in Health Cloud

Health Cloud provides a Lightning component that helps your users view and register network participations for the providers that they onboard. Records created by this component are stored in the Healthcare Facility Network object. If a contract is specified for the network participation, then an additional record is created in the Provider Network Contract object as well.



Note: Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

The Network Participation Lightning component is compatible with: Business Account, Person Account, and Healthcare Payer Network record pages. The component's behavior is contextually determined by the type of the record page it's added to. Here's how the New Participation flow changes based on the type of record page it's configured on:

- Business Account record pages:
 - While registering new network participations, the participation location references Healthcare Facility records.
 - Users can select individual providers associated with the business account's provider group to register multiple network participations. A network participation is always registered for the business account that the flow is launched from.
 - The component lists network participations filtered by the Business Account record that the component is viewed from.
- Person Account record pages:
 - While registering new network participations, the participation location references Healthcare Practitioner Facility records.
 - The flow skips the provider selection screen and selects the provider of the Person Account record that is used to launch the flow.
 - The component lists network participations filtered by the Person Account record that the component is viewed from.
- Healthcare Payer Network record pages:
 - The New Participation button is hidden and users can't create network participations from that record page.
 - The Component lists network participations filtered by the Healthcare Payer Network from which the component is viewed.

Your users can use the component to record multiple network participations in batches. All they have to do is select the required practice locations, providers, and networks on the appropriate screens. However, if multiple locations are selected, then all the providers associated with those locations are automatically selected for registering network participations.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Configure the Network Participation Component

Add the Network Participation Lightning component on appropriate record pages for your users. Using this component, your users can register network participation for the providers that they bring into their network.

 **Note:** Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

You can place the Network Participation component on these record pages:

- Business Account record pages
- Person Account record pages
- Healthcare Payer Network record pages

Choose the appropriate record page based on your business needs. You're not limited to placing the component on only one type of record page—If you choose to do so, you can place it on all three types of record pages.

1. Open the appropriate record page in the Lightning App Builder.

Here are three ways you can open this page in the Lightning App Builder:

- (Recommended) Navigate to the page in your org and select **Edit Page** from the **Setup** menu.
- From Setup, go to the appropriate object in the Object Manager and select **Lightning Record Pages**. Then, select the record page that you want to configure with this component and click **Edit**.
- From Setup, in the Quick Find box, enter *Lightning App Builder* and select **Lightning App Builder**. Then, click **Edit** for the appropriate record page.

2. Place the Network Participation component on your page layout.
3. When you're done, save your configuration and activate your page.

Your users can now start registering network participations.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Provider Network Contract Management

Contract management plays a significant role in provider networks. An effective contract management system ensures that contracts have the right payments, providers are held accountable for care outcomes, and clinicians work towards qualitative, patient-centric care. It involves defining appropriate, agreed-upon payment terms so that payers, providers, and provider groups can focus on care coordination and health management.

 **Note:** Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

Contracts can exist between:

- Payers and provider groups
- Payers and providers
- Provider groups and providers

With providers, there are different levels of contractual terms. Within contracts, there are also varying terms and conditions for different provider relationships and specialties.

- Participating providers (specialists or consultants) in the organization network agree to the contracted payment terms and conditions, including reimbursement structures. They're considered In-network providers; when members access healthcare services from these providers, there's cost reduction and savings.

- Non-Participating providers don't participate in the organization network and aren't bound by the reimbursement structures and negotiated terms applicable for participating providers. They're considered Out-of-network providers.

These are some of the main contract payment types that the healthcare industry supports:

Fee-for-Service

Healthcare providers are paid a negotiated amount for each service they perform. The amounts are based on the comprehensive fee schedule definition set up by Centers for Medicare and Medicaid Services (CMS). Example: patient visits.

Category-Based Payment

Healthcare providers are paid based on a defined negotiation for each procedure category that they work on. Example: vaccines.

Percentile-Based Payment

Providers are paid based on the percentile range that the member falls into. Each percentile range has a separate fee, which is determined by factors such as the member's age. For the same service, the provider is paid a different amount for members in the 50th percentile and 75th percentile.

Shared Savings

The payer shares the profit and loss with the provider and provider groups. The payment terms are dependent on the forecasted expenditure and the profit or loss percentage for the defined time period. This payment type is generally seen in an Accountable Care Organization (ACO).

Capitated Payment

Providers are paid a fixed amount per member every month for a fixed set of services. As part of the program, the payer can also decide to withhold some amount and pay it later as a bonus amount based on the performance.

Bundled Payment

Providers are paid for each procedure bundle they work on. Bundles are a group of procedures that are offered together by the provider. Bundled payment is tier-based and can have different prices depending on the services and care offered. Members and payers choose the bundle category that works best for them. Example: Basic, mid, and premium tier.

Preventive Care

Providers are paid a bonus when they reach an agreed upon target such as reducing the admission or readmission rates by a certain percentage.

[Contract Management in Health Cloud](#)

Health Cloud's comprehensive contract management solution provides payers, providers, and provider groups with a single, integrated system for recording contract information. The ability to find the information they need and manage fee schedules all in one place makes your contracting specialists' jobs easier and ensures faster access to patient care.

[Configure the Contract Payment Agreements Related List](#)

Add the Contract Payment Agreements related list to Contract record pages so that your contracting specialist can define the payment terms for a contract.

[Configure Custom Payment Agreement Types](#)

Give your contracting specialists additional flexibility by providing other payment types. You can configure custom payment types that meet your organization's business needs and contract specifications.

Contract Management in Health Cloud

Health Cloud's comprehensive contract management solution provides payers, providers, and provider groups with a single, integrated system for recording contract information. The ability to find the information they need and manage fee schedules all in one place makes your contracting specialists' jobs easier and ensures faster access to patient care.

Ensure that you create the contract for the provider network using the Contract page and have it ready before defining the payment terms. To simplify the process, you can associate the contract with the right network participation record directly on the Contract record page. Then, your contract applies to all providers or provider groups who are part of the network participation.

 **Note:** Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

Health Cloud contract management consists of the Contract Payment Agreement parent object, its child objects, and the Contract Payment Agreement Terms lightning component, which help to support these seven industry-standard payment types:

Payment Types	Health Cloud Object for this Payment Type
Fee-for-Service	Standard Care Fee Agreement
Category-Based Payment	Categorized Care Fee Agreement
Percentile-Based Payment	Percentile Care Fee Agreement
Shared Savings	Shared Saving Payment Agreement
Capitated Payment	Capitation Care Fee Agreement
Bundled Payment	Bundled Care Fee Agreement
Preventive Care	Preventive Care Agreement

 **Note:** These objects are accessible only within the context of the Contract Payment Agreement parent object and not from the App launcher. Your users can't create standalone records for them.

If your organization's contract specifications require a different payment type, you can configure custom payment types. See [Configure Custom Payment Agreement Types](#).

Configure the Contract Payment Agreements Related List

Add the Contract Payment Agreements related list to Contract record pages so that your contracting specialist can define the payment terms for a contract.

 **Note:** Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

1. From Setup, open the Object Manager, click **Contract**, and then click **Page Layouts**.
2. Click your page layout's name to edit it.
3. Click **Related Lists**.
4. Drag the Contract Payment Agreements to the Related Lists section and save your changes.

No additional configuration is required. The Contract Payments Agreement Terms lightning component is available on the Contract page by default.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To configure the Contract Payment Agreement related List:

- Create, Read, and Update permission on Contract object

Configure Custom Payment Agreement Types

Give your contracting specialists additional flexibility by providing other payment types. You can configure custom payment types that meet your organization's business needs and contract specifications.

 **Note:** Provider Network Management is available in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

1. From Setup, open the Object Manager and create a custom object for the new payment type.
2. Create custom fields that meet your contracting needs and save your changes.
3. Go to the Contract Payment Agreement object in the Object Manager.
4. Click **Fields & Relationships**, then click **Agreement Type**.
5. Click **New** and enter a custom picklist value that matches the name of the custom object you created earlier.
6. Save your changes.
The configuration is complete and the link between the custom object and picklist value is established.

The custom payment type is now available for selection from the Agreement Type field of the Contract Payment Agreement page. Your contracting specialist can use the payment type to define the payment terms of their contracts.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To configure custom payment agreement types:

- Customize Application

Help High-Risk Patients and Members

Give your users a holistic understanding of patients and members, so that they can provide more personalized care and support. Social workers and case managers capture critical social and environmental factors like homelessness and low income as barriers and related social determinants. With social determinants of health, they can create intervention tasks to address barriers and help mitigate avoidable adverse health events for patients and members.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Social Determinants of Health

Get Oriented		Get to know how to assess and record barriers to health and address them with interventions. • Discover the Social Determinants of Health Data Model
		• Social Determinants of Health and Code Sets
Data Model		Explore the Health Cloud data model and objects that capture social determinants. • Social Determinants
Related Permission Sets and Permission Set Licenses		Assign permission set licenses and permission sets. • Assign Health Cloud Permission Set Licenses • The Health Cloud Social Determinants Permission Set

Set Up and Manage Social Determinants of Health

[Grant Access to Records for Social Determinants](#)

Sharing settings specify the level of access your users have to records and fields used to assign and track information about social determinants. Organization-wide sharing settings specify the default level of access users have to each others' records. You use organization-wide sharing settings to lock down your data to the most restrictive level. For example, users have object-level permissions to read and edit opportunities, and the organization-wide sharing setting is Read-Only. By default, those users can read all opportunity records, but can't edit any unless they own the record or are granted other permissions.

[Customize Picklists and Fields for Social Determinants](#)

You can specify picklist values that are meaningful to your organization and users for the Care Determinant Type, Care Barrier Type, and Care Intervention Type objects. If your company uses custom values for the Status and Priority fields, you can add or change them, as well.

[Add the Care Determinants Component to a Record Page](#)

The Care Determinants Lightning component lets you associate barriers with an object like an account and configures how barriers and their details appear in the app.

[Create Care Barrier Types](#)

Create a library of standard types or classes of barriers that patients or members encounter. Make sure to modify user permissions so that users have access to these types.

[Create Care Determinant Types](#)

Create a library of standard types or classes of determinants that patients or members encounter. Make sure to modify user permissions so that users have access to these types.

[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.

Grant Access to Records for Social Determinants

Sharing settings specify the level of access your users have to records and fields used to assign and track information about social determinants. Organization-wide sharing settings specify the default level of access users have to each others' records. You use organization-wide sharing settings to lock down your data to the most restrictive level. For example, users have object-level permissions to read and edit opportunities, and the organization-wide sharing setting is Read-Only. By default, those users can read all opportunity records, but can't edit any unless they own the record or are granted other permissions.

1. From Setup, in the Quick Find box, enter *Sharing Settings*, and then select **Sharing Settings**.

2. Grant access to the following objects by setting their visibility to public access.

If you don't want users creating barrier types or determinant types, restrict them to public read-only access to those objects.

- Care Barriers
- Care Barrier Types
- Care Determinants
- Care Determinant Types
- Care Intervention Types

3. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Customize Picklists and Fields for Social Determinants

You can specify picklist values that are meaningful to your organization and users for the Care Determinant Type, Care Barrier Type, and Care Intervention Type objects. If your company uses custom values for the Status and Priority fields, you can add or change them, as well.

1. From the management settings for the object whose picklist values you want to edit, go to Fields & Relationships related list, and click the name of the picklist field to update.
For example, for the Care Determinant Type object, you can add or edit values for the Type field.

2. In the Picklist Values section, click **Edit** next to a value.
3. Change the value's name, and optionally make the value the default for the master picklist.
4. Optionally, click Search Layouts and remove the date and time fields from the Default layout.
Removing the fields ensures that only the barrier type name appears in the search box.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Add the Care Determinants Component to a Record Page

The Care Determinants Lightning component lets you associate barriers with an object like an account and configures how barriers and their details appear in the app.

1. In the Lightning App Builder, select the **Care Determinants** component and move it to an editable part of a case record page or an account record page.
For example, add the Care Determinants component onto Patient Console with Pinned Leftbar, and set it as the App Default.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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.

3. Click **Activate** and assign the page as an App Default.
4. Save your changes.
5. Create a record type named SocialDeterminant for the Task object, and make the record type available to the profiles using the component. This record type drives the Task page layout that is used in the Care Determinants component.

 **Example:** Sample Care Determinant component:

Barrier Details

* Care Barrier Type

 Lack of Transportation
 ×

* Patient

 Charles Green
 ×

Priority

Normal

Case

 00001005
 ×

Effective From

* Name

Lack of Transportation

* Status

Open

Active

☒

Survey Response

Search Survey Responses... 

Effective To

Related Social Determinants

Access to health care

Child care

Education

Employment

Finances

Food

Housing

Immigration/Migration

Incarceration

Race/Ethnicity

Safety

Social Connection/Isolation

Transportation

Veteran Status

Cancel

Save Barrier

Save Barrier and Add Interventions

Create Care Barrier Types

Create a library of standard types or classes of barriers that patients or members encounter. Make sure to modify user permissions so that users have access to these types.

1. From the App Launcher, find and select **Care Barrier Types**, and click **New**.
2. Enter a name for the barrier type such as *Lack of access to transportation* or *Low household income*.
3. To make the barrier type available to use, select **Active**.
4. Optionally, select a code type and code to associate the barrier type with a code.
5. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Create Care Determinant Types

Create a library of standard types or classes of determinants that patients or members encounter. Make sure to modify user permissions so that users have access to these types.

1. From the App Launcher, find and select **Care Determinant Types**, and click **New**.
2. Enter a name for the determinant type such as *Income* or *Housing*.
3. To make the determinant type available to use, select **Active**.
4. Select the type of determinant you're creating, such as **Finances** or **Housing**.
5. Select the social or behavioral domain for the determinant, such as **Employment** or **Stress**.
6. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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. From the App Launcher, find and select **Care Intervention Types**, and 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. For Code Type, select a medical code type for the intervention type.
5. For Code, enter the code associated with the medical code type.
6. Select an intervention type.
7. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Note: Make sure to add a custom lookup field on the Activity object that looks up to Care Intervention Type object. Set the field-level security for all profiles that use this field.

Manage Care Requests

Give your users the tools to collaborate seamlessly when submitting, assigning, or processing care requests. Utilization management makes it easier for provider and payer organizations to gather member and clinical data, streamline care request reviews, and evaluate requests for medical necessity.

Authorization for care requests typically requires a significant amount of administrative work, both by payers and providers. The review process can be tiresome and time-consuming, with multiple screen switches and data from various sources. To simplify this process, Utilization Management includes a number of guided workflows that help to ensure:

- Services are aligned to medical necessity guidelines
- Care is provided at the right time in the right setting

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Utilization Management

Get Oriented	 Get to know how Utilization Management helps you to process care requests. • Learn About Utilization Management • Understand the Utilization Management Data Model • Set Up Utilization Management
Data Models	 Explore the Health Cloud data model and objects that support utilization management, and learn more about the REST APIs supporting care requests. • Utilization Management • Request Bodies  • Health Cloud Utilization Management and Code Sets
Related Permission Set	 Assign permission set licenses and permission sets to users. • Assign the Health Cloud Utilization Management Permission Set

Set Up and Manage Utilization Management

[Authorization Requests](#)

Medications, surgeries, personalized therapies, and healthcare treatments can all lead to huge bills for the payers and patients. Many of these expensive procedures can be avoided or replaced by simpler, cost-effective alternatives that take place in outpatient settings. To verify cost of care and medical necessity of procedures and treatments, payers must conduct authorization reviews of the care requests that providers raise.

[Utilization Management Setup Checklist](#)

We’ve put together a handy guide to help you through the initial steps for setting up Utilization Management. With this setup, you can ensure that your users can handle care requests efficiently.

[Authorization Request Process Setup for Payers](#)

Help your payer users to easily handle and review authorization requests with a predefined app and set of OmniScripts. These components present a centralized view of the information needed for prior authorization and concurrent reviews, from eligibility check, to uploading supporting documents, to final approval.

[Authorization Request Process Setup for Providers](#)

Help your provider users to easily create and submit authorization requests using FHIR-aligned, industry-specific APIs, along with a predefined suite of Integration procedures and DataRaptors. These components retrieve member information, service requests, and other details required to create an authorization request record and submit the request to the payer.

Authorization Requests

Medications, surgeries, personalized therapies, and healthcare treatments can all lead to huge bills for the payers and patients. Many of these expensive procedures can be avoided or replaced by simpler, cost-effective alternatives that take place in outpatient settings. To verify cost of care and medical necessity of procedures and treatments, payers must conduct authorization reviews of the care requests that providers raise.

But authorization reviews are often manual and highly dependent on variable factors such as care type and admission type, requiring users to switch between various processes to collate information. From need assessment to coverage benefit verification, authorization can be a lengthy process.

To ensure ease of access to information and smoother collaboration between payers and providers, Health Cloud's Utilization Management provides these capabilities:

- Centralized and guided workflows with multiple OmniStudio components that empower your users to easily manage authorization request submissions and reviews
- Integrated payer app for seamless review processing
- Automatic administrative checks based on rules
- Controlled access based on request status
- Context-specific notes for clinical documents, service codes, and others
- Service-level agreement (SLA) tracking, along with analytics-based insights on SLA violations, during the review process
- Custom reports to analyze care request data
- Queue routing for streamlined approval process
- FHIR R4 aligned data model for interoperability and integration with external systems
- FHIR Da Vinci Health Record Exchange aligned APIs, deployed on MuleSoft, for uninterrupted request processing

The Da Vinci Health Record Exchange (HReX) implementation guide (IG) is a foundational guide that defines FHIR profiles, operations, and guidance. HL7's Da Vinci project produces standards and implementation guidelines based on HL7 FHIR to better connect payers and providers to tackle authorization requests.

[Authorization Request Process Flow in a Provider's Office](#)

Utilization Management's solution for providers gathers necessary clinical information from the Electronic Health Record (EHR) system and establishes a connection with the clearing house or payer system. With this seamless integration, provider users can efficiently create and submit authorization requests and deliver timely care to patients.

[Authorization Request Process Flow in a Payer's Office](#)

Utilization management's comprehensive approach for payers ensures that patients receive optimal medical care that's delivered in the appropriate setting at the necessary time, while helping users properly manage high-cost care and hospitalizations.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

SEE ALSO:

[Salesforce Help: Manage Prior Authorization Requests](#)

Authorization Request Process Flow in a Provider's Office

Utilization Management's solution for providers gathers necessary clinical information from the Electronic Health Record (EHR) system and establishes a connection with the clearing house or payer system. With this seamless integration, provider users can efficiently create and submit authorization requests and deliver timely care to patients.

When a patient books an appointment or visits a provider, the patient's diagnosis and service information are updated in the EHR. Before the provider can proceed with the treatment for the patient, an authorization request must be raised to the payer. The authorization coordinator on staff at the provider's office is responsible for handling the end-to-end authorization process of the patient's services. On receiving an approval for the requested services from the payer, the provider can proceed with care delivery.

Let's see how authorization coordinators manage requests:

1. View and retrieve patient information, clinical data (diagnosis and service), requesting and servicing provider details, and more from the EHR system.
2. Check the need of authorization for the requested services or diagnosis from the payer.
3. Create and submit authorization requests, with necessary details and documents, to the payer based on the defined requirements.
4. Follow up on the status of the submitted request.
5. Provide additional information to the payer to enable prompt decision making.
6. Receive the determination in a timely manner so that patient care is delivered as planned.
7. After the request is approved, submit approval reference details to the payer for processing claim submissions. If the request is denied, raise an appeal request with the payer for reconsideration or request for a peer-to-peer meeting.

SEE ALSO:

[Utilization Management Setup Checklist](#)

[Authorization Request Process Setup for Providers](#)

[Manage Care Requests](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Authorization Request Process Flow in a Payer's Office

Utilization management's comprehensive approach for payers ensures that patients receive optimal medical care that's delivered in the appropriate setting at the necessary time, while helping users properly manage high-cost care and hospitalizations.

With a highly refined process and solid technological workflows, Utilization Management's process flow helps your payer users achieve improved health outcomes and operational efficiencies. Let's see how:

1. The Intake Specialist or Coordinator creates an authorization request based on the details the provider or member shares. They check the eligibility of service requested, add information related to the request, update provider details, and add supporting documents.
2. The Admin Reviewer then performs the first level of review to verify member eligibility, check availability of required documents to support clinical review, and verify provider's network status.
3. The Utilization Management Nurse performs a clinical review of the request by referring to the payer's internal guidelines and industry standard medical necessity guidelines. The nurse either approves a request or marks it for further review by the medical director.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

4. The Medical Director provides the final determination for requests they receive. By analyzing the observations of previous reviewers against respective services, diagnosis, clinical documents, and medical guidelines, they get a 360-degree view of the request and are able to quickly make an informed decision.

Occasionally, if the medical director denies or partially approves a request, a peer-to-peer review meeting is scheduled between the medical director and requesting provider. This meeting helps to clarify follow-up questions, exchange views, and align both parties on a decision.

Utilization Management Setup Checklist

We've put together a handy guide to help you through the initial steps for setting up Utilization Management. With this setup, you can ensure that your users can handle care requests efficiently.

To get in-app help, you can refer the guided setup instructions available in the Utilization Management Settings page under Setup.

[Set Up Permissions and Data for Utilization Management](#)

To use Utilization Management, complete these prerequisites.

[Enable OmniStudio Runtime Settings and OmniStudio Metadata for Utilization Management](#)

To seamlessly run authorization-related OmniScripts in Health Cloud, enable the Standard OmniStudio Runtime Settings.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Set Up Permissions and Data for Utilization Management

To use Utilization Management, complete these prerequisites.

- Install and configure Health Cloud
- Enable person accounts
- Install OmniStudio package version 240.3 or above
- Ensure system admins have these permission sets and permission set licenses:
 - Health Cloud permission set license
 - Health Cloud Platform permission set license
 - OmniStudio Admin permission set
 - OmniStudio User permission set
 - RuleEngine Designer permission set
 - RuleEngine Runtime permission set
- Assign these permission sets to your users:
 - Health Cloud Foundation
 - Health Cloud Utilization Management
 - OmniStudio User permission set
 - RuleEngine Runtime permission set
- Enable the Health Cloud: Utilization Management for providers org permission and assign the Utilization Management Provider User user permission to your provider users
- Ensure you have the MuleSoft - Salesforce Healthcare APIs SKU to use the payer inbound API: Prior Authorization API

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- Ensure you have the Mulesoft add-on product called MuleSoft Direct for Health cloud to use the provider APIs: Prior Authorization EMR Retrieval API and Prior Authorization Claim Submission API
- Ensure your org data is set up using these objects:

Salesforce Object	Type of Data
Account (business accounts and person accounts)	Member and provider details
Purchaser Plan and Member Plan	Member's insurance plan details
Healthcare Payer Network (business account)	Payer details
Healthcare Provider (business accounts and person accounts), Healthcare Provider NPI, Board Certification, Healthcare Provider Taxonomy, Contact	Requesting and servicing provider details
Healthcare Facility (for business accounts) and Healthcare Practitioner Facility (for person account's contact)	Payer and provider facility details
Code sets	Service code and diagnosis code details

- Add care request type values to the Type field picklist on the Case object. For example, Initial Request, Extension or Amendment.

Enable OmniStudio Runtime Settings and OmniStudio Metadata for Utilization Management

To seamlessly run authorization-related OmniScripts in Health Cloud, enable the Standard OmniStudio Runtime Settings.

1. From Setup, in the Quick Find box, enter *OmniStudio Settings*, and then select **OmniStudio Settings**.
2. Set the Standard OmniStudio Runtime Settings to Enabled.
3. Set OmniStudio MetaData to Enabled.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To enable OmniStudio Runtime Settings and OmniStudio Metadata:

- OmniStudio Admin permission set

Authorization Request Process Setup for Payers

Help your payer users to easily handle and review authorization requests with a predefined app and set of OmniScripts. These components present a centralized view of the information needed for prior authorization and concurrent reviews, from eligibility check, to uploading supporting documents, to final approval.

Authorization requests require some additional setup. Few configurations such as setting up an experience cloud site, timeline parameters, custom reports, and case routing are optional and are dependent on your business needs.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

[Set Up Support Process and Record Types for Utilization Management](#)

In order to use OmniScript processes included with the OmniStudio package, configure record types and support processes that support Utilization Management. Assign profiles and page layouts to record types to determine which record types apply when users create, edit, or view records.

[Set Up Care Request Configurations](#)

Create care request configuration records for different types of care requests such as Prescription drugs, Admission, PreAuthorization, or Service.

[Customize Case and Care Request Pages for Utilization Management](#)

Use the Lightning App Builder to design the Case and Care Request lightning pages for users to handle care requests.

[Enable the Utilization Management for Payers App](#)

Simplify authorization request reviews and provide your users with a comprehensive view of requests by enabling the Utilization Management for Payers App.

[OmniStudio Components for the Payer Authorization Request Process](#)

Utilization Management is built using a predefined suite of OmniStudio components, which combine to provide a smooth, guided user interaction that empowers your payer users to easily handle the complex authorization process.

[Configure Statuses for Authorization Requests](#)

Care requests move through a series of steps from submission to approval. To get a clear understanding of the progress and assignment of requests, it's critical to track the real-time status.

[Configure Action Buttons for Processing Authorization Request Reviews](#)

Help your users to launch OmniScripts and handle authorization requests in an efficient and timely manner by adding FlexCard-based action buttons to the Case record page. Visibility of the buttons is based on the case status, case substatus, and request type.

[Manage Rules for Automating Authorization Request Workflows](#)

Use Business Rules Engine components and features to speed up and streamline approval processes, simplify complex lookups, and automate business decisions in your authorization request workflows.

[Customize the Predefined Authorization Process](#)

Keep pace with ever-changing business needs and provide additional flexibility for your users by customizing the predefined OmniStudio components and workflow rules. With these customizations, you can speed up process management and automation, and implement a simplified, time-saving solution to meet your business needs.

[Set Up Peer-to-Peer Scheduling for Authorization Request Reviews](#)

Help your users to schedule and conduct timely peer-to-peer reviews with healthcare providers to discuss the actual or potential reason for denial of an authorization request.

[Create Custom Report Types and Custom Reports for Utilization Management](#)

Set up a custom report type and custom report so that your users can view and analyze data related to their authorization requests.

Experience Cloud Site for Utilization Management

Build and set up an Experience site to enable your site users handle authorization requests.

