



Patient Reported Outcome

ePRO: Patient-Centered Care in Action!

App installation user manual for Salesforce CRM users to send assessment forms to patients.

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About Patient Reported Outcome

Patient Reported Outcome (ePRO) is a cutting-edge digital solution designed to revolutionize healthcare by empowering care providers, including healthcare professionals, therapists, and caregivers, in delivering personalized and patient-centered care.

This versatile application streamlines the process of creating, distributing, and managing assessment forms for patients while seamlessly recording and analyzing their responses. Patient Reported Outcome is your trusted partner in enhancing patient care, improving treatment outcomes, and facilitating data-driven decision-making.

Pre-requisites

You must have Salesforce Health Cloud edition with Omni Studio package pre-installed in your Salesforce Org.

How to Download the App

Installation of Patient Reported Outcome App from Salesforce App Exchange.

Connect Your Salesforce Account to Your Trailblazer.me Profile

- 1.1. In a new browser tab, open **AppExchange**.
- 1.2. Click your avatar to open your Trailblazer.me account menu, then click **Settings**.
- 1.3. Under the Salesforce Accounts header in the Connected Accounts section, click **Connect**.
- 1.4. If you see the Choose a Username page, click **Log In with a Different Username**. If you see a login page, skip to the next step.
- 1.5. Enter your Salesforce username and password, then click **Log In**.
- 1.6. Click on **Link Account**.

Steps to Install Application to Salesforce Org -

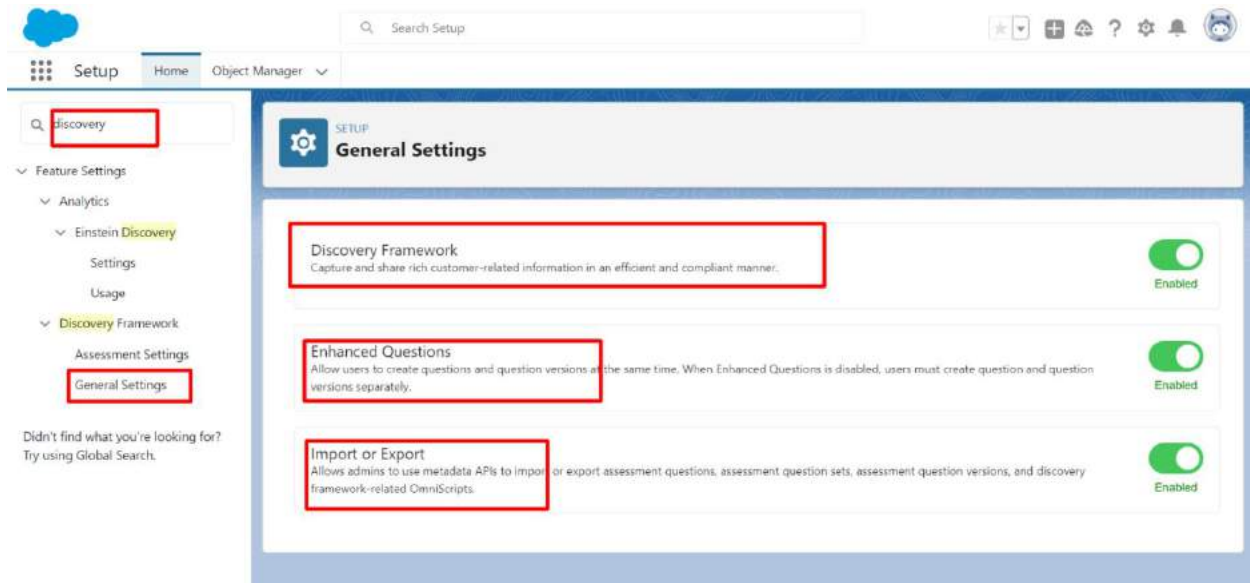
- 2.1. In a new browser tab, open **AppExchange**.
- 2.2. Search for **Patient Reported Outcome**.
- 2.3. Click on **Apply Filters** button and choose Solution type as Apps to narrow down search result.
- 2.4. Click on the **Patient Reported Outcome** App Name.
- 2.5. Now click on **Get it Now** button.
- 2.6. You will see 2 options **Install in Production** and **Install in Sandbox**.
- 2.7. In Install in Production, you will see all the connected salesforce accounts.
- 2.8. If you cannot find the username for the account in which you want to install, then check **Connect Your Salesforce Account to Your Trailblazer.me Profile** i.e. section **Error! Reference source not found**.
- 2.9. Choose the username and click **Install in Production**.
- 2.10. You will see a page where you can confirm your details.
- 2.11. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agree to Terms and Conditions.
- 2.12. Click on **Confirm and Install**, it will take you to the login screen.
- 2.13. If you want to Install in Sandbox then click on **Install in Sandbox** button.
- 2.14. You will see a page where you can confirm your details.

- 2.15. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agreed to the terms and conditions.
- 2.16. Click on **Confirm and Install** it will take you to the login screen.
- 2.17. Provide your login credentials and select for which users you want to install the application.
- 2.18. After that application installation will start.

***We strongly recommend not using any file that you receive from any unauthorized source or any other source not mentioned above.**

Steps before using Patient Assessment Functionality:

1. Look for Discover framework and click **General setting** in quick find from setup and **enable** options like **Discovery Framework**, **Enhanced Questions**, **Import or Export**.



2. Under **Discovery Framework** click on **Assessment Settings** and enable the **Guest User Assessments**.

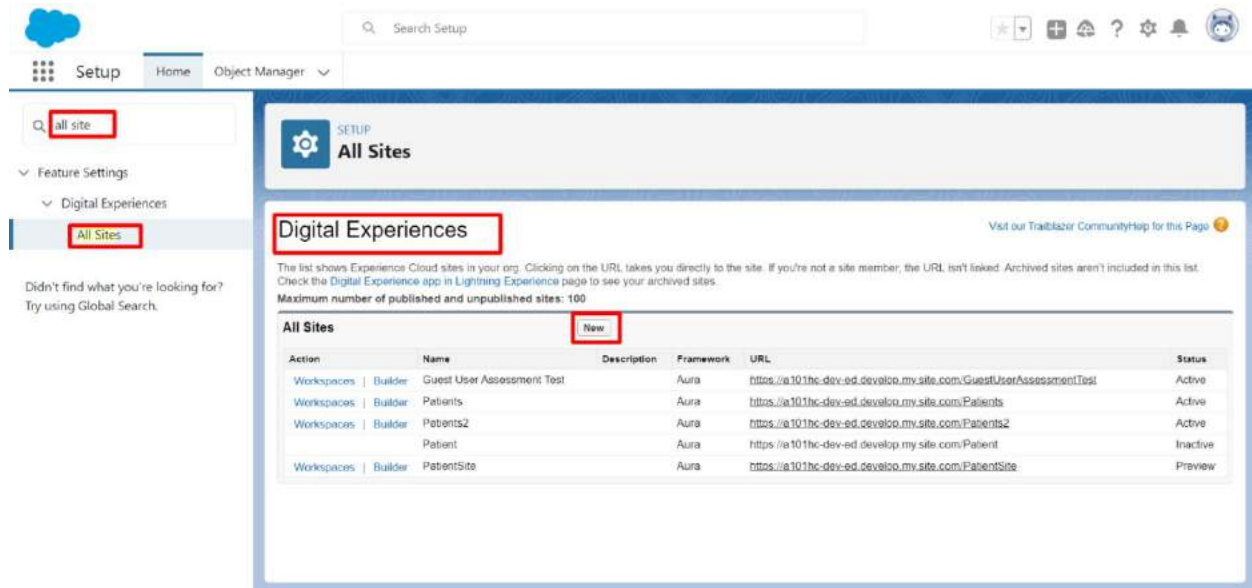
The screenshot shows the Salesforce Setup interface. In the left sidebar, the search bar contains 'discovery', and the 'Assessment Settings' link under the 'Discovery Framework' section is highlighted with a red box. The main content area is titled 'Assessment Settings'. It features a toggle switch for 'Guest User Assessments' which is currently 'Enabled' (indicated by a green circle and a red box). Below this, the 'Assessment Envelope Expiration' section allows setting the number of days before an assessment envelope expires, with a default of 30 days. The 'Send Email Assessment Flow' section is partially visible at the bottom.

3. Go to **Digital Experiences** and click on **Settings**.
4. Click the checkbox of **Enable Digital Experiences** and **Save** the changes.

The screenshot shows the Salesforce Setup interface for Digital Experiences. In the left sidebar, the search bar contains 'digital', and the 'Settings' link under the 'Digital Experiences' section is highlighted with a red box. The main content area is titled 'Settings' and 'Experiences'. It includes a 'Save' button at the top. The 'Enable Digital Experiences' section contains a checkbox labeled 'Enable Digital Experiences' which is currently unchecked (highlighted with a red box). Below the checkbox, a note states: 'After you enable digital experiences in your org, you must still create, configure, customize, and then activate a site before it's live and available to users.' A 'Save' button is located at the bottom right of the settings section.

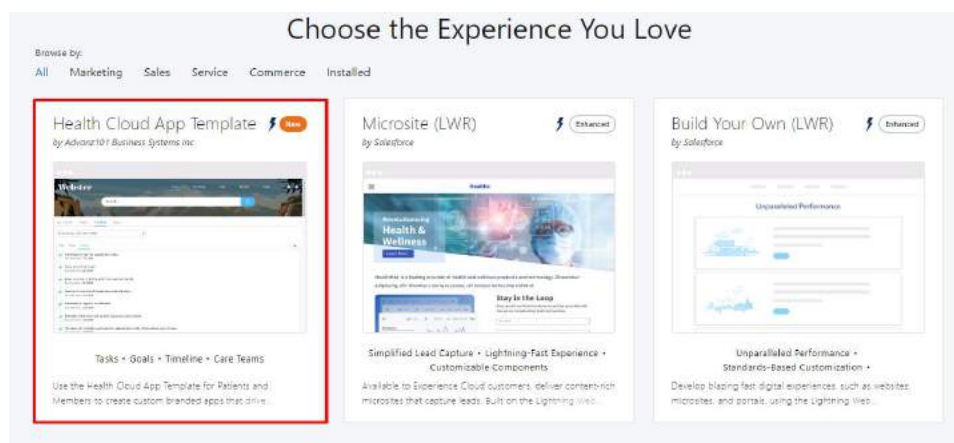
Create a New Experience Site

1. Now to create new site, in **Quick find** search for **All Sites** under **Digital Experiences** and click on **New** button.

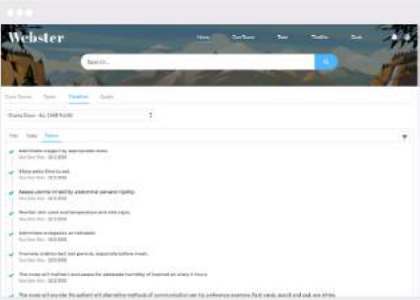


2. After clicking **New**, select **Health Cloud App Template** by Advanz101 Business Systems Inc.

Note: You can use any other template, except the **LWR** templates.



3. Click on **Get Started**.



Health Cloud App Template

by Advanz101 Business Systems Inc

Get Started

About This Template

Use the Health Cloud App Template for Patients and Members to create custom branded apps that drive engagement and provide a connected experience from awareness to adherence. Empower patients to track health goals, collaborate, and learn about wellness.

Features

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

Goals
The Goals component lets community users view and track health goals that have been made available through sharing.

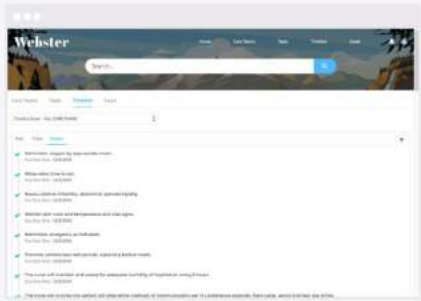
4. Enter Name (as per requirement) and URL.

URL – **GuestUserAssessment** (mandatory to use this URL only)

5. Click **Create**

← Back

Help & Tr



Enter a Name

Not sure what to enter? Don't worry—you can always change it later.

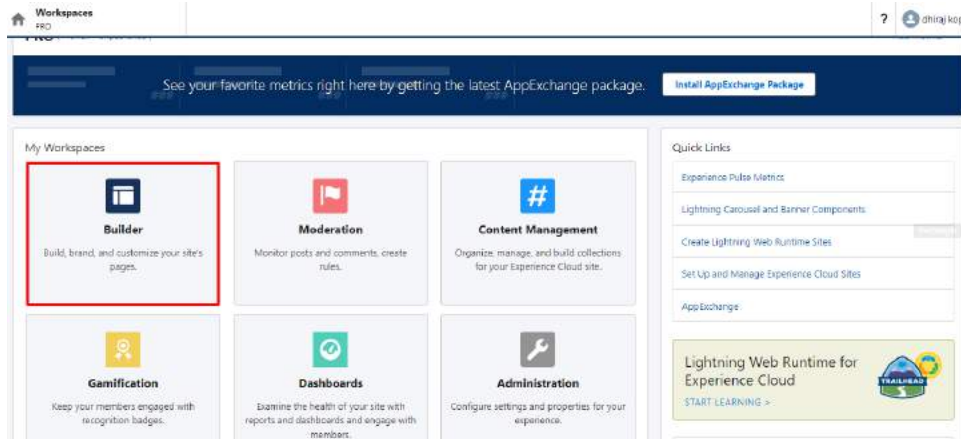
Name
PROD

URL
curious-appy-217126-dev-ed.develop.my.site.c... **GuestUserAssessment**

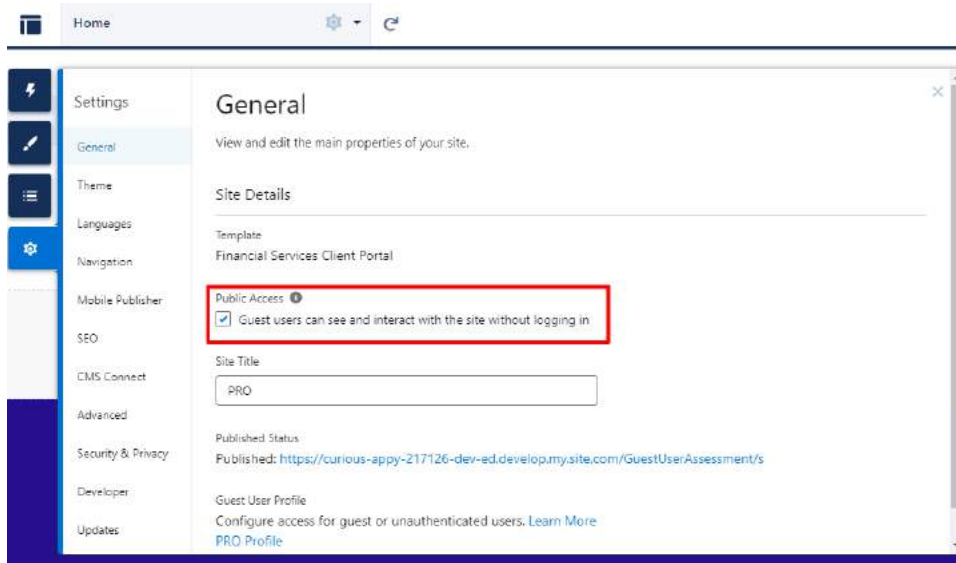
Create

Note – URL appended has to be **GuestUserAssessment** due to dependency on other internal functionality.

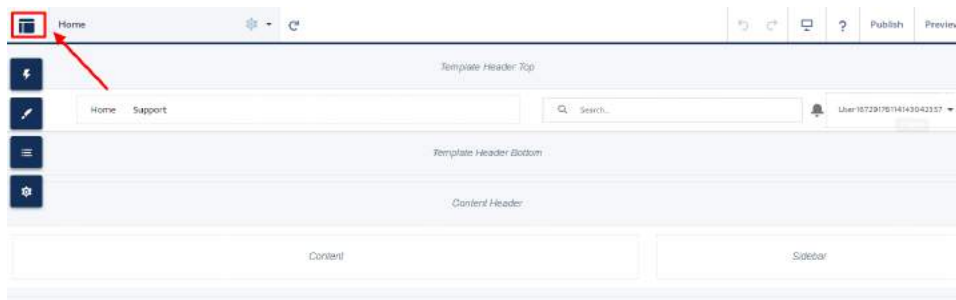
6. Click on **Builder**



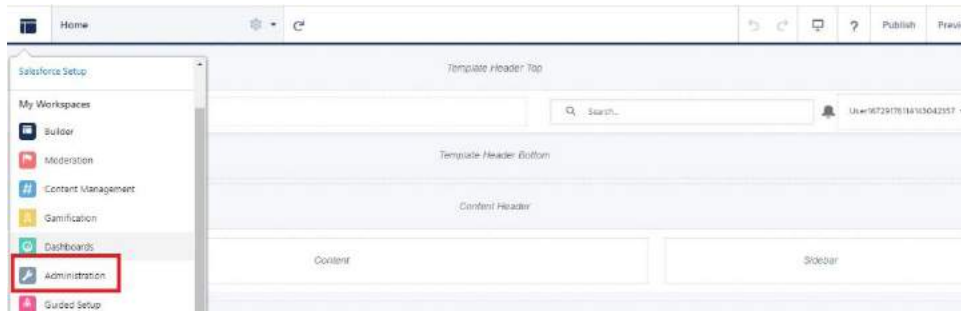
7. Navigate to the gear icon on the left panel and select it. Enable **Public Access** visible under Settings -> General as shown below.



