



IMPLEMENTING HEALTH CLOUD STEP BY STEP

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ROADMAP FOR IMPLEMENTATION

1

Enable Required Features

- Person Accounts
- Shared Contacts
- My Domain
- Chatter

2

Install the Health Cloud Managed Package

3

Assign the Health Cloud PSL and health Cloud Platform PSL to each Health Cloud User

4

Configure the Managed Package to leverage Person Accounts



I. ENABLE REQUIRED FEATURES



PERSON ACCOUNTS

- Person Accounts are considered best practice and required for all new implementations
- Turn on Person Accounts for the org by following the pre-requisites



SETUP

Person Accounts

Person Accounts

Person Accounts store information about people by combining certain account and contact fields into a single record. [Learn More](#)

Person Accounts Enabled

Assign the Person Account record type to User Profiles to fully enable Person Accounts. [View Profiles](#)

1. For Salesforce Classic: From Setup, click **Manage Users | Profiles**.
For Lightning Experience: From Setup, click **Users | Profiles**.
2. Click the profile name you want to assign the Person Account record type to.
3. In the **Record Type Settings**, find the Accounts entity and click **Edit**.
4. Move the Person Account record type from **Available Record Types** to **Selected Record Types**.
5. In the **Business Account and Person Account Default Record Types** section, verify that:
 - The **Person Account Default Record Type** dropdown has **Person Account** selected.
 - The **Business Account Default Record Type** dropdown has a value other than **--Master--** selected.
6. Click **Save**.
7. Repeat the process for any other profiles you want using Person Accounts.

SHARED CONTACTS

- Allow Contacts to be related to multiple Accounts by using the Contacts to Multiple Accounts Setting

SETUP
Account Settings

Enable Account Logos *

* In order to provide these account intelligence features, Salesforce searches for additional information about your accounts from third party sources. Examples of shared data include an account name, website, and ticker symbol. We recommend you review the privacy policies of these third parties. Keep in mind that these third parties may offer different privacy and security protections than those provided by Salesforce.

Contacts to Multiple Accounts Settings

Allow users to relate a contact to multiple accounts

When users delete an account that has direct contacts that are related to other accounts:

- Block users from deleting the account
- Allow users to delete the account, and automatically delete all direct contacts even if they are related to other accounts

When users replace the primary account on a contact record:

- Save the relationship between the contact and the previous primary account as an indirect relationship
- Delete the relationship between the contact and the previous primary account

MY DOMAIN

- Enable My Domain

Production orgs created in Winter '21 and later may have a My Domain by default.

My Domain

Help for this Page

My Domain Step 1

Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree on.

```
graph LR; A[Choose Domain Name] --> B[Domain Registration Pending]; B --> C[Domain Ready for Testing]; C --> D[Domain Deployed to Users];
```

Choose Your Domain Name

Enter a domain name and check whether it's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once it's registered.

Your domain name can be up to 40 characters. It can include letters, numbers, and hyphens; but it can't start or end with a hyphen.