Set Up Timeline Parameters for Tracking Authorization Reviews

Define milestone trackers to give your users a complete view of upcoming and completed milestones, and display countdowns for active and overdue milestones. Your users can use these trackers to review authorization requests within specific timelines.

Automate Case Routing with Omni-Channel

Speed up and streamline the authorization approval process by automating workflows with routing configurations. Use Omni-Channel to quickly route cases to the correct users so that they can review authorization requests on time.

Set Up Support Process and Record Types for Utilization Management

In order to use OmniScript processes included with the OmniStudio package, configure record types and support processes that support Utilization Management. Assign profiles and page layouts to record types to determine which record types apply when users create, edit, or view records.



Note: These steps are required to use the OmniScript processes included with the OmniStudio package.

1. Create a support process for Utilization Management:
 - a. From Setup, enter *Support Processes* in the Quick Find box and select **Support Processes**.
 - b. Click **New** and select **Master** from Existing Support Process.
 - c. Provide a name and description for the support process.
 - d. Save your changes.
 - e. Leave the Case Status section as is and save your changes.
2. From Setup, open the Object Manager, and go to the Case object.
3. Under Record Types, click **New**.
4. Select **Master** from Existing Record Type.
5. Provide a label, name, and description for the record type.
6. Select the support process you created earlier.
7. Select **Active** to activate the record type.
8. Select **Make Available** next to a profile to make the record type available to users with that profile.
9. For selected profiles, select **Make Default** next to a profile to make it the default record type for users of that profile.
10. Click **Next**.
11. Choose a page layout option to determine what page layout displays for records with this record type:
 - a. To apply a single page layout for all profiles, select **Apply one layout to all profiles** and choose the page layout from the dropdown list.
 - b. To apply different page layouts based on user profiles, select **Apply a different layout for each profile** and choose a page layout for each profile.
12. Save your changes.

Now, follow the same steps to define record types and assign profiles and page layouts in these objects: Care Request, Care Request Extension, Care Request Item, Care Diagnosis, and Care Request Drug.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To set up support process and record types:

- Health Cloud Utilization Management permission set

-  **Important:** Create a record type named **PreAuthorization** in each of these objects to enable your users to manage authorization requests.
-  **Note:** As an optional step, you can install the Health Cloud Care Request Extensions unmanaged package, which contains an app with the record types, page layouts, and other metadata to support Utilization Management. The package also includes a customizable Care Request support process.

SEE ALSO:

- [Install Health Cloud Packages](#)
- [Create Record Types](#)
- [Configure Statuses for Authorization Requests](#)

Set Up Care Request Configurations

Create care request configuration records for different types of care requests such as Prescription drugs, Admission, PreAuthorization, or Service.

Prereq: Ensure you’ve created a record type named **PreAuthorization** in each of these objects: Case, Care Request, Care Request Extension, Care Request Item, Care Diagnosis, and Care Request Drug to enable your users to manage authorization requests.

-  **Important:** Create a care request configuration with the Label, Name, Care Request Record Type, and Care Request Type set to **PreAuthorization**. This setup is specifically for managing authorization requests.
- From Setup, enter *Care Request Settings* in the Quick Find box, then select **Care Request Settings**.
 - Click **New Care Request Configuration**.
 - Enter the following:

Field	Description
Label	Name of the care request as it appears in user interface.
Name	The unique name used by the API and managed packages.
Care Request Record Type	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.
Default record type	Record type that is used as the default.
Care Request Type	Type of care request. For example, Appeal, Service request, or Admission.
Care Request Records	The list of available objects used to configure the care request. The possible values are: <i>CareDiagnosis</i> , <i>CareRequestDrug</i> ,

EDITIONS

- Available in: Lightning Experience
- Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

- To set up care request configurations:
- Health Cloud Utilization Management permission set

Field	Description
	<i>CareRequestItem</i> , and <i>CareRequestExtension</i> .
Active	Select to activate this configuration and make it available to users.

4. Save your changes.

Customize Case and Care Request Pages for Utilization Management

Use the Lightning App Builder to design the Case and Care Request lightning pages for users to handle care requests.

- Use Lightning App Builder to configure the Care Request and Case Lightning pages for your users to track and manage care requests. These pages give you a basic framework with a highlight panel, path component, and tabs listing the care request details.
- Add the 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 that your users need information about such as diagnoses, service codes, and prescriptions.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Enable the Utilization Management for Payers App

Simplify authorization request reviews and provide your users with a comprehensive view of requests by enabling the Utilization Management for Payers App.

By showing all cases that are currently open, the app helps your users to easily identify and take action on high priority or urgent requests. The app's home page provides a unified snapshot to help your users start and plan their day.

1. From Setup, in the Quick Find box, enter *Utilization Management Settings*, and then select **Utilization Management Settings**.
2. Set Utilization Management for Payers App to Enabled.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To enable the app:

- Health Cloud Utilization Management permission set

OmniStudio Components for the Payer Authorization Request Process

Utilization Management is built using a predefined suite of OmniStudio components, which combine to provide a smooth, guided user interaction that empowers your payer users to easily handle the complex authorization process.

The built-in OmniScripts contain the user-interaction logic that takes users through the authorization process with consistent responses. Your users can easily review the requests using these OmniScript processes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

OmniScript	Use
HealthCloudUM/AuthorizationRequest	Create and submit an authorization request
HealthCloudUM/AdminReview	Conduct an admin review of an authorization request
HealthCloudUM/UMNurse	Conduct a nurse review of an authorization request
HealthCloudUM/MedicalDirectorReview	Conduct a medical director review of an authorization request
HealthCloudUM/P2PScheduling	Schedule a peer-to-peer review meeting between the medical director and requesting provider
HealthCloudUM/P2PReview	Conduct a peer-to-peer review with the requesting provider

Each of these OmniScripts includes a number of:

- DataRaptors—Transfer and transform data between Salesforce and the OmniScripts, FlexCards, and Integration Procedures tools.
- Integration Procedures—Bundle server-side data integration operations for efficiency and reuse.
- FlexCards—Display data and launch actions for reviewing the requests.



Note: The predefined OmniStudio components are ready to use, however, we recommend using a cloned version of these components. Simply clone each OmniScript and the associated FlexCards, DataRaptors, and Integration Procedures, retain the settings, save with a different name, activate the cloned version, and relink the components. Similarly, clone and activate the FlexCards that launch these OmniScripts and relink them to the corresponding cloned OmniScripts. Cloning ensures that you don't face any process disruptions when predefined components are updated during automatic upgrades.

FlexCard to Clone	OmniScript to Clone
HealthCloudUMPriorAuthIntakeLaunch	HealthCloudUM/AuthorizationRequest
HealthCloudUMAdminFlowLaunch	HealthCloudUM/AdminReview
HealthCloudUMNurseFlowLaunch	HealthCloudUM/UMNurse
HealthCloudUMAuthReviewsLaunch	HealthCloudUM/MedicalDirectorReview
HealthCloudUMAuthReviewsLaunch	HealthCloudUM/P2PScheduling
HealthCloudUMAuthReviewsLaunch	HealthCloudUM/P2PReview
HealthCloudUMConcurrentReviewLaunch	HealthCloudUM/AuthorizationRequest

Configure Statuses for Authorization Requests

Care requests move through a series of steps from submission to approval. To get a clear understanding of the progress and assignment of requests, it's critical to track the real-time status.

At a high-level, a typical authorization care request transitions through each of these stages:

- Intake Specialist or Coordinator creates authorization requests based on the details shared by the provider or member.
- Admin Reviewer performs the first level of review.
- Utilization Management Nurse performs a clinical review of the request.
- Medical Director reviews and provides the final determination of the requests they receive.

To help your users efficiently use Utilization Management's highly refined technological workflows, define appropriate case statuses. To make things easy for you, Case substatuses are already predefined.

1. From Setup, open the Object Manager, and go to the Case object.
2. Under Fields & Relationships, click **Status**.
3. Click **New** in the Status Picklist Values section.
4. Enter the authorization request statuses, as shown. Enter each value on its own line.
 - Intake
 - Admin Review
 - Nurse Review
 - MD Review
 - Determination



Important: Enter these exact values to ensure the right authorization-related OmniScripts launch for your users.

5. Save your changes.

Now, your users can easily track the progress of authorization requests.

You can now select the case status picklist values that appear in the Path component of the Case page to help your user view the various stages of a care request process.

SEE ALSO:

[Salesforce Help: Set Up Support Process and Record Types](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To add case status:

- Update on Case object

Configure Action Buttons for Processing Authorization Request Reviews

Help your users to launch OmniScripts and handle authorization requests in an efficient and timely manner by adding FlexCard-based action buttons to the Case record page. Visibility of the buttons is based on the case status, case substatus, and request type.

Each FlexCard contains an action button that triggers the launch of the integrated OmniScript based on the configured visibility rules. For example:

- The HealthCloudUMAdminFlowLaunch FlexCard contains the Start Admin Review button.
- The Start Admin Review button launches the HealthCloudUM/AdminReview OmniScript, which initiates an admin review of the authorization request.
- The Start Admin Review button is available only when the case status is Admin Review. Setting visibility rules using case status helps you to achieve this conditional display.

 **Note:** Before adding the buttons, make sure you've configured the necessary case status values.

1. Go to the Case Lightning record page.

 **Note:** Go to the home page of the Utilization Management for Payers app for adding the FlexCard for the Add Authorization Request Details button.

2. Select , and then select **Edit Page**.
3. In the Lightning App Builder, add action buttons for each case status using FlexCard components:
 - a. Place FlexCard components on the page layout.
 - b. In the Properties pane for each FlexCard, select the FlexCard name and configure visibility rules, as shown.

FlexCard Name	Visibility Rule	Shows This Action Button	Launches This OmniScript
HealthCloudUMPriorAuthIntakeLaunch	No action is required to set the visibility rules.	Add Authorization Request Details	HealthCloudUM/AuthorizationRequest
HealthCloudUMAdminFlowLaunch	Record Field > Status Equal Admin Review	Start Admin Review	HealthCloudUM/AdminReview
HealthCloudUMNurseFlowLaunch	Record Field > Status Equal Nurse Review	Start Utilization Management Nurse Review	HealthCloudUM/UMNurse
HealthCloudUMAuthReviewsLaunch	No action is required to set the visibility rules as they're predefined based on Case Status equals MD Review and Substatus doesn't equal Peer to Peer Review Scheduled.	Start Medical Director Review	HealthCloudUM/MedicalDirectorReview
HealthCloudUMAuthReviewsLaunch	No action is required to set the visibility rules as they're predefined based on Case Status equals Nurse Review and Substatus equals Schedule Peer to Peer Review.	Schedule Peer-to-Peer Review	HealthCloudUM/P2PScheduling

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To add action buttons:

- Update on Case object

FlexCard Name	Visibility Rule	Shows This Action Button	Launches This OmniScript
HealthCloudUMAuthReviewsLaunch	No action is required to set the visibility rules as they're predefined based on Case Status equals MD Review and Substatus equals Peer to Peer Review Scheduled.	Start Peer-to-Peer Review	HealthCloudUM/P2PReview
HealthCloudUMConcurrentReviewLaunch	No action is required to set the visibility rules as they're predefined based on Request Type equals Inpatient - Physical Health Review or Outpatient - Physical Health Review.	Create Concurrent Review	HealthCloudUM/AuthorizationRequest



Note: These OmniScripts and FlexCards are ready to use, however, we recommend using a cloned version of them. Simply clone each of the above OmniScript and FlexCard, retain the settings, save with a different name, and activate the cloned version. Go to each cloned FlexCard and relink it to the corresponding cloned OmniScript. Cloning ensures that you don't face any process disruptions when predefined OmniScripts are updated during automatic upgrades.

4. Activate the settings and save your changes.

Now, when your users access the Case record page, the action button that matches with the current status and substatus of the case is shown.

Manage Rules for Automating Authorization Request Workflows

Use Business Rules Engine components and features to speed up and streamline approval processes, simplify complex lookups, and automate business decisions in your authorization request workflows.

With the help of Expression Set Templates, Expression Sets, and Decision Matrices, you can define, customize, and activate rules for member eligibility check, document checklists, and auto approval of authorization requests.

- Expression Set Templates - Prebuilt, read-only rules. Templates provide an outline for building your expression set.
- Expression Sets - A series of rules created using expression set elements. Each element in an expression set represents a logical step that's run sequentially. Expression sets evaluate conditions, perform mathematical operations, look up decision matrices, and perform multiple transformations simultaneously.
- Decision Matrices - Lookup tables that match your input values to a row in the matrix. When the matrix finds an exact match, it returns the row's output value.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Automate Workflows with Predefined Rules

Simplify and expedite reviews of authorization requests by using built-in business rules and logic. Use the predefined expression set templates and define decision matrices to perform automatic validation, reduce administrative errors, and cut down on repetitive tasks.

SEE ALSO:

[Salesforce Help: Business Rules Engine](#)

Automate Workflows with Predefined Rules

Simplify and expedite reviews of authorization requests by using built-in business rules and logic. Use the predefined expression set templates and define decision matrices to perform automatic validation, reduce administrative errors, and cut down on repetitive tasks.

Utilization Management provides these prebuilt expression set templates that are readily integrated with the Omniscript processes:

- HealthCloudUM_AutoApproval - Validates if an authorization request can be auto-approved without reviews
- HealthCloudUM_DocsChecklist - Validates if an authorization request includes the required clinical documents
- HealthCloudUM_NeedAssessment - Validates if the diagnostic and service codes requested in an authorization require approval

In tandem with these predefined expression set templates, you must define a set of decision matrices to obtain rule-based workflow automation.

1. From the App Launcher, find and select **Lookup Tables**.
2. Click **New** and select **Decision Matrix**.
3. Use the following table to define the required decision matrices:
 - a. Provide the name for the decision matrix.
 - b. Set the Type as Standard.
 - c. Add input and output columns for each decision matrix as specified.

Decision Matrix Name	Purpose	Columns for Input Data	Columns for Output Data
HealthCloudUM_DocsChecklist	Defines the list of mandatory documents required for a request type and region.	• RequestType (Text) • Region (Text)	Files (Text)  Note: Provide a comma-separated list of document names.
HealthCloudUM_NeedAssessment	Indicates if authorization is required for a member who has an individual member plan.	• ServiceCode (Text) • RequestType (Text) • PlanName (Text) • City (Text) • State (Text)	Output (Text) • Required • Not Required

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To define decision matrices and expression sets:

- RuleEngine Designer permission set

Decision Matrix Name	Purpose	Columns for Input Data	Columns for Output Data
NeedAssessmentRuleGroupPlanConditions	Indicates if authorization is required for a member who has a group member plan.	- ServiceCode (Text) - RequestType (Text) - PlanName (Text) - City (Text) - State (Text)	Output (Text) - Required - Not Required
HealthCloudUM_AutoApproval	Indicates if authorization requests with a combination of specific input parameters can be automatically approved.	- RequestType (Text) - ServicingProviderInNetwork (Boolean) - ServiceCode (Text) - IsMemberActive (Boolean) - MemberPlanLOB (Text)	IsAutoApproved (Boolean)

- Add rows and values for each decision matrix, and save your changes.
- Edit the decision matrix version and set it to **Enabled**.
- Save your work.
- Next, from the App Launcher, find, and select **Expression Set Templates**.
- Clone each of these predefined expression set templates and save them as expression sets with the same name:
 - HealthCloudUM_AutoApproval
 - HealthCloudUM_DocsChecklist
 - HealthCloudUM_NeedAssessment
- Activate the expression set, set the rank as **1**, and save your changes.

 **Important:** Use the same name and input and output structure of the expression sets for accurate integration with the predefined OmniScripts.

Now, when your users create and review authorization requests, the guided workflow process refers to the predefined rules and validates the request details.

SEE ALSO:

[Salesforce Help: Business Rules Engine](#)

Customize the Predefined Authorization Process

Keep pace with ever-changing business needs and provide additional flexibility for your users by customizing the predefined OmniStudio components and workflow rules. With these customizations, you can speed up process management and automation, and implement a simplified, time-saving solution to meet your business needs.

1. [Define Custom Rules to Automate Authorization Request Workflows](#)

Achieve full potential of authorization request workflow by customizing the rules to address your business' unique needs. Define decision matrices and expression sets to streamline, optimize, and standardize processes for your organization.

2. [Design Custom OmniStudio Components for Authorizations](#)

Use the OmniStudio Designer to customize the default OmniScripts and components so that they match your internal process and fulfill operational requirements for authorizations.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Define Custom Rules to Automate Authorization Request Workflows

Achieve full potential of authorization request workflow by customizing the rules to address your business' unique needs. Define decision matrices and expression sets to streamline, optimize, and standardize processes for your organization.

Before you begin, analyze each stage of your organization's review process and identify areas with tedious manual work and opportunity for errors. Fine-tune the rules to address these unique challenges.

1. From the App Launcher, find and select **Lookup Tables**.
2. Click **New**, and select **Decision Matrix**.
3. Define and set up the required number of decision matrices for your business:
 - a. Provide a name for the decision matrix and set the Type as **Standard**.
 - b. On the Related tab of your Decision Matrix record page, click version **1** of the matrix.
 - c. Add columns to define your input and output data.
 - d. Add rows and values for the decision matrix, and save your changes.
 - e. Edit the decision matrix version, set it to **Enabled**, and save your changes.
4. Next, from the App Launcher, find, and select **Expression Sets**.
5. Click **New**.
6. Define and set up the required expression sets for your business:
 - a. Provide a name for the expression set.
 - b. On the Related tab of your Expression Set record page, in the row for version 1, click , then select Open in Expression Set Builder.
 - c. In the Expression Set Builder, define the properties of the expression set version.
 - d. Define a series of steps connected in a logical flow by using variables, constants, conditions, calculations, and decision matrices that you set up earlier.
 - e. Save your changes.
 - f. On the Details tab of the Expression Set Version record page, select **Active**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create decision matrices and expression sets:

- RuleEngine Designer permission set

- g. Set the rank as **1**.
- h. Save your changes.

You’ve now customized the rules but we aren’t quite finished. Next, update the OmniScripts and related components to ensure they refer to these customized rules for validating request details.

SEE ALSO:

[Salesforce Help: Business Rules Engine](#)

Design Custom OmniStudio Components for Authorizations

Use the OmniStudio Designer to customize the default OmniScripts and components so that they match your internal process and fulfill operational requirements for authorizations.

We have already defined custom rules for automating authorization workflows. Now, let’s customize the OmniStudio components to refer to those custom rules.

The OmniScript Designer enables you to preview dynamic web forms as you build them using a drag-and-drop interface. You can update all of the OmniStudio components: OmniScripts, DataRaptors, Integration Procedures, and FlexCards. By customizing and fine-tuning these components, you can offer your users a guided interaction that helps to optimize various procedures.

1. From the App Launcher, find and select **OmniScripts**.
2. Select the OmniScript to update, and click **New Version**.
 - HealthCloudUM/AuthorizationRequest
 - HealthCloudUM/AdminReview
 - HealthCloudUM/UMNurse
 - HealthCloudUM/MedicalDirectorReview
 - HealthCloudUM/P2PScheduling
 - HealthCloudUM/P2PReview
3. Use a different name for the OmniScript and update it to suit your business needs:
 - a. Make changes to the logical flow, actions, steps, and elements, and more.
 - b. Use the custom expression sets that you created earlier for applying the rules.
 - c. (Optional) If you want to make changes to the Integration Procedures or Data Raptors, clone the corresponding record, update it to suit your needs, activate, and use it in the cloned OmniScript.
4. After you’ve updated the OmniScript, activate the settings and save your changes.
5. Now, from the App Launcher, find, and select **OmniStudio FlexCards**.
6. Select the FlexCard to update:
 - a. Click **New Version**.
 - b. Use a different name for the FlexCard.
 - c. In the Properties pane, select the corresponding cloned OmniScript as shown:

EDITIONS

Available in: Lightning Experience
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To customize OmniStudio components:

- OmniStudio Admin permission set
- Health Cloud Utilization Management permission set

Clone of FlexCard	Clone of OmniScript
HealthCloudUMPriorAuthIntakeLaunch	HealthCloudUM/AuthorizationRequest

Clone of FlexCard	Clone of OmniScript
HealthCloudUMAdminFlowLaunch	HealthCloudUM/AdminReview
HealthCloudUMNurseFlowLaunch	HealthCloudUM/UMNurse
HealthCloudUMAuthReviewsLaunch	HealthCloudUM/MedicalDirectorReview
HealthCloudUMAuthReviewsLaunch	HealthCloudUM/P2PScheduling
HealthCloudUMAuthReviewsLaunch	HealthCloudUM/P2PReview
HealthCloudUMConcurrentReviewLaunch	HealthCloudUM/AuthorizationRequest

7. After you've updated the FlexCard, activate the settings and save your changes.

8. Go to the Case Lightning record page.

 **Note:** Go to the home page of the Utilization Management for Payers app for adding the cloned HealthCloudUMPriorAuthIntakeLaunch FlexCard.

9. Select , and then select **Edit Page**.

10. In the Lightning App Builder, add action buttons for each case status using the cloned FlexCard components and set visibility rules.

a. Place FlexCard components on the page layout.

b. In the Properties pane for each FlexCard, select the FlexCard name and configure visibility rules, as shown.

Clone of FlexCard	Visibility Rule
HealthCloudUMPriorAuthIntakeLaunch	No action is required to set the visibility rules.
HealthCloudUMAdminFlowLaunch	Record Field > Status Equal Admin Review
HealthCloudUMNurseFlowLaunch	Record Field > Status Equal Nurse Review
HealthCloudUMAuthReviewsLaunch	No action is required to set the visibility rules as they're predefined based on Case Status equals MD Review and Substatus doesn't equal Peer to Peer Review Scheduled.
HealthCloudUMAuthReviewsLaunch	No action is required to set the visibility rules as they're predefined based on Case Status equals Nurse Review and Substatus equals Schedule Peer to Peer Review.
HealthCloudUMAuthReviewsLaunch	No action is required to set the visibility rules as they're predefined based on Case Status equals MD Review and Substatus equals Peer to Peer Review Scheduled.
HealthCloudUMConcurrentReviewLaunch	No action is required to set the visibility rules as they're predefined based on Request Type equals Inpatient - Physical Health Review or Outpatient - Physical Health Review.

11. Activate the settings and save your changes.

That's it! Now, when your users access the Case record page, the action button that matches with the current status and substatus of the case is shown. Also, when your users create and review authorization requests, the customized OmniStudio components and rules are used.

Set Up Peer-to-Peer Scheduling for Authorization Request Reviews

Help your users to schedule and conduct timely peer-to-peer reviews with healthcare providers to discuss the actual or potential reason for denial of an authorization request.

In this review meeting scheduled by your nurses, the medical directors have an open communication with the requesting provider, resolve conflicting opinions, and help gain alignment.

But, before your nurses can schedule peer-to-peer reviews and your medical directors can conduct the reviews, you must set up peer-to-peer scheduling.

1. [Enable Salesforce Scheduler and Omni-Channel for Utilization Management](#)

Let your users schedule peer-to-peer review meetings with their healthcare providers by enabling Salesforce Scheduler and Omni-Channel.

2. [Create Users and Assign Permissions for Peer-to-Peer Scheduling](#)

Create user records for each medical director and nurse in your organization, then assign them the required permissions to schedule and conduct peer-to-peer reviews.

3. [Make Users Available for Peer-to-Peer Appointment Scheduling](#)

Enable your medical directors and nurses to handle peer-to-peer reviews by setting up operating hours, skills, office locations, and appointment duration for the peer-to-peer review meetings.

4. [Define a Named Credential for Peer-to-Peer Scheduling](#)

For effective peer-to-peer review scheduling, create a named credential that makes a REST call to an external system without using a username or password.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Lightning Scheduler Add-On license

Enable Salesforce Scheduler and Omni-Channel for Utilization Management

Let your users schedule peer-to-peer review meetings with their healthcare providers by enabling Salesforce Scheduler and Omni-Channel.

1. From Setup, enter *Scheduler* in the Quick Find box, then select **Salesforce Scheduler Settings**.
2. Enable Event Management.
3. Next, from Setup, enter *Omni-Channel* in the Quick Find box, then select **Omni-Channel Settings**.
4. Enable Omni-Channel.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Lightning Scheduler Add-On license

USER PERMISSIONS

To enable Salesforce Scheduler

- Lightning Scheduler Add-On license

Create Users and Assign Permissions for Peer-to-Peer Scheduling

Create user records for each medical director and nurse in your organization, then assign them the required permissions to schedule and conduct peer-to-peer reviews.

1. Add medical directors and nurses as users in the org.
2. Create a permission set with the Salesforce Scheduler permission set license.
 - a. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
 - b. Click **New**.
 - c. Enter a label, API name, and description for your permission set. We recommend *Salesforce Scheduler*.
 - d. In the License picklist, select Salesforce Scheduler, and click **Save**.
 - e. On the permission set overview page, under System, click **System Permissions**.
 - f. Click **Edit**.
 - g. Enable the **Let a user be included in appointments in Salesforce Scheduler** permission.
 - h. Save your work.
 - i. In the Permission Changes Confirmation dialog, click **Save**.
3. Assign the Salesforce Scheduler permission set to the users you created for medical directors or nurses. Assigning the permission set automatically assigns the associated permission set license.
 - a. On the Salesforce Scheduler permission set overview page, click **Manage Assignments**, and then click **Add Assignments**.
 - b. Select the users, then click **Assign**.
 - c. Click **Done**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Lightning Scheduler Add-On license

USER PERMISSIONS

To create users and assign permissions

- Manage Health Cloud and Lightning Scheduler Add-On license

Make Users Available for Peer-to-Peer Appointment Scheduling

Enable your medical directors and nurses to handle peer-to-peer reviews by setting up operating hours, skills, office locations, and appointment duration for the peer-to-peer review meetings.