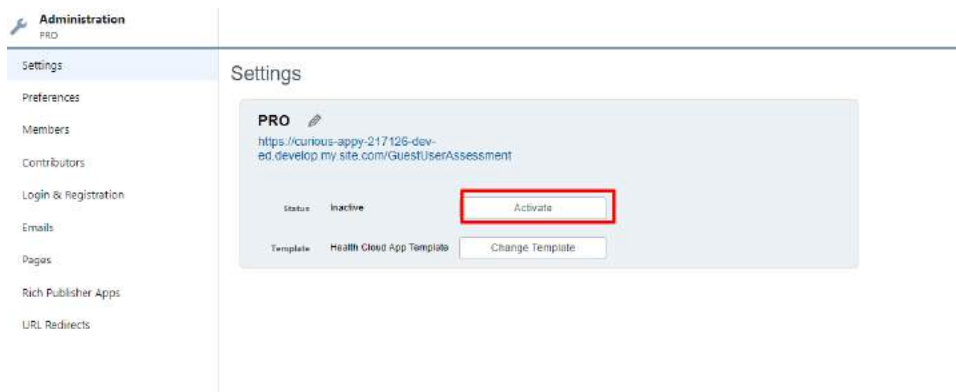
8. To activate page click on the top left corner icon.



9. Click on **Administration**

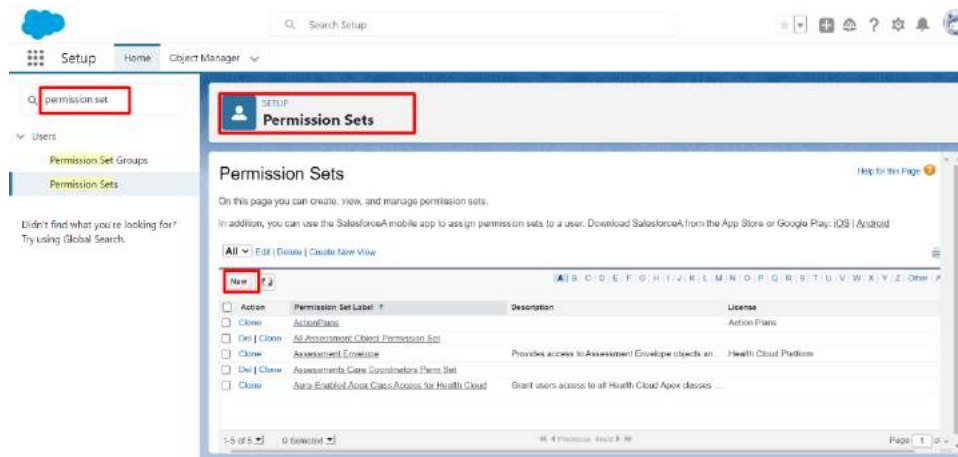


10. Click on **Activate** button then click on **OK**.

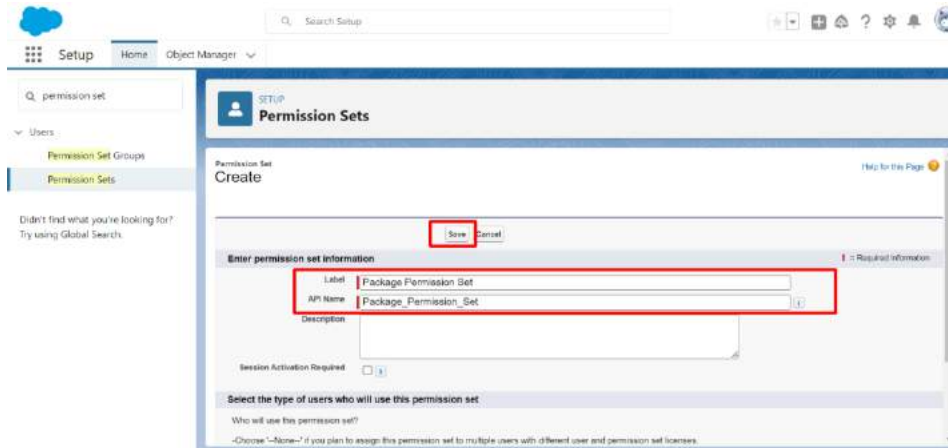


Create Permission Sets

1. To create permission set, search for **permission set** in quick find box then click on **Permission Sets**.



2. We will create an Unlicensed Permission set -
3. To create a new permission set, click on **New** button, give **label** and **API name** and **Save** it.



4. Staying on the same page, click on **Object Settings**.

The screenshot shows the 'Setup' page with 'Permission Sets' selected. The 'Package Permission Set' overview is displayed, showing details like API Name (Package_Permission_Set), Namespace Prefix (Advanz101), and Created By (Idan.Ali). The 'Apps' section is expanded, and the 'Object Settings' subsection is highlighted with a red box. The 'Object Settings' description reads: 'Permissions to access objects and fields, and settings such as tab availability'.

5. Select Assessment Question Responses

The screenshot shows the 'Setup' page with 'Permission Sets' selected. A list of objects is displayed, including 'AppointmentScheduleLog', 'AppointmentTopicTimeSlot', 'AssessmentDashboard', 'AssessmentEvaluationItem', 'AssessmentEnvelopes', 'AssessmentForm', 'AssessmentIndicatorDefinition', 'AssessmentQuestionAssignment', 'AssessmentQuestionConfig', 'AssessmentQuestionResponses', 'AssessmentQuestion', 'AssessmentQuestionScore', 'AssessmentQuestionSetConfig', and 'AssessmentQuestionSet'. The 'Assessment Question Responses' object is highlighted with a red box.

6. Then click **edit** and check the checkbox before **Read, Create**.

7. Click **Save**.

The screenshot shows the 'Setup' page with 'Permission Sets' selected. The 'Package Permission Set' overview is displayed, and the 'Object Settings' section is expanded. The 'Assessment Question Responses' object is selected, and the 'Object Permissions' table is shown. The 'Read' and 'Create' checkboxes are checked, and the 'Save' button is highlighted with a red box.

Permission Name	Enabled
Read	☒
Create	☒
Edit	☐
Delete	☐
View All	☐
Modify All	☐

8. Similarly follow above steps for below Objects.

- **Assessment Questions:** Permission to be granted – **Read**
(If already Read permission is present then no need to change)

Assessment Questions	Read	15	--
--------------------------------------	------	----	----

- **Assessment Question Versions:** Permission to be granted - **Read**
(If Read permission is already present then no need to change)

Assessment Question Versions	Read	22	--
--	------	----	----

- **Assessments:** Permission to be granted - **Read, Create**

Assessments	Read, Create	18	--
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- **Assessment Responses:** Permission to be granted - **Read, Create**

Assessment Responses	Read, Create	6	--
--------------------------------------	--------------	---	----

- **Vlocity DataRaptor Batch Queue:** Permission to be granted - **Read, Create**

Vlocity DataRaptor Batch Queue	Read, Create	7	--
--	--------------	---	----

9. Create Omnistudio Licensed Permission set

10. To create a new permission set, click on **New** button.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under the 'Setup' menu, the 'Permission Sets' link is highlighted. The main content area displays the 'Permission Sets' page. At the top left of this page, there is a 'New' button with a plus icon, which is highlighted with a red box. Below this, there is a table of existing permission sets. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The first row shows 'Action Plans' with a license of 'Action Plans'. The second row shows 'All Assessment Object Permission Set' with a license of 'Health Cloud Platform'. The third row shows 'Assessment Envelope' with a license of 'Health Cloud Platform'. The fourth row shows 'Assessments Care Coordinators Perm Set' with a license of 'Health Cloud Platform'. The fifth row shows 'Aura-Enabled Apex Class Access for Health Cloud' with a license of 'Health Cloud Platform'. The sixth row shows 'Book Vaccination Appointments' with a license of 'Health Cloud Platform'. The table is currently empty, and the 'New' button is the primary action to create a new permission set.

11. Give label and API name, select Omnistudio license and **Save** it.

Search Setup

Setup Home Object Manager

permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

Permission Sets

Permission Set Create

Save Cancel

Enter permission set information ⓘ = Required Information

Label PRO OmniStudio Guest User

API Name PRO_OmniStudio_Guest_User ⓘ

Description

Session Activation Required ☐ ⓘ

Select the type of users who will use this permission set

Who will use this permission set?

-Choose "None" if you plan to assign this permission set to multiple users with different user and permission set licenses.

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? Learn more here.

License OmniStudio

Save Cancel

12. While staying on the same page, Click on object settings.

Search Setup

Setup Home Object Manager

permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

Permission Sets

Permission Set PRO OmniStudio Guest User

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	PRO_OmniStudio_Guest_User_SF
License ⓘ OmniStudio	Namespace Prefix	Advanz101
Session Activation Required ☐	Created By	Sudarsan Varma 7/22/2023, 12:56 AM
Last Modified By	Irfan Ali 8/17/2023, 5:29 PM	

Apps

Object Settings
Permissions to access objects and fields, and settings such as tab availability

Flow Access
Permissions to execute Flows

External Credential Principal Access
Permissions to authenticate with external credential principal mappings

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

13. Click on Omni Data Transformation Items.

Setup Home Object Manager

Q permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?
Try using Global Search.

SETUP
Permission Sets

Permission Set
PRO Omnistudio Guest User

Q Find Settings... Clone Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview > Object Settings

Object Settings

Object Name	Object API Name
Omni Data Transformation Items	OmniDataTransformItem
Omni Data Transformations	OmniDataTransform
Omni Electronic Signature Templates	OmniESignatureTemplate
Omni Process Compilations	OmniProcessCompilation
Omni Process Elements	OmniProcessElement
Omni Processes	OmniProcess
OmniScript Saved Sessions	OmniScriptSavedSession
Omni UI Cards	OmniUiCard

14. Click the **Edit** button to edit **Object Permissions** and then enable **Read** Object permission.

Setup Home Object Manager

Q permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for?
Try using Global Search.

SETUP
Permission Sets

Permission Set
PRO Omnistudio Guest User

Q Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview > Object Settings > **Omni Data Transformation Items**

Omni Data Transformation Items Edit

Tab Settings

Available	Visible
☐	☒

Object Permissions

Permission Name	Enabled
Read	☒
Create	☐
Edit	☐
Delete	☐

Setup Home Object Manager

Search Setup

permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set: PRO OmniStudio Guest User

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview > Object Settings > Omni Data Transformation Items

Omni Data Transformation Items Save Cancel

Tab Settings

Available Visible

Object Permissions

Permission Name	Enabled
Read	☒
Create	☐
Edit	☐
Delete	☐

15. For Field Permissions click **Read Access** at header to select all and then click **Save**.

Setup Home Object Manager

Search Setup

permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set: PRO OmniStudio Guest User

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview > Object Settings > Omni Data Transformation Items

Omni Data Transformation Items Save Cancel

Tab Settings

Available Visible

Object Permissions

Permission Name	Enabled
Read	☒
Create	☐
Edit	☐
Delete	☐

Field Permissions

Field Name	Read Access	Edit Access
Default Value	☒	☐
Default	☒	☐
Field Data Type	☒	☐
Field Group	☒	☐
Field Operator	☒	☐
Field Value	☒	☐
Formula Converted	☒	☐
Formula Expression	☒	☐
Formula Result Path	☒	☐
Formula Sequence	☒	☐
Global Key	☒	☐
Input Field Name	☒	☐
Input Object Name	☒	☐
Input Object Query Sequence	☒	☐
Linked Field Name	☒	☐
Linked Object Sequence	☒	☐
Lookup By Field Name	☒	☐
Lookup Object Name	☒	☐
Lookup Returned Field Name	☒	☐
Migration Attribute	☒	☐
Migration Category	☒	☐
Migration Group	☒	☐
Migration Key	☒	☐
Migration Pattern	☒	☐
Migration Process	☒	☐
Migration Type	☒	☐
Migration Value	☒	☐
Omni Data Transformation	☐	☐
Omni Data Transformation API Name	☐	☐
Output Creation Sequence	☒	☐
Output Field Format	☒	☐
Output Field Name	☒	☐
Output Object Name	☒	☐
Required For Upsert	☒	☐
Transform Value Mappings	☒	☐
Upsert Key	☒	☐

16. Go back to object setting and click on **Edit** button on **Omni Data Transformations**.

The screenshot shows the 'Setup' page in the ADVANZ 101 interface. The left sidebar contains a search bar and navigation links for 'Users', 'Permission Set Groups', and 'Permission Sets'. The main content area is titled 'Permission Sets' and shows the configuration for the 'PRO OmniStudio Guest User'. The 'Object Settings' dropdown is set to 'Omni Data Transformations', and the 'Edit' button is highlighted with a red box.

17. Under **Object Permissions** enable **Read** permission.

The screenshot shows the 'Setup' page in the ADVANZ 101 interface. The left sidebar contains a search bar and navigation links for 'Users', 'Permission Set Groups', and 'Permission Sets'. The main content area is titled 'Permission Sets' and shows the configuration for the 'PRO OmniStudio Guest User'. The 'Object Settings' dropdown is set to 'Omni Data Transformations', and the 'Save' button is highlighted with a red box. The 'Object Permissions' table is visible, with the 'Read' permission row highlighted and the 'Enabled' checkbox checked.

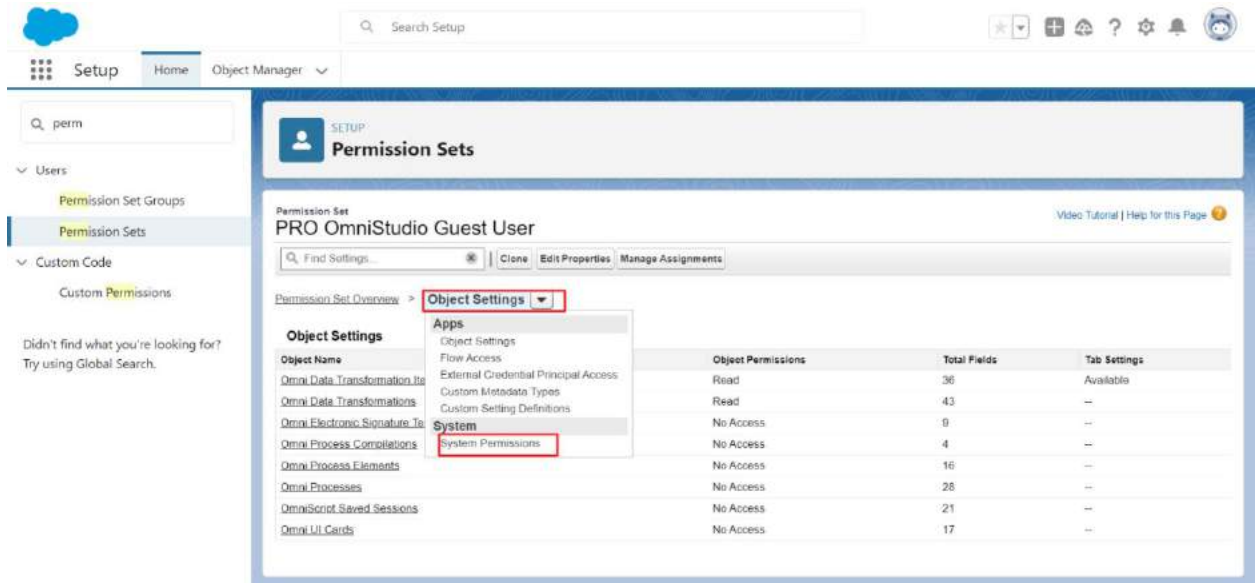
Permission Name	Enabled
Read	☒
Create	☐
Edit	☐
Delete	☐

18. For **Field Permissions** click **Read Access** at header to select all and then click **Save**.

Field Permissions

Field Name	Read Access	Edit Access
Active	☒	☐
API Name	☒	☒
Assignment Rules Used	☒	☐
Batch Size	☒	☐
Deleted On Success	☒	☐
Description	☒	☐
Error Ignored	☒	☐
Expected Input JSON	☒	☐
Expected Input Other Data	☒	☐
Expected Input XML	☒	☐
Expected Output JSON	☒	☐
Expected Output Other Data	☒	☐
Expected Output XML	☒	☐
Field Level Security Enabled	☒	☐
Global Key	☒	☐
Input Parsing Class	☒	☐
Input Type	☒	☐
Namespace	☒	☒
Null Inputs Included in Output	☒	☐
Output Parsing Class	☒	☐
Output Type	☒	☐
Override Key	☒	☐
Owner	☒	☒
Preprocessor Class Name	☒	☐
Preview JSON Data	☒	☐
Preview Other Data	☒	☐
Preview Source Object Data	☒	☐
Preview XML Data	☒	☐
Process Super Bulk	☒	☐
Required Permission	☒	☐
Response Cache Time-to-Live In Minutes	☒	☐
Response Cache Type	☒	☐
Rollback On Error	☒	☐
Source Object	☒	☐
Source Object Default	☒	☐
Synchronous Process Threshold	☒	☐
Target Output Document ID	☒	☐
Target Output File Name	☒	☐
Type	☒	☒
Unique Name	☒	☒
Version	☒	☒
XML Declaration Removed	☒	☐
XML Output Tags Order	☒	☐

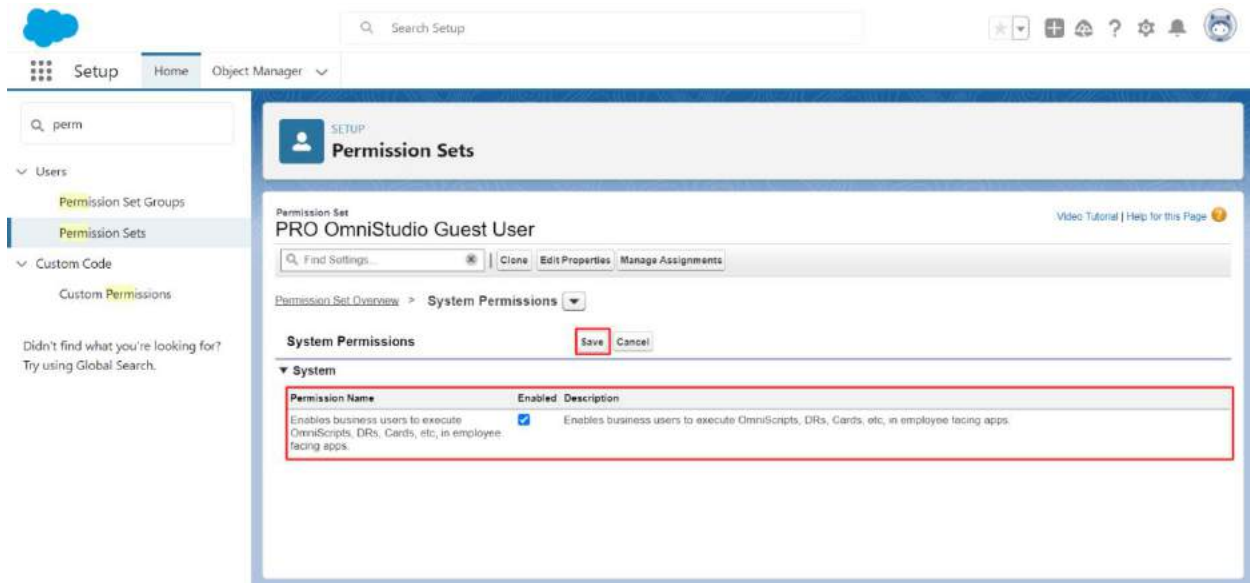
19. While staying on the same screen, click on **System Permissions** from the Object Settings dropdown menu.