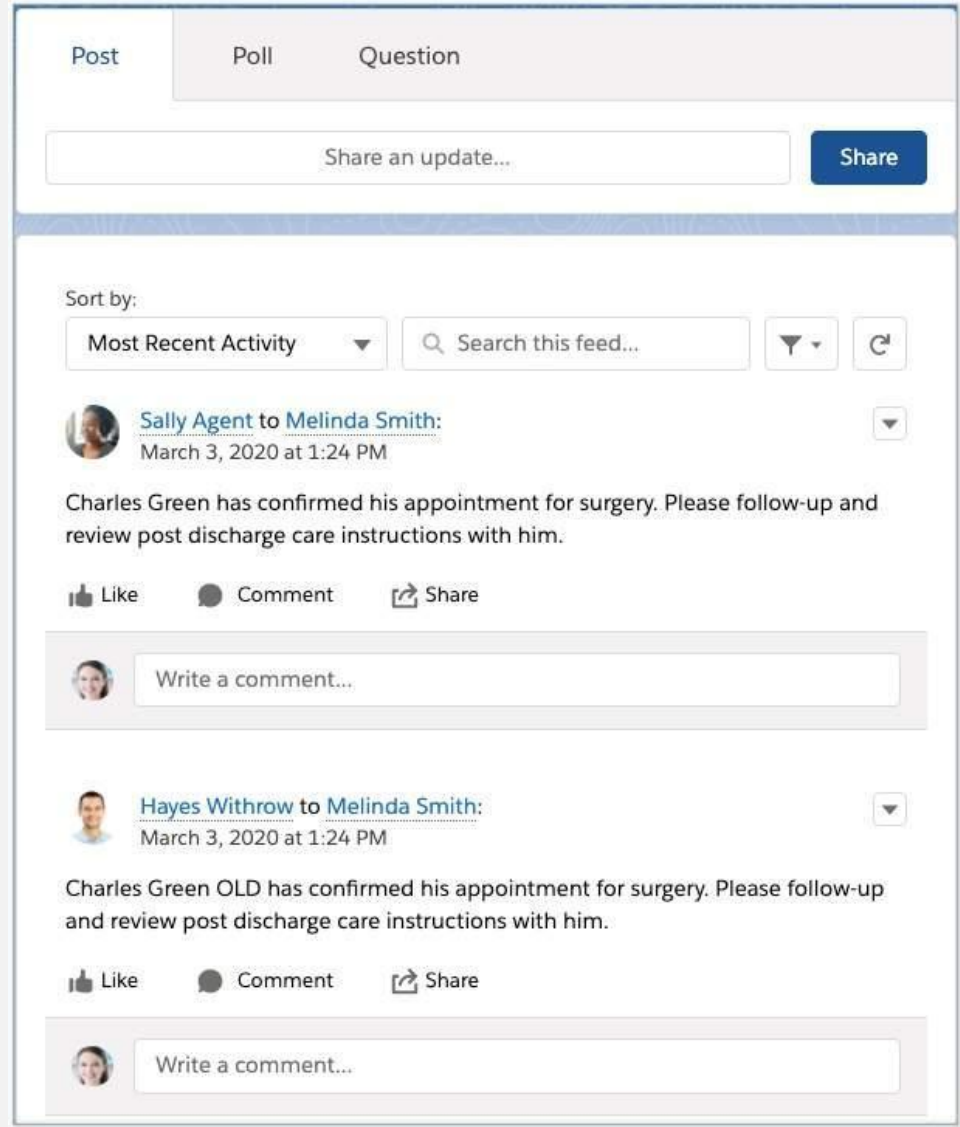
https://jedeye-tech **1** -dev-ed.my.salesforce.com/ **2**

After you click Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when it's done.

CHATTER

- Chatter allows Health Cloud users to collaborate in real time within Salesforce

Production orgs created in Winter '21 and later may have a My Domain by default.



2. INSTALL MANAGED PACKAGE



INSTALL HEALTH CLOUD MANAGED PACKAGE

- Health Cloud Managed Package delivers the core features of Health Cloud
- Health Cloud Manage Package has to be installed before you can install and configure the unmanaged packages

IMPORTANT

- DO NOT DELETE any part of the managed package after installing it
- [URL:](https://industries.secure.force.com/healthcloud)
<https://industries.secure.force.com/healthcloud>

3. ASSIGN PERMISSION SETS



ASSIGN PERMISSION SET LICENSES

- Required Health Cloud Permission Sets
 - Health Cloud PSL – gives access to the managed package
 - Health Cloud Platform PSL – gives access to core (non-package) Health Cloud capabilities.

4. CONFIGURE MANAGED PACKAGE



CONFIGURE MANAGED PACKAGE FOR PERSON ACCOUNTS

- In Custom Settings, Enable use of Person Account
- Once it's enabled, configure the default mapping in the custom metadata type settings to create patients or members in Health Cloud through the Individual Record Type mapper

MODELING REQUIREMENTS



MODELING PATIENTS OR MEMBERS

- Health Cloud DOES NOT support using Contacts for patients or members

IMPORTANT

- You will not be able to fully leverage Health Cloud functionality without modeling your patients and members as Person Accounts.
- DO NOT USE the individual Data Model due to significant limitations

MODELING PROVIDERS

- For net-new organizations, Salesforce recommends that Providers are modeled as Person Accounts

IMPORTANT

- There are instances in Health Cloud where certain relationships between objects require an Account relationship. If you model Providers as Contacts then the leverage is lost.
- Experience Cloud with Partner or External Apps Licenses Limitations
 - Partners in the Partner Portal cannot be modeled as Person Accounts and Providers need an Account – Contact Model

MODELING EVERYONE ELSE

- All other “Person” entities in the org such as caregivers, Health Cloud is flexible.

NOTEWORTHY

- It’s important to plan for the future. What if a caregiver becomes a patient? Easiest transition would be to already have caregivers modeled as Person Accounts.

REFERENCES

Salesforce Partner Portal

- Information sourced from the Partner Learning Camp section of the Salesforce Partner Portal.

Partner Learning Camp

- Tutorials, training modules, and resources obtained from the Partner Learning Camp section of the Salesforce Partner Portal.

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THANK YOU!