1. Configure skills and areas of specialization of medical directors.
 - a. From Setup, enter *Skills* in the Quick Find box, then select **Skills** under Salesforce Scheduler.
 - b. Create skill records for each medical director skill. For example, Cardiology.
2. Configure operating hours for each medical director.
 - a. From the App Launcher, find and select **Operating Hours**.
 - b. Create operating hour records and select the required time zone.
 - c. In the Set Service Appointment Windows section, add a row for each working day of the week and set the start and end time.
3. Configure work type to define the appointment duration of peer-to-peer review meetings.
 - a. From the App Launcher, find and select **Work Types**.
 - b. Create a work type called *Peer to Peer Review*.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Lightning Scheduler Add-On license

USER PERMISSIONS

To make users available for appointments

- Health Cloud Foundation permission set and Lightning Scheduler Add-On license

- c. Set the required duration of the peer-to-peer review meeting. This duration is used to divide appointment slots for the medical director.
4. Configure service territory records to store the information about the office where the medical directors work.
 - a. From the App Launcher, find and select **Service Territories**.
 - b. Create service territory records for each medical director.
 - c. Associate the corresponding operating hour record that you created earlier with this service territory.
 - d. Set the service territory as **Active**.
 - e. Go to the Related tab of the record, and add the *Peer to Peer Review* work type that you created earlier.
5. Configure Service Resource records to store information about medical directors and nurses, and to associate them with service territories.
 - a. From the App Launcher, find and select **Service Resources**.
 - b. Create service resource records for each medical director and nurse.
 - c. Associate the user record that you created earlier for the medical director or nurse with the service resource.
 - d. Set the service resource as **Active** and select the required resource type.
 - e. For each service resource that you created for medical directors, go to the Related tab, and add the corresponding service territory and skill that you created earlier.

Make sure the territory type of the service territory is set to Primary.

Define a Named Credential for Peer-to-Peer Scheduling

For effective peer-to-peer review scheduling, create a named credential that makes a REST call to an external system without using a username or password.

To simplify the setup of authenticated callouts, define a named credential to specify the base URL for REST callout endpoint and its required authentication parameters in one definition. Salesforce handles all authentication; you can also skip remote site settings for the site defined in the named credential.

By separating the endpoint URL and authentication from the callout definition, named credentials make it easier to maintain callouts. For example, if an endpoint URL changes, you update only the named credential. All callouts that reference the named credential simply continue to work.

Prerequisite: Create a connected app and an authentication provider.

1. From Setup, enter *Named Credentials* in the Quick Find box, then select **Named Credentials**.
2. Click **New**.
3. Enter the label and name as **UM**, and specify the org URL.

 **Important:** Make sure you use **UM** as the name, or you can't schedule peer-to-peer meetings.

4. Select the following values:
 - a. Identity Type: Named Principal
 - b. Authentication Protocol: OAuth 2.0

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and the Lightning Scheduler Add-On license

USER PERMISSIONS

To define a named credential

- Customize Applications

- c. Auth Provider: Use the value of the authentication provider that you set up earlier
 - d. Scope: refresh_token full
5. Select **Start Authentication Flow on Save**.
 6. Save your changes.

SEE ALSO:

[Salesforce Help: Configure a Salesforce Authentication Provider](#)

[Salesforce Help: Create a Connected App](#)

Create Custom Report Types and Custom Reports for Utilization Management

Set up a custom report type and custom report so that your users can view and analyze data related to their authorization requests.

Create a custom report type that defines the set of records and fields available to a report based on the relationship between a primary object and its related objects. To enable reports to pull data from more than just the primary object, consider adding related objects.

When creating the custom report type for authorization requests, you can choose any of the care request related objects. To get the maximum benefit, we recommend that you use Case as the primary object, and Care Request and Care Request Extension as the child objects.

Other available child objects include: Care Request Item, Care Diagnosis, Care Request Drug, and Care Request Reviewer.

1. From Setup, enter *Report Types* in the Quick Find box, then select **Report Types**.
2. Click **New Custom Report Type** and provide these details.
 - a. Select **Case** as the Primary Object.
 - b. Enter the report type label, report type name, description.
 - c. Select the category and deployment status:
 - d. Click **Next**, and select the box under the primary object.
 - e. Select **Care Request** and **Care Request Extension** as the first and second child objects.
 - f. For each child object, select **Each "A" record must have at least one related "B" record**, and save your changes. The report shows only parent records with child records.
3. Select the required fields, arrange them in sections as you want them to appear to users, and save your changes.
4. Now, from the App Launcher, find, and select **Reports**.
5. Click **New Report**.
6. Choose the report type that you created, then click **Continue**.
7. Add or remove fields, group by rows and columns, filter report data, or add a chart. Customize your report until it shows exactly the data that you need.
8. Click **Save**, and give your report a name and description. With access and sharing in mind, save the report in an appropriate folder. Now, your users can access this saved report to analyze, understand, and get answers to their questions on authorization requests.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create custom report types and custom reports:

- Create and Customize Reports permission set
- Manage Custom Report Types permission set
- Health Cloud Utilization Management permission set
- Health Cloud Foundation permission set



Note: You can also create dashboards from these created reports and share with your users.

SEE ALSO:

[Salesforce Help: Set Up a Custom Report Type](#)

Experience Cloud Site for Utilization Management

Build and set up an Experience site to enable your site users handle authorization requests.

Prerequisites:

- Enable Digital Experiences
- Select **Allow using standard external profiles for self-registration, user creation, and login** under Digital Experience Settings
- Use Sharing Settings to create a sharing rule for Account, Code Set, Member Plan, Healthcare Provider, and Healthcare Facility Network objects so that your site users can access records created by other users.
- Ensure you have these org-wide licenses and permissions:
 - Customer Community for Health Cloud
 - Customer Community Plus for Health Cloud
 - External Apps for Health Cloud
 - HealthCloud For Community permission set license
 - OmniStudio Runtime for Communities permission set license

1. [Build an Experience Site for Utilization Management](#)

Set up an Experience site to enable your site users to create and submit authorization requests using a configurable flow powered by Omnistudio.

2. [Give Users Access to Your Experience Cloud Site for Utilization Management](#)

Assign permissions to your site users to enable them to create and submit authorization requests.

SEE ALSO:

[Salesforce Help: Experience Cloud](#)

[Salesforce Help: Sharing Rules](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and Health Cloud for Experience Cloud Sites

Build an Experience Site for Utilization Management

Set up an Experience site to enable your site users to create and submit authorization requests using a configurable flow powered by Omnistudio.

1. From Setup, under Digital Experiences, click **All Sites**.
2. Click **New**, select the Customer Account Portal template, and publish the site with the default settings.
3. Back on the Digital Experiences page, click **Workspaces** next to your site, then select **Administration**.
4. In the Members section, add the profiles who need access to the site.
5. Back on the Digital Experiences page, click **Builder** next to your site.
6. In the Builder, create a standard page for managing authorization requests, add it as a menu item, and make the page publicly available.
7. Place an OmniScript component onto the page and set the properties. To add the Authorization Intake OmniScript, select these properties:
 - For OmniScript Type, select **HealthCloudUM**
 - For OmniScript SubType, select **AuthorizationRequest**
8. Add a menu item for each required object such as Case and Care Request to enable your users to easily access the records.
9. Publish your site.

SEE ALSO:

[Salesforce Help: Experience Cloud](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and Health Cloud for Experience Cloud Sites

USER PERMISSIONS

To set up an Experience site for Utilization Management

- Health Cloud For Community add-on license AND Customer Community or Customer Community Plus add-on license

Give Users Access to Your Experience Cloud Site for Utilization Management

Assign permissions to your site users to enable them to create and submit authorization requests.

Assign these permission sets and permission set licenses to your site users to enable them to create and submit authorization requests using the Experience cloud site.

- Utilization Management for Experience Cloud Sites permission set
- Rule Engine Runtime permission set
- OmniStudio User permission set
- OmniStudio Runtime for Communities permission set license
- Health Cloud for Experience Cloud Sites permission set license

SEE ALSO:

[Salesforce Help: Experience Cloud](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and Health Cloud for Experience Cloud Sites

USER PERMISSIONS

To assign permissions to site users

- Health Cloud For Community add-on license AND Customer Community or Customer Community Plus add-on license

Set Up Timeline Parameters for Tracking Authorization Reviews

Define milestone trackers to give your users a complete view of upcoming and completed milestones, and display countdowns for active and overdue milestones. Your users can use these trackers to review authorization requests within specific timelines.

For the authorization request process, milestones represent required, time-dependent steps such as Admin Review or Nurse Review. These milestones are added to an entitlement process, which is a timeline that includes the logic necessary to enforce different service levels for different stages of the case.

1. Define milestones for each case status.

a. From Setup, go to Milestones, and click **New Milestone**.

b. Create milestone records with these names:

- Admin Review
- Nurse Review
- Medical Director Review
- Peer-to-Peer Scheduling
- Peer-to-Peer Review

c. Enter a description and select the recurrence type as **No Recurrence**.

d. Save your changes.

2. Define an entitlement process for authorization request reviews.

a. From Setup, enter Entitlement in the Quick Find box, then select Entitlement Processes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create milestones and to create and update entitlement processes:

- Manage Entitlements

- b. Click New Entitlement Process.
 - c. Select Case as the entitlement process type.
 - d. Enter a name and description for the entitlement process.
 - e. Select Active to enable the process.
 - f. In the Advanced Options section:
 - Set Case enters the process as **Based on case created date**
 - Set Case exits the process as **Based on when case is closed**
 - g. Save your changes.
3. Associate each milestone that you created to the entitlement process.
 - a. In the Milestones section of the Entitlement Processes page, click **New**.
 - b. Select the milestone name.
 - c. In Time Trigger (Minutes), enter the number of minutes in which users must complete the milestone. Example: 300 minutes for Admin Review.
 - d. Set the start time as Entitlement Process.
 - e. Set the order in which the milestone must occur. Example: Admin Review as 1, Nurse Review as 2.
 - f. (Optional) Depending on your business need, choose *criteria are met* and select the filter criteria that a record must meet for a milestone to apply.

For example, for the Admin Review milestone, you can set Case: Status equals Admin Review. This milestone displays on the Case record page only when the status is Admin Review.
 - g. Save your changes.
4. Create an entitlement record for each request type and associate the entitlement process record that you created earlier.

 **Note:** You can use Business Rules Engine components to define business rules for assigning entitlements to case records.
5. Customize your Case page layout for milestones to help your users track their progress.
 - a. From the App Launcher, find and select **Cases**.
 - b. On the Case record page, select **Edit Page** from the Setup menu.
 - c. Place the Milestones component on your page layout.

That's it! Now, when a case is created for a member, your users can track the case's milestones and monitor their review progress.

SEE ALSO:

[Salesforce Help: Set Up and Manage Entitlements and Milestones](#)

Automate Case Routing with Omni-Channel

Speed up and streamline the authorization approval process by automating workflows with routing configurations. Use Omni-Channel to quickly route cases to the correct users so that they can review authorization requests on time.

With the flexible and customizable nature of Omni-Channel, you can manage your users' capacity to perform authorization request reviews. Use queues or skills to define which users review which type of requests.

Route work to queues

Distribute the workload among a team of users by defining queues. Queue members can jump in to take ownership of any record in a queue. For example, you can define one queue of admin reviewers to review initial requests, and another queue to review extension requests.

Set up rules to automate assignment of cases to different queues. You can use Business Rules Engine components to define complex business rules for automated case routing.

Route work to a skill

Enhance the authorization request flow by automatically assigning requests of a particular type to the most qualified user with the required skills.

SEE ALSO:

[Salesforce Help: Set Up Routing](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Authorization Request Process Setup for Providers

Help your provider users to easily create and submit authorization requests using FHIR-aligned, industry-specific APIs, along with a predefined suite of Integration procedures and DataRaptors. These components retrieve member information, service requests, and other details required to create an authorization request record and submit the request to the payer.



Note: Utilization Management solution for providers supports FHIR-aligned, industry-specific APIs, MuleSoft integration, and OmniStudio components. The user interface to process the authorization requests will be supported in future releases.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

[OmniStudio Components for the Provider Authorization Request Process](#)

Utilization Management provides a set of predefined OmniStudio Integration Procedures and DataRaptors to retrieve member information from the provider's Electronic Health Record (EHR) system and to submit the authorization request to the payer's system.

[Built-In MuleSoft Integration to Manage Authorization Requests](#)

Integrate Health Cloud with external Electronic Health Record (EHR) and payer systems by using FHIR Da Vinci Health Record Exchange aligned, industry-specific APIs, and integration applications deployed on MuleSoft. With this Industry Integration Solution, you experience an accelerated and hassle free, end-to-end authorization process.

[Set up Integration Definitions for Apex Classes](#)

Use Integration Definitions to quickly set up integrations with different external endpoints using a low code interface. Create integration definitions for Apex classes used to integrate providers with EHR and payer systems. The integration procedures of the provider process call these integration definitions instead of directly pointing to the Apex classes.

OmniStudio Components for the Provider Authorization Request Process

Utilization Management provides a set of predefined OmniStudio Integration Procedures and DataRaptors to retrieve member information from the provider's Electronic Health Record (EHR) system and to submit the authorization request to the payer's system.

Let's take a look at the different components used to retrieve information from the provider's EHR system:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Name	Type	Details
Retrieve Member First Name, Last Name, and Date of Birth	Integration Procedure	Retrieves patient records that match the given first name, last name, and date of birth from the provider's EHR system. First name, last name, and date of birth are the mandatory input parameters.
Prepare Input Data for Retrieve Member First Name, Last Name, and Date of Birth	DataRaptor	Prepares and sets up the input data for retrieving patient records.
Retrieve Member ID	Integration Procedure	Retrieves the patient record that matches the given patient ID from the provider's EHR system. Patient ID is a mandatory input parameter.
Prepare Input Data for Retrieve Member ID	DataRaptor	Prepares and sets up the input data for retrieving the patient record matching the patient ID.
Retrieve Patient Service Requests	Integration Procedure	Retrieves patient service requests that match the given patient ID, status, and type from the provider's EHR system. Patient ID, status, and type are the mandatory input parameters.
Prepare Input Data for Retrieve Patient Service Requests	DataRaptor	Prepares and sets up the input data for retrieving the service requests.
Retrieve Patient Insurance Details	Integration Procedure	Retrieves patient insurance details that match the given patient ID from the provider's EHR system. Patient ID is a mandatory input parameter.
Prepare Input Data for Retrieve Patient Insurance Details	DataRaptor	Prepares and sets up the input data for retrieving the insurance details.

Name	Type	Details
HealthCloudUtilizationManagementProviderRetrieveClinicalDetails	Integration Procedure	Retrieves patient clinical details that match the given patient ID and service requests from the provider's EHR system. Patient ID is a mandatory input parameter.
HealthCloudUtilizationManagementProviderRetrieveClinicalDetailsSetup	DataRaptor	Prepares and sets up the input data for retrieving the clinical details.
HealthCloudUtilizationManagementProviderGenerateRequestID	Integration Procedure	Generates Request ID for a prior authorization request by appending timestamp to the logged in user's organization ID. This ID is required to make calls to the provider's EHR system APIs.

These components are used to submit the authorization request to the payer's system:

Name	Type	Details
HealthCloudUtilizationManagementProviderCreatePriorAuthRequest	Integration Procedure	Creates a prior authorization request and records based on inputs retrieved from the provider's EHR system. The ID of the care request item is updated in serviceRequestsResponses of the preClaimSubmitInfo parameter.
HealthCloudUtilizationManagementProviderRetrieveRecordByCode	DataRaptor	Retrieves the record ID from the provider system that matches the code received from the EHR system.
HealthCloudUtilizationManagementProviderCreatePriorAuthRequest	DataRaptor	Creates a prior authorization request based on inputs retrieved from the provider's EHR system.
HealthCloudUtilizationManagementProviderPriorAuthCreateSetup	DataRaptor	Sets up the recordTypeId, careRequest, and claimBundleInputs details for creating a prior authorization request.
HealthCloudUtilizationManagementProviderSubmitPriorAuthRequest	Integration Procedure	Submits the prior authorization request to the payer system.
HealthCloudUtilizationManagementProviderPriorAuthSubmissionSetup	DataRaptor	Sets up the prior authorization request details for submission to the payer.
HealthCloudUtilizationManagementProviderSavePriorAuthResponse	Integration Procedure	Saves the response that's received on the prior authorization request from the payer system.
HealthCloudUtilizationManagementProviderUpdatePriorAuthResponse	DataRaptor	Updates the prior authorization request with the response that's received from the payer system.

Built-In MuleSoft Integration to Manage Authorization Requests

Integrate Health Cloud with external Electronic Health Record (EHR) and payer systems by using FHIR Da Vinci Health Record Exchange aligned, industry-specific APIs, and integration applications deployed on MuleSoft. With this Industry Integration Solution, you experience an accelerated and hassle free, end-to-end authorization process.

Use Integrations to implement digital workflows and create seamless user experiences. Health Cloud’s comprehensive solution gives you:

- Predefined integration procedures, DataRaptors, and Apex classes that help you retrieve member information from EHR and submit authorization requests to payers.
- Pre-built integration applications, built using the FHIR standards, that enable Health Cloud to interact with external EHR and payer systems. These out-of-the-box integration applications help providers by reducing the time and cost to go live. These apps are available to users who have the MuleSoft add-on product called MuleSoft Direct for Health cloud.
 - Prior Authorization EMR Retrieval API helps provider systems to automatically retrieve all the relevant datasets from the EMR to prepare a Da Vinci (an HL7 FHIR accelerator) aligned prior authorization request.
 - Prior Authorization Claim Submission API helps provider systems to send a Da Vinci (an HL7 FHIR accelerator) aligned prior authorization request to a clearing house or a payer endpoint. It handles the submission of the request and inquiry about the request status.

SEE ALSO:

[Salesforce Developer Guide: Industry Integrations](#)

Set up Integration Definitions for Apex Classes

Use Integration Definitions to quickly set up integrations with different external endpoints using a low code interface. Create integration definitions for Apex classes used to integrate providers with EHR and payer systems. The integration procedures of the provider process call these integration definitions instead of directly pointing to the Apex classes.

You can easily point integration procedures to a different Apex class by making simple updates to the integration definition.

1. From Setup, in the Quick Find box, enter *Integration Definitions*, and then select **Integration Definitions**.
2. Click **New**.
3. Set the type as **Apex Defined**.
4. Enter these exact names and developer names for the integration definition, and select the corresponding Apex classes.

Name/Developer Name	Apex Class
EHR	hcumprovider.ElectronicHealthRecordIntegrationService
Payer	hcumprovider.PayerIntegrationService

5. Click **Save**, and then activate the integration definition.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To create an integration definition:

- IndustriesIntegrationFwk org permission

Your integration procedures can now call the integration definitions and the configured Apex classes.

SEE ALSO:

[Salesforce Help: Integration Definitions](#)

Verify Patient Benefits

Integrate benefit verification into the end-to-end patient access workflow to help caregivers and patients reduce the time and effort it takes to find out what coverage is available under each patient's health benefits.

1. [Check Requirements for Benefit Verification](#)
Verify that you have the back end data in place and that your users have the access they need.
2. [Set up Data for Benefit Verification](#)
Verify that you have the back end data in place so that benefit verification can work.
3. [Connect to a Benefit Verification Service](#)
For each external service containing information about coverage for patients, show Health Cloud how to get the data it needs to verify benefits.
4. [Configure Care Limit Requests](#)
Show Health Cloud how to construct a request to the verification service to determine the benefits that are available to a patient.
5. [Show Benefit Verification in the Console](#)
Enable your call center agents to verify patient benefits conveniently by putting the benefit verification component in their Health Cloud console.

Check Requirements for Benefit Verification

Verify that you have the back end data in place and that your users have the access they need.

1. Assign the Health Cloud Foundation permission set to any users who will be using benefits information.
2. Create a named credential to support authenticated callouts, if you don't already have one.
A named credential specifies the URL of a callout endpoint and its required authentication parameters in one definition. To simplify the setup of authenticated callouts, specify a named credential as the callout endpoint.
3. Populate the Code Set object with the Service Type Codes you need.
You can have up to 180 codes. See the [X12 Service Type Codes reference](#) for a full list.
 - a. In the Code Set object, add a value to the Code Set Type picklist field for service type codes.
Call it something descriptive, like Service Type Codes for Benefit Verification.
 - b. Create service type codes by selecting the picklist value in the Code Set Type field.
4. Verify that the Purchaser Plan object is populated with information about the coverage plans that are available to your users.
The `verifiable` field must be set to True.
5. Verify that each patient is represented in an Account record.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- Each patient is connected with a coverage set using a Member Plan record.

At a minimum, the Name, Member, Member Number, Group Number, and Payer fields must be populated.

Set up Data for Benefit Verification

Verify that you have the back end data in place so that benefit verification can work.

- Verify that each patient is represented in an Account record.
- Verify that the Purchaser Plan object is populated with information about the coverage plans that are available to your users.

The `Verifiable` field must be set to True, and the Plan Type field must be populated.

- Verify that each patient is connected with a coverage set using a Member Plan record.
This is where the information that's visible to the user comes from. For best results, make sure these fields are populated:

UI Field	Source Field	Sample Data
Member Plan Name	MemberPlan.Name	Plan 1
Member Number	MemberPlan.MemberNumber	MN1234
Group Member	MemberPlan.GroupNumber	GN4321
Effective From	MemberPlan.EffectiveFrom	"Jan 1, 2020"
Effective To	MemberPlan.EffectiveTo	"Dec 31, 2021"
Relationship to Subscriber	MemberPlan.RelationshipToSubscriber	Self

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- Create an Identifier record where the Parent Record is the value of the Payer field on the MemberPlan object.
- Populate the Code Set object with the Service Type Codes you need.
You can have up to 180 codes. See the [X12 Service Type Codes reference](#) for a full list.
 - In the Code Set object, add a value to the Code Set Type picklist field for service type codes.
Call it something descriptive, like Service Type Codes for Benefit Verification.
 - Create service type codes by selecting the picklist value in the Code Set Type field.

Connect to a Benefit Verification Service

For each external service containing information about coverage for patients, show Health Cloud how to get the data it needs to verify benefits.

- In Setup, find Care Benefit Verification Settings and click **New Care Benefit Verification Settings**.
- Give this connection a meaningful label.
The label should spell out which specific service is verifying benefits in this case, to distinguish it from what may be multiple other verification services.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

3. Specify the Apex class you created to connect to your verification service.
See [Benefit Verification Apex Interface](#) for details.
4. In **Care Benefit Verification URI Path**, provide a link to the endpoint where Health Cloud can access the verification service data.
5. If this is the default service, select Default.
If your organization supports multiple payers, you may have different benefit verification services. One of them must be the default so that all verification requests will work.
6. In Service Type Source System, specify the external EHR system where this verification stores its service type codes.
7. In **Care Benefit Verification Service Named Credential**, provide the login information that authorizes Health Cloud to connect to the external system.
8. Enter the name of the organization that's issuing the verification request.
9. Specify the National Provider Identifier number that identifies your organization in benefits verification requests.
Your NPI is recorded in the [NPPES NPI Registry](#).
10. For **Code Set Type**, enter the grouping of service type codes that this configuration will support.
11. In **General Plan Service Type Code**, specify the code that describes the plan benefits as a whole.

 **Tip:** This code is usually *30*, which stands for plan coverage and general benefits for the member's policy or contract.

SEE ALSO:

[Salesforce Setup Guide: Named Credentials](#)

[Health Cloud Developer Guide: Benefit Verification Settings Object](#)

[Health Cloud Developer Guide: Benefit Verification Connect API](#)

Configure Care Limit Requests

Show Health Cloud how to construct a request to the verification service to determine the benefits that are available to a patient.

1. In Setup, find Care Limit Type under Benefits Verification and click **New Care Limit Type**.
2. Give this connection a meaningful label.
3. For **Limit Type**, enter one of the alphanumeric codes from the [Health Information Knowledgebase](#).
For example, for a co-payment requirement, enter *B*.
4. For **Metric Type**, select the unit by which the benefit limit is counted.
Select Money if the limit is on the amount that may be billed, or Amount if the limit involves a maximum expenditure. If the limit can't be measured in terms of money, time, or amount, select Text so the user can type a description.

EDITIONS

Available in: Lightning Experience

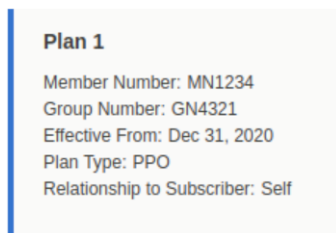
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Show Benefit Verification in the Console

Enable your call center agents to verify patient benefits conveniently by putting the benefit verification component in their Health Cloud console.

1. On any Account or Case page, click the gear icon and select **Edit page**.
2. In the editor, drag **Benefits Verification** from the Components panel and drop it on the page.
3. Save your changes and click **Active**.
4. Select **Assign as Org Default** on the ORG DEFAULT tab, then click **Close**.

The component on the Account or Case page pulls the data from the Member Plan object and shows it like this:



EDITIONS

Available in: Lightning Experience

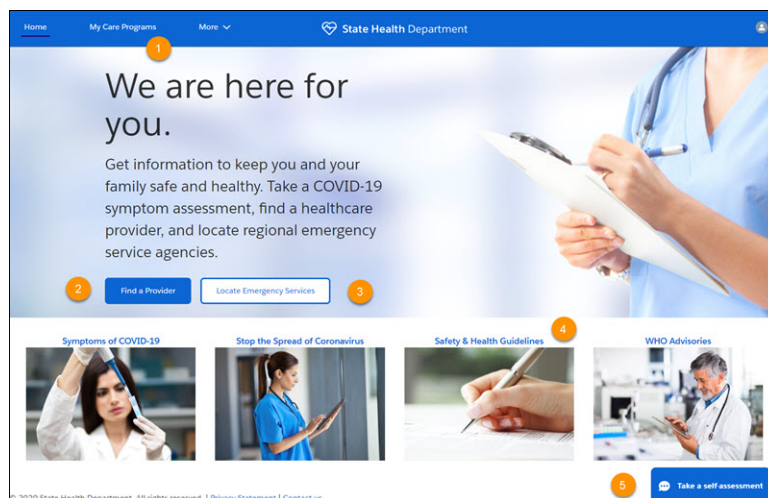
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 people 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 people assessed, enrolled in a care program, and monitored is crucial.

New Clinical Assessment

Current Symptoms for Rod Laver

Does the individual report any of the following symptoms?

Fever Greater than 100.4F (38C)

☐ Yes
☐ No
☐ Unknown

Subjective Fever or Felt Feverish

☐ Yes
☐ No
☐ Unknown

Cough

☐ Yes
☐ No
☐ Unknown

Muscle Aches

☐ Yes
☐ No
☐ Unknown

Runny Nose

☐ Yes
☐ No
☐ Unknown

Sore Throat

☐ Yes
☐ No
☐ Unknown

[Previous](#) [Next](#)

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.