The screenshot shows the 'Permission Sets' configuration page for the 'PRO OmniStudio Guest User'. The 'Object Settings' dropdown menu is open, showing a list of objects and their permissions. The 'System' option is highlighted in the dropdown menu.

Object Name	Object Permissions	Total Fields	Tab Settings
Omni Data Transformation Its	Read	36	Available
Omni Data Transformations	Read	43	--
Omni Electronic Signature Te	No Access	9	--
Omni Process Completions	No Access	4	--
Omni Process Elements	No Access	16	--
Omni Processes	No Access	28	--
OmniScript Saved Sessions	No Access	21	--
Omni UI Cards	No Access	17	--

20. Click Edit and then Click the checkbox for **Enables business users to execute OmniScripts, DRs, Cards, etc, in employee facing apps**, click **Save**.



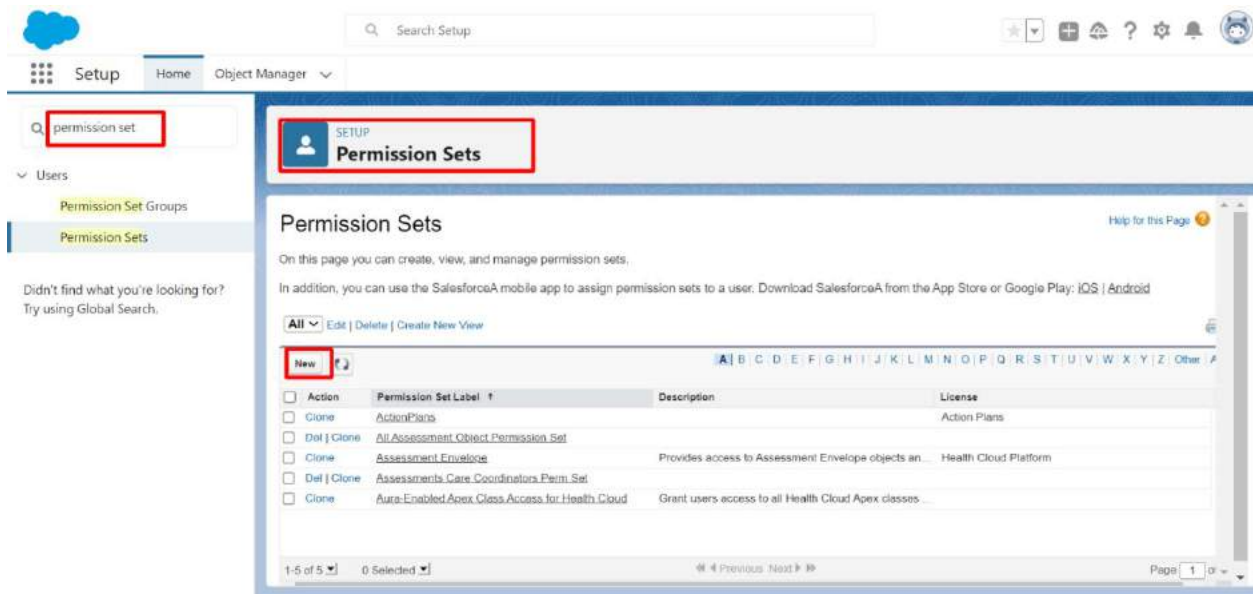
The screenshot shows the 'System Permissions' configuration page for the 'PRO OmniStudio Guest User'. The 'System' permission is highlighted, and the 'Save' button is visible.

Permission Name	Enabled	Description
Enables business users to execute OmniScripts, DRs, Cards, etc, in employee facing apps.	☒	Enables business users to execute OmniScripts, DRs, Cards, etc, in employee facing apps.

21. Click **Save** on the Permission change Confirmation screen.

22. For **Industries Assessment License** Permission set -

23. To create a new permission set, click on **New** button.



Search Setup

Setup Home Object Manager

permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android

All Edit Delete Create New View

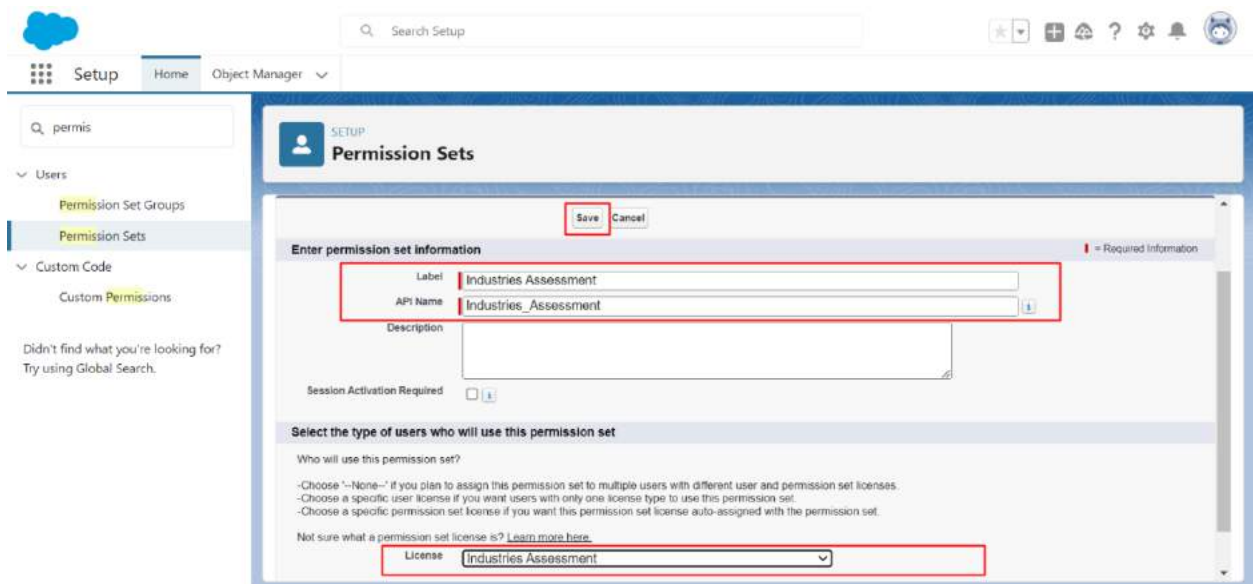
New

Action	Permission Set Label	Description	License
Clone	ActionPlans		Action Plans
Del Clone	All Assessment Object Permission Set		
Clone	Assessment Envelope	Provides access to Assessment Envelope objects an...	Health Cloud Platform
Del Clone	Assessments Care Coordinators Perm Set		
Clone	Aura-Enabled Apex Class Access for Health Cloud	Grant users access to all Health Cloud Apex classes...	

1-5 of 5 0 Selected 4 Previous Next

Page 1

24. Give label and API name, select **Industries assessment** license and **save** it.



Search Setup

Setup Home Object Manager

permis

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Save Cancel

Enter permission set information

Label Industries Assessment

API Name Industries_Assessment

Description

Session Activation Required

Select the type of users who will use this permission set

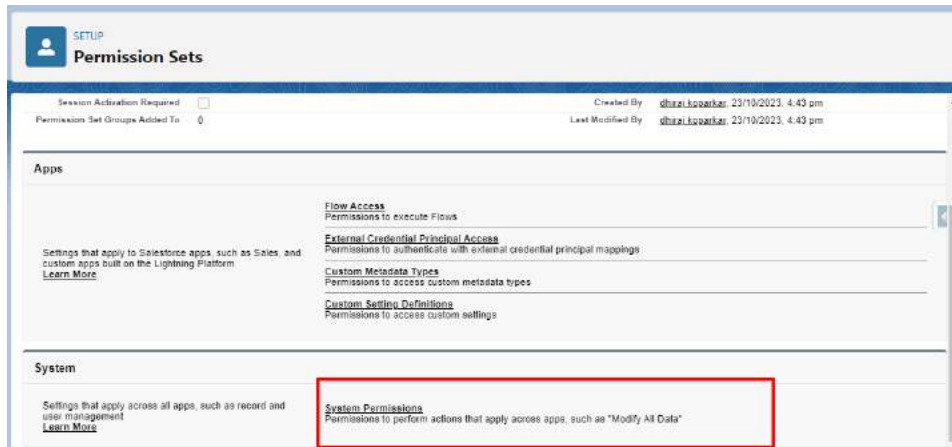
Who will use this permission set?

-Choose "None" if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

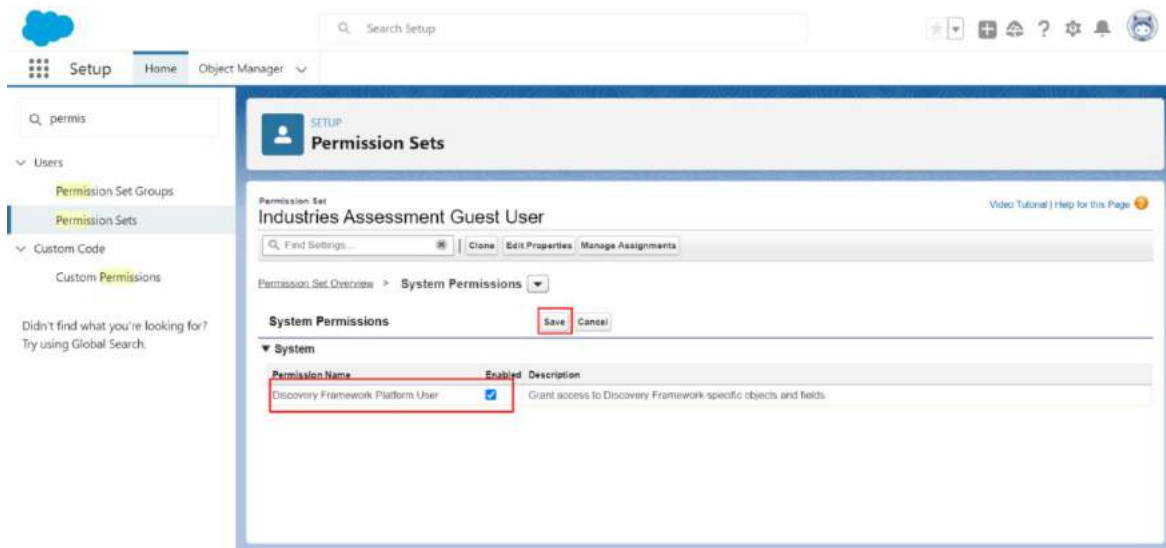
Not sure what a permission set license is? [Learn more here.](#)

License Industries Assessment

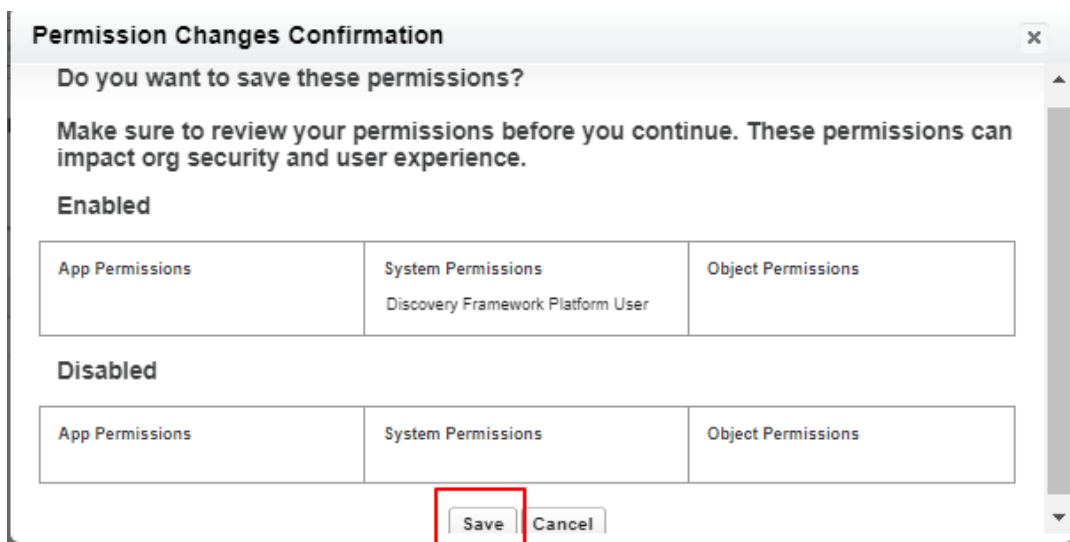
25. Click on **System Permissions**.



26. Click **Edit** and enable **Discovery Framework Platform User** then click **Save**.



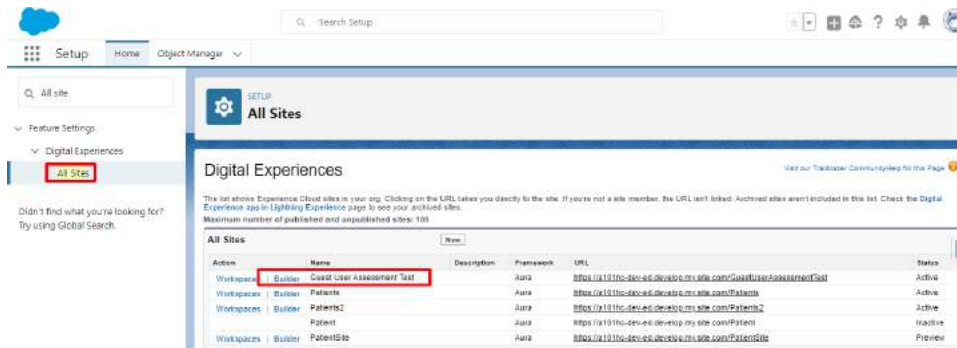
Permission changes confirmation modal will appear. Click **Save** to confirm.



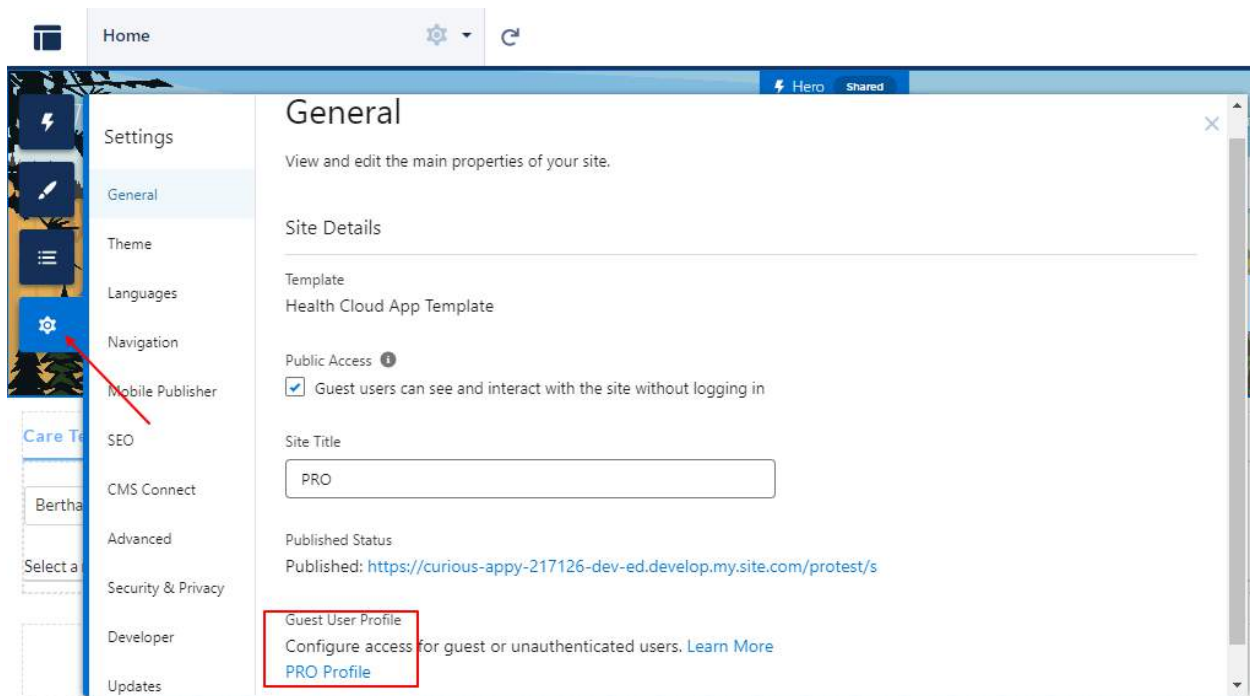
Assign Apex Classes and Permission sets to Guest User

Assign Apex Classes

1. Go to **Setup**, in quick find type all sites and click on **All Sites**.
2. Click on **Builder** of your experience site.