Emergency Response Management Console

Search: Charles Green

Gender: Male, Age: 42 Years, Phone: (229) 229-2234, Email: charleg@wend.com

Life Events (1)

Enrolled to Public Health Emergency Program (2)

Entered into Quarantine (3)

Isolated (4)

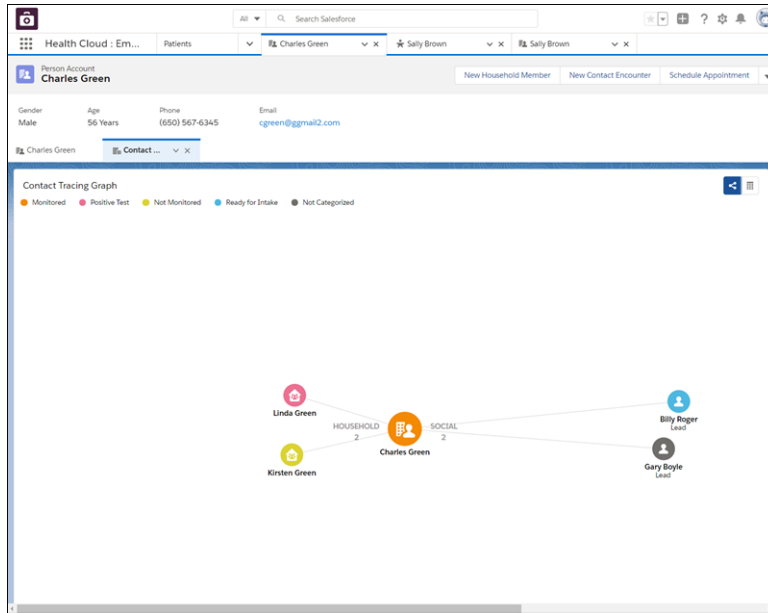
Care Program Enrollments (1)

Care Program: Public Health Emergency Prog., Status: Active, Created Date: 5/19/2020, 7:34 AM

Clinical Assessment Responses (1) (5)

Clinical Assessment Response: CA 5/19/2020, 7:33 AM, Created Date: 5/19/2020, 7:33 AM, Created By: Admin User

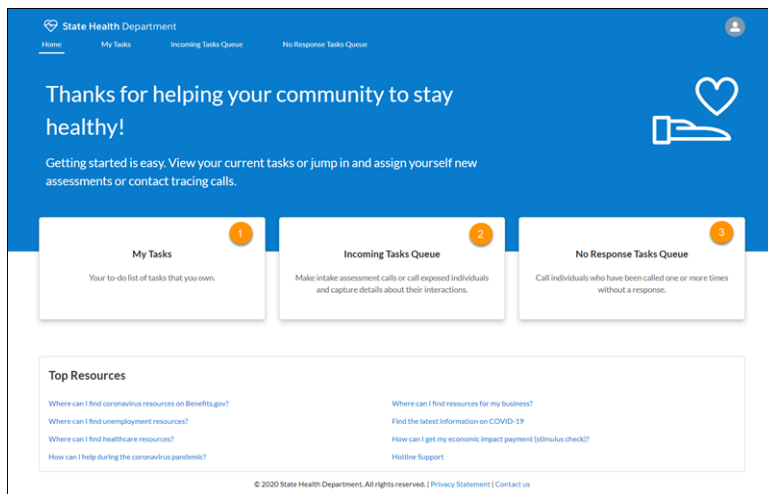
Create actionable and comprehensive care and social services plans, personalized to each patient. Add information about people the patient has been in contact with (1) and track incidents and milestones to gain insight into the patient's condition (2). Understand the social and environmental factors that define the extra services that 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 affected people 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 affected people 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. Use pre-defined Experience Cloud template for contact tracers to do contact tracing and communication. Use 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

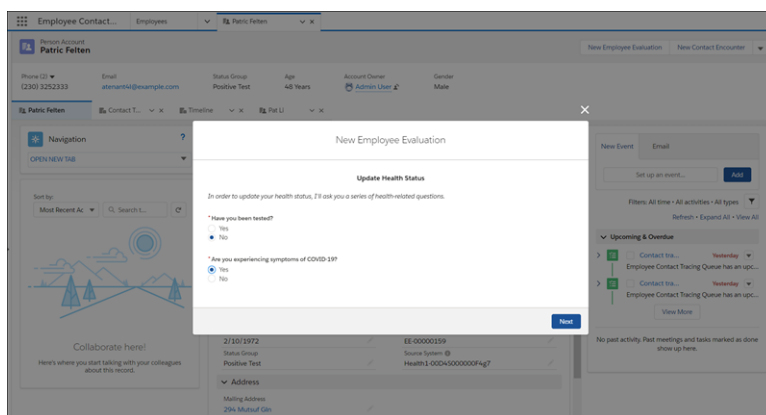
With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees.

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.

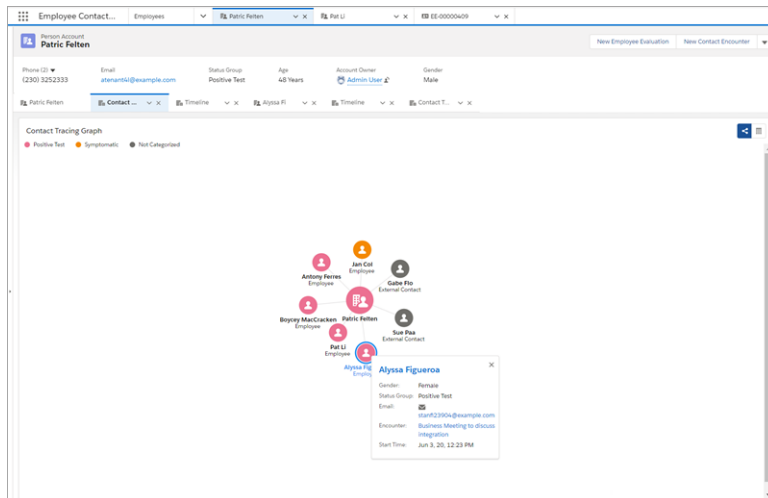
EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



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 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:

[Emergency Response Management for Public Health: 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](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Use Care Programs to Track and Manage Cohorts of Patients and Members

Maximize the impact of your care programs with enrollment and management tools to help drive adherence and improve outcomes. Care programs can cover services such as patient outreach, access to medications, access to care, financial assistance, or remote monitoring. 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Care Programs

Get Oriented	 Get to know how care programs can drive better health outcomes. • Health Cloud Care Programs • Consent Management for Health Cloud • Get to Know the Care Program Data Model
Data Models	 Explore the Health Cloud data model and objects for care programs. • Life Sciences Program Management
Care Plans	 Create customized care plans to help members and patients. • Manage Patient or Member Care to Improve Outcomes
Social Determinants of Health	 Capture critical social and environmental factors like homelessness and low income as barriers in the care of your patients or members. • Set Up Social Determinants to Assist High-Risk Patients and Members
Consent Management	 Associate consent documents with a care program. • Consent Management for Health Cloud



- [Add Consent Documents to a Care Plan](#)

Extend Health Cloud



Note: These features require separate licenses.

Salesforce Scheduler	 - Let members self-schedule non-physician appointments and equipment reservations • Appointment Booking with Salesforce Scheduler
	 • Set Up Salesforce Scheduler
Campaigns and Journeys	 - Enroll members into journeys and campaigns with Marketing Cloud Distributed Marketing integrated into Health Cloud. • Manage Campaigns • Build Relationships and Personalized Journeys with Campaigns • Campaigns in Marketing Cloud
Intelligent Form Reader with Amazon Textract	 - Help increase accuracy and efficiency by automatically extracting text from faxed documents. • Intelligent Form Reader
Field Service Lightning	 - Empower field care providers with mobile patient management. • Field Service Basics
	 • Field Service

Set Up and Manage Care Programs

[Map External Program Enrollment Fields to Health Cloud](#)

To use the Care Program Enrollments 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 and Ship Devices for Care Programs](#)

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 Care Program Enrollments API to create program enrollment records, create mappings from source system fields to Salesforce target entities and attributes.

1. From Setup, in the Quick Find box, enter *Care System Field Mapping*, and then select **Care System Field Mapping**.
2. Click **New Care System Field Mapping**.
3. Enter these values:

Field	Description
Label	The label for this care system field mapping.
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.
IsActive	Select to activate this configuration and make it available to users.
Role	The role the entity field represents.

4. Save your work.

SEE ALSO:

[Care Programs for Health Cloud Empower](#)

[Care Program Enrollments](#)

[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 sets to give users the correct access to forms and other data.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

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 specific people by combining certain account and contact fields into one record. Person accounts are the recommended record types for care plan participants.

Create a Care Program and Add Related Records

To create a care program, define the program and the relationships and activities within it. Also create a care program product and care program provider and other records as needed.

Create a Care Program Goal

Create a Care Program Goal, and associate it with a care program.

Care Program Providers

To help a care team identify the primary healthcare practitioner associated with a care program provider, create an association between the practitioner and the provider. This link also allows the care team to look up all the healthcare practitioners involved with a care program provider.

Configure the Program Enrollment Flow

Use Flow Builder to automate your care program enrollment process. We've delivered an enrollment flow that helps your users select a program, add related products and providers, and capture the participant's consent.

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.

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.

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 sets to give users the correct access to forms and other data.

- 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
- Create a permission set that gives access to the objects used to manage consent forms. Select **Object Settings** in your new permission set and enable the following object permissions.
 - Authorization Forms: Read

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

- Authorization Form Consents: Read, Create, Edit
 - Authorization Form Data Uses: Read
 - Authorization Form Texts: Read
 - Data Use Purposes: Read
3. Clone the Health Cloud Foundation permission set. Select **Object Settings** in your cloned permission set and configure Read access for these objects.
 - Care Programs
 - Care Program Enrollees
 - Care Program Enrollee Products
 - Care Program Enrollment Cards
 - Care Program Products
 - Care Program Providers
 4. Enable care coordinators and care managers to enroll participants in programs.
 - a. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
 - b. Clone the Standard User profile and add a profile name.
 - c. In the cloned profile, click **Edit** and scroll to General User Permissions.
 - d. Enable Run Flows.

 **Note:** Care Program Enrollee requires at least an Account, User, or Lead record and has a validation preventing a duplicate of either an Account, User, or Lead relationship.
 5. Allow care coordinators to enroll patients in the same care program more than one time.
 - a. From Setup, in the Quick Find Box, enter *Program Enrollee Settings*, and then select **Program Enrollee Settings**.
 - b. Enable **Multiple Enrollments in the Same Care Program**.

 **Note:** After you enable this setting, you can't disable it.
 6. To enable participants to view content in 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 cloned profile.
 - a. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
 - b. Clone the Customer Community Plus User profile and add a profile name.
 - c. In the cloned profile, click **Edit** and scroll to General User Permissions.
 - d. Enable View Content in Portals.
 - e. Save your changes.

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 specific people by combining certain account and contact fields into one record. Person accounts are the recommended record types for care plan participants.

Make sure to enable Experience Cloud in your org.

1. From the App Launcher, go to Health Cloud - Lightning Console.
2. To open a patient's record page, go to the patient tab and click the name of a patient
3. Click , and select **Enable Customer User**.

This option opens a new user record in your Salesforce org with some details prepopulated from the contact record.

4. Edit the user record for this external user and assign the Customer Community Plus license and the cloned Customer Community Plus profile.
5. Click **Save**.
6. 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

Create a Care Program and Add Related Records

To create a care program, define the program and the relationships and activities within it. Also create a care program product and care program provider and other records as needed.

Make sure you create records for the Product and the Provider objects. You must associate these records with the Care Program Product and Care Program Provider, respectively.

1. Create a care program.
 - a. From the App Launcher, find and select **Care Programs**.
 - b. Click **New**, and enter the name of the care program. For example, create a care program called *Diabetes Control* for patients who have high blood sugar.
 - c. Select the parent program the care program is part of, if any.
 - d. If you create a care program for advanced therapies, in Category, select **Advanced Therapy**.



Note: Make sure you add the Category field to the Care Program Page Layout

- e. Enter the start date and end date for the care program.
- f. Add a description for the care program.
- g. Select the status of the care program.
- h. Save your changes.

2. Create a care program product.



Note: Unless you specify a product in the Product field, you won't be able to choose a product when you enroll a patient to the care program using the Care Program Enrollment Flow.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

- a. From the App Launcher, find and select **Care Program Products**.
 - b. Click **New**, and enter the name of the care program product.
 - c. In Care Program, select the care program record the product is for. For example, select the care program you created in the previous step, that is, *Diabetes Control*.
 - d. Select a product.
 - e. Select the status of the care program product.
 - f. Save your changes.
3. Create a care program provider.
 - a. From the App Launcher, find and select **Care Program Provider**.
 - b. Click **New**, and enter the provider's name.
 - c. Select the account that provides the product to the enrollee.
 - d. Select the care program product you created in the previous step.
 - e. Select the status of the care program provider.
 - f. Save your changes.
4. Optionally, configure the following records based on how your company uses care programs.
 - Care Program Eligibility Rules: Define the eligibility criteria for participation in a care program. Use the Care Program Eligibility Rules object to associate a care program with an enrollment eligibility criteria record.
 - Care Program Enrollee: Create records for participants enrolled in a care program. Indicate whether the patient was at a long-term healthcare facility during enrollment, add the Lead Id representing the patient, and specify the opt-out date and reason.
 - 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 or enrollment 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 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

Care Program Providers

To help a care team identify the primary healthcare practitioner associated with a care program provider, create an association between the practitioner and the provider. This link also allows the care team to look up all the healthcare practitioners involved with a care program provider.

- 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.

EDITIONS

Available in: Lightning Experience
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

New Care Program Healthcare Provider

Information

* Care Provider Association Name

* Care Program Provider ⓘ

Search Care Program Providers... 🔍

Source System ⓘ

Effective To ⓘ

Primary Provider ⓘ

☐

Healthcare Provider ⓘ

Search Healthcare Providers... 🔍

Source System Identifier ⓘ

Effective From ⓘ

Cancel

Save & New

Save

 **Note:** To assign this healthcare provider as the primary provider, select **Primary Provider**.

- 5. Save your changes.

Configure the Program Enrollment Flow

Use Flow Builder to automate your care program enrollment process. We’ve delivered an enrollment flow that helps 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**.

EDITIONS

Available in: Lightning Experience
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

2. In New Flow screen, select **All + Template**.
3. Select the Program Enrollment flow type, and click **Next**.
4. The elements for a basic enrollment and consent flow appear in the builder.
Drag any additional elements you want to use onto the canvas.
5. Select each of the flow elements and configure the screen properties.
6. Save your flow.
7. Add the Enroll in Program quick action to a record page.



Note: 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.

- a. From the object management settings for Person Account, go to Page Layouts and select **Person Account Layout**.
- b. If the buttons in the Salesforce Mobile and Lightning Experience Actions section aren't visible, click **override the predefined actions**.
- c. Click **Mobile & Lightning Actions**.
- d. Drag the Enroll in Program action into the Salesforce Mobile and Lightning Experience Actions section.



Note: Under **Quick Actions**, there's 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.

- e. Save your changes.

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.

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 cloned profile.

1. From Setup, in the Quick Find box, enter *All Sites*, and then select **All Sites**.
2. Select **Workspaces** next to your Experience Cloud site.
3. Click **Administration > Members**.
4. Select the cloned Customer Community Plus profile.
5. Click **Add**.
6. Save your changes.
7. From Workspace, go to **Builder** and click .
8. Drag the Care Programs for Health Cloud Empower component from the Components panel onto an editable area of the page.
9. Edit the properties of the component, as necessary.
10. From Home, select **+New Page**.
11. To create a custom detail page for Care Program Enrollee, click **Object Pages**, and select the Care Program Enrollee object.
12. Click **Create**.
13. Drag the Care Program Consent Forms component onto an editable area of the page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

14. Publish and activate the site.

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. Provide more information about each consent form with Authorization Form and Authorization Form Text. Then, use Authorization Form Data to associate the consent form with the care program.

[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.

[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.

[Grant Site Members Access to Consent Documents](#)

Make sure site members can view and consent to documents when they log into the site and open their care program card.

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. Provide more information about each consent form with Authorization Form and Authorization Form Text. Then, use Authorization Form Data to associate the consent form with the care program.

Make sure you have the consent form you want to use for your care program in your org. If you don't have a consent form in your org, navigate to the Files tab and upload a consent form file.

1. Create a data use purpose for your consent form. 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 session for treatment, or equipment rental, or a home health visit.

- a. From the App Launcher, find and select **Data Use Purpose**, and then select **New**.
- b. Enter a name for the data use purpose, such as *Pre-Arthroscopy Program Consent Forms*.
- c. 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.

- d. Save your changes.
2. Next, create an Authorization Form record to provide information about each consent form.
 - a. From the App Launcher, find and select **Authorization Form**, and then select **New**.
 - b. Enter the name, revision number, and effective dates of the consent form.
 - c. Add a default auth form text to use if text isn't available for a specific language.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

If you don't have a default auth form text record available in your org, create a default auth form text record after you save the Authorization Form record. Add the default auth form text record to the Authorization Form record.

 **Note:** If Intelligent Document Automation is enabled in your org, only Authorization Form records that have an associated record in the Default Auth Form Text field are displayed in the care program enrollment flow

- d. If the program requires that the participant consents to the form, select **Signature Required**.
- e. Save your changes.

3. Create an Authorization Form Text record 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.

- a. From the App Launcher, find and select **Authorization Form Text**, and then select **New**.
- b. Enter the name of the text for the consent form. For example, *Consent for Treatment (Spanish)*.
- c. For Summary Auth Form Text, add a summary to describe the form's purpose and display to customers when asking for their consent.
- d. For Authorization Form, select the associated authorization form record.
- e. Select the locale for the content document.

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.

- f. Select the checkbox for **Is Active**.

 **Note:** If Intelligent Document Automation is enabled in your org, only Authorization Form Texts records that are active are displayed in the care program enrollment flow.

- g. For Content Document, select the uploaded consent form.
- h. Save your changes.

4. Connect the consent form with the care program.

- a. From App Launcher, find and select **Authorization Form Data Uses**.
- b. Select **New**
- c. Enter the name of the form in the Authorization Form field.
- d. Add the name of the care program in the Data Use Purpose field.
- e. Save your changes.

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.

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.

EDITIONS

Available in: Lightning Experience

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5. In the **Purpose** field, select the care program to clone the consent forms to.
6. Save your changes.

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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

Grant Site Members Access to Consent Documents

Make sure site members can view and consent to documents when they log into the site and open their care program card.



Tip: You can also manage Files membership through a public group or by adding a single user. If you're doing this via API, use the ContentWorkspaceMember object to manage library membership.

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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

SEE ALSO:

[Using Salesforce Files](#)

Register and Ship Devices for Care Programs

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 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**.

Add an Action to the Patient's Account Page

Configure an action for the flow you created and add the action to the person account page layout.

1. From the object management setting for Accounts, click **Buttons, Links, and Actions**.
2. Select **New Action**.
3. In Action Type, select **Flow**.
4. In Flow, select **Register Device and Create Shipping Request**.
5. In Standard Label Type, select **None**.
6. Add a label, name, and description for the new action.
7. Save your changes.
8. From the object management setting for Person Accounts, go to Page Layouts.
9. Select **Person Account Layout**.
10. From the Mobile & Lightning Actions menu, drag the **Register Device and Create Shipping Request** field onto an editable part of the page.
11. Save your changes.

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 devices for the patient.

Register Device and Create Shipping Request

Register Or Ship Devices

Device Types

- OnTrackWellness Glucose Meter **1**
- BeWell Watch Series 1
- StayHealthy Blood Pressure Monitor

Register Devices (1) **Create Shipping Request (0)**

Device ID

[Add Device](#)

Register 1 OnTrackWellness Glucose Meter

 **GM101010** 

Account: Charles Green

Unique Identifier: GM101010

Product: OnTrackWellness Glucose Meter

[Previous](#) [Save](#)

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 then click **Save Shipping Info**.

Register Device and Create Shipping Request

Register Or Ship Devices

Device Types

- StayHealthy Blood Pressure Monitor

Register Devices (0) | Create Shipping Request (0)

Quantity
1

* Shipping Address

* Street
1 Market Street

* City
San Francisco

* State/Province
CA

* Zip/PostalCode
94103

Country
United States

Previous
Save

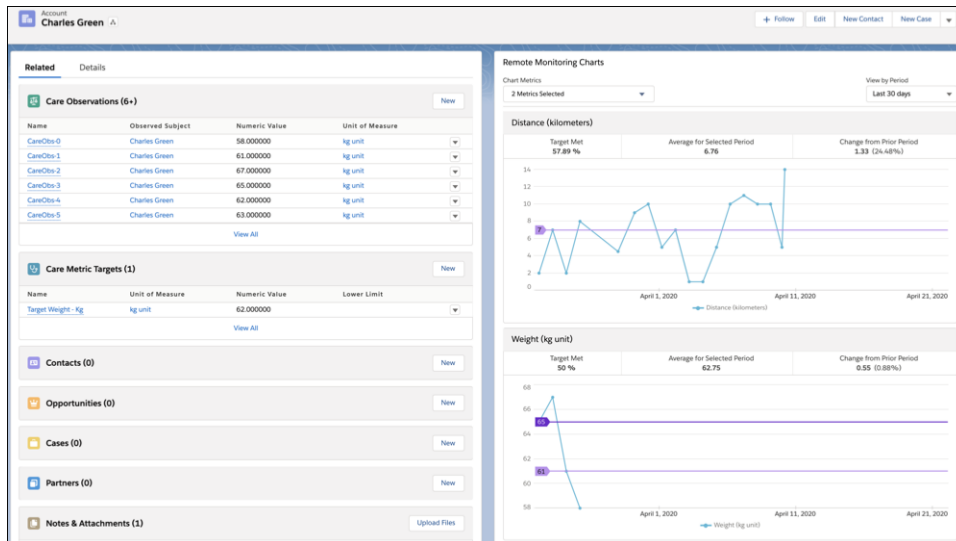
4. Save your changes.



Note: Starting Summer '21, the organization-wide default sharing setting for the Product object is Private. If you're new to Health Cloud, to use the object for device registrations, change the sharing setting to Public Read/Write.

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 in Health Cloud](#)

Create code sets, units of measure, and care metric targets to set up remote monitoring. Enable care coordinators to 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 and Ship Remote Monitoring Devices](#)

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 Care Observation Triggers](#)

Use process builder to create care observation triggers when a patient's care observations don't meet the care metric target conditions. You can create a trigger to post on Chatter or send an email to notify the user about care observations that fall out of range.

Set Up Remote Monitoring in Health Cloud

Create code sets, units of measure, and care metric targets to set up remote monitoring. Enable care coordinators to 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. From the App Launcher, find and select **Code Sets**.
 - b. Click **New**.
 - c. Add a name for Code Set. For example, to set the metric for a patient's weight, enter *Pounds*.
 - d. Add a code for the metric you want to observe. For example, lbs
 - e. For Code Set Type, select **None**.
 - f. Select the checkbox for Active.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

New Code Set

Information

* Name

Owner Name

Source System

System Version

* Code

* Code Set Type

Effective Date

End Date

Active ☐

Primary ☐

Custom Code ☐

Code Description

- g. 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. From the App Launcher, find and select **Units of Measure**.
 - b. Click **New**.
 - c. Enter a name for Unit of Measure.

- d. Add a unit code. For example, lbs.
- e. Select a Type of measurement.

The screenshot shows a web form titled "New Unit of Measure". It has a section header "Information" in a grey bar. Below this, there are several input fields: a text field for "Name" with an asterisk indicating it is required; a dropdown menu for "Owner Name" currently showing "Admin User"; a text field for "Unit Code" with an asterisk and an information icon; a text field for "Description"; and a dropdown menu for "Type" with an asterisk and an information icon, currently showing "Custom". At the bottom right of the form are three buttons: "Cancel", "Save & New", and "Save".

- f. 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. From the App Launcher, find and select **Care Metric Targets**.
 - b. Click **New**.
 - c. Enter a Care Metric Target name. For example, Target Weight.
 - d. Select the patient whose care is being tracked.
 - e. Select a code for the observed metric.
 - f. Select a unit of measure.
 - g. Enter a start date for target value to take effect.
 - h. Choose a type of care metric target value. If you select MIN, MAX, or EXACT, enter a numeric value for the care metric target. If you select RANGE, enter upper limit and lower limit values. If you select BOOLEAN, select the checkbox for Outcome Positive.

 **Note:** To set an org-level care metric target, leave the Patient field blank.

- i. 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 496.

 **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 the object management settings for Accounts, go to Page Layouts.
 - b. Select the layout for the patient account page where you want to display the care observations.
 - c. On the palette, select **Related Lists**.
 - d. 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**.
 - e. Save your changes.
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

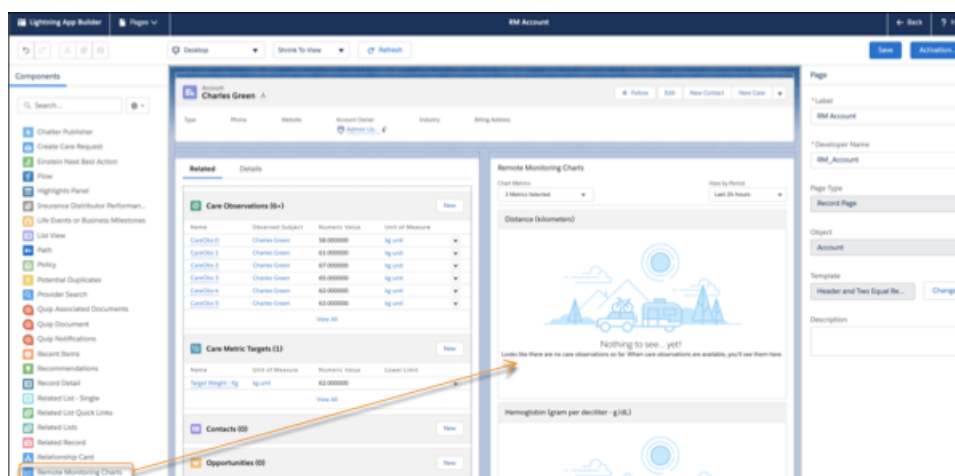
- Id

- Name
- EffectiveDateTime
- NumericValue
- IsOutcomePositive
- ExpectedValueId
- HasMetExpectedValue

CareMetricTargetStandardFields

- Type
- NumericValue
- UpperLimit
- LowerLimit
- IsOutcomePositive

- From Setup, in the Quick Find box, enter *App Builder*, and select **Lightning App Builder**.
- In the Lightning Pages list, click **Edit** next to your Account record page.
- Drag the **Remote Monitoring Charts** component to the location where you want to display the charts.