3. Select **Guest User Profile** from Setting (gear icon)



4. Give **Apex class** permission to guest user (here we need to give 'omnistudio.Business ProcessDisplayController', omnistudio.NewportUtilities class access) using the following steps.
5. Click on Enable Apex class

SETUP
Profiles

Profile
PRO Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | **Enabled Apex Class Access** | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Provider Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definition Access](#) | [Enabled Flow Access](#) | [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [View Users](#)

Name	PRO Profile		
User License	Guest User License	Custom Profile	☒
Description			
Created By	shirai.koozhar	20/10/2023, 5:44 pm	Modified By: shirai.koozhar 20/10/2023, 5:44 pm

Page Layouts

Standard Object Layouts	Global	Global Layout	Healthcare Practitioner Facility	Healthcare Practitioner Facility Layout
Email Application	Not Assigned			

6. Edit Apex class Access

Enabled Apex Class Access [Edit](#) [Enabled Apex Class Access Help](#)

No Apex Classes enabled

7. Search that class and move to Enable Apex classes.

SETUP
Profiles

Enable Apex Class Access

Select the Visualforce pages that you want to make accessible at this Salesforce site.

[Save](#) [Cancel](#)

Available Apex Classes

- omnistudio.VlocityContinuationIntegration
- omnistudio.VlocityDocsUtils
- omnistudio.VlocityErrorLoggingService
- omnistudio.VlocityOpenInterface
- omnistudio.VlocityOpenInterface2
- omnistudio.VlocityOpenInterfaceExecutor
- omnistudio.VlocityScheduledJobTriggerHandler
- omnistudio.VlocityTrackingEntryMigrationBatch
- omnistudio.VlocityTrackingService
- omnistudio.VlocityTrackingServiceFieldMappings
- omnistudio.XmlToJson
- omnistudio.Zippex
- trihdttips.tt_UtilController
- omnistudio.BusinessProcessDisplayController

Enabled Apex Classes

- omnistudio.NewportUtilities

[Add](#)

[Remove](#)

Enable Apex Class Access

Select the Visualforce pages that you want to make accessible at this Salesforce site.

Save Cancel

Available Apex Classes

omnistudio.VlocityBatchSObjectJob
omnistudio.VlocityContinuationIntegration
omnistudio.VlocityDocsUtils
omnistudio.VlocityErrorLoggingService
omnistudio.VlocityOpenInterface
omnistudio.VlocityOpenInterface2
omnistudio.VlocityOpenInterfaceExecutor
omnistudio.VlocityScheduledJobTriggerHandler
omnistudio.VlocityTrackingEntryMigrationBatch
omnistudio.VlocityTrackingService
omnistudio.VlocityTrackingServiceFieldMappings
omnistudio.XmlToJson
omnistudio.Zippex
trihdtps_tt_UtilController

Add
Remove

Enabled Apex Classes

omnistudio.NewportUtilities
omnistudio.BusinessProcessDisplayController

8. Save it.

Assign Permission Sets:

1. Click on **View users**

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links like 'Setup Home', 'Service Setup Assistant', 'Commerce Setup Center', etc. The main content area is titled 'PRO Profile'. It includes a description of the profile and a list of enabled permissions. Below this, the 'Profile Detail' section shows the profile name 'PRO Profile', user license 'Guest User License', and a 'View Users' button highlighted with a red box. The 'Page Layouts' section is partially visible at the bottom.

2. Click on the Site Guest User (in this case it is Site Guest User, PRO but it will be Site Guest User along with your site name)

The screenshot shows the Salesforce Setup interface. On the left, there is a navigation menu with options like Setup Home, Service Setup Assistant, Commerce Setup Center, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, and Optimizer. The main content area is titled 'PRO Profile' and includes a table with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains one entry: 'PRO Profile' with a 'Full Name' of 'PRO Profile' and an 'Active' status of 'Yes'. The 'Edit' link for this profile is highlighted with a red box.

3. Click on **Edit Assignments** in Permission Set Assignments section

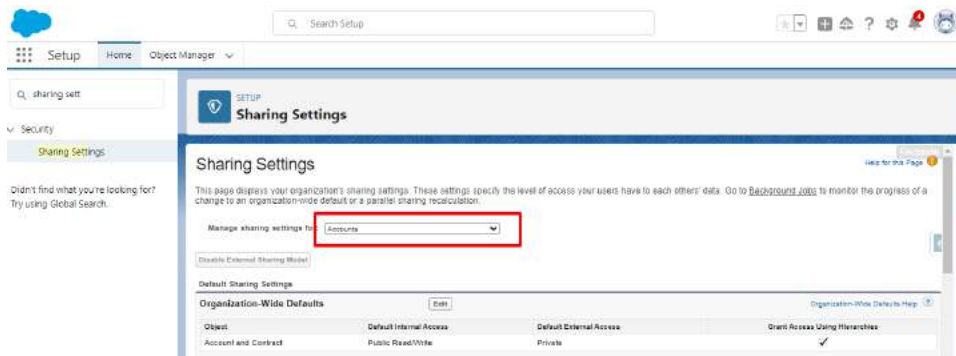
The screenshot shows the Salesforce Setup interface for the 'Users' section. It displays various user settings like Language, Federation ID, App Registration, Security Key, Lightning Login, and Temporary Verification Code. Below these, there is a section for 'Permission Set Assignments' with a table showing 'No records to display'. The 'Edit Assignments' button is highlighted with a red box. Below this, there is a section for 'Permission Set Assignments: Activation Required' with another 'No records to display' message.

4. Add all the 3 permission sets which you created and click **Save**

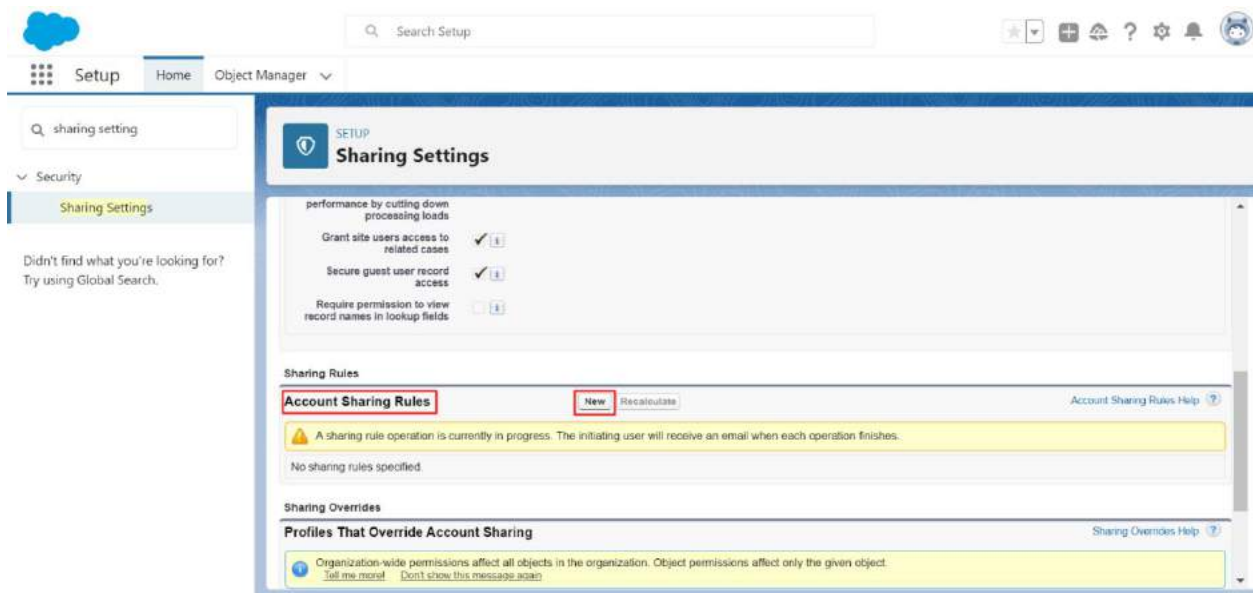
The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. It displays a list of 'Available Permission Sets' and a list of 'Enabled Permission Sets'. The 'PRO Site Guest User' is selected, and the 'Save' button is highlighted with a red box. The 'Enabled Permission Sets' list includes 'Industries Assessment Guest User', 'PRO Omnistudio Guest User', and 'Package Permission Set'.

Sharing Settings

1. To create sharing setting, go to **Sharing Settings** from **Quick Find**
2. Select **Accounts** object from the dropdown menu



3. Click on the **New** button under **Account Sharing Rules**.



4. Give name and label.
5. Select your Rule type "**Guest user access based on criteria**"
6. Add criteria, like **Created by ID not equal to null (keep blank)**. Share this rule with **new guest user** that you created while creating site and **Default Account and Contract Access** should be **Read Only**, then Save it.

Setup
Sharing Settings

Setup
Account Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization.
You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label:
Rule Name:

Step 2: Select your rule type

Rule Type: ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

The sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these criteria, you're allowing guest users to view records. Grants on records restricts their access to records according to the criteria without logging in. To restrict user who accessing database and customer access to an account making proper criteria to ensure accounting and user never access logging in to secure your user and its data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate to the sensitivity of your data. Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.

Criteria	Field	Operator	Value	
	Created By ID	not equal to		AND
	None	None		AND
	None	None		AND
	None	None		AND
	None	None		AND

[Add Filter Logic...](#)

Additional Options: ☐ Include records owned by high-volume users

Step 4: Select the users to share with

Share with:

Step 5: Select the level of access for the users

Default Account and Contact Access:

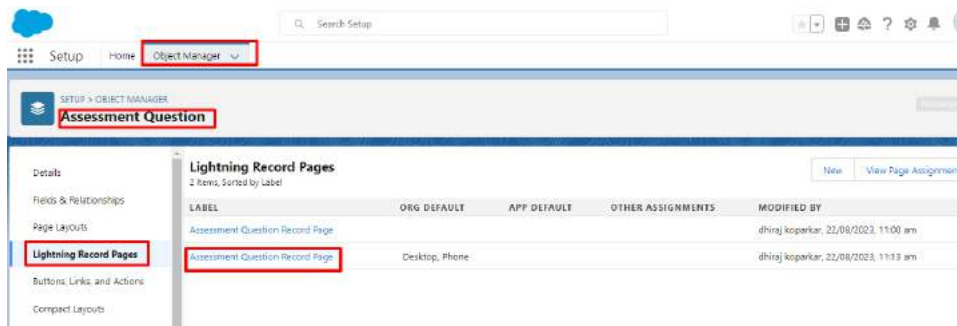
7. Follow the same steps for creating 'sharing setting' as done for **Account**, for the following objects:

- **Assessment Questions**
- **Omni Data Transformations**
- **Omni Processes**
- **Vlocity DataRaptor Batch Queues**
- **Assessment Responses**

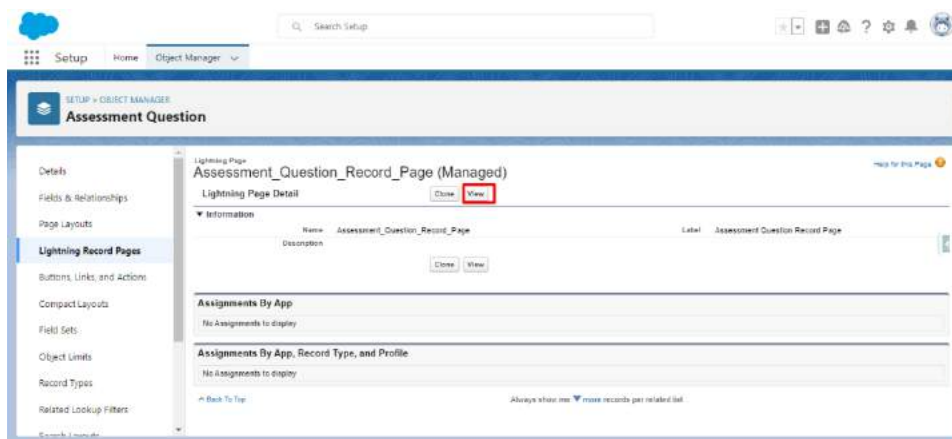
PRO objects settings

Activate Assessment Question Record Page

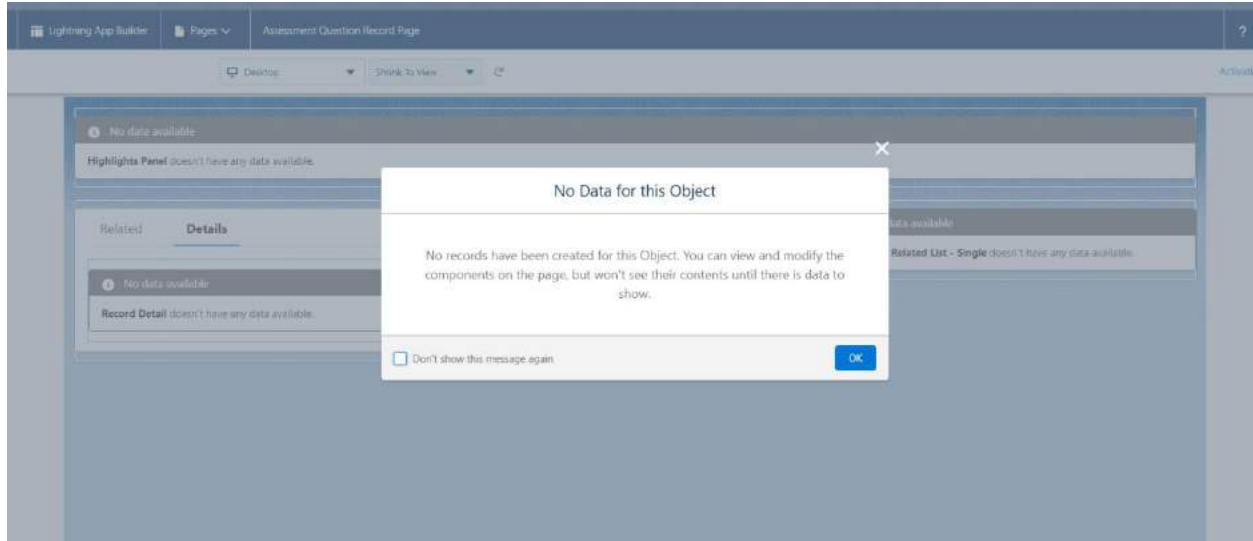
1. Go to setup -> object manager -> assessment question -> select Lightning Record Pages
2. Click on the page which is created after installing the app (most recent) and if there is only one page then click on it.



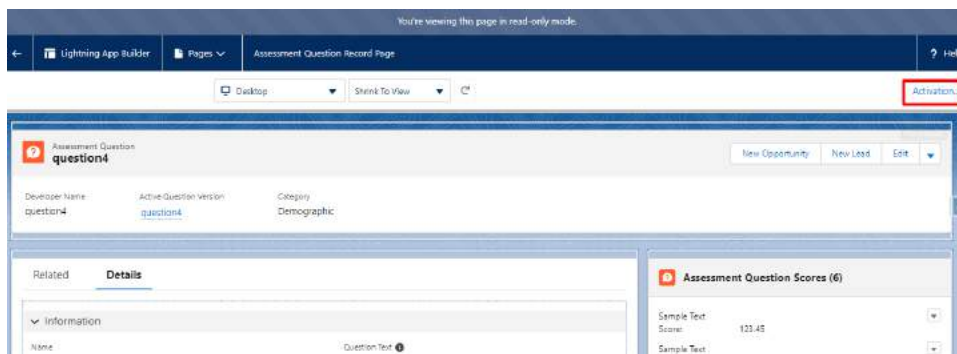
3. Click View



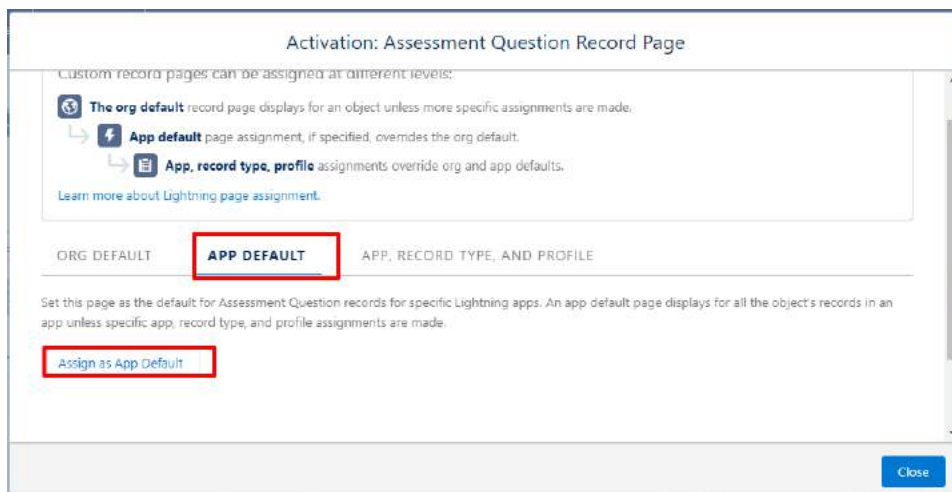
4. If there is no Assessment Question record then you will see "No data for this object" message, click on OK and proceed.



5. Click on **Activation**.



6. Click on App default and then click **Assign as App Default**



7. Select **Patient Reported Outcome**

8. Click on **Next**

Select Apps

Select the Lightning apps to display "Assessment Question Record Page" as the app default page.

App Name	Description
☐ OmniStudio	
☒ Patient Reported Outcome	
☐ Playground Starter	Get started with your Trailhead Playground.
☐ Sales	Manage your sales process with accounts, leads, opportunities, ...
☐ Salesforce CMS	Manage content and media for all of your sites.
☐ Salesforce Scheduler Setup	Set up personalized appointment scheduling.

Cancel Back Next

9. Select Desktop and Phone

10. Click on Next

Select Form Factor

For each app that you assigned this page to as the app default, select the form factor that you want the page to apply to. For example, if you select only the Phone option, then this page will be the app default page for this app only when viewed on a mobile device.

App Name	FORM FACTOR
Patient Reported Outcome	☒ Desktop and phone ☐ Desktop ☐ Phone

Cancel Back Next

11. Click Save

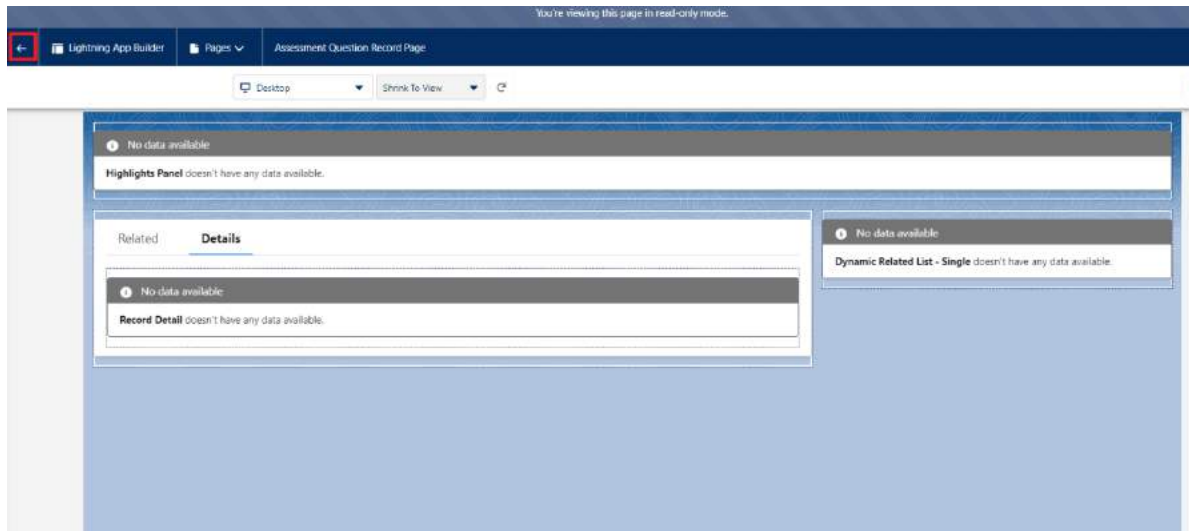
Review Assignments

Review the app default assignments to be saved for "Assessment Question Record Page".

App Name	FORM FACTOR	Current App Default	New App Default
Patient Reported Outcome	Phone	System Default	Assessment Question Record Page
Patient Reported Outcome	Desktop	System Default	Assessment Question Record Page

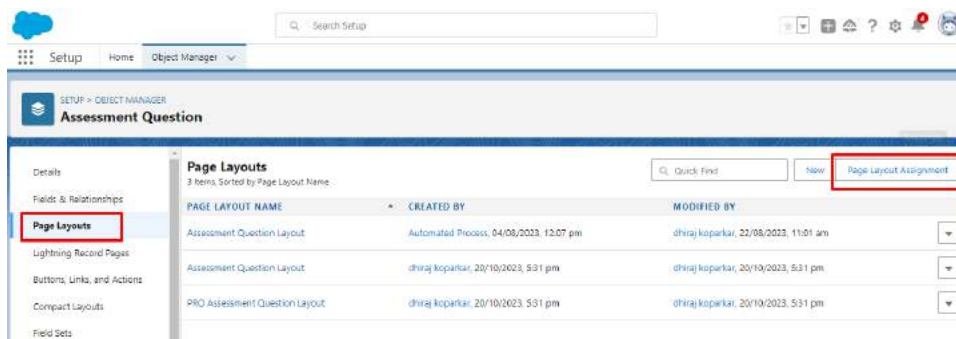
Cancel Back Save

12. Click the **Back** arrow

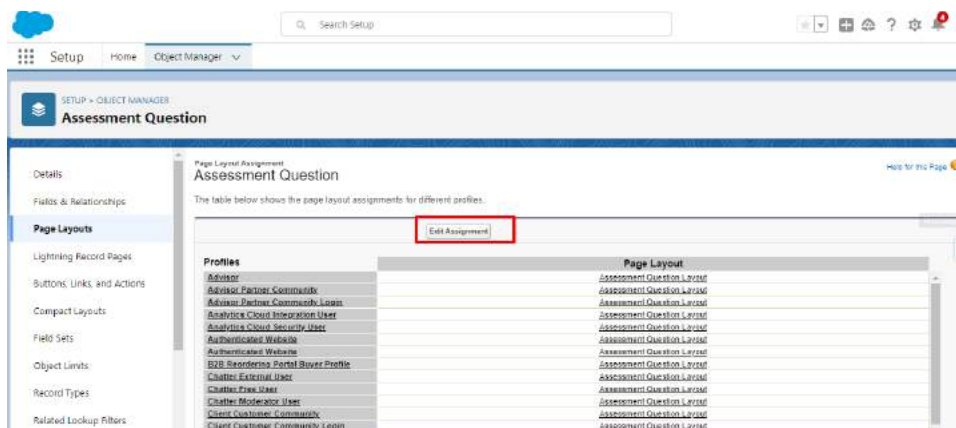


Assign assessment question page layout

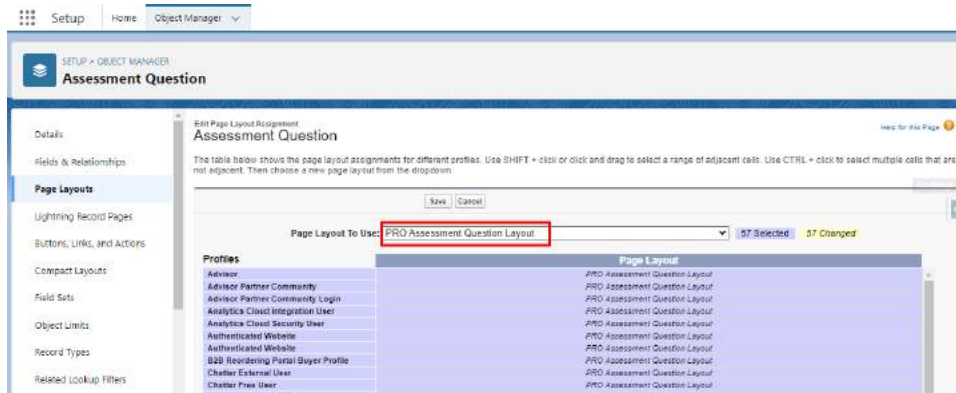
1. Select **page layouts** and then click on **Page Layout Assignment**.



2. Click on **Edit Assignment**.

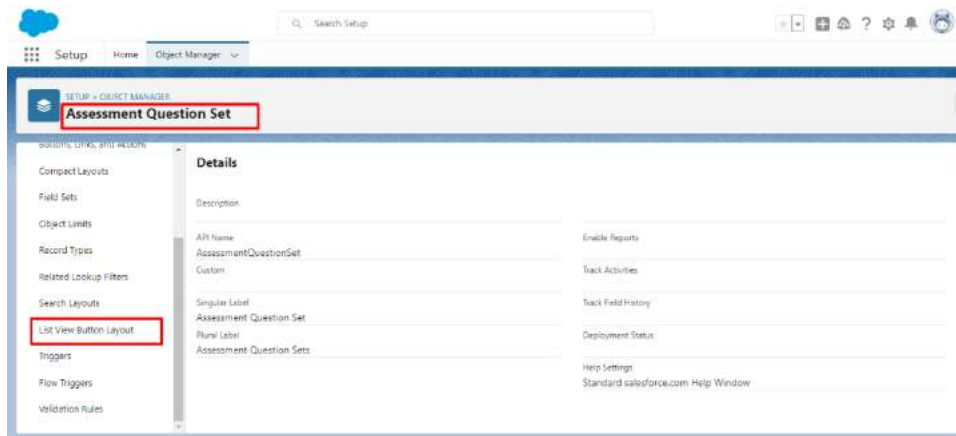


- Then select profile according to requirement of user then select **PRO assessment question layout** from dropdown, and then click on the **Save** button.

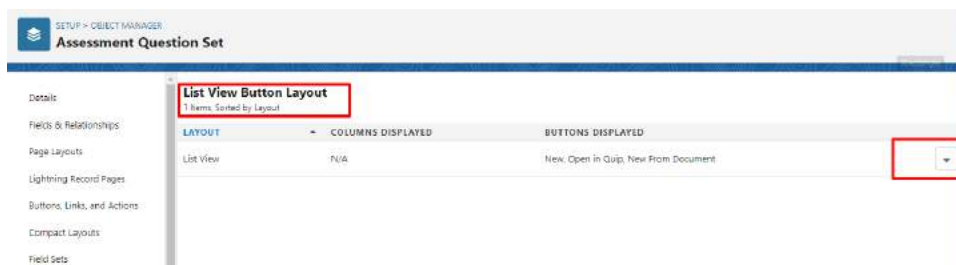


Assessment Question Set Setting

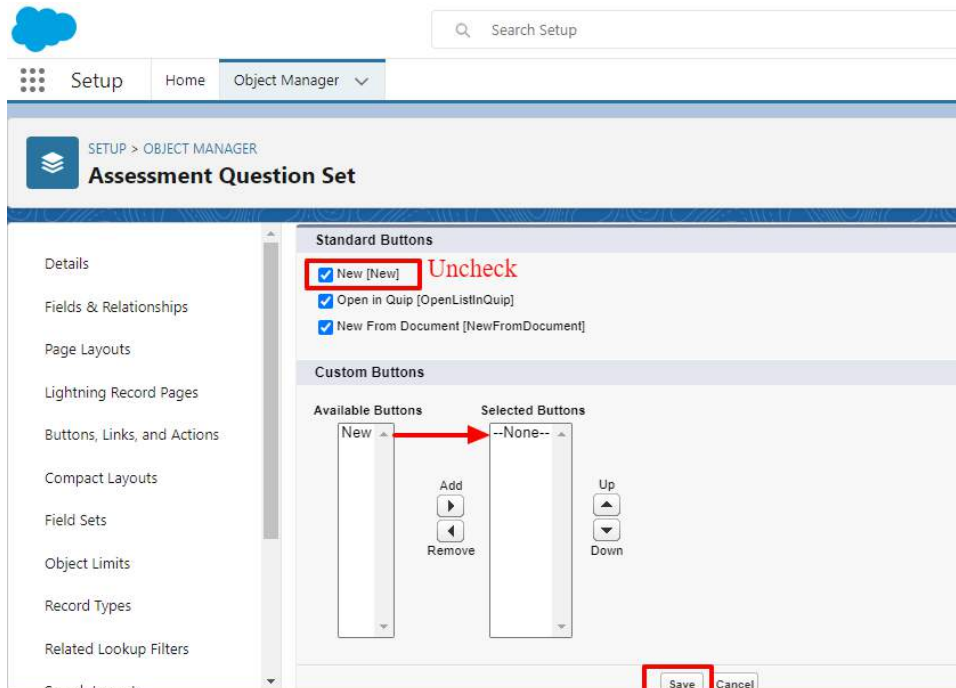
- Go to Setup -> Object Manager -> Assessment Question set
- Click on **List View Button Layout**



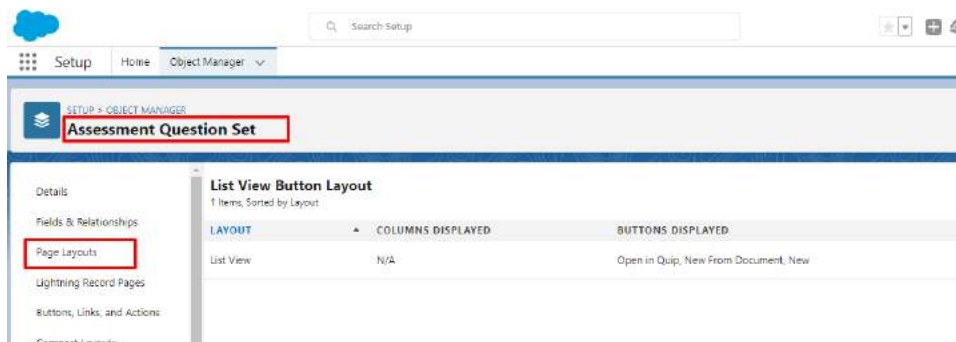
- Click on **Edit**



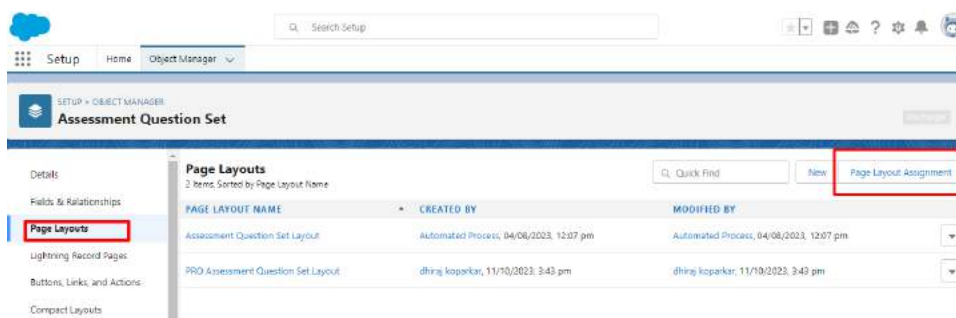
- Uncheck the new checkbox and then move **New** button from available buttons to selected buttons.
- Click **Save**



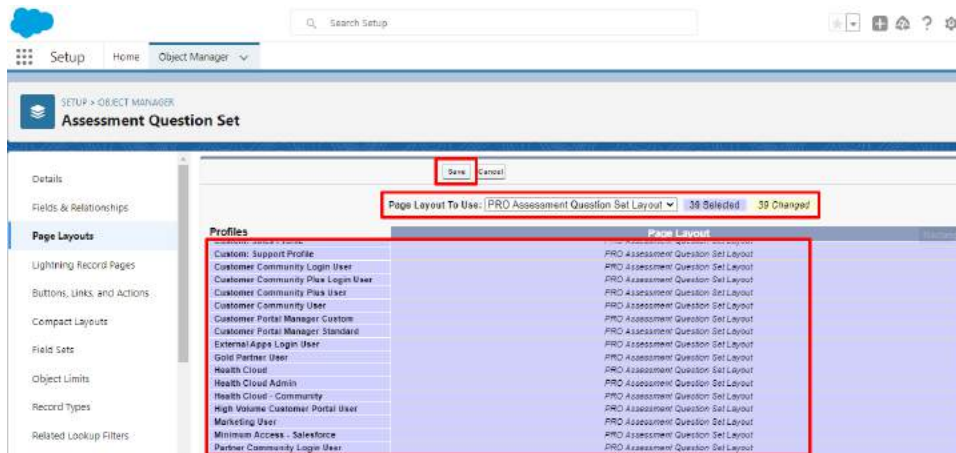
6. Now click on **Page Layouts**



7. Click on **Page Layout Assignment**

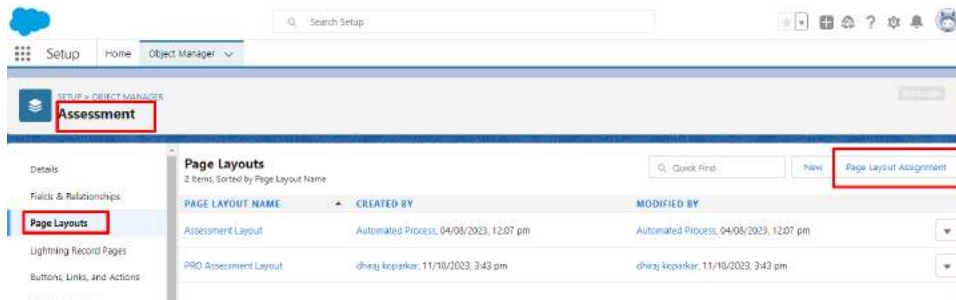


8. Click on **Edit Assignment** and select profiles according to your requirement then select **PRO Assessment Question Set Layout** from dropdown and click on the **Save** button.

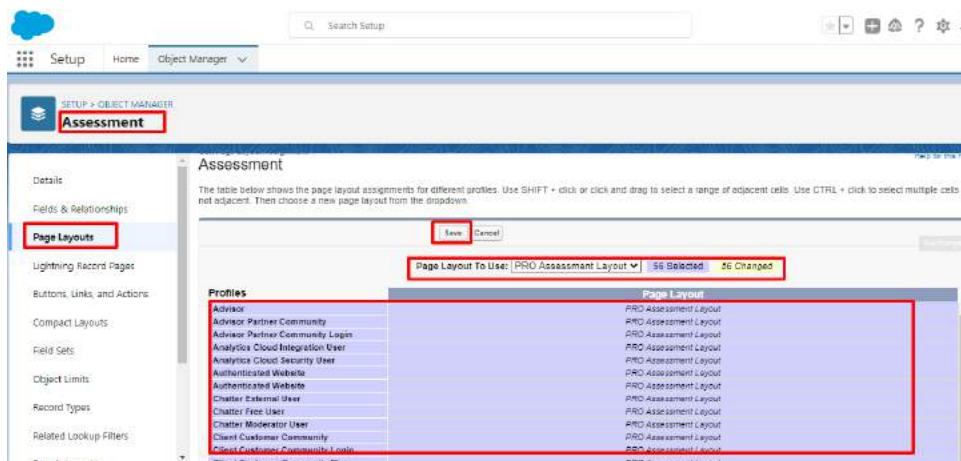


Assessment Setting

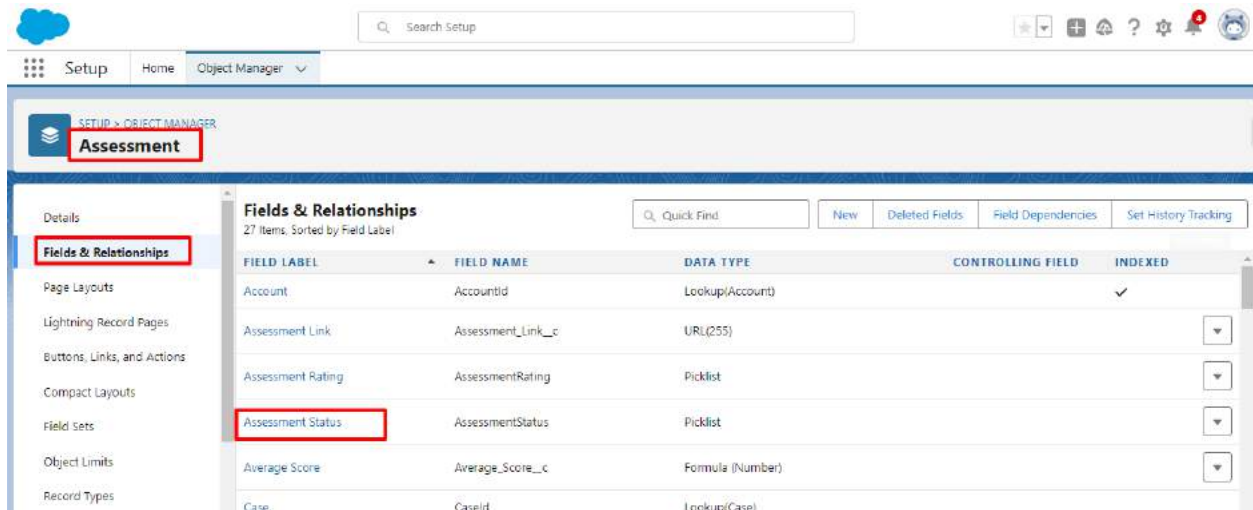
1. Go to Setup -> Object Manager -> Assessment
2. Click on Page Layout then click on Page Layout Assignment.



3. Click on **Edit Assignment** and select profiles according to your requirement then select **PRO Assessment Layout** from dropdown and click on the **Save** button.



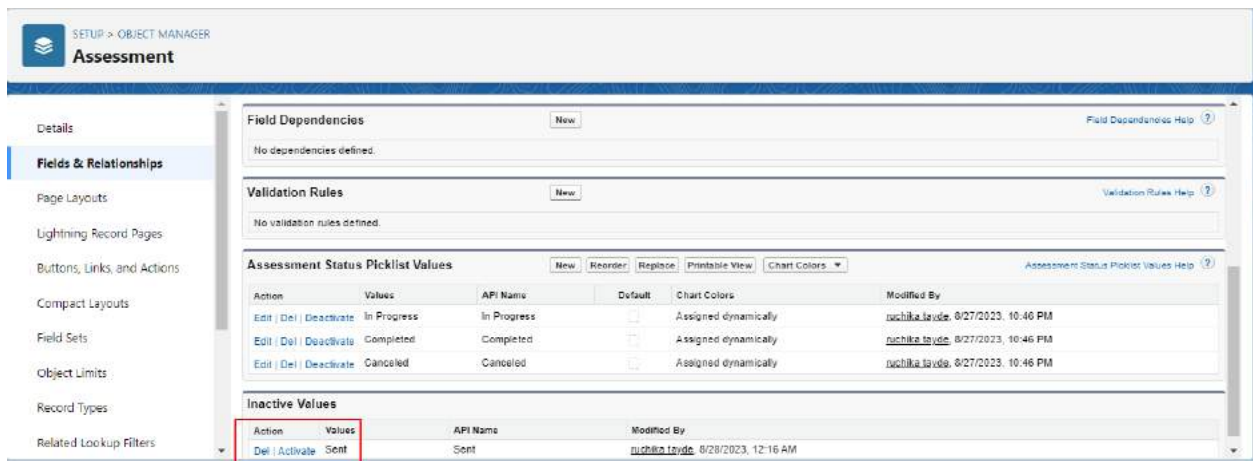
4. Click on **Field & Relationships** and then click on **Assessment Status**



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Fields & Relationships' highlighted. The main content area displays the 'Assessment' object manager. The 'Fields & Relationships' tab is selected, showing a list of 27 items. The 'Assessment Status' field is highlighted in the list.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	AccountId	Lookup(Account)		✓
Assessment Link	Assessment_Link_c	URL(255)		
Assessment Rating	AssessmentRating	Picklist		
Assessment Status	AssessmentStatus	Picklist		
Average Score	Average_Score__c	Formula (Number)		
Case	CaseId	Lookup(Case)		

5. Scroll down and click on **Activate** on **Sent** value



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Fields & Relationships' highlighted. The main content area displays the 'Assessment' object manager. The 'Assessment Status Picklist Values' section is selected, showing a table of values. The 'Activate' button is highlighted for the 'Sent' value.

Action	Values	API Name	Default	Chart Colors	Modified By
Edit / Del / Deactivate	In Progress	In Progress	☐	Assigned dynamically	puchika.lavde 8/27/2023, 10:46 PM
Edit / Del / Deactivate	Completed	Completed	☐	Assigned dynamically	puchika.lavde 8/27/2023, 10:46 PM
Edit / Del / Deactivate	Canceled	Canceled	☐	Assigned dynamically	puchika.lavde 8/27/2023, 10:46 PM

Action	Values	API Name	Modified By
Del / Activate	Sent	Sent	puchika.lavde 8/28/2023, 12:16 AM

6. Click on **New** on **Assessment Status Picklist Values**

Field Dependencies

Validation Rules

Assessment Status Picklist Values

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	In Progress	In Progress	☐	Assigned dynamically	nuchika.tayde, 8/27/2023, 10:46 PM
Edit Del Deactivate	Completed	Completed	☐	Assigned dynamically	nuchika.tayde, 8/27/2023, 10:46 PM
Edit Del Deactivate	Canceled	Canceled	☐	Assigned dynamically	nuchika.tayde, 8/27/2023, 10:46 PM

Inactive Values

Action	Values	API Name	Modified By
Del Activate	Sent	Sent	nuchika.tayde, 8/28/2023, 12:16 AM

7. Add Scheduled and Delayed
8. Click on **Save**

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.

Scheduled
Delayed

Save Cancel

Person Account Setting.

1. Go to Setup -> Object Manager -> Person Account
2. Click on **Record Type**

Record Types

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Person Account	Deactivate this record type	☒	nuchika.tayde, 10/12/2023, 3:31 AM
Person Account	Person Account	☒	nuchika.tayde, 10/10/2023, 3:18 AM

3. Edit the record type with description **Deactivate this record type**.

4. Deselect **Active** checkbox and click on the **Save** button.

Setup > OBJECT MANAGER
Person Account

Details
Page Layouts
Compact Layouts
Record Types
Flow Triggers

Edit Record Type
Person Account (Managed)
Enter a new name for the selected record type and click Save.

This Record Type is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Record Type

Record Type Label: Person Account
Record Type Name: PersonAccount
Namespace Prefix: ADVANS101
Installed Package: Patient Reported Outcome
Description: Deactivate this record type

Active ☐

Save Cancel

5. Click on **Page Layouts** then click on **Page Layout Assignment**.

Setup > OBJECT MANAGER
Person Account

Details
Page Layouts
Compact Layouts
Record Types
Flow Triggers

Page Layouts
2 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Person Account Layout	dhiraj.koparkar, 19/07/2023, 2:24 pm	dhiraj.koparkar, 22/08/2023, 11:01 am
PRO Person Account Layout	dhiraj.koparkar, 11/10/2023, 3:49 pm	dhiraj.koparkar, 11/10/2023, 3:44 pm

6. Click on **Edit Assignment** and select profiles according to your requirement then select **PRO Person Account Layout** from dropdown and click on the **Save** button.

Setup > OBJECT MANAGER
Person Account

Details
Page Layouts
Compact Layouts
Record Types
Flow Triggers

Page Layout To Use: PRO Person Account Layout 58 Selected 58 Changed

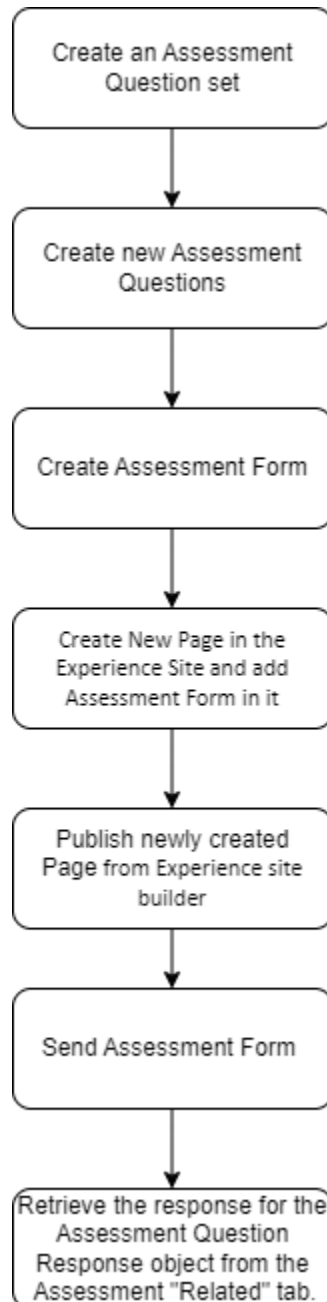
Save Cancel

Profiles

Profiles	Record Types	Person Account
Advisor	PRO Person Account Layout	PRO Person Account Layout
Advisor Partner Community	PRO Person Account Layout	PRO Person Account Layout
Advisor Partner Community Login	PRO Person Account Layout	PRO Person Account Layout
Analytics Cloud Integration User	PRO Person Account Layout	PRO Person Account Layout
Analytics Cloud Security User	PRO Person Account Layout	PRO Person Account Layout
Authenticated Website	PRO Person Account Layout	PRO Person Account Layout
Authenticated Website	PRO Person Account Layout	PRO Person Account Layout
B2B Reordering Portal Buyer Profile	PRO Person Account Layout	PRO Person Account Layout
Chatbot External User	PRO Person Account Layout	PRO Person Account Layout
Chatbot Free User	PRO Person Account Layout	PRO Person Account Layout
Chatbot Moderator User	PRO Person Account Layout	PRO Person Account Layout
Client Customer Community	PRO Person Account Layout	PRO Person Account Layout
Client Customer Community Login	PRO Person Account Layout	PRO Person Account Layout
Client Customer Community Plus	PRO Person Account Layout	PRO Person Account Layout
Client Customer Community Plus Login	PRO Person Account Layout	PRO Person Account Layout
Client	PRO Person Account Layout	PRO Person Account Layout

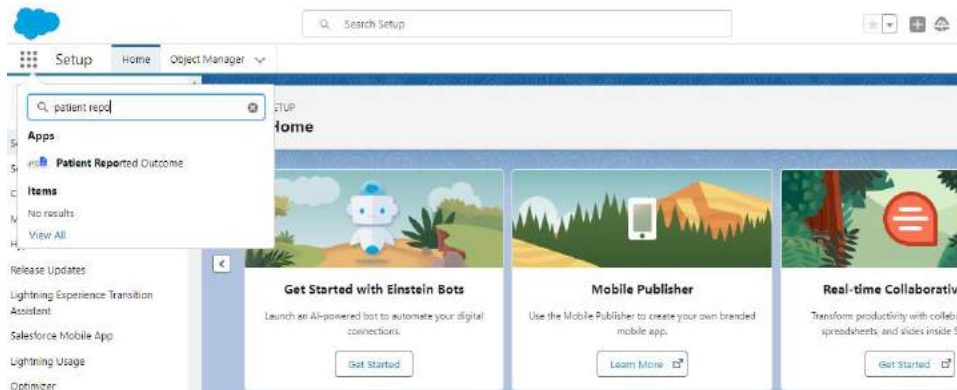
Functionality

Process Flow



Go to Patient Reported Outcome app

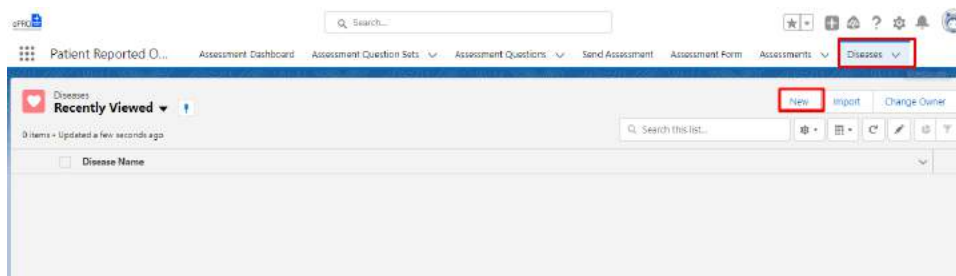
1. Click on **App Launcher** and find the Patient Reported Outcome app.



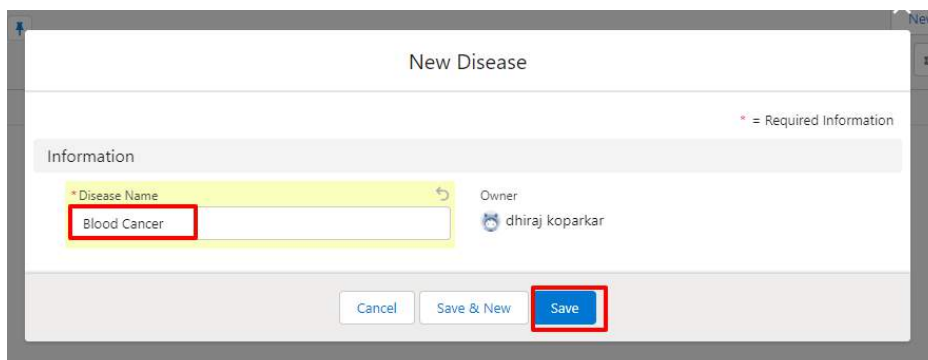
Create Disease

This feature can be used to assign diseases to the person Account and Assessment Question Set thereby mapping disease to patients and vice versa. This helps to send assessments to a group i.e. the disease group.

1. Click on the Disease tab in Patient Reported Outcome App.
2. Click **New**



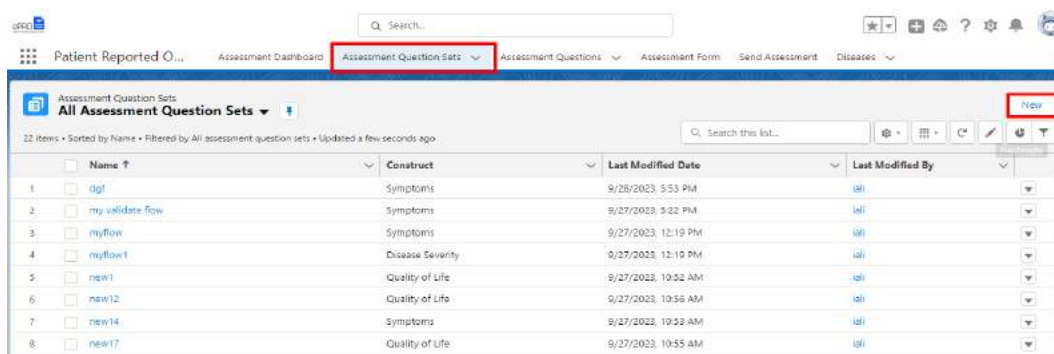
3. Click **Save**.



Create Question Set

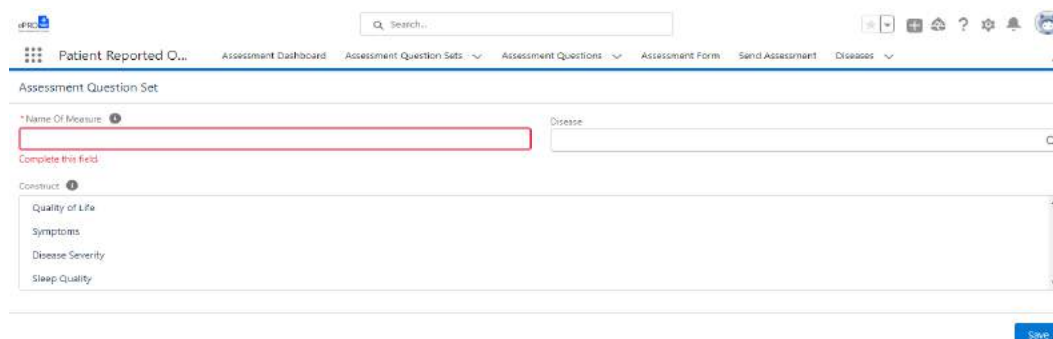
To facilitate the efficient addition of multiple questions within a form, you can create a "question set" and allocate all the desired questions for that specific form to this question set. You can also make different sets for different forms. For example: you can create a question set for Sleep Apnea disease and add all the questions related to sleep apnea in the question set and this will help you while creating assessment forms where you can just write the name of question set and with one click add all the questions in the assessment form for Sleep Apnea.

1. Click on **Assessment Question Set** tab.
2. Click **New** and Enter name, construct and select disease.



	Name	Construct	Last Modified Date	Last Modified By
1	idg1	Symptoms	9/26/2023, 5:53 PM	idg1
2	my validate flow	Symptoms	9/27/2023, 9:22 PM	idg1
3	myflow	Symptoms	9/27/2023, 12:19 PM	idg1
4	myflow1	Disease Severity	9/27/2023, 12:19 PM	idg1
5	new1	Quality of Life	9/27/2023, 10:52 AM	idg1
6	new12	Quality of Life	9/27/2023, 10:56 AM	idg1
7	new14	Symptoms	9/27/2023, 10:53 AM	idg1
8	new17	Quality of Life	9/27/2023, 10:55 AM	idg1

3. Click **Save**.



Assessment Question Set

*Name Of Measure:

Disease:

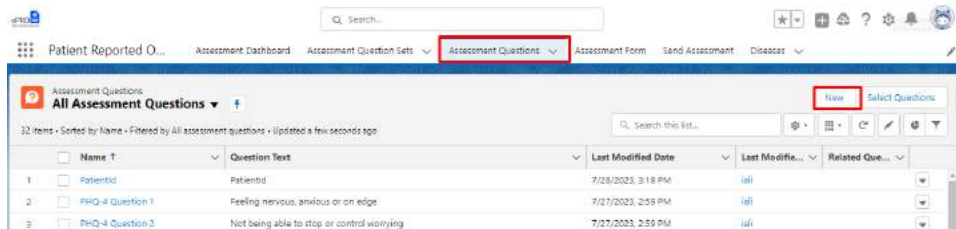
Construct:

- Quality of Life
- Symptoms
- Disease Severity
- Sleep Quality

Save

Create Assessment Question

1. Go to “Assessment Question” tab and click **New**.



2. Create first Question for PatientId (required for internal functionality)

Add name Question: **PatientId**

Select Data Type: **Text**

Category: **Demographic**

Question Text: **PatientId**

Enable **Active** checkbox

Add question(s) to your question set.

3. Click **Save**

Note: It is mandatory to create **Patientid** assessment question record.

Scoring Functionality

This functionality will help you calculate the score of assessment form submitted by the Patient and will help you in analyzing the data and show which patient is performing well or not.

Note: You should give score only for **Assessment Questions** with **Select** and **Radio** data type.

1. To give score to options click on question from **Assessment Question** tab.

Note: Follow same scoring criteria for all the Assessment Questions in a single Assessment Question set. For example, you have given scoring as 1-2-3-4 for a question with 4 options then do not give scoring as 10-20-30-40 for another question. It will make it difficult for you to track the performance of patients.

For best results use same scoring criteria for all the assessment questions in all the Assessment Question sets.

gHC

Search...

Patient Reported O... Assessment Dashboard Assessment Question Sets Assessment Questions Assessment Form Send Assessment Dismiss

Assessment Questions

All Assessment Questions

32 items • Sorted by Name • Filtered by All assessment questions • Updated 4 minutes ago

Search this list...

	Name	Question Text	Last Modified Date	Last Modified By	Related Questions
1	PatientId	PatientId	7/28/2023, 3:18 PM	iah	
2	PHQ-4 Question 1	Feeling nervous, anxious or on edge	7/27/2023, 2:59 PM	iah	
3	PHQ-4 Question 2	Not being able to stop or control worrying	7/27/2023, 2:59 PM	iah	
4	PHQ15 Question 1	Stomach Pain	7/27/2023, 4:33 PM	iah	
5	PHQ15 Question 10	Shortness of breath	7/27/2023, 4:46 PM	iah	

2. Edit any option from **Assessment Question Score**.

gHC

Search...

Patient Reported O... Assessment Dashboard Assessment Question Sets Assessment Questions Assessment Form Send Assessment Dismiss

Assessment Question

PHQ-4 Question 1

Clone Delete Change Owner

Related Details

Information

Name: PHQ-4 Question 1
Developer Name: PHQ-4 Question_1
Category: Demographic
Active Question Version: PHQ-4 Question 1

Question Text: Feeling nervous, anxious or on edge
Data Type: Select

Assessment Question Scores (4)

Not at all
Score: 0

Several days
Score: 1

More than half the days
Score: 2

Nearly every day
Score: 3

View All

3. Click drop down arrow beside the response you want to add score to and click edit and give score for that option.

4. Click **Save**

Assessment Dashboard Assessment Question Sets Assessment Questions Assessment Form Send Assessment Dismiss

Edit Not at all

* = Required Information

* Assessment Question Option

Not at all

Assessment Question

PHQ-4 Question 1

Score

0

Created By: Irfan Ali, 7/27/2023, 2:59 PM

Last Modified By: Irfan Ali, 7/31/2023, 11:43 AM

Cancel Save & New Save

Create Assessment Form

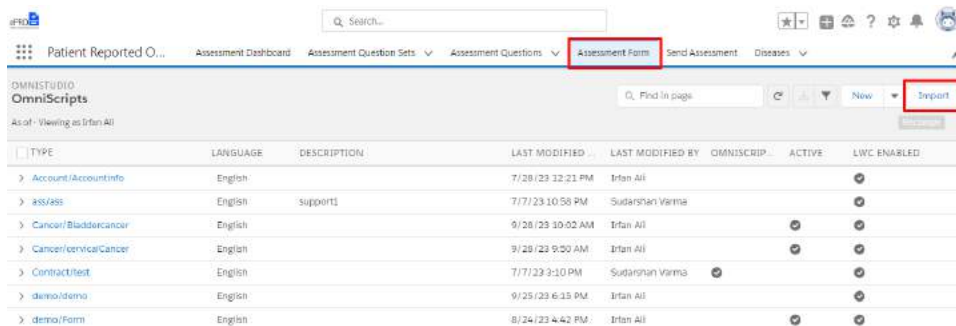
To create the Assessment Form, you need to download the standard form file from the document section.

Note – Newly downloaded file includes all the prebuilt configurations, and this can be reused to create multiple new assessment forms.

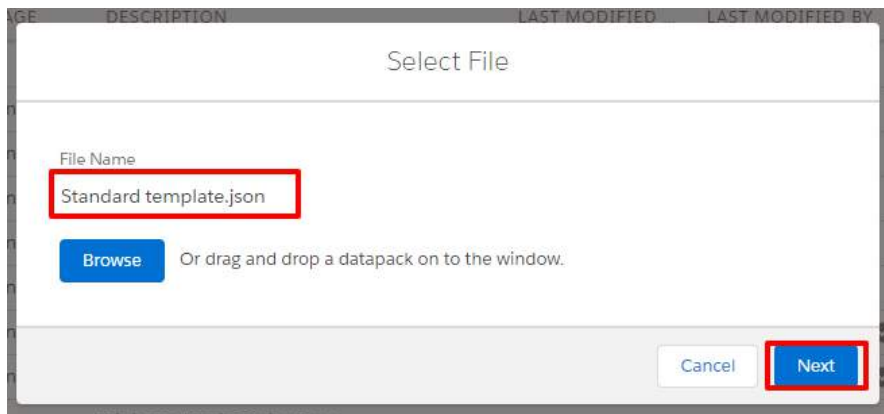
1. Go to “Assessment Form” tab

Note- If you want to create Omniscrypt Form from scratch without using import please refer ‘PRO Omniscrypt Form from Scratch’ doc.

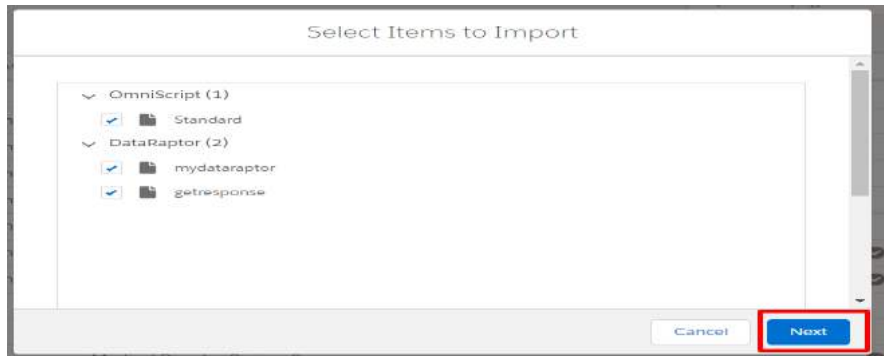
2. Click **Import**.



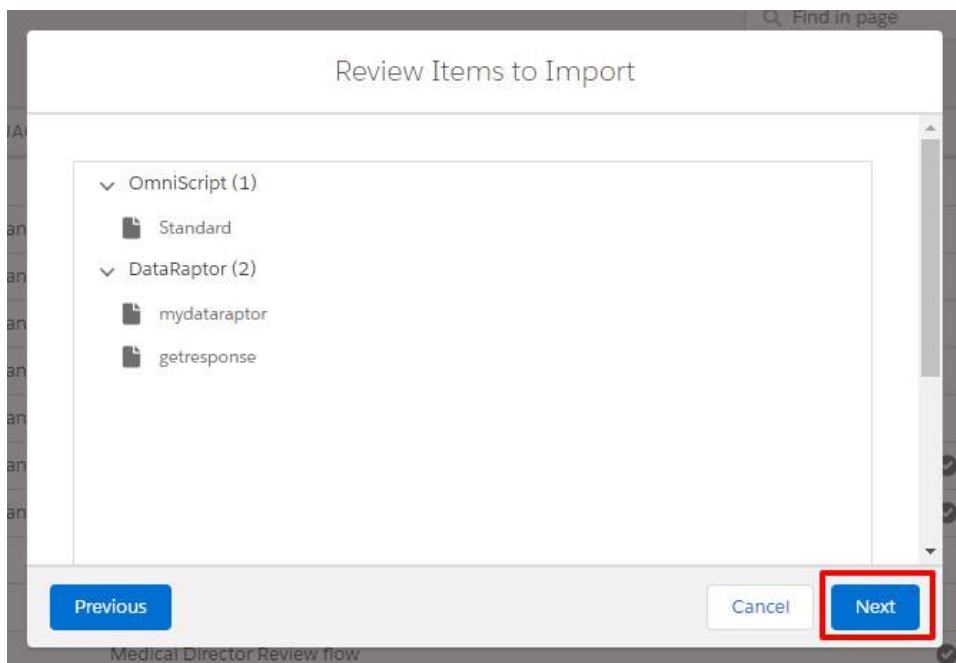
3. Browse the above downloaded document from your device.
4. Click **Next**



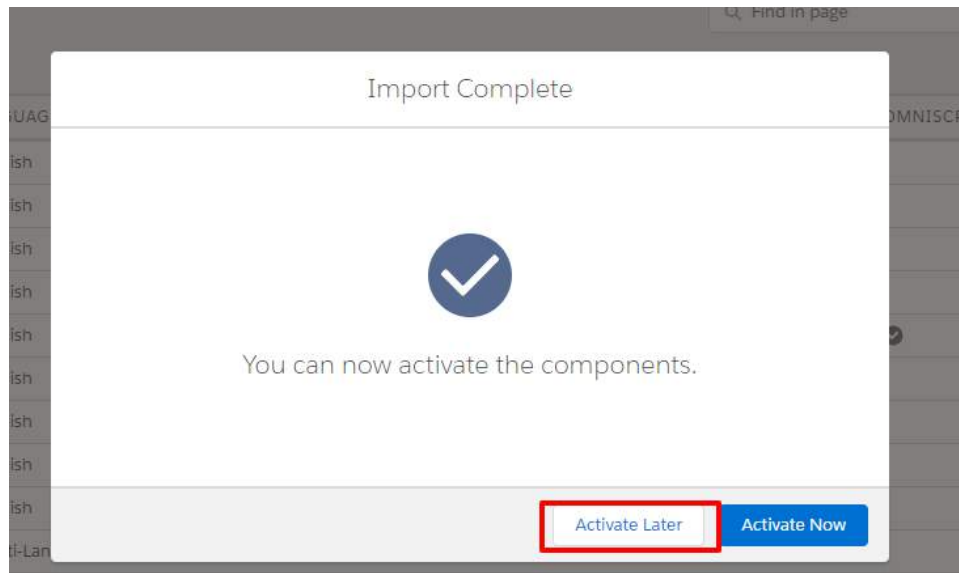
5. Click **Next**



6. Click **Next**



7. Click on **Activate Later**.



Once Import operation is completed for creating new assessment form, after approximately a minute it will open automatically.

In case it does not open, then you can find it on the same page with the name as "PRO/Template" and within it, "Standard".

8. Click on "Standard"

ePRO

Search...

Patient Reported O... Assessment Dashboard Assessment Question Sets Assessment Q

OMNISTUDIO
OmniScripts

As of - Viewing as dhiraj koparkar

TYPE	LANGUAGE	DESCRIPTION
> HealthCloudUM/AdminReview	English	This is the Admin Review Flow
> HealthCloudUM/AuthorizationRequest	English	Creates an authorization request for a mem...
> HealthCloudUM/MedicalDirectorRevi...	English	Medical Director Review flow
> HealthCloudUM/P2PReview	English	P2P Review flow
> HealthCloudUM/P2PScheduling	English	P2P Scheduling Process
> HealthCloudUM/PriorAuthReview	English	Parent OS rendering MD Review, P2P Review...
> HealthCloudUM/UMNurse	English	This is the UM Nurse Flow
> Ins/UploadDocuments	English	Uploads documents.
▼ PRO/Template	English	
☐ Standard (Version 1)	English	
> Quality_of_life/sleeping_disorder	English	

9. Click **Edit** to change the form name according to your requirement.

Search...

Patient Reported O... Assessment Dashboard Assessment Question Sets Assessment Questions Assessment Form Send Assessment Assessments Diseases

OmniScript
Standard

Preview New Version Activate Version **Edit** Edit Base...

Type	Sub Type	Language	Version	Active	Description	Custom Type
PRO	Template	English	1	Active		Discovery Framework

Hide Conditional Elements Theme Lightning

DataRaptorExtractAction1
DataRaptor Extract Action

Build Setup

Search For Element

ACTIONS

10. Change the name, type and subtype. (**Mandatory**)

11. Click Save.

Edit OmniScript

*** Name**

*** Language**

*** Type**

*** SubType**

Description

12. To add question in your Form.

13. Click On **Edit Form**.

The screenshot shows the Advanz 101 interface with the 'Edit Form' button highlighted in the top navigation bar. The interface includes a search bar, navigation tabs, and a main content area with a table of assessment questions.

14. Add your general question for the form.

Edit Form

Search Assessment Questions

Question Set:

Category:

☐ Select All

0 results found

New OmniScript

Write your general ques...

Drag questions here:

> Confirmation

> Response already subm...

> Invalid Patient Id

Before adding your Question Don't forget to add **patientid** (**Required**) question because PatientId will be helpful to create association of Assessment with Patient and for future mapping of data for the report and dashboard.

The screenshot shows the 'Edit Form' window. On the left, under 'Question Set', there is a search bar with 'patientid' entered. Below it, a list of questions is shown, with 'Patientid' selected and highlighted by a red box. A red arrow points from this box to the 'New OmniScript' section on the right. In the 'New OmniScript' section, there is a large text area for 'Write your general ques...' and a list of questions to be added: 'Confirmation', 'Response already subm...', and 'Invalid Patient Id'.

15. Now Add multiple assessment questions using the assessment question set.

Similarly, add all questions or you can also add question set so whatever question in your set so that all appear, and you can add all of them at once.

16. Click on OK

The screenshot shows the 'Edit Form' window. On the left, under 'Question Set', there is a search bar with 'Sleep Disorder' entered. Below it, a list of question sets is shown, with 'Sleep Disorder' selected and highlighted by a red box. A red arrow points from this box to the 'New OmniScript' section on the right. In the 'New OmniScript' section, there is a large text area for 'Write your general ques...' and a list of questions to be added: 'Confirmation', 'Response already subm...', and 'Invalid Patient Id'.

17. Click on Step1

The screenshot shows the 'Build' interface. On the left, there is a sidebar with a list of elements. 'Step 1' is selected and highlighted by a red box. The main area shows a list of elements to be added, including 'DataRaptor/ExtractAction1', 'DataRaptor/ExtractAction2', and 'Step 1'.

18. Select **PatientId** question from step1 (shown below).

The screenshot shows the Advanz 101 interface for editing an assessment form. The main area displays 'Step 1' with a list of questions. The 'PatientId' question is highlighted with a red box. The right sidebar shows the 'STEP PROPERTIES' panel with fields for Name, Field Label, Chart Label, and Instruction.

19. Enable **Read only** checkbox.

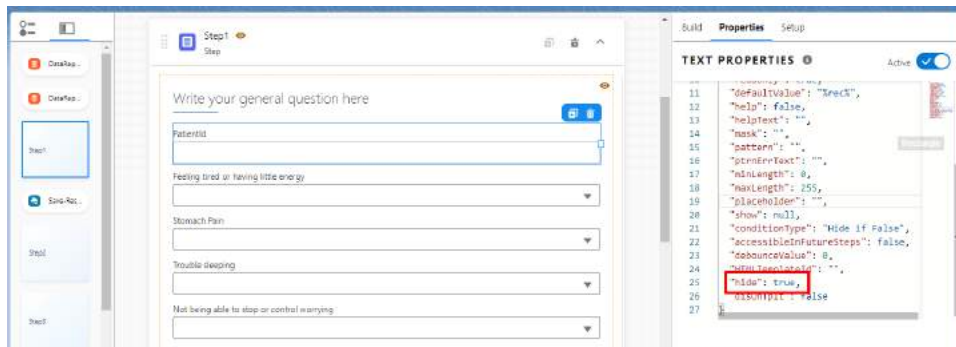
20. Add **%rec%** in default value.