- 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.

- From Setup, enter *Care System Field Mapping* in the Quick Find box, then select **Care System Field Mapping**.
- Click **New Care System Field Mapping**.
- Enter the following:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Field	Description
Label	The label for this care system field mapping.
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.
IsActive	Select to activate this configuration and make it available to users.
Role	The role the field represents.

4. Save your changes.

Register and Ship Remote Monitoring Devices

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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 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**.

Add an Action to the Patient's Account Page

Configure an action for the flow you created and add the action to the person account page layout.

1. From the object management setting for Accounts, click **Buttons, Links, and Actions**.
2. Select **New Action**.

3. In Action Type, select **Flow**.
4. In Flow, select **Register Device and Create Shipping Request**.
5. In Standard Label Type, select **None**.
6. Add a label, name, and description for the new action.
7. Save your changes.
8. From the object management setting for Person Accounts, go to Page Layouts.
9. Select **Person Account Layout**.
10. From the Mobile & Lightning Actions menu, drag the **Register Device and Create Shipping Request** field onto an editable part of the page.
11. Save your changes.

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 devices for the patient.

Register Device and Create Shipping Request

Register Or Ship Devices

Device Types

- OnTrackWellness Glucose Meter **1**
- BeWell Watch Series 1
- StayHealthy Blood Pressure Monitor

Register Devices (1) **Create Shipping Request (0)**

Device ID

[Add Device](#)

Register 1 OnTrackWellness Glucose Meter

GM101010 [×](#)

Account: [Charles Green](#) Unique Identifier: **GM101010**

Product: [OnTrackWellness Glucose Meter](#)

[Previous](#) [Save](#)

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 then click **Save Shipping Info**.

4. Save your changes.



Note: Starting Summer '21, the organization-wide default sharing setting for the Product object is Private. If you're new to Health Cloud, to use the object for device registrations, change the sharing setting to Public Read/Write.

Set Up Care Observation Triggers

Use process builder to create care observation triggers when a patient's care observations don't meet the care metric target conditions. You can create a trigger to post on Chatter or send an email to notify the user about care observations that fall out of range.

Define a process for the care observation trigger and give it a name and description.

1. From Setup, in the Quick Find box, enter *Process Builder*, and then select **Process Builder**.
2. Click **New**.
3. Enter a name for the process. For example, Care Observation Trigger. The API Name field is autopopulated. Keep it as is.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

4. Enter a description for your process.
5. For The process starts when, select **A record changes** from the picklist.
6. Save your work.

SEE ALSO:

[Email Alert Actions](#)

Add an Object and When to Start the Process

1. In the Process Builder, click **+Add Object**.
2. In the Object field, select **Care Observation** from the picklist.
3. For Start the process, select **only when a record is created**.
4. Save your changes.

Add a Criteria for the Action

1. Click **+Add Criteria** and enter a Criteria Name. For example, Value Outside Range.
2. For Criteria for Executing Actions, select **Conditions are met**.
3. Set the conditions for the criteria. For Field, select **Processing Result** from the picklist.
4. For Operator, select **Equal**.
5. For Type, select **Picklist**.
6. For Value, select **Record processed. Expected value updated. Observation Numeric Value or Outcome Positive does not meet Care Metric Target conditions**.
7. For Conditions, select **All of the conditions are met (AND)**.
8. Save your changes.

Set Up an Immediate Action

1. To define an immediate action, click **+Add Action**.
2. Select an action type to send a notification. For example, Post to Chatter.
3. Enter an action name.
4. For Post to, select **User**.
5. For User, select **Search for a user**.
6. Enter the name of the user and the message you want to send.
To tailor the message for your patient, select a Merge Field.
7. Save your changes.
8. Click **Activate**.

Process Insurance Claims from External Sources

The claims data model makes externally sourced claims data available as external objects, so users can answer queries from providers and members without using multiple screens or applications. The Claims data model uses external objects, allowing 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Claims Management

 **Note:** Get the Salesforce Connect license via [OData 2.0 or 4.0 Adapter](#). A Salesforce Connect license is required to use external objects.

Get Oriented	 Get to know about claims management in Health Cloud. • Health Insurance and Claims • Work with External Data Sources
Data Models	 Explore the Health Cloud data model and objects for that support claims management. • Claims Data Model

Set Up and Manage Claims Management

- [Install the Claims Data Model](#)

The Health Cloud claims functionality is delivered as an unmanaged package containing a set of external objects that you customize to fit your organization's specific requirements.
- [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.

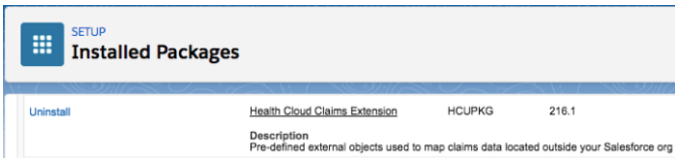
- 3. [Map Claims Data to Your Source System](#)
Customize your external objects so that the right claims data from your source system shows up in Health Cloud.
- 4. [Display Claims Data](#)
Enable users to see claims, claim diagnoses, and claims providers by setting tab visibility for claims and related 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 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. Assign the Health Cloud Utilization Management permission set to access the Health Cloud Platform permission set license.

- 1. Paste the URL for the Claims package into your browser navigation bar. If you're using Windows OS, press **Enter**. For MAC, press **Return**.
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](#)
- [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 install the Claims data model, Health Cloud sets up an external data connection for you with the typical settings selected. Update those settings to work with your requirements. 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 configured to use an external data source called "Claims Data Source."

EDITIONS

Available in: Lightning Experience
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

EDITIONS

Available in: Lightning Experience
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 your work.



Important: Don't click **Validate and Sync**.

SEE ALSO:

[Salesforce Help: Add an External Data Source](#)

[Health Cloud Developer Guide: Claims Data Model](#)

[Apex Developer Guide: Apex Connectors](#)

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, in the Quick Find box, enter *External Objects*, and then select **External Objects**.
2. Click **Edit** next to one of the Claims objects and make sure it's mapped to the correct external table.
3. Save your changes.
4. Select the name of each external Claims object, and then click **Edit** next to each of its custom fields to map to the correct external column in the source system.
5. Add any additional custom fields you need, mapping them to fields in your source system.
6. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Display Claims Data

Enable users to see claims, claim diagnoses, and claims providers by setting tab visibility for claims and related objects.

 **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, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
2. Click the profile that needs to view claims data.
3. Click **Edit** and scroll down to **Tab Settings**.
4. Under Standard Tab Settings, select **Default On** next to Claims.
5. Under Custom Tab Settings, select **Default On** next to Claim Diagnoses, Claim Diagnoses Procedures, Claim Headers, Claim Lines, and Claim Providers.
6. Save your changes.
7. Repeat for each profile that needs to view claims data.

To check that the data is visible, log in using one of the profiles you edited, then go to the Health Cloud console and look for the new tabs.

SEE ALSO:

[Install a Package](#)

[Install a Package](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 template flows and 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 package, you 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](#)
Add a health-specific record type to your service case object to store the data that your flow generates.

3. [Create a Quick Action to Launch the Flow](#)

Help users launch and navigate through workflows with the help of quick actions. Quick actions enable you to perform a series of actions with just a few clicks. You can also create customized quick actions based on the specific needs of your users. Add a quick action to your interface so that users can easily launch your flows.

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.

5. [Health Cloud Flows](#)

For Health Cloud, Salesforce provides standard flow templates that are tailored to meet specific business needs.

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> 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 flows 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 > Installed Packages > Health Cloud Flows > View Components**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Create a Service Case Record Type

Add a health-specific record type to your service case object to store the data that your flow generates.

1. From the object management settings for cases, go to Record Types and click **New**.
2. To use an existing record type, select a value from the Existing Record Type picklist.
To use the default record type, select **Master**.
3. For **Record Type Label**, enter *Service Case*.
4. The Record Type Name field is autopopulated. Keep it as is.
5. For **Support Process**, select *Healthcare*.
6. Provide a description of the record type and select **Active** to put it to work.
7. Select **Make Available** to assign the record type to profiles, and click **Next**.
8. In Apply one layout to all profiles, select the page layout where you want to add the record type. For example, Case Layout.
9. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Create a Quick Action to Launch the Flow

Help users launch and navigate through workflows with the help of quick actions. Quick actions enable you to perform a series of actions with just a few clicks. You can also create customized quick actions based on the specific needs of your users. Add a quick action to your interface so that users can easily launch your flows.

1. From the object management settings for Accounts, go to **Buttons, Links, and Actions**, and click **New Action**.
 - a. For **Action Type**, select Flow.
 - b. Select a flow that you already created to use as a quick action. For example, New Appeal.
 - c. Select **None** in **Standard Label Type** picklist.
 - d. Enter your label in the Label field. For example, Start an Appeal.
 - e. The Name field is autopopulated. Keep it as is.
 - f. (Optional) You can enter a description and select an icon for your action.
2. Save your work.

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. From the object management settings for Accounts, go to Page Layouts and click **Patient Layout**.
2. Click **Mobile and Lightning Actions**.
3. Select the flow you created and drag it to the **Mobile and Lightning Experience Actions** section.
4. Save your changes.

A button now appears in the Patient Highlights component. The user can click it to start the associated flow.

Health Cloud Flows

For Health Cloud, Salesforce provides standard flow templates that are tailored to meet specific business needs.

[Identity Verification Flows](#)

Health Cloud includes the Verify Caller Identity and the Verify Customer Identity flow templates that are specific to identity verification. The Verify Customer Identity flow templates includes a linked subflow called Verify Linked Caller Identity.

[Flow Screen Components](#)

Health Cloud provides screen components that extend the types of input fields available in flow screens.

[Invocable Actions](#)

Learn about the object-level access that's required for using invocable actions.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

EDITIONS

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Identity Verification Flows

Health Cloud includes the Verify Caller Identity and the Verify Customer Identity flow templates that are specific to identity verification. The Verify Customer Identity flow templates includes a linked subflow called Verify Linked Caller Identity.

Identity Verification Flows

The flow templates for identity verification are designed to help organizations obey regulations that protect sensitive information.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Identity Verification Flows

The flow templates for identity verification are designed to help organizations obey regulations that protect sensitive information.

Flow	Purpose
Verify Customer Identity	Verifies the identity of a customer before a CSR or CCA can process the customer's request and saves the customer verification data for auditing purposes.
Verify Customer Identity Base Flow	Verifies the identity of a customer before a CSR or CCA can process the customer's request and, if a record ID is passed into the flow, saves the customer verification data for auditing purposes. Also, gives you the option to add the flow to a Lightning record page or to the utility bar based on your business requirements.
Verify Linked Customer Identity	Verifies the identity of a customer after a CSR or CCA has verified the identity of the customer's authorized representative.



Note: To run an identity verification flow, you must have the required identity verification process setup records.

Flow Screen Components

Health Cloud provides screen components that extend the types of input fields available in flow screens.

Flow Screen Input Component: Display Search Results

Display the results of searches for callers and customers to the CSR or CCA. The component appears in the Verify Customer Identity and the Verify Linked Caller Identity flow templates.

Flow Screen Input Component: Display Verification Results

Display a message to a CSR or CCA indicating that verification was successful. The component appears in the Verify Customer Identity and the Verify Linked Caller Identity flow templates.

Flow Screen Input Component: Search for Caller

Enable users to search Salesforce for callers as part of the identity verification process.

Flow Screen Input Component: Search for Customer

Enable users to search Salesforce or an external data source for callers and customers as part of the identity verification process. The component appears in the Verify Customer Identity and the Verify Linked Caller Identity flow templates.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

[Flow Screen Input Component: Verify Caller Identity](#)

Displays the information required to confirm the identity of a caller.

SEE ALSO:

[Provided Flow Screen Components](#)

Flow Screen Input Component: Display Search Results

Display the results of searches for callers and customers to the CSR or CCA. The component appears in the Verify Customer Identity and the Verify Linked Caller Identity flow templates.



Note: This screen component requires Lightning runtime.

ATTRIBUTE	DESCRIPTION
Allow Next When No Search Results Found	Specifies whether to allow the contact center agent to proceed to the next screen when a search with the specified criteria produces no results.
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Search Criteria	An Apex <code>id_verification.SearchFilters</code> record that contains a search type and keywords.
Search Results Found	Indicates whether a search with the specified criteria returned results.
Keywords	The keywords used to perform the search on the selected object.
Verification Context	As input, an Apex <code>id_verification.VerificationContext</code> record containing a verification process definition record, a record ID, and the name of the object to search. As output, an Apex <code>id_verification.VerificationContext</code> record containing the caller's identification verification context.

SEE ALSO:

[Flow Screen Components](#)

[Provided Flow Screen Components](#)

Flow Screen Input Component: Display Verification Results

Display a message to a CSR or CCA indicating that verification was successful. The component appears in the Verify Customer Identity and the Verify Linked Caller Identity flow templates.



Note: This screen component requires Lightning runtime.

ATTRIBUTE	DESCRIPTION
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Automatically Navigate to Details	Indicates whether the subtab with the caller details is automatically opened when the identity is verified.
Enable Secondary Message Hyperlink	Indicates whether a hyperlink in the secondary message is active.
Secondary Message	The message to display in the flow screen beneath the primary message.
Primary Message	The primary message displayed in the flow screen.
Initial Object Name	The object for the record selected in the initial search.
Initial Record ID	The ID of the selected record from the initial search.
Initial Record Name	The name of the person whose identity was verified.
Linked Object Name	The object for the record selected in the associated search.
Linked Record ID	The ID of the selected record from the associated search.
Linked Record Name	The name of the associated person whose identity was verified.

SEE ALSO:

[Flow Screen Components](#)
[Provided Flow Screen Components](#)

Flow Screen Input Component: Search for Caller

Enable users to search Salesforce for callers as part of the identity verification process.

Table 6: Configure the Search for Caller Component

Attribute	Description
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores
Search Heading Label	User-friendly text that displays above the search field in the component.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Search for Caller component:

- Health Cloud permission set license

Attribute	Description
Verification Context	As input, a variable that stores the information required to run the search operation. As output, the identity verification context with verifiers.

SEE ALSO:

[Flow Screen Components](#)[Provided Flow Screen Components](#)

Flow Screen Input Component: Search for Customer

Enable users to search Salesforce or an external data source for callers and customers as part of the identity verification process. The component appears in the Verify Customer Identity and the Verify Linked Caller Identity flow templates.

 **Note:** This screen component requires Lightning runtime.

ATTRIBUTE	DESCRIPTION
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Verification Context	As input, an Apex <code>id_verification.VerificationContext</code> record containing a verification process definition record, a record ID, and the name of the object to search. If the verification context includes the search type, the Search Type field isn't displayed to the flow user when the flow runs. As output, an Apex <code>id_verification.VerificationContext</code> record containing details about the selected search type.
Keywords	The keywords used to perform the search on the selected object.
Search Type	An Apex <code>id_verification.SearchFilter</code> record selected by the user. If the Verification Context attribute contains search type, this field isn't displayed to the flow user when the flow runs.

SEE ALSO:

[Flow Screen Components](#)[Provided Flow Screen Components](#)

Flow Screen Input Component: Verify Caller Identity

Displays the information required to confirm the identity of a caller.

Table 7: Configure the Verify Caller Identity Component

Attribute	Description
API Name	An API name can include underscores and alphanumeric characters without spaces. It must begin with a letter and can't end with an underscore. It also can't have two consecutive underscores.
Disable action	A boolean. When it's set to <code>False</code> , you're redirected to the relevant record page upon successful verification.
Optional Verifiers Heading	A variable that stores the heading for the optional verifiers section.
Optional Verifiers User Instruction	Stores the user instruction about the minimum number of questions to be answered for the optional verifiers section.
Required Verifiers Heading	Stores the heading for the required verifiers section.
Required Verifiers User Instruction	Stores the user instructions for the required verifiers section.
Verification Context	As input, a variable that contains the identity verification context of the caller. As output, the identity verification context with verifiers.
Verification Status	Stores the status of verification. It's an output property.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To use the Verify Caller Identity component:

- Health Cloud permission set license

SEE ALSO:

- [Flow Screen Components](#)
- [Provided Flow Screen Components](#)

Invocable Actions

Learn about the object-level access that's required for using invocable actions.

Build Identity Verification Context

OBJECT	READ	CREATE	UPDATE
Identity Verification Process Definition	Yes	No	No

OBJECT	READ	CREATE	UPDATE
Identity Verification Process Detail	Yes	No	No
Identity Verification Process Field	Yes	No	No

Get Verification Data

OBJECT	READ	CREATE	UPDATE
Identity Verification Process Definition	Yes	No	No
Identity Verification Process Detail	Yes	No	No
Identity Verification Process Field	Yes	No	No

Save Member Verification Steps

OBJECT	READ	CREATE	UPDATE
Engagement Interaction	Yes	No	No
Engagement Topic	Yes	No	No
Identity Verification Process Definition	Yes	No	No
Identity Verification Process Detail	Yes	No	No
Identity Verification Process Field	Yes	No	No

Set up Action Plans

An action plan defines the tasks and other items needed to complete a business process, such as handling a patient intake or scheduling a visit. You can create action plans for various objects, including account, campaign, case, contact, contract, lead, and opportunity records, and custom objects.

Before you create an action plan template, understand the business flows that the action plan will represent. You can build your own flows using the Flow Builder, or you can use existing flows.

1. Create an action plan template.
 - a. From the App Launcher, find and select **Action Plan Templates**.
 - b. Click **New**.
 - c. Enter a name and select the template owner.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- d. Make sure that **Let users add items to action plans** isn't selected.
 - e. In the Action Plan Type field, select the process you are supporting with this action plan.
 - f. In the Target Object field, select the object that will be updated when the user launches this action plan.
 - g. Save your work.
2. Add task flows in the 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 a flow to add to your template.
 - c. If you want this task to be mandatory, select **Required**.
 - d. Save your changes.
 - e. Add more task flows as needed.
 - f. After you add all task flows for your template, click **Publish Template**.

SEE ALSO:

[Salesforce Help: Action Plans](#)

Manage Campaigns

Campaigns are an effective way to help patients and members stay engaged with their care team and stick with their care plans. From health education to appointment reminders, you can improve patient participation throughout a connected experience. Build campaigns and create health journeys across populations, identify groups of people who share a need, and then assign them to the campaigns. Recruit, onboard, and engage the providers in your network through targeted campaigns. Payers can manage the entire member journey through acquisition, onboarding, engagement, and retention to create a seamless member experience.

[Let Users Add People to Health Cloud Campaigns](#)

You can enable your users to set up Marketing Cloud campaigns and assign people to them from inside Health Cloud.

[Show Campaigns in the Timeline and Patient Card](#)

Show a patient or member's campaign assignments on the patient card and the patient timeline.

[Create a Campaign](#)

Whether it's an educational email campaign for patients in a diabetes care cohort or an onboarding campaign for new providers, campaigns save you time and increase engagement.

[Add a Care Program Campaign](#)

To create a care program campaign, associate a campaign with a care program.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Let Users Add People to Health Cloud Campaigns

You can enable your users to set up Marketing Cloud campaigns and assign people to them from inside Health Cloud.

 **Note:** Campaigns are available only in Lightning Experience.

1. From Setup, enter *users* in the Quick Find box, and click **Users**.
2. Click **Edit** next to the name of users who create campaigns or add members to campaigns.
3. Select **Marketing User** checkbox and save the settings.

SEE ALSO:

[Build Relationships and Personalized Journeys with Campaigns](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To enable access to campaigns:

- Manage User

Show Campaigns in the Timeline and Patient Card

Show a patient or member's campaign assignments on the patient card and the patient timeline.

 **Note:** If you launched your Health Cloud org with the Winter '19 release or later, you can skip this step.

1. From the Health Cloud - Lightning Admin Home page, select the Timeline View Configurations tab.
2. Click **Campaigns** in the Timeline View Configuration Name column.
3. Select the **Active** checkbox and save.
4. Go back to the Health Cloud - Lightning Admin Home page, select the Patient Card Configurations tab, and repeat these steps.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Create a Campaign

Whether it's an educational email campaign for patients in a diabetes care cohort or an onboarding campaign for new providers, campaigns save you time and increase engagement.

1. In App Launcher, enter *Campaigns*, and select **Campaigns**.
2. Enter a campaign name.
3. Select the Active checkbox if you're ready to roll out the campaign.
4. Select a value for the type of campaign.
5. Select the status of the campaign.
6. Select a **Start Date** and an **End Date**.
After you save the campaign, you can add attachments and people to the campaign.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To view campaigns:

- Read on campaigns

To create campaigns:

- Create on campaigns

AND

Marketing User
checked in your user
information

To change campaigns:

- Edit on campaigns

AND

Marketing User
checked in your user
information

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.

EDITIONS

Health Cloud is available in Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create campaigns:

- Read on campaigns
- AND

Marketing User
checked in your user
information

Support and Manage Provider Referrals

Help your users monitor referrals from submission to closure. Health Cloud referral management provides tools to prioritize the best referrals, ensure timely referral processing, and track final confirmation of a referral from the referring physician.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Referral Management

Get Oriented		Get to know how to track referrals from submission to closure. Referrals and Provider Relationship Management
Data Model		Explore the Health Cloud data model and objects that support referral management. Referral Management Custom Fields on Standard Objects
Related Unmanaged Package		Install the Health Cloud Reports for Patient Referral Management unmanaged package. Install Health Cloud Packages
Intelligent Document Automation		Streamline intake and referral conversion on a digital, HIPAA-compliant workspace. Support Intelligent Document Automation

Set Up and Manage Referral Management

[Configure Referral Management](#)

Follow these steps to set up the queues, objects, and access that your users need to submit referrals.

[Create an Approval Process](#)

Use an approval process to automate the way referrals are approved.

[Schedule an Apex Job To Calculate Referral Scores](#)

Keep your referral scores for each practitioner up-to-date by scheduling an Apex job to calculate the number of converted referrals.

[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.

Configure Referral Management

Follow these steps to set up the queues, objects, and access that your users need to submit referrals.

1. [Assign the Health Cloud Platform Permission Set License](#) to yourself and your users.
2. [Set up queues](#) and assignment rules for incoming leads.
That way, referrals are submitted to the correct referral coordinator or group for management.
3. [Create a support process](#) for both leads and opportunities.
4. [Schedule an Apex job](#) that calculates referral scoring.
5. 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.
6. [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.
7. If your company uses custom values for the picklist fields, you can add or change them as well.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

8. [Set up an approval process](#) for referrals that need approval and specify the sequence of required steps to approve a referral.
9. Use Process Builder to [automate your business processes](#).
For example, you might create tasks to notify members and providers about the status of a referral.
10. 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.
11. Add the referral page layouts for leads and opportunities to any pages used to submit and manage referrals.
12. If you want referring physicians outside the organization to submit referrals, set up a partner Experience Cloud site.
13. 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 task, 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, in the Quick Find box, enter *Approval Processes*, and then select **Approval Processes**.
2. For Manage Approval Processes For, select **Lead**.
3. Select **Create New Approval Process | Use Jump Start Wizard**.
4. For Name, enter *Referral Approval Process*.
5. The Unique Name field is autopopulated. Keep it as is.
6. For Approval Assignment Email Template, enter the name of the referral assignment notification email template you created.
7. Optionally, set up an entry criteria for the approval process.
8. For Select Approver, select **Automatically assign to queue**.
9. Select a referral approval queue.
10. Save your changes.
11. Click **View Approval Process Detail Page**.
12. 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**, enter the name of the users, 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

i. For Name, enter *Approved Referral Owner*.

j. Accept the unique name.

k. Choose the field to update.

Depending on your choice of field update, provide additional details about the new field value.

l. Save your changes.

13. 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.

Schedule an Apex Job To Calculate Referral Scores

Keep your referral scores for each practitioner up-to-date by scheduling an Apex job to calculate the number of converted referrals.

Referral Scores tell you the conversion percentage for each referring practitioner. The scores are based on the number of converted referrals vs. the total referrals for each practitioner.

Total referrals are the count of referrals submitted in the last six months by this referring practitioner. Converted referrals are a count of those referrals that have a status of "Closed-Converted". To keep these values up-to-date, schedule an Apex job that calculates these numbers and displays them in the Total Referrals and Converted Referrals fields on the contact record:

1. From Setup, in the Quick Find box, enter *Apex Classes*, then select **Apex Classes**.

2. Click **Schedule Apex**.

3. Enter a Job Name such as *Calculate Referral Scores*.

4. For Apex Class, search for and select **HcReferrerScoreScheduledJob**.

5. Specify how often you want the job to run.

- For **Weekly**—enter one or more days of the week that the job runs (such as Monday and Wednesday).
- For **Monthly**—enter either the date that the job runs or the day (such as the second Saturday of every month).
- Specify the start and end dates. If you enter a single day, the job only runs once.



Note: We recommended scheduling the job to run daily by choosing Weekly and selecting each day.

6. Save your changes.

View or change the details of your scheduled job by going to **Settings > Scheduled Jobs**, and clicking **Manage** next to the job name.

SEE ALSO:

[Schedule an Apex Class](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To schedule an Apex job:

- Author Apex

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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

```
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());
}
}
}
```

Provide Patient and Member Insights with Analytics

CRM Analytics for Health Cloud gives you a complete view of your data to help you deliver connected, one-to-one patient or member care. Use business insights from CRM Analytics apps to drive intelligent patient engagement, improve care effectiveness, and identify and manage risk throughout your patient and member population.

 **Note:** This feature requires a separate license.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



Learn About Analytics for Health Cloud

Get Oriented



Get to know Health Cloud analytics.

- CRM Analytics for Healthcare Administration
- CRM Analytics for Healthcare Dashboards
- Explore with CRM Analytics



- CRM Analytics: Improve Time to Therapy and Boost Patient Adherence

Enable CRM Analytics for Health Cloud

.To get started configuring or creating Analytics apps, first enable CRM Analytics.

Set Up Your Org for Analytics for Healthcare and Create the App

Analytics for Healthcare enables care coordinators, utilization managers, and referral managers to gain critical insights and visualize key metrics about their patient populations.

Set Up Analytics for Health Cloud: Risk Stratification

Analytics for Health Cloud: Risk Stratification helps your company identify high-risk patients. Use this information to proactively manage those patients and provide preventive care to reduce over-consumption of expensive healthcare resources.

Prior-Authorization Review SLA Breach Predictions

Get predictions about the likelihood of prior authorization requests breaching service-level agreements (SLA) by creating an app using the Prior-Authorization Review SLA Breach Likelihood template. Payers can use these predictions to review top factors that cause delays and ensure SLA-compliance by acting on them.

Enable CRM Analytics for Health Cloud

.To get started configuring or creating Analytics apps, first enable CRM Analytics.

1. From Setup, enter *Getting Started* in the Quick Find box, and then select **Getting Started**.
2. Click **CRM Analytics**.



Note: If you see the Launch CRM Analytics button, CRM Analytics is already enabled.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and CRM Analytics for Healthcare

Set Up Your Org for Analytics for Healthcare and Create the App

Analytics for Healthcare enables care coordinators, utilization managers, and referral managers to 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 CRM Analytics for Health Cloud 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 prevent avoidable admissions by detecting patients who aren't adhering to their care plans. Coordinators can segment patients by age, risk, and barriers to identify people who are at risk and 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.

EDITIONS

Available for an extra charge in Lightning Experience in **Enterprise** and **Unlimited** editions that have Health Cloud enabled.

- 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 CRM Analytics.

See [Give Agents and Managers Patient Insights with Analytics for Healthcare](#) 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 CRM Analytics before, learn about it from [Explore Data and Take Action with CRM Analytics](#).



Note: Salesforce Health Cloud includes access to the CRM Analytics for Manufacturing app. Analytics for Manufacturing enables demand planners and account managers at medical device manufacturers to 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 CRM Analytics 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. [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.
2. [Assign Permission Sets for Analytics for Healthcare](#)
Assign permission sets to give the right users access to Analytics for Healthcare.
3. [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.
4. [Create and Share an App from the Analytics for Healthcare Template](#)
The Analytics for Healthcare template makes it easy to create the analytics app you need and share it with your users.
5. [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 CRM Analytics. Schedule the app to refresh every day to ensure that your app uses up-to-date data.
6. [Embed Analytics for Healthcare Dashboards in Lightning Pages](#)
Analytics for Healthcare includes dashboards intended for embedding and access in Lightning Experience pages.
7. [Understand Analytics for Healthcare Limitations](#)
Analytics for Healthcare provides access to CRM Analytics capabilities and features.

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.

1. Install the Health Cloud managed package.
2. To be sure Utilization Analytics dashboards work correctly, install and set up Utilization Management. See [Utilization Management Setup Checklist](#) on page 442.
3. To be sure [Referral Analytics dashboards](#) work correctly, install and set up Referral Management. See [Set Up Referral Management](#) on page 517.
4. Enable the Intelligent Sales preferences. See [Enable Intelligent Sales](#).
5. 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](#).

6. Give the Analytics Integration User the necessary permission sets.
 - a. From **Setup**, enter *users* in the **Quick Find** box, and then select **Users**.
 - b. Click the **Integration User**.
 - c. Click **Permission Set Assignments**, and then click **Edit Assignments**.
 - d. Select the **Action Plans**, **Health Cloud Utilization Management**, and **Industries Visit** permission sets.
 - e. Click **Add**, then click **Save**.
7. Make sure you have at least one record for each of these objects:
 - Account
 - Address
 - AssessmentTask
 - AssessmentTaskOrder
 - CareBarrier
 - CareBarrierDeterminant
 - CareBarrierType
 - CareDeterminant
 - CareDeterminantType
 - CareRequest
 - Case
 - Contact
 - Event
 - 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



Note: In Analytics for Healthcare, data about patients comes from the Opportunity object, and data about referrals comes from Lead.

During app creation, CRM Analytics 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.

Assign Permission Sets for Analytics for Healthcare

Assign permission sets to give the right users access to Analytics for Healthcare.

Permission Set	Description	Role
CRM Analytics Plus User	Grants access to read-only features enabled by the CRM Analytics Plus license.	User
HealthCare Analytics User	Grants access to view HealthCare Analytics apps.	User
CRM Analytics Plus Admin	Grants access to all features enabled by the CRM Analytics Plus license.	Admin
HealthCare Analytics Admin	Grants access to create and customize HealthCare Analytics apps.	Admin

1. From Setup, enter *Permission* in the Quick Find box, then select **Permission Sets**.
2. Click the permission set to assign, for example, **CRM Analytics Plus User**, and then click **Manage Assignments**.
3. Click **Add Assignments**.
4. Select the users to assign this permission set, then click **Next**.
5. Click **Assign**, then click **Done**.
6. Repeat these steps for each permission set.

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.

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, then click **Back to Profile**.
 6. Repeat these steps for the Contact object, and then for any other objects and fields used by the Analytics Integration User profile.
- You can now create the Analytics for Healthcare app.

Create and Share an App from the Analytics for Healthcare Template

The Analytics for Healthcare template makes it easy to create the analytics app you need and share it with your users.

1. From the App Launcher, go 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 an app or use settings from an existing app, make a selection, and click **Continue**. CRM Analytics checks your Salesforce org's data for compatibility. 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, make a selection and click **Continue**.
6. 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** and click **Looks good, next**.
 - To select custom settings to reflect the use cases you and others on your team want to view data for, select **Custom** and 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 dimmed.

- **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**.

7. Add person accounts and any other record types you're using in your org. Select one or more record types, then click **Looks good, next**.
8. Give your app a name that you and users in your org can easily remember, and click **Create**.



Note: We recommend using *Analytics for Healthcare* in your app name to make it easier to find.

9. 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.



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.

10. Now that you've created the app, share it with users in your organization.

You can share it with any user who has the Healthcare Analytics admin or user permission sets.

- a. Open your app if it's not already open. If you've navigated away from CRM Analytics Studio, go back to it, select **All Items**, find your app, and click it.
- b. Click the Share icon  at upper right.
- c. In the next screen, use the search field under **Invite others:** to find other users in your org.
- d. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

 **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.

- e. 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 CRM Analytics. Schedule the app to refresh every day to ensure that your app uses up-to-date data.

To schedule your app, see [Schedule Data Refresh for a CRM Analytics App](#). Select a time outside normal work hours so the data refresh doesn't interrupt business activities. 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 Dashboards in Lightning Pages](#) 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 Dashboards in Lightning Pages](#).

Care. Embed in the Account (Patient/Member) page layout. Set the Filter attribute with the following:

```
{
  "datasets": {
    "HLS_Care_Request": [
      {
        "fields": [
          "MemberId"
        ],
        "filter": {
          "operator": "in",
          "values": [
            "$Id"
          ]
        }
      }
    ],
    "HLS_Care_Plan": [
      {
        "fields": [
          "AccountId"
        ],
        "filter": {
```

```

        "operator": "in",
        "values": [
            "$Id"
        ]
    }
}
],
"HLS_Problem": [
    {
        "fields": [
            "Account.Id"
        ],
        "filter": {
            "operator": "in",
            "values": [
                "$Id"
            ]
        }
    }
],
"HLS_Task": [
    {
        "fields": [
            "AccountId"
        ],
        "filter": {
            "operator": "in",
            "values": [
                "$Id"
            ]
        }
    }
],
"HLS_Goal": [
    {
        "fields": [
            "Problem.Account.Id"
        ],
        "filter": {
            "operator": "in",
            "values": [
                "$Id"
            ]
        }
    }
]
}
}

```

Converted Patient. Embed in the Opportunity (New Patient) page layout. Set the Filter attribute with the following:

```

{
  "datasets": {
    "HLS_Patient": [
      {

```

```
      "fields": [
        "ConvertedOpportunityId"
      ],
      "filter": {
        "operator": "in",
        "values": [
          "$Id"
        ]
      }
    }
  ]
}
```

Referral Patient. Embed in the Lead (Referral) page layout. Set the Filter attribute with the following:

```
{
  "datasets": {
    "HLS_Referral": [
      {
        "fields": [
          "Id"
        ],
        "filter": {
          "operator": "in",
          "values": [
            "$Id"
          ]
        }
      }
    ]
  }
}
```

Understand Analytics for Healthcare Limitations

Analytics for Healthcare provides access to CRM Analytics capabilities and features. Analytics for Healthcare gives you the same access to CRM Analytics capabilities as the CRM Analytics Growth and Plus licenses. Consult this chart to see any limitations.

Table 8: Analytics for Healthcare Limitations

Capability	CRM Analytics Growth or Plus; Analytics for Healthcare
Data sources	Salesforce and external data
Object support	Standard and custom objects
Data volume	- CRM Analytics Plus: 10 billion rows - CRM Analytics Growth: 100 million rows
Can customize existing dashboards?	Yes
Can create dashboards?	Yes

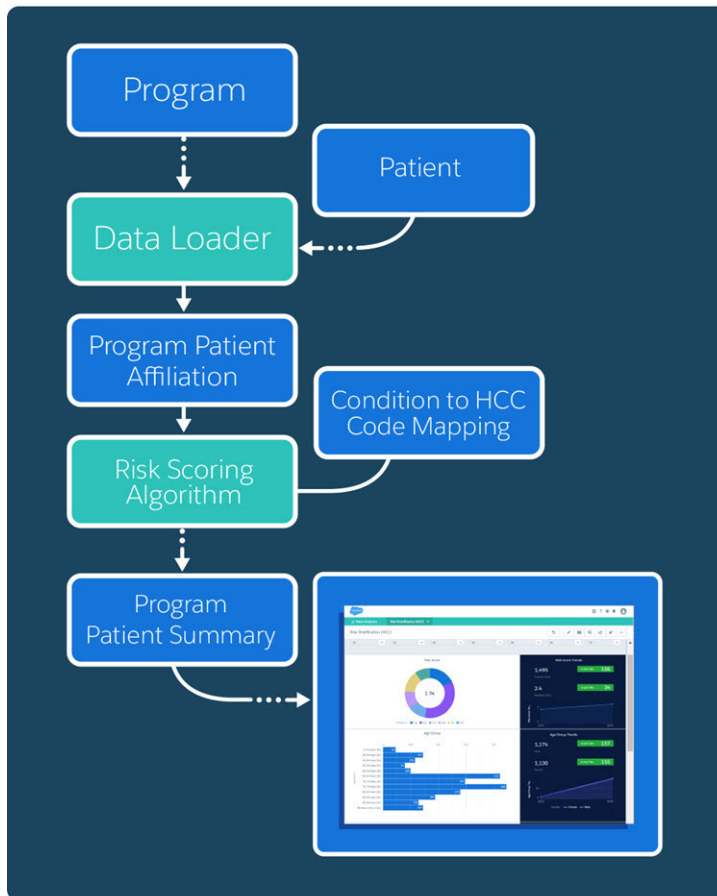
Capability	CRM Analytics Growth or Plus; Analytics for Healthcare
Can customize existing datasets?	Yes
Can create datasets?	Yes
Can create custom CRM Analytics apps?	Yes
Supports Einstein Discovery and Experience Cloud integration?	Yes
Supports bulk actions and APEX steps?	Yes
Supports Sales Cloud Einstein artificial intelligence?	No
Supports Salesforce Inbox?	No

Set Up Analytics for Health Cloud: Risk Stratification

Analytics for Health Cloud: Risk Stratification helps your company identify high-risk patients. 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.



 **Note:** Each Health Cloud org comes with five CRM Analytics 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.

[Enable a Permission Set License for the Admin](#)

Enable the CRM Analytics Plus permission set license to create a permission set for Health Cloud admins.

[Create a Permission Set for the Health Cloud CRM Analytics Admin](#)

After you enable the CRM Analytics Platform permission set license, create a permission set to assign to the Health Cloud CRM Analytics admin user. This permission set enables full access to manage Analytics for Health Cloud.

[Install the Einstein Analytics for Health Cloud: Risk Stratification Package](#)

The Einstein Analytics for Health Cloud: Risk Stratification package contains functionality for the CRM Analytics for Health Cloud: Risk Stratification dashboard.

[Assign Permission Sets for Analytics for Health Cloud](#)

Assign permission sets to give the right users access to Analytics for Health Cloud functionality.

[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.

[Give Your Users Access to CRM Analytics](#)

Assign the appropriate permissions so that users can view reports and dashboards in Analytics Studio, and view patient data.

Set Up and Start Risk Scoring Dataflow

Set up row-level security to restrict access to records as needed. Schedule the app to refresh daily to assure that it's using up-to-date data.

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. Extended metadata (XMD) enables you to customize the formatting of dataset fields and their values in CRM Analytics dashboards and lenses. If you modify the XMD for a dataset, every UI visualization that uses the dataset shows the modified format.

Add Picklist Values and Page Layouts for CRM Analytics

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.

Add Risk Scoring Record Types to the Admin Profile

To expose CMS Risk Scoring data in an CRM Analytics dashboard, you must add the associated record types to the Health Cloud admin profile.

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 CRM Analytics dashboards so that your company can make informed care decisions.

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. The patient risk scores are updated based on the recalculation results.

Enable a Permission Set License for the Admin

Enable the CRM Analytics Plus 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 **CRM Analytics Plus Admin** permission set license.
5. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Create a Permission Set for the Health Cloud CRM Analytics Admin

After you enable the CRM Analytics Platform permission set license, create a permission set to assign to the Health Cloud CRM Analytics 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 CRM Analytics Admin.
4. For License, select **None**.
5. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

6. On the Permission Set Overview page, click **System Permissions**.
7. Select **Manage Analytics**.
8. Save your changes.
9. Assign the permission set to admins who manage CRM Analytics.

Install the Einstein Analytics for Health Cloud: Risk Stratification Package

The Einstein Analytics for Health Cloud: Risk Stratification package contains functionality for the CRM Analytics for Health Cloud: Risk Stratification dashboard.

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**.
- b. Look for **Einstein Analytics for Health Cloud: Risk Stratification**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

SEE ALSO:

[Install Health Cloud Packages](#)

[Install Health Cloud Packages](#)

Assign Permission Sets for Analytics for Health Cloud

Assign permission sets to give the right users access to Analytics for Health Cloud functionality.

Permission Set	Description	Role or User
Einstein Analytics for Health Cloud Integration	Assign to the User, Integration user. Gives the Analytics for Health Cloud app access to your Salesforce data.	User, Integration
Einstein Analytics for Health Cloud Admin	Grants access to Analytics for Health Cloud functionality.	Admin

1. From Setup, enter *Permission* in the *Quick Find* box, then select **Permission Sets**.
2. Click the permission set to assign, for example, **Einstein Analytics for Health Cloud Admin**, and then click **Manage Assignments**.
3. Click **Add Assignments**.

4. Select the users to assign this permission set, then click **Next**.
5. Click **Assign**, then click **Done**.
6. Repeat these steps for each permission set.

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, in the Quick Find box, enter *Remote Site Settings*, and then select **Remote Site Settings**.

2. Click **New Remote Site**.

3. Enter a name for Remote Site Name.

This field represents the Remote Site Setting API name. Make sure the **Remote Site Name** doesn't include spaces or two consecutive underscores, and doesn't end with an underscore.

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.vf.force.com/apex/HcWaveListIntegrationPage`. Enter `https://MyDomainName--healthcloudga.vf.force.com` as the value for Remote Site URL.

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.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

8. Click **Save**.

SEE ALSO:

[My Domain URL Formats](#)

Give Your Users Access to CRM Analytics

Assign the appropriate permissions so that users can view reports and dashboards in Analytics Studio, and view patient data.

[Create a Permission Set for CRM Analytics 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.

[Enable View Access for Health Cloud CRM Analytics Users](#)

Enable access for users to view the Analytics for Health Cloud: Risk Stratification. Users who are assigned a Health Cloud CRM Analytics permission set can then access Analytics Studio from the App picker.

Create a Permission Set for CRM Analytics 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, in the Quick Find box, enter *Permission*, and 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. Click **Edit**.
8. Select **Use Analytics**. Optionally, select **Download Analytics Data** so that users can 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.
9. Save your changes.
10. Assign the permission set to users who view reports and dashboards in Analytics Studio.

Enable View Access for Health Cloud CRM Analytics Users

Enable access for users to view the Analytics for Health Cloud: Risk Stratification. Users who are assigned a Health Cloud CRM Analytics 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 CRM Analytics app can open.

1. From the App Launcher, find and open **Analytics Studio**.

2. From **Apps**, hover over **Analytics for Health Cloud** and click **Share** from the list.
3. Select the users who have the Risk Stratification (HCC) permissions and can see all patient or member data.

 **Important:** Only grant access to people who have a valid need to know the protected health information of all patients your organization treats.

4. Save your changes.

Set Up and Start Risk Scoring Dataflow

Set up row-level security to restrict access to records as needed. Schedule the app to refresh daily to assure that it's using up-to-date data.

If a CRM Analytics user has access to a dataset, they have access to all records in the dataset, by default. Only grant access to people who have a valid need to know the PHI of all patients your organization 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.

To schedule your app, see [Schedule Data Refresh for a CRM Analytics App](#). Select a time outside normal work hours so the data refresh doesn't interrupt business activities.

 **Note:** The app refresh 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

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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. Extended metadata (XMD) enables you to customize the formatting of dataset fields and their values in CRM Analytics dashboards and lenses. If you modify the XMD for a dataset, every UI visualization that uses the dataset shows the modified format.

 **Important:** Before starting this task, the dataflow must have finished running at least once.

1. Download the XMD files.
 - a. From Setup, in the Quick Find box, enter *Static*, and 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. Under All Items, click the **Datasets** tab.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

- c. Click  next to FinalDashboardDataset, and select **Edit**.
- d. Under Extended Metadata File, click  next to the FinalDashboardDataset.xmd.json file, and select **Replace**.
- e. From the downloaded and extracted zip folder, upload the FinalDashboardDataset file.

 **Note:** The XMD file name corresponds with the dataset name.

Add Picklist Values and Page Layouts for CRM Analytics

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 the object management settings for Accounts, go to **Record Types**.
 - b. Select the **Person Account** record type.
 - c. Click **Edit** for the following picklists and select all available values.

Field	Values
Enrollment Type	Dual, NonDual, FBDual, ESRD
Medicare Enrollee	New Enrollee, Continued
OREC	Age, Disabled

- 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.

Objects	Fields to Add
Account (Patient Layout)	Disabled, Enrollment Type, Institution, Low Income, Medicaid Eligibility Status, Medicare Enrollee, OREC
EHR Encounter	Hospitalize Period End, Hospitalize Period Start, Period End
EHR Conditions	Code Label, Encounter, Source System Modified, Year Documented
Contact (Patient Layout)	Gender

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

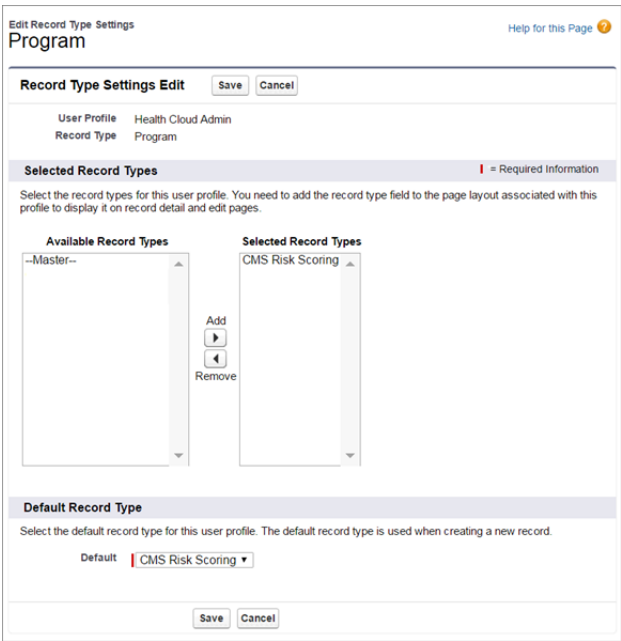
Add Risk Scoring Record Types to the Admin Profile

To expose CMS Risk Scoring data in an CRM Analytics 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 CRM Analytics 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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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 International Classification of Diseases (ICD) and Hierarchical Condition Category (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 a patient's risk score and other summary information about the patient and affiliated programs using CRM Analytics 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 International Classification of Diseases (ICD) and Hierarchical Condition Category (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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

1. From the Health Cloud - Admin Home page, select the Condition to HCC Code Mapping tab, and click **New**.
2. Enter the following:

Field	Description
Mapping ID	System-generated identifier for a specific mapping relationship.
Condition Code	The ICD code for a specific condition.
HCC Code	The CMS HCC code.
Year + Condition + HCC Code	Unique key for the record that links the Valid From field, the ICD condition code, and the HCC code.
Valid From	Number field that holds the year in which the HCC code became valid. For example, <i>2016</i> .
Valid Through	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.
Active	Indicates whether this condition to HCC mapping is active and available for use.

3. Save your work.

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 Field, Rate, Target, Unit of Measure, and Time Span fields, then you must add them to the page layout.

1. From the Health Cloud - Admin Home page, find and select the Programs tab, and then click **New**.
2. Select a record type for the new program and click **Continue**.
Make sure the custom record types are available to users with your profile in Custom Record Type Settings.
3. Enter the following:

Field	Description
Program Name	Name of the program.
User Role Field	Types of providers who qualify for reimbursement during a time period, if applicable.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Field	Description
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 <code>Minutes</code> and <code>Seconds</code> .
Time Span	Measurement period for the program. Valid values are <code>Annually</code> , <code>Monthly</code> , <code>Quarterly</code> , and <code>Weekly</code> .
Report Name	Name of the Analytics dashboard that uses this information. For example, CCM Dashboard.

4. Save your work.

SEE ALSO:

[Care Programs for Health Cloud Empower](#)

[Care Programs for Health Cloud Empower](#)

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:

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Field	Description
Patient	Lookup field to Account.
Program	Program in which the person is enrolled.
Provider	Name of the physician or other health care provider.
Status	Status of the person's Medicare Chronic Care Management (CCM) program.

Field	Description
Start Date	Date when the person's enrollment in the program starts.
End Date	Date when the person's enrollment in the program ends.
Is Active	Indicates whether the enrollment of the person in the associated program is active.
Recalculate?	Indicates whether new and relevant information about the person has been received that triggers a recalculation of the appropriate program metrics. Changes to the following fields trigger a recalculation of a patient's risk score. - Account: Disability, Enrollment Type, Institution, Medicaid, and OREC. - Contact: Birthdate, and Gender. - EHR Condition: Date Asserted, Encounter, and Source System Modified. Adding or deleting an EHR Condition record also triggers a recalculation. - EHR Encounter: Hospitalize Period End, Hospitalize Period Start, Period End, and Period Start.

3. Click **Save**.

SEE ALSO:

[Salesforce Help: Data Loader](#)

View Program Patient Summary Information

View a patient's risk score and other summary information about the patient and affiliated programs using CRM Analytics 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's 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:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Field	Description
Name	System-generated identifier.
Gender	Person's gender.
Age	Person's age in years as of December 31 for the year being calculated.
Disability Status	Indicates whether the person is flagged as disabled in the Patient record.
Institution	Indicates whether the person is in an institution. A blank field indicates that the patient resides in a community.
New Patient	Indicates whether the person is a new Medicare patient or a continued enrollee.
Low Income	Indicates whether the person falls within low-income guidelines.
Enrollment Type	Indicates the patient's Medicare enrollment type.
Risk Score	Person's calculated HCC risk score.  Note: If a person has a risk score of 0, check to see that the enrollment type is set correctly for that person.
Year	Year that the risk score applies to.
HCC Codes	HCC codes that apply to the person for the year.
Age Band	Person's age group in years as of December 31 for the year being calculated. Age band is system generated.
Effective Date	Date when the risk score was calculated.
Most Recent	Identifies that this summary information is the most current for the person for that year.
Number of Conditions	Number of medical conditions associated with the person.
Patient Program Affiliation	Lookup field to the Program Patient Affiliation object.
Conditions	List of Hierarchical Condition Category (HCC) codes associated with the person.

3. Save your work.

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:

Field	Description
Provider Name	Name of the physician or other healthcare provider.
EHR Practitioner	Name of the provider as it exists in the EHR Practitioner object.
Related Contact	Contact record for the provider.
Related User	User record for the provider, followed by user's name.
Active	Indicates whether this provider is actively practicing.

3. Save your work.

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 the date on which it was performed, the name of practitioners involved, and reason for the procedure.

1. From the Health Cloud - Admin Home page, select the EHR Procedures tab, and click **New**.
2. Enter the following:

Field	Description
Request	Reference to the request for the procedure.
Account	The person account that represents the patient or member.
Status	Status of the procedure.
Category	High-level categorization of the procedure.
Code	Industry-standard code for the procedure.
Code Label	Industry-standard name for the procedure.
Body Site	Anatomical location for the procedure.
Reason 1	Reason that the procedure was requested.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Field	Description
Reason 2	Reason that the procedure was requested.
Reason 3	Reason that the procedure was requested.
Reason 4	Reason that the procedure was requested.
Performed Date Time	Date and time that the procedure was performed.
Not Performed	Indicates that the procedure wasn't performed as scheduled.
Reason Not Performed	Reason that the procedure wasn't performed.
Encounter	EHR Encounter associated with the procedure.
Location	Physical location where the procedure was performed, such as a clinic or a medical office.
Outcome	Result of the procedure.
Report	Name of the report related to the procedure.
Complication	Code that identifies any resulting complications.
Items Used	Items used during the procedure.
Follow Up Instructions	Instructions for care after the procedure.
Notes	Additional information about the procedure.
Source System ID	Record ID from a system outside of Salesforce.