The screenshot shows the Advanz 101 interface with the 'Text Properties' panel open for the 'PatientId' question. The 'Read-only' checkbox is checked, and the 'Default Value' is set to '%rec%'. The 'PatientId' question is highlighted with a red box in the main area.

21. Select **Edit Properties As JSON** from properties of **PatientId** question.

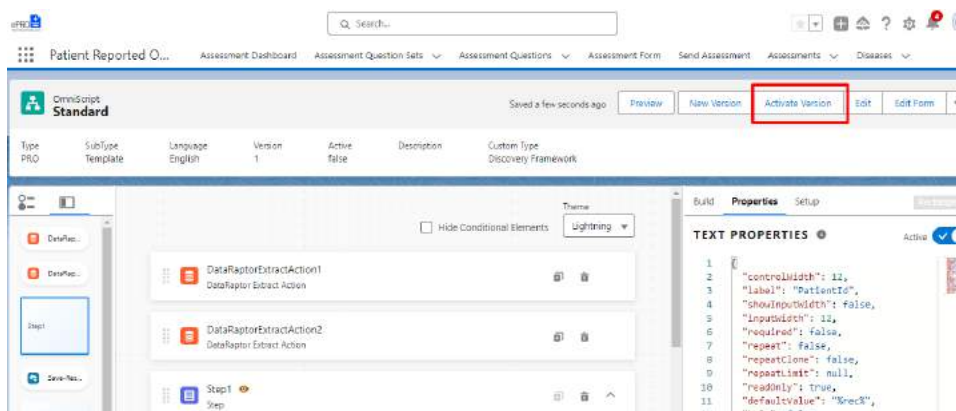
The screenshot shows the Advanz 101 interface with the 'Text Properties' panel open for the 'PatientId' question. The 'Edit Properties As JSON' button is highlighted with a red box in the bottom right corner.

22. Change hide from false to true

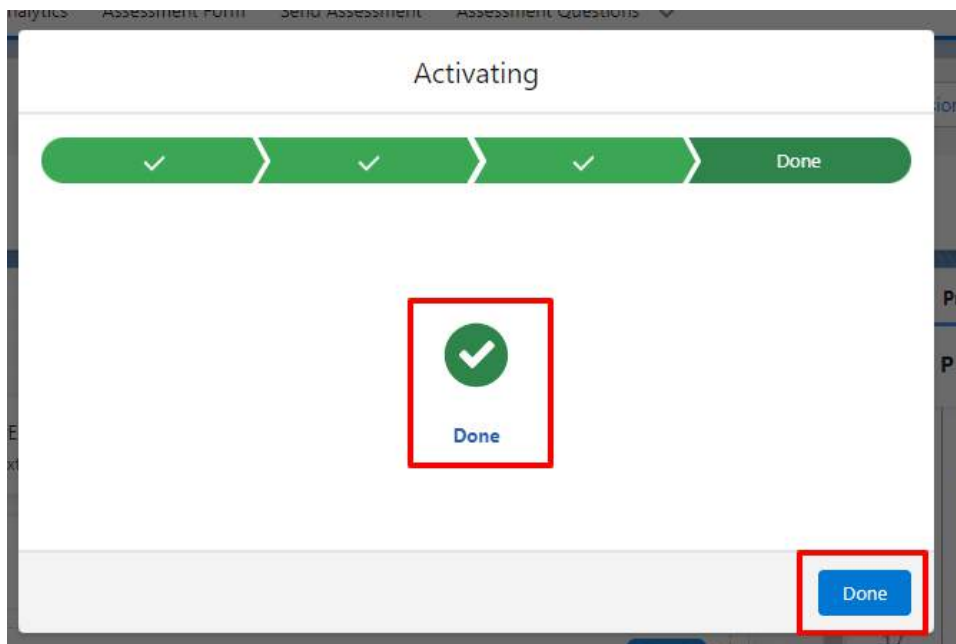


Note: All steps are mandatory for patientid question.

23. Then select Activate Version



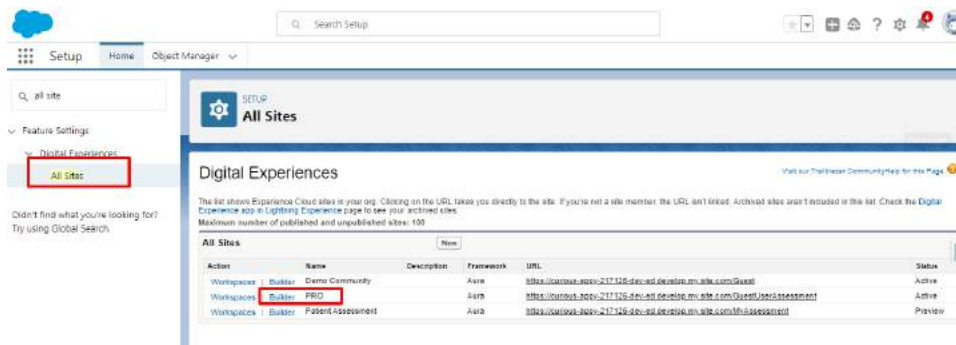
24. Click on Done.



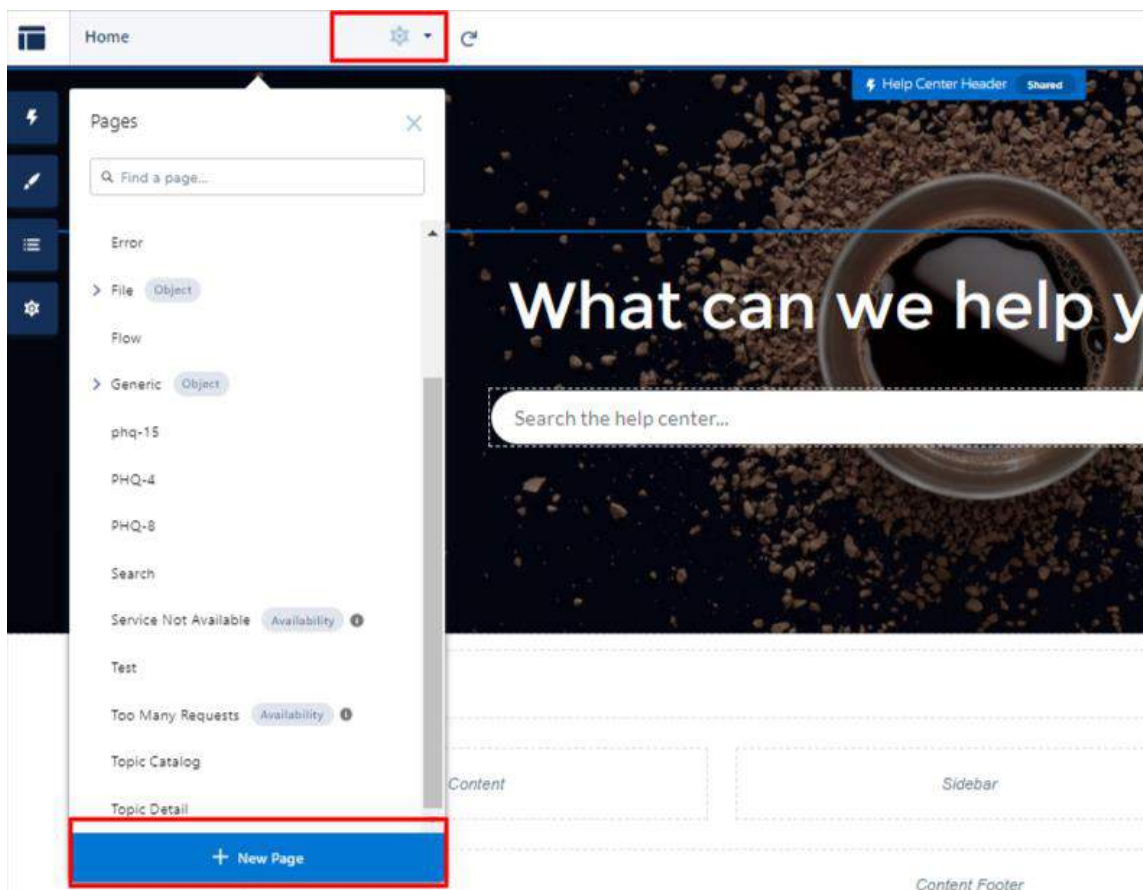
Add Assessment Form In Experience Site

To run Assessment form in any web browser, assessment form needs to be published on web page. For uploading assessment on web page, there are some steps that are necessary to be performed and are mentioned below.

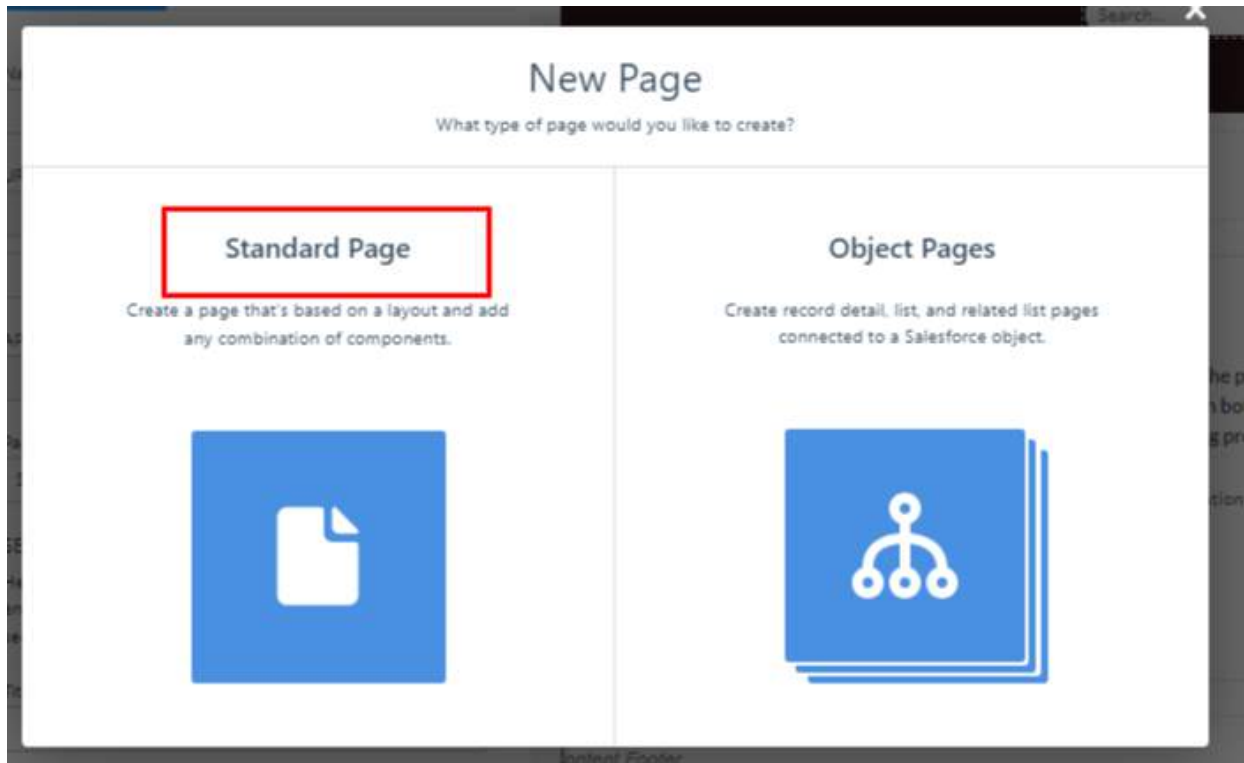
1. Go to Setup -> Search "All site" in Quick Find Box and click **Builder** action beside the name of your site which you created in initial steps.



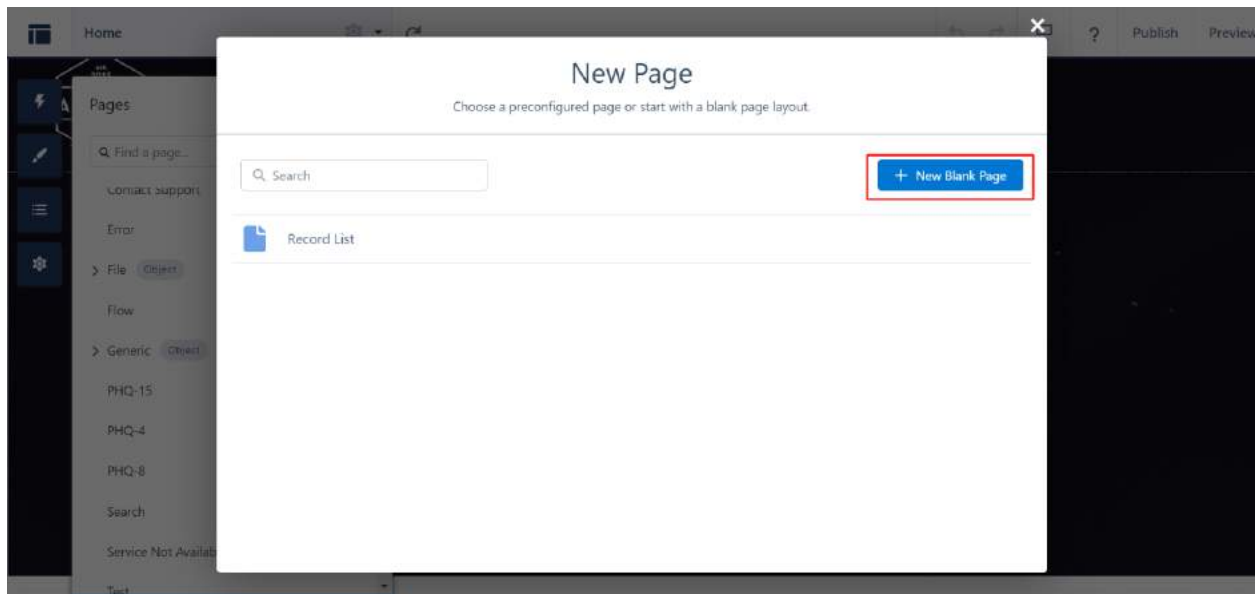
2. Click on dropdown icon and click on new page



3. Then select **Standard Page**



4. Select **New Blank Page**



5. Select Page layout for your page

New Page
Choose a content layout that defines the regions of your page.

Introducing Flexible Layouts New
Gives you the most control over your page and its layout.
Build your own layout by adding full-width sections across your page. Create up to six columns within each section, then resize them for the ultimate flexible design. Add sections to build out the page and stack them as you wish.

Current Layouts

- 1 full-width column (highlighted with a red box)
- 2 columns, 1:2 ratio
- 2 columns, 1:1 ratio
- 2 columns, 2:1 ratio

← Back Next

6. Click **Next**, add **Name** and **API Name**.

Note: Name should be same as the name of your Assessment (omniscrypt) form.

7. Click **Create**.

New Page
Give your page a name and a URL.

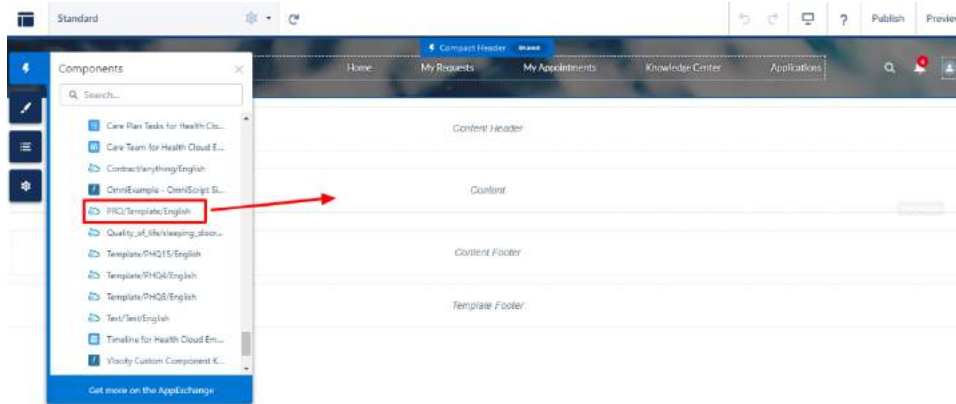
* Name
Standard

* URL
/ standard

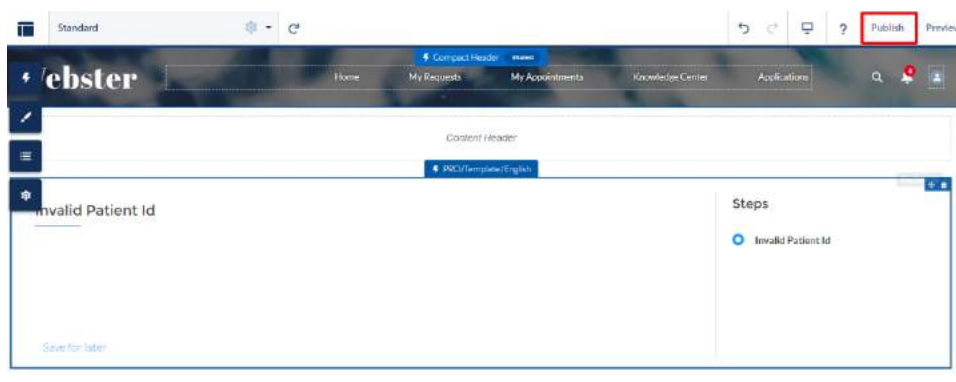
API Name ⓘ
standard

← Back Create