3. Save your work.

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 Performers tab, and click **New**.
2. Enter the following:

Field	Description
Procedure	Name of the procedure.
Performer	Name of the practitioner performing the procedure.
Performer Role	Practitioner's role during the procedure.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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:

Field	Description
Account	The account that represents the patient or member.
Ordered By	Name of the practitioner making the request.
Category	High-level categorization of the procedure.
Code	Industry-standard code for the procedure.
Code Label	Industry-standard name for the procedure.
Body Site	Anatomical location for the procedure.
Reason 1	Reason that the procedure was requested.
Reason 2	Reason that the procedure was requested.
Reason 3	Reason that the procedure was requested.
Reason 4	Reason that the procedure was requested.
Priority	Priority of the procedure.
Ordered On	Date and time the request was created.
Scheduled Date Time	Scheduled date and time to perform the procedure.
Encounter	Encounter associated with the procedure.
Status	Status of the procedure.
Notes	Additional information about the procedure.
Source System ID	Record ID from a system outside of Salesforce.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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. The patient risk scores are updated based on the recalculation results.

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.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

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**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To execute Apex classes:

- Author Apex

To invoke the class:

- Author Apex AND View All Data

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, and select **Execute**.

```
HealthcloudGA.HcCMSRiskScoringScheduledJob riskJob =
    new HealthcloudGA.HcCMSRiskScoringScheduledJob (2017);
```

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

```
String sch = '0 00 00 * * ?';  
String jobName = 'Risk Scoring Job';  
System.schedule('Risk Scoring Job', sch , riskJob);
```

Prior-Authorization Review SLA Breach Predictions

Get predictions about the likelihood of prior authorization requests breaching service-level agreements (SLA) by creating an app using the Prior-Authorization Review SLA Breach Likelihood template. Payers can use these predictions to review top factors that cause delays and ensure SLA-compliance by acting on them.

[Assign Permission Sets for Prior-Authorization Review SLA Breach Predictions](#)

Assign permission sets to give the right access to the Prior-Authorization Review SLA Breach Predictions app.

[Set Field-Level Security for Analytics Integration Users](#)

Provide integration users access to all fields used in the app that's created using the Prior-Authorization Review SLA Breach Likelihood template.

[Set Up Your Salesforce Org to Use the Prior-Authorization Review SLA Breach Likelihood Template](#)

Install the Health Cloud managed package, set up Utilization Management, and enable Intelligent Sales before using the Prior-Authorization Review SLA Breach Likelihood template.

[Sync Health Cloud Object Data](#)

The machine learning model requires features from certain Salesforce objects to generate the SLA breach score for prior authorization requests.

[Create an App to Predict SLA Breaches for Prior-Authorization Reviews](#)

Use the Prior-Authorization Review SLA Breach Likelihood template to create an app that provides prediction scores about the likelihood of prior authorization requests breaching service-level agreements.

[Recipes, Datasets, and Dashboards](#)

The app created using the Prior-Authorization Review SLA Breach Likelihood template creates two customizable recipes, three datasets, and a dashboard.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and CRM Analytics for Healthcare

Assign Permission Sets for Prior-Authorization Review SLA Breach Predictions

Assign permission sets to give the right access to the Prior-Authorization Review SLA Breach Predictions app.

These are the required permission sets for the Prior-Authorization Review SLA Breach Predictions app.

Permission Set	Description	Role or User
CRM Analytics Plus User	Grants access to read only features enabled by the CRM Analytics Plus license.	User
HealthCare Analytics User	Grants access to view the HealthCare Analytics apps.	User
CRM Analytics Plus Admin	Grants access to all features enabled by the CRM Analytics Plus license.	Admin
HealthCare Analytics Admin	Grants access to create and customize HealthCare Analytics apps..	Admin
Action Plans	Grants access to the Action Plans feature.	Integration User
Health Cloud Utilization Management	Grants read access to Health Insurance records and create, read, and update access to Utilization Management records.	Integration User
Industries Visit	Enables Industries Visit features.	Integration User

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and CRM Analytics for Healthcare

USER PERMISSIONS

To assign user permissions:

- Assign Permission Sets

1. From Setup, enter *Permission* in the **Quick Find** box, then select **Permission Sets**.
2. Click the permission set to assign, for example, **CRM Analytics Plus User**, and then click **Manage Assignments**.
3. Click **Add Assignments**.
4. Select the users to assign this permission set, then click **Next**.
5. Click **Assign**, then click **Done**.
6. Repeat these steps for each permission set to assign.

Set Field-Level Security for Analytics Integration Users

Provide integration users access to all fields used in the app that's created using the Prior-Authorization Review SLA Breach Likelihood template.

1. Go to the object management settings for the object whose field-level security you want to edit and select **Fields & Relationships**.
2. Select the field you want to edit, and then click **Set Field-Level Security**.
3. Select **Visible** for the Analytics Cloud Integration User.
4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and CRM Analytics for Healthcare

USER PERMISSIONS

To assign user permissions:

- Manage Profiles and Permission Sets
- AND
- Customize Application

Set Up Your Salesforce Org to Use the Prior-Authorization Review SLA Breach Likelihood Template

Install the Health Cloud managed package, set up Utilization Management, and enable Intelligent Sales before using the Prior-Authorization Review SLA Breach Likelihood template.

1. Install the Health Cloud managed package. For information about installing the Health Cloud managed package, see [Install Health Cloud Packages](#).
2. To be sure Utilization Analytics dashboards work correctly, install and set up Utilization Management. For information about setting up Utilization Management, see [Utilization Management Setup Checklist](#).
3. Enable the Intelligent Sales preferences. For information about enabling Intelligent Sales, see [Enable Intelligent Sales](#).

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and CRM Analytics for Healthcare

Sync Health Cloud Object Data

The machine learning model requires features from certain Salesforce objects to generate the SLA breach score for prior authorization requests.

Add these objects to the data sync:

- Care Diagnosis
- Care Request
- Care Request Drug
- Care Request Item
- Case

Sync these fields:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and CRM Analytics for Healthcare

Object	Field
Care Diagnosis	Care Request ID
Care Diagnosis	Care Request Case ID
Care Request	Actual Admission Date
Care Request	Actual Discharge Date
Care Request	Admission Source
Care Request	Admission Type
Care Request	Care Request Case ID
Care Request	Clinical Case Type
Care Request	Created Date
Care Request	Criteria Met
Care Request	Cumulative Length of Stay
Care Request	Current Level of Care
Care Request	Decision Date
Care Request	Decision Reason
Care Request	Due Date
Care Request	Extended Request
Care Request	Facility Room Bed Type
Care Request	First Reviewer Notes
Care Request	General Practitioner Verbal Notification Date
Care Request	General Practitioner Written Notification Date
Care Request	Info Received Date
Care Request	Info Requested Date
Care Request	Medical Director Notes
Care Request	Member Date of Birth
Care Request	Member Written Notification Date
Care Request	Member Verbal Notification Date
Care Request	Next Review Date
Care Request	Par Provider
Care Request	Place of Service
Care Request	Received Date

Object	Field
Care Request	Reopened Date
Care Request	Requested Date
Care Request	Requested Length of Stay
Care Request	Requested Level of Care
Care Request	Requester Type
Care Request	Requesting Practitioner License
Care Request	Requesting Practitioner Verbal Notification Date
Care Request	Requesting Practitioner Written Notification Date
Care Request	Requesting Practitioner Specialty
Care Request	Review Date
Care Request	Scheduled Admission Date
Care Request	Scheduled Discharge Date
Care Request	Servicing Practitioner License
Care Request	Servicing Practitioner Specialty
Care Request Drug	Care Request Case ID
Care Request Drug	Care Request ID
Care Request Drug	Days Supply
Care Request Drug	Frequency
Care Request Drug	Therapy Duration
Care Request Drug	Units
Care Request Item	Ambulance Transport Type
Care Request Item	Care Request ID
Care Request Item	Care Request Case ID
Care Request Item	Code Type
Care Request Reviewer	Reviewer Type
Care Request Reviewer	Status
Case	Case Origin
Case	Case Reason
Case	Closed Date
Case	Owner ID

Object	Field
Case	Priority
Case	Status
Case	Type

SEE ALSO:

[Add and Remove Local Salesforce Objects and Fields from Data Sync](#)

Create an App to Predict SLA Breaches for Prior-Authorization Reviews

Use the Prior-Authorization Review SLA Breach Likelihood template to create an app that provides prediction scores about the likelihood of prior authorization requests breaching service-level agreements.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and CRM Analytics for Healthcare

1. From the App Launcher, find and select **Analytics Studio**.
2. Click **Create**, then select **App**.
3. Select **Prior-Authorization Review SLA Breach Likelihood**, then click **Continue**.
4. Review the preview page, and then click **Continue**.
5. Choose to create an app or to use settings from an existing app, and then click **Continue**.
Analytics runs a compatibility check of the data in Salesforce.
 - a. If the compatibility check fails, perform the instructions in the error message to resolve the issues, and then try to create the app again.
 - b. If the compatibility check completes successfully, click **Looks good, next**.
6. Configure these settings in the Care Request Workflow Dates & Tolerance Limit section:
 - a. Select a field that stores the start date and time of prior authorization requests.
 - b. Select a field that stores the end date and time of prior authorization requests.
 - c. Select the number of minutes that prior authorization requests can take beyond the end date and time without breaching the SLA.
For example, if you select 30 minutes, prior authorization requests that exceed 30 minutes after the due date and time are considered as breaching the SLA.
 - d. Click **Looks good, next**.
7. Select fields with data that can improve your predictions and click **Looks good, next**.
8. Enter a name for your app, and then click **Create**.
Creating the app takes a few minutes.
9. To view your app after the process is complete, refresh the page.

The app now runs preconfigured recipes to create example, prediction, and predicted score datasets, and a dashboard.

 **Important:** The Einstein Discovery model that gets the predictions runs only when:

- A minimum of 400 care requests records are available for filtering, and

- After filtering care request records based on the app settings, a minimum of 100 care request records that breached the SLA and 100 request records that haven’t breached the SLA are available.

SEE ALSO:

[Salesforce Help: Einstein Discovery Capacities and Limits](#)

Recipes, Datasets, and Dashboards

The app created using the Prior-Authorization Review SLA Breach Likelihood template creates two customizable recipes, three datasets, and a dashboard.

Recipes and Datasets

The app created using the Prior-Authorization Review SLA Breach Likelihood template creates two recipes, Care Request Workflow Duration Datasets and SLA Breach Predictions. The recipes create example, prediction, and predicted score datasets.

Prior-Authorization Review SLA Breach Predictions Dashboard

Show the likelihood of a prior authorization request breaching service-level agreements (SLA) by adding the Prior-Authorization Review SLA Breach Predictions dashboard to a care request or case record page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and CRM Analytics for Healthcare

Recipes and Datasets

The app created using the Prior-Authorization Review SLA Breach Likelihood template creates two recipes, Care Request Workflow Duration Datasets and SLA Breach Predictions. The recipes create example, prediction, and predicted score datasets.

Table 9: Recipes and Datasets

Recipe	Description	Output
Care Request Workflow Duration Datasets	Evaluates cases, care requests, care request drugs, care request items, and care diagnoses to create an example dataset that Einstein learns from and a prediction dataset which Einstein uses to provide predictions.	• Care Request Example dataset • Care Request Workflow Duration Prediction dataset
SLA Breach Predictions	Evaluates the prediction dataset to get the SLA breach score for prior authorization requests. The recipe also identifies top three factors that possibly contribute to SLA breaches.	Predicted dataset

 **Important:** If you schedule the Care Request Workflow Duration Datasets recipe to run

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and CRM Analytics for Healthcare

Recipe	Description	Output
at a specific time, schedule the SLA Breach Predictions recipe to run after the recipe runs. Scheduling an event-based run for SLA Breach Predictions recipe ensures that it consumes the latest dataset.		

You can modify the recipes in these scenarios:

- Your schema deviates from the Health Cloud schema.
- A custom field of an existing entity changes.
- The use of feature data changes from an existing entity to a custom entity.
- The data doesn't load properly.
- The app stops working because of incorrect data values.

SEE ALSO:

[Salesforce Help: Manage Recipes](#)

[Salesforce Help: Run Data Sync and Recipes to Create and Refresh Datasets](#)

[Salesforce Help: Schedule a Recipe to Run Automatically](#)

Prior-Authorization Review SLA Breach Predictions Dashboard

Show the likelihood of a prior authorization request breaching service-level agreements (SLA) by adding the Prior-Authorization Review SLA Breach Predictions dashboard to a care request or case record page.



Note: If you schedule the Care Request Workflow Duration Datasets recipe to run at a specific time, edit the last modified date query of the dashboard and specify the same time. Editing the last modified date query ensures that the estimated prediction time on the dashboard is accurate.

SEE ALSO:

[Salesforce Help: Embed Dashboards in Lightning Pages](#)

[Prior-Authorization Review SLA Breach Prediction Dashboard and Model](#)

[Edit a Query](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud and CRM Analytics for Healthcare

Manage Commercial Excellence

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, and create account manager targets.

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 orders are booked and use this insight to monitor and enforce compliance to the agreement.

To make sales agreements available to your users, see [Manage Long-Term Business with Sales Agreements](#).

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

All

Search Sales Agreements and more...

Manufacturing

Home

Accounts

Contacts

Sales Agreements

Orders

Opportunities

Products

Chatter

More

Star

Grid

Help

Settings

Notifications

User

Sales Agreement

Quarterly Volume Agreement

EditDeleteClone

Account

Status

Start Date

End Date

Schedule Frequency

Total Agreement Amount

Sutter Health

Draft

7/1/2019

12/31/2020

Quarterly

\$13,650,000.00

Details

Agreement Terms

Related

Sales Agreement

All Products

Refresh

PRODUCT NAME	METRIC	TOTAL	Jul '19 to Sep '19	Oct '19 to Dec '19
KN103 Knee	Planned Quantity	1,000	167	167
	Actual Quantity	0	0	0
	Sales Price (USD)	5,000	5,000	5,000
	Discount Percentage	10	10	10
	Planned Amount (USD)	4,500,000	751,500	751,500
KN104 Knee	Planned Quantity	2,000	334	334
	Actual Quantity	0	0	0
	Sales Price (USD)	3,000	3,000	3,000

Sales Agreement Products (3)

KN103 Knee

Sales Price: \$5,000.00

Initial Total ... 1,000

Discount Per... 10.00%

KN104 Knee

Sales Price: \$3,000.00

Initial Total ... 2,000

Discount Per... 15.00%

KN105 Knee

Sales Price: \$1,500.00

Initial Total ... 3,000

Discount Per... 10.00%

View All

This sample sales agreement tracks anticipated shipments of a product at three price levels.

Sales Agreement Product

KN103 Knee

List Price

Sales Price

Initial Total Quantity

Total Planned Quantity

Discount Percentage

\$5,000.00

\$5,000.00

1,000

1,000

10.00%

Related

Details

Information

Name

KN103 Knee

Sales Agreement

Quarterly Volume Agreement

List Price

\$5,000.00

Initial Total Quantity

1,000

Total Planned Quantity

1,000

Total Proposed Planned Quantity

Product

KN103 Knee

Pricebook Entry

KN103 Knee

Sales Price

\$5,000.00

Discount Percentage

10.00%

Total Planned Amount

\$4,500,000.00

Total Proposed Planned Amount

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.

To make forecasting available to your users, see [Create Holistic Forecasts with Advanced Account Forecasting](#).

Account
Great Health Clinic

RelatedDetailsNewsForecast

Forecast

All Quantity Metrics

Show GrowthRecalculate

Product Name	Metric	Total	Feb'19	Mar'19
HP101 Hip	Opportunity Quantity	0	0	0
	Last Year's Orders Quantity	0	0	0
	Current Orders Quantity	100	0	0
	Sales Agreement Planned Quantity	0	0	0
	Forecasted Quantity	100	0	0
HP102 Hip	Opportunity Quantity	0	0	0
	Last Year's Orders Quantity	0	0	0
	Current Orders Quantity	200	0	0
	Sales Agreement Planned Quantity	0	0	0
	Forecasted Quantity	200	0	0

Account Manager Targets

Convert your business growth plans into measurable targets with Account Manager Targets. Create targets for revenue, quantity, and other measure types and allocate specific target percentages to your team members. Strategically distribute targets by products and accounts to meet market demands and organizational requirements. Distribute targets by month, quarter, or year for better visibility and periodic reviews. Update target values at any time and redistribute targets as needed.

To make target managing available to your users, see [Strategically Grow Your Business with Account Manager Targets](#).

Manage Inventories, Surgical Cases, and Cycle Counts with Intelligent Sales

Maximize productivity for your sales teams by giving them the tools required to efficiently plan and execute their surgical case visits and cycle counts. Give your teams valuable insight into field inventory and impacted revenue, with visits-based product availability projections. If someone has a product shortfall, they can request a product transfer from a nearby inventory. Reps can also blaze through cycle counts with fewer errors using their mobile devices.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences



Learn About Intelligent Sales for Health Cloud

Get Oriented



Get to know Intelligent Sales.

- [Use Intelligent Sales Agreements and Forecasting](#)
- [Use Intelligent Sales to Manage Sales Visits and Inventory](#)
- [Explore with CRM Analytics](#)

Data Model



Explore the Health Cloud data models and objects that support your sales team.

- [Intelligent Sales Data Model](#)

Set Up and Manage Intelligent Sales

[Visit Types in Intelligent Sales](#)

Intelligent Sales helps your sales reps and sales operations teams schedule visits for your business. Visits can be either surgical case visits for your reps to sell their products, or cycle count visits for your reps to audit their inventories. Visit types are created using the Work Type object.

[User Personas for Intelligent Sales](#)

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.

[The Intelligent Sales Data Model](#)

Intelligent Sales uses many objects to work its magic for your sales teams. But not all user roles interact directly with these objects. Admins interact with them more than sales reps 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 set up access.

[External Data Sources for Expected Quantity in Cycle Counts](#)

Expected quantities in cycle counts are automatically calculated from product item records in Intelligent Sales. However, if you need to use external data sources for these numbers, use our `IFetchInventoryCount` Apex Interface with your own custom Apex classes and methods.

[Configure the Page Layouts for Product Transfer and Product](#)

Configure the page layouts of Product Transfer and Product before your users start using Intelligent Sales. The default layout doesn't include Source Location, Status, and Expected Pickup Date fields for Product Transfer, and the Serialized field for Product. You must add these fields to the page layouts.

[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.

[Intelligent Sales Sample Flows for Field Inventory Management](#)

Manage your serialized inventories using the Intelligent Sales Sample Flows for Field Inventory Managements. Capture and fulfill product requests and ensure all products are accounted for by performing cycle counts with built-in business processes designed to optimize field inventory management. To ensure that the flows meet your business' unique needs, flows are customizable.

Visit Types in Intelligent Sales

Intelligent Sales helps your sales reps and sales operations teams schedule visits for your business. Visits can be either surgical case visits for your reps to sell their products, or cycle count visits for your reps to audit their inventories. Visit types are created using the Work Type object.

Surgical Case Visits

Your sales operations team schedules surgical case visits when they receive an order for your products from a provider. Your reps visit the provider on the day of the procedure to fulfill the order and perform typical actions like registering the patient's details for your organization or authorizing the order for handoff. In some cases, for certain products, sales reps may schedule surgical case visits directly too. Intelligent Sales supports these tasks out of the box with our Patient Registration and Order Authorization flows. If your reps need to perform more tasks during a visit, you can create flows and add them to your action plan templates.

And that's not all. Intelligent Sales gives your reps and sales operations teams visibility into product shortfalls, with estimated revenue impact figures, for their upcoming surgical case visits. If your rep has a shortfall, either the rep or their sales operations contact can easily arrange for a product transfer from a nearby rep or warehouse.

Cycle Count Visits

Cycle count visits are scheduled for inventories to check the numbers available on record against the numbers that are physically present in inventories. Cycle counts can be either planned or ad hoc. Sales operations teams schedule planned counts at regular intervals using their desktops. Sales reps schedule ad hoc counts using their mobile devices.

Intelligent Sales helps your teams through these counts by pulling in the required inventory numbers from your records in Salesforce. The barcode scanner in the mobile app also saves your reps the hassle of manually entering every serial number. And the app automatically adds the scanned serial numbers to its list and tallies the numbers, so reps don't have to keep track of how many products they've counted.

Intelligent Sales also supports blind cycle counts. A blind cycle count is a cycle count where the sales rep isn't aware of the expected inventory count at the location. All you have to do is create a work type that's marked for blind cycle counts.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

User Personas for Intelligent Sales

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.

- **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.
- **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.
- **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 rely solely on the mobile app for these visits.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

The Intelligent Sales Data Model

Intelligent Sales uses many objects to work its magic for your sales teams. But not all user roles interact directly with these objects. Admins interact with them more than sales reps or other field-oriented roles.

The Intelligent Sales data model includes these objects.

- **Account:**
 - Hospitals and providers that your organization deals with.
 - Patients that your devices are registered for in a surgical visit. If you use the Patient Registration flow in your action plan template, it automatically creates these records for you when the visit is completed. 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.
- **Contact:** The point of contact for your sales reps at a given account location.
- **Location:** The locations of different hospitals and your sales reps' inventories.
- **Address:** The address details for your locations.
- **Product:** The products your organization provides.
- **Product Item:** A combination of a product, the location of its inventory, and the quantity available at that location. If your product is serialized, the initial quantity for the Product Item record must be zero. Any change to the quantity is automatically handled based on changes in Serialized Product.
- **Serialized Product:** The serial numbers of individual products and the product item records that they're associated with. Each new serialized product that's associated with a product item record automatically increases the Product Item record quantity by one.
- **Product Fulfillment Location:** A combination of records that ties a sales rep to an inventory, an account, and an account location.

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

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

- **Product Availability Projection:** The 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 these records for you.
- **Product Transfer:** Product transfers requested by sales reps when they have shortfalls. The visit creation flow creates these records for you.
- **Product Request:** The date a sales rep needs a transfer to happen. The visit creation flow creates these records 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 these records for you.
- **Action Plan Template:** Reusable templates that add assessment tasks to visits.
- **Assessment Task:** Tasks sales reps complete during a surgical visit. The visit creation flow creates these records for you.
- **Generic Visit Task:** The cycle count task for a specific product. Generic visit task records act as definition records that the system uses to create instance records for specific visits. At the time of execution, instance records for visit tasks are automatically created for a visit based on the Generic Visit Task definition record.
- **Generic Visit Task Context:** The product item context for a generic visit task. Because these records must be associated with product item records, you need to create separate generic visit task context records for every product at every inventory location. Generic visit task context records act as definition records that the system uses to create instance records for specific visits. At the time of execution, instance records for visit task context are automatically created for a visit based on the Generic Visit Task Context definition record.
- **Generic Visit Task Context Relation:** The junction object that connects generic visit task records with generic visit task context records. These records act as definition records that the system uses to create instance records for specific visits. At the time of execution, instance records for visit task context relation are automatically created for a visit based on the Generic Visit Task Context Relation definition record.
- **Generic Visit Key Performance Indicator:** The expected quantities and the counted quantities of a product at an inventory location. As an admin, you only create a template record in this object, leaving all the value-related fields blank. Instance records are created automatically when a cycle count is initiated, and the value-related fields are automatically filled during the cycle count. At the time of execution, instance records for key performance indicators are automatically created for a visit based on the Generic Visit Key Performance Indicator definition record. Actual and expected product values are automatically populated during a visit based on your inventory records in Salesforce.
- **Assessment Indicator Definition:** The data type for the quantities recorded in generic visit key performance indicator records. For cycle counts, the data type must always be Number.
- **Work Type:** The duration-related properties of a visit. For surgical visits, select the Is Used For Inventory Projection checkbox. For cycle count visits, select the Cycle Counting checkbox, and when applicable, the Blind Cycle Counting checkbox.
- **Visit:** Visits created by sales teams to fulfill product orders from accounts or perform cycle counts for their inventories. The visit creation flow creates these records for you. This data model is centered around the Visits object.
- **Visitor:** The sales reps assigned to different visits. The visit creation flow creates these records for you.
- **Visited Party:** The contacts sales reps visit at accounts. The visit creation flow creates these records for you.
- **Order:** This object isn't a required part of the Intelligent Sales data model and is only used with the Order Authorization flow. When you use the order authorization flow in your action plan template, an order record is automatically created with 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 set up 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 Standard Object Permissions section.
8. Select **Read**, **Create**, **Edit**, and **Delete** for Visits, Product Items, and Product Fulfillment Locations.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

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9. Deselect **View All** for Visits, Product Items, and Product Fulfillment Locations.

10. Save your changes.

Now you're ready to set up your Apex Triggers.

[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.

SEE ALSO:

[User 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 code.

EDITIONS

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```
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;
        }
        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;
    }
    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);
            }
        }
    }
}

```

d. Select File > Save.

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.

```

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
ProductFulfillmentLocationShare where UserOrGroupID = :userId and RowCause='Manual'];

            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;
    }
}

```

d. Select File > Save.

Now sales reps can see only the inventories they're responsible for.

External Data Sources for Expected Quantity in Cycle Counts

Expected quantities in cycle counts are automatically calculated from product item records in Intelligent Sales. However, if you need to use external data sources for these numbers, use our `IFetchInventoryCount` Apex Interface with your own custom Apex classes and methods.

1. In the Developer Console, select **File > New Apex Class**
2. Implement this Apex interface in the Apex class:

```
public class UpdateInventory implements healthcloudext.IFetchInventoryCount{
//Sample Apex Class to fetch Inventory count from external Inventory Location (Input
parameter : visitId)
    public Map<Id,Integer> getInventoryCount(String visitId){
        Map<Id,Integer> sample = new Map<Id,Integer>();
        //Logic to fetch numbers from external data source
        //Use Apex code to connect to external API and fetch result
        //Return Type: Map of Product Item Id against its Count(Integer Value)
        return sample;
    }
}
```

If any record against `ProductItemId` is missing a value, and that product item already has a value for expected quantity in the Intelligent Sales system, then the value in the Intelligent Sales system is used instead.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

Configure the Page Layouts for Product Transfer and Product

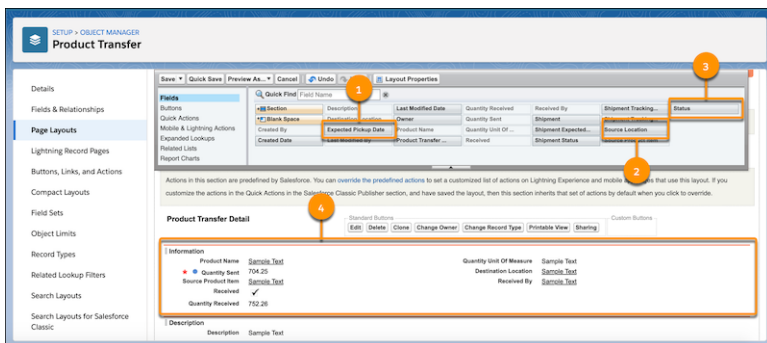
Configure the page layouts of Product Transfer and Product before your users start using Intelligent Sales. The default layout doesn't include Source Location, Status, and Expected Pickup Date fields for Product Transfer, and the Serialized field for Product. You must add these fields to the page layouts.

1. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**. Next, click **Product Transfer**, and then go to the Page Layouts section.
2. Select **Product Transfer Layout**.
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.

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5. Similarly, from object management settings for **Product**, go to **Page Layout** and select **Product Layout**.
6. From the Fields menu, drag **Serialized** onto an editable area of the page.
7. 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.

Capabilities of Intelligent Sales such as projecting product shortfalls, and creating and executing site visits, among others, help your med tech sales team only if the right data is in the right object. For instance, make sure that your entries in objects like Location, Product Item, and Product Fulfillment Location have the right attributes.

EDITIONS

Available in: **Lightning Experience**

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1. [Set Up Work Types for Visits](#)

Use work type records to create visit types. Work types determine the kind of visits that are created using the New Visit Flow on the Intelligent Sales home page. You can create work types for surgical case visits, cycle count visits, or blind cycle count visits. The work type used to create a visit also determines whether that visit is factored into product shortfall projections.

2. [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.

3. [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're responsible for.

4. [Set Up Visit Tasks and Action Plan Templates for Cycle Counts](#)

Action plan templates define the sets of tasks that your sales reps perform during visits. Our system automatically creates visit tasks for scheduled cycle count visits using the details you define in these action plan templates.

5. [Set Up Action Plan Templates for Surgical Case Visits](#)

Action plan templates define the sets of tasks your sales reps perform during visits. Our system automatically creates Assessment Task records for scheduled surgical case visits using the details you define in these action plan templates. Action plan templates created for surgical case visits use flows as visit tasks for your sales reps.

6. [Register and Authorize Patient Product Orders Faster with Flows](#)

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 Work Types for Visits

Use work type records to create visit types. Work types determine the kind of visits that are created using the New Visit Flow on the Intelligent Sales home page. You can create work types for surgical case visits, cycle count visits, or blind cycle count visits. The work type used to create a visit also determines whether that visit is factored into product shortfall projections.



Note: Add the **Is Used For Inventory Projection**, **Cycle Counting**, and **Blind Cycle Counting** fields in the Work Type page layout. Also make sure the field-level security for these three fields is set to visible for your users.

1. From Setup, enter *Intelligent Sales Settings* in the Quick Find box and select **Intelligent Sales Settings**.
2. Click **New Work Type**.
3. Enter a name, estimated duration, and duration type for the work type.
4. If you're creating a work type for surgical cases, select **Is Used For Inventory Projection**. If the work type is for cycle counts, leave this checkbox unselected.
5. If you're creating a work type for cycle counts, select **Cycle Counting**. If the work type is for surgical cases, leave this checkbox unselected.
6. If you're creating a work type for blind cycle count, select **Blind Cycle Counting** after you select **Cycle Counting**.
7. Save your work.

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Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Health Cloud for Life Sciences

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. Select **Business** record type and click Next.
 - c. Enter the account name and other relevant information.
 - d. 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.

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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.



Note: To use this account location as a consigned inventory location also, select **Inventory Location**.

- 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're 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

- e. Save your record.
 - f. On the record page for your new product, go to the Related tab and click **Add Standard Price**.
 - g. Make sure that the price book selected is the standard price book and enter the list price.
 - h. Save your changes.
- ### 2. Add an inventory location.
- a. From the App Launcher, go to Locations and click **New**.
 - b. Add 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.

Important: Be sure to enter a value for Zip/Postal Code. If this value is blank, or if the address 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.

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- 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 Products 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 account this user is responsible for.

If you're creating a product fulfillment location record to represent a warehouse that doesn't directly supply products to accounts, 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.

If you're creating a product fulfillment location record to represent a warehouse that doesn't directly supply products to accounts, leave this field blank.

- h. Save your record.



Important: It's critical that you set up all the required 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. Missing data and inconsistent records interfere with the product availability projections and revenue risk estimations.

Set Up Visit Tasks and Action Plan Templates for Cycle Counts

Action plan templates define the sets of tasks that your sales reps perform during visits. Our system automatically creates visit tasks for scheduled cycle count visits using the details you define in these action plan templates.

1. Create a Generic Visit Task record.

Generic Visit Task records are used as templates for creating Visit Task records when a cycle count is scheduled. You can use the same Generic Visit Task record for all products and all inventories in your organization, or you can use dedicated records for each product in your organization. In either case, only the tasks related to the products selected for a count appear on your rep's list of tasks for that count.

- a. From the App Launcher, find and select **Generic Visit Tasks**.
- b. Click **New**.
- c. Enter a name for the task.
Count Products
- d. Set the status to **Is Defined**.
- e. Leave all other fields blank and save your work.

2. Create a Generic Visit Task Context record.

Generic Visit Task Context records define generic visit tasks in the context of a specific inventory. Create individual Generic Visit Task Context records for each product in each inventory. For instance, if your organization has heart valves at warehouses Zeta and Beta, create Generic Visit Task Context records for heart valves at each warehouse.

- a. From the App Launcher, find and select **Generic Visit Task Contexts**.
- b. Click **New**.
- c. Enter a name for the record. We recommend including the name of the inventory so that it's easier for you to identify it later.
Count Heart Valves at Warehouse Zeta
- d. Set the Context field to Product Item and select a Product Item record.
- e. Set the status to **Is Defined**.
- f. Leave all the other fields blank and save your work.

3. Create an Assessment Indicator Definition record.

Assessment Indicator Definition records define the data type for the values stored in Generic Visit Key Performance Indicator records. We'll talk about Generic Visit Key Performance Indicators in a bit. For now, let's create an Assessment Indicator Definition record and configure it for the Number data type. You can create a single record for your org and reuse it for all the Generic Visit Key Performance Indicator records you create for cycle counts.

- a. From the App Launcher, find and select **Assessment Indicator Definition**.
- b. Click **New**.
- c. Enter a name for the record and select **Number** in the **Assessment Indicator Definition** picklist.
- d. Save your work.

4. Create a Generic Visit Key Performance Indicator record.

The expected quantities of products at inventory locations and the actual quantities counted during cycle counts are stored in Key Performance Indicator (KPI) records. The system creates these KPI records from the templates you define in the Generic Visit Key Performance Indicator object. A Generic Visit Key Performance Indicator record is connected to the Generic Visit Task Context record

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for which it's storing expected and counted quantities. Create a separate Generic Visit Key Performance Indicator record for each Generic Visit Task Context record.

- a. Go to the **Related** tab on the Generic Visit Task Context record that you created earlier.
- b. Select **New** next to Generic Visit Key Performance Indicator.
- c. For the **Visit Task Context** field, select the Generic Visit Task Context record you just came from.
This field is auto-populated if you're creating the record from the Related tab of the Generic Visit Task Context record.
- d. In the **Assessment Indicator Definition** field, select the Assessment Indicator Definition record you created earlier.
- e. Select a unit of measure and leave the remaining fields blank.
- f. Save your work.

5. Create a Generic Visit Task Context Relation record.

A Generic Visit Task Context Relation record connects a Generic Visit Task Context record to its related Generic Visit Task record.

- a. Go to the **Related** tab on the Generic Visit Task Context record that you created earlier.
- b. Click **New** next to Generic Visit Task Context Relations.
- c. In the **Visit Task** field, select the Generic Visit Task record you created earlier.
- d. In the **Visit Task Context** field, select the Generic Visit Task Context record you created earlier.
This field is auto-populated if you create this record from the Related tab of the Generic Visit Task Context record.
- e. Save your work.

6. Create an action plan template.

An action plan template defines the tasks that reps perform during a visit.

- a. From the App Launcher, find and select **Action Plan Templates**.
- b. Click **New**.
- c. Enter a name and select the template owner.
- d. Make sure that the option that lets users add items to action plans isn't selected.
- e. In the Action Plan Type field, select **Assessment Execution**.
- f. In the Target Object field, select **Visits**.
- g. Save your work.

We're almost done. Just one more step to go!

7. Add your visit tasks to your action plan template and publish it.

- a. In the Items tab of your action plan template, click **New Visit Task**.



Warning: Only add Visit Tasks to your templates for cycle counts.

- b. In the **Visit Task Type** field, select **GenericVisitTask**.
- c. In the **Visit Task** field, select the Generic Visit Task record you created for the action plan template.
- d. Select the **Is Required** checkbox.
- e. Save your choices.
- f. And finally, click **Publish Template** on the Action Plan Template record.

Set Up Action Plan Templates for Surgical Case Visits

Action plan templates define the sets of tasks your sales reps perform during visits. Our system automatically creates Assessment Task records for scheduled surgical case visits using the details you define in these action plan templates. Action plan templates created for surgical case visits use flows as visit tasks for your sales reps.

Before you create an action plan template for a surgical case visit, 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, find and select **Action Plan Templates**.
- b. Click **New**.
- c. Enter a name and description.
- d. Make sure that **Let users add items to action plans** isn't selected.



Note: We recommend not selecting **Let users add items to action plans** to prevent sales reps from adding unauthorized tasks to their action plans.

- e. In the Action Plan Type field, select **Visit Execution**.
- f. In the Target Object field, select **Visit**.
- g. Save your work.

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 a flow to add to your template.
- c. If you want this task to be mandatory during visits, select **Required**.
- d. Save your changes.
- e. Add more task flows as needed.
- f. After you add all task flows for your template, click **Publish Template**.

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Register and Authorize Patient Product Orders Faster with Flows

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

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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.

Intelligent Sales Sample Flows for Field Inventory Management

Manage your serialized inventories using the Intelligent Sales Sample Flows for Field Inventory Managements. Capture and fulfill product requests and ensure all products are accounted for by performing cycle counts with built-in business processes designed to optimize field inventory management. To ensure that the flows meet your business' unique needs, flows are customizable.

With sample flows such as Trial Request Management and Loan Request Management, your customers can take your products for a test drive and return them safely to you. If you have products you give out as samples, then the Sample Request Management flow is for you. You even have flows designed to facilitate the process of product retrieval and efficiently manage cycle counts. Leverage the full potential of these flows by customizing them as per your unique business needs.

Let's take a quick look at the sample flows and what they can do for your business.

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Sample Request Management (Request Capture and Request Fulfillment)

This flow captures the provider's request for a sample product, then fulfills the request when the product is delivered to the provider. It also updates the serialized product inventory and captures the provider's e-signature for regulatory compliance.

Trial Request Management (Request Capture and Request Fulfillment)

This flow captures the provider's request for a trial product, then fulfills the request when the product is delivered to the provider. It links the request with a new or existing opportunity, creates an order, and updates the serialized product inventory. The flow also captures the provider's e-signature for regulatory compliance.

Loan Request Management (Request Capture and Request Fulfillment)

This flow captures the provider's request for a trial product, then fulfills the request when the product is delivered to the provider. It also creates an order for the delivered product, updates the serialized product inventory, and captures the provider's e-signature for regulatory compliance.

Product Retrieval Management (Retrieval of Trial and Loan Products)

This flow enables the retrieval of a product provided as a loan or a trial. It captures the product condition details and quantity at the time of retrieval and updates the serialized product inventory. It also captures the provider's e-signature for regulatory compliance.

Mark as Lost

The Mark as Lost cycle count flow updates the serialized product inventory by marking a product as lost during a cycle count.

Relate to Order

The Relate to Order cycle count flow updates the serialized product inventory by relating a product to a new or existing order during a cycle count. You also have the option of linking the order with an existing visit for the selected account.

To learn more about the sample flows and get instructions for deploying them to Salesforce, see [Accelerator: Intelligent Sales Sample Flows](#).

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 helps care team members access Health Cloud data on mobile devices using Field Service.

2. [Set a Default List View for the Field Service Mobile App for Health Cloud](#)

Set a default Service Appointments list view for your mobile users, so they see the most relevant Service Appointments when they log in.

3. [Connect Flows to the Field Service Mobile App for Health Cloud](#)

Create app extensions that connect flows to the Field Service Mobile App for Health Cloud.

SEE ALSO:

[Field Service](#)

Install the Health Cloud Package Extension for Field Service

This optional extension package delivers the process that helps 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.

2. Paste this URL for the package into your browser navigation bar:
<http://industries.force.com/healthcloudextensionfieldservice> and press **Enter**.

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](#)

[Install Health Cloud Packages](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Set a Default List View for the Field Service Mobile App for Health Cloud

Set a default Service Appointments list view for your mobile users, so they see the most relevant Service Appointments when they log in.

 **Note:** Before you begin, create a Service Appointments list view—for example, Service Appointments this month—to use as the default list view for mobile users. See [Create a List View](#) for more information.

1. From Setup, in the Quick Find box, enter *Field Service Mobile Settings*, and then select **Field Service Mobile Settings**.
2. Click  next to Field Service Mobile Settings, then click **Show Details**.
3. Under **Customization**, click  next to Default List View Developer Name, and add the API name of the list view you want as the default.
4. Save your work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To edit Field Service Mobile Settings:

- Customize Application

Connect Flows to the Field Service Mobile App for Health Cloud

Create app extensions that connect flows to the Field Service Mobile App for Health Cloud.

After you install the Health Cloud Package Extension for Field Service, create app extensions that connect the installed flows to the Field Service Mobile App for Health Cloud. Connecting these flows allows your mobile users to perform common tasks from the mobile app.

1. In Setup, in the Quick Find box, enter *Field Service Mobile Settings*, then select **Field Service Mobile Settings**.
2. Click  next to Field Service Mobile Settings, then click **Show Details**.
3. Under **App Extensions**, click **New**.
4. Enter a label for your app extension, for example, *Close Care Plan Tasks*. This label is what your users see in the app.
5. For **Type**, select **Flow**.
6. Enter a name that expresses the purpose of the flow, for example, *Close Care Plan Tasks*.
7. For **Launch Value**, enter the API name of the flow, for example, *CloseCarePlanTasks*.
8. For **Scoped to Object Types**, which controls where users can find and activate the flow, enter the API name of the object. If you want to scope the flow to multiple objects, separate the object names with a comma and no space. For example, if you enter *Account, Contact*, users can activate the flow from the detail page of an account or contact. To create an unscoped flow action so that users can activate the flow from multiple screens, leave this field blank.
9. Save your work.
10. Create an app extension for each of the flows installed with the Health Cloud Package Extension for Field Service.

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Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

USER PERMISSIONS

To update Field Service Mobile Settings:

- Customize Application

View Events Using Enhanced Timeline in Health Cloud

The Enhanced Timeline component shows key events relating to a person or a resource in one place, so your users can see information from a single source of truth.

[How Enhanced Timeline Works in Health Cloud](#)

A timeline lets users see data from objects as a sequence of events happening over time. You determine what information shows on the timeline by choosing the base (or primary) object and the related objects. You can use standard objects or custom objects.

[Set Up an Enhanced Timeline in Health Cloud](#)

Configure interactive timelines that facilitate access to information about patients.

[Add Enhanced Timeline to a Record Page](#)

To let your Health Cloud users see the Timeline and its data, add it to a Lightning record page.

[Add Enhanced Timeline to Your Experience Cloud Site](#)

To let people use Timeline without logging in to Health Cloud, add it to your Experience Cloud site.

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Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

How Enhanced Timeline Works in Health Cloud

A timeline lets users see data from objects as a sequence of events happening over time. You determine what information shows on the timeline by choosing the base (or primary) object and the related objects. You can use standard objects or custom objects.

A user's profile permissions determine access to timelines. You can assign a user multiple timeline configurations.

For example, a user profile can have access to timelines that represent medical data, engagement data, and assessment data.

Before you start configuring a timeline, identify your business requirements. At a minimum, decide which objects are required for the timeline and the information you want it to show.



Note: If you are using the legacy Timeline feature, we recommend that you switch to Enhanced Timeline to take advantage of new configuration capabilities and responsive layout. You can also enable users to create and edit events in Enhanced Timeline.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

SEE ALSO:

[Set Up an Enhanced Timeline in Health Cloud](#)

[Add Enhanced Timeline to a Record Page](#)

[Add Enhanced Timeline to Your Experience Cloud Site](#)

Set Up an Enhanced Timeline in Health Cloud

Configure interactive timelines that facilitate access to information about patients.

User Permissions Needed

To configure a Timeline:	Read and Edit access for objects you're including on the Timeline

EDITIONS

Available in: Lightning Experience
Available in: **Enterprise** and **Unlimited** Editions

1.

From Setup, in the Quick Find box, enter *Timeline*, and then select **Timeline**.
2.

Turn on **Timeline Configuration**.

 **Note:** Enabling Timeline is a one-time task. After you enable Timeline in your org, you can't disable it.
3.

Click **New Timeline**.

a.

Enter a name for the timeline.

b.

Enter an API name for the timeline, or accept the name that's automatically generated.

c.

Select an object that serves as the basis for the timeline.

You can base your timeline on any Salesforce object (standard or custom). You can add related objects to the timeline later.
For example, to represent a patient's medical history on a timeline, select Account as the timeline object.

d.

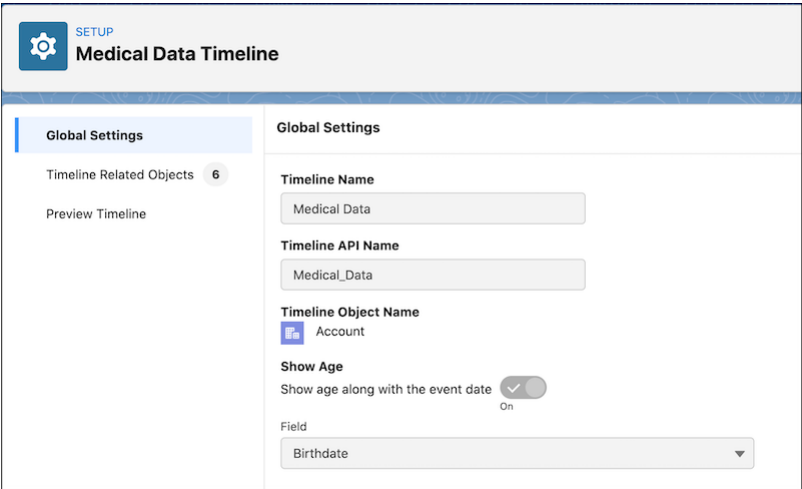
Click **Save**.
4.

On the Global Settings page, turn **Show Age** on to show how old a record of the base or primary object was when an event occurred, along with the date of the event.

If the base object is Person Account and the person was five years and two months old when they were vaccinated, that is shown alongside the vaccination event on the timeline.
5.

If you chose to show age along with the timestamp, choose the field to use for calculating age.

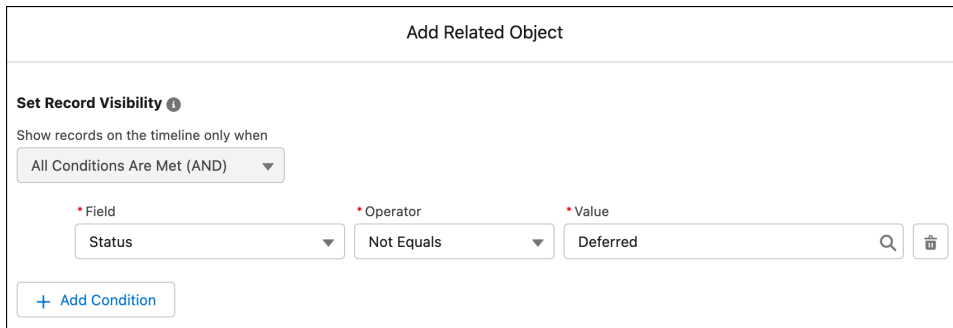
To show the age of the patient, select the **Birthdate** field.



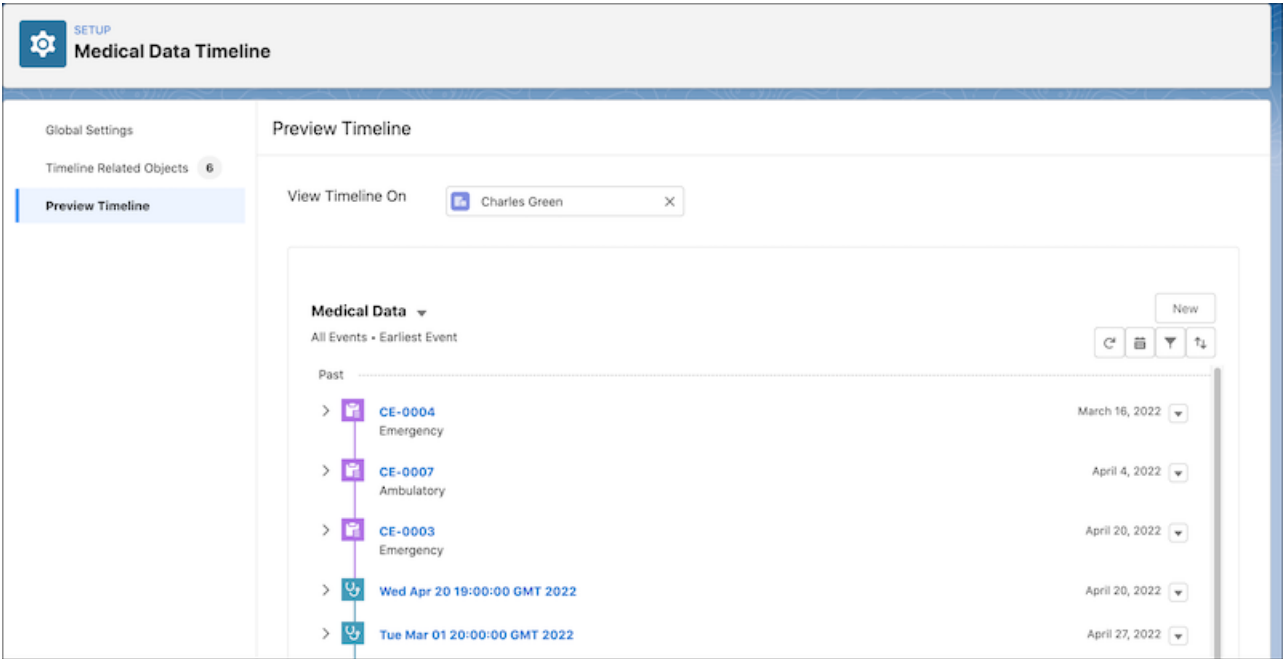
6.

Click **Next**.

7. On the Timeline Related Objects page, click **Add Related Object**.
 - a. Select a related object (standard or custom) that contains information you want to display on the timeline.
You can add up to five related objects per base object. If an object has record types, you can select up to five record types.
 - b. Select the field that associates the related object with the base timeline object, then click **Next**.
If a related object has only one lookup to the base object, then the field is auto-selected and can't be changed.
 **Note:** Enhanced Timeline doesn't support encrypted fields. Make sure any field you choose isn't encrypted.
 - c. Add conditions for showing records on the timeline, and then click **Next**.
For example, you can show tasks that aren't canceled or deferred.



- d. Select the Title, Subtitle, and Timestamp fields for the timeline events, and then click **Next**.
Every event on a timeline has a title, an optional subtitle, and a timestamp, which are sourced from fields in the related object.
 - For title, you can use something like a Subject field. It might be something like "Care Plan for Smoking Cessation."
 - For subtitle, you can use something like a Description field. It might be something like "Charles Green has consistently lower oxygen levels and this care plan is to help him quit smoking."
 - The timestamp shows the date and time when an event took place alongside the event on the timeline.
 - e. Select the fields and related lists you want to display on the timeline, and then click **Add**.
8. To save the timeline and make it available for use, click **Activate**.
9. Preview the timeline you've configured by selecting a base object record in the View Timeline On field.



SEE ALSO:
[How Enhanced Timeline Works in Health Cloud](#)

Add Enhanced Timeline to a Record Page

To let your Health Cloud users see the Timeline and its data, add it to a Lightning record page.

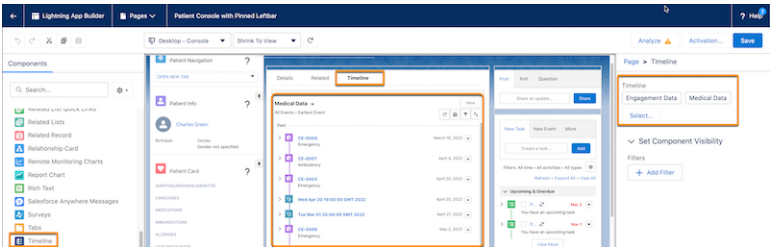
User Permissions Needed

To configure a Timeline:	Read and Edit access for objects you’re including on the Timeline

1. Go to the record page of the object on which you created a timeline.
2. Select the gear icon on the top-right corner of the page and then click **Edit Page**.
3. Drag the Timeline component to the editable content area.
4. To select the timeline configurations you want to make available to users, click **Select** in the component properties panel.
Only active timeline configurations are available for selection.

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- 5. In the Timeline window, select the required configurations and then click **OK**.
You can select up to 5 timeline configurations.
- 6. Save and activate your changes.

SEE ALSO:
[How Enhanced Timeline Works in Health Cloud](#)

Add Enhanced Timeline to Your Experience Cloud Site

To let people use Timeline without logging in to Health Cloud, add it to your Experience Cloud site.

User Permissions Needed

To configure a Timeline:	Read and Edit access for objects you're including on the Timeline

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- 1. From Setup, in the Quick Find box, enter *ALL Sites* and select **All Sites**.
- 2. Click **Builder** for the site in which you want to add Enhanced Timeline.
You can add Enhanced Timeline to only those sites that support record detail pages.
- 3. Select the required record page from the Home menu.
- 4. Drag the **Enhanced Timeline** component from the Components menu to the relevant content area.
- 5. In the Enhanced Timeline properties panel, click **Select....**
- 6. In the Enhanced Timeline window, select the required configurations and then click **OK**.
You can select up to five configurations.
- 7. Publish your changes.

SEE ALSO:
[How Enhanced Timeline Works in Health Cloud](#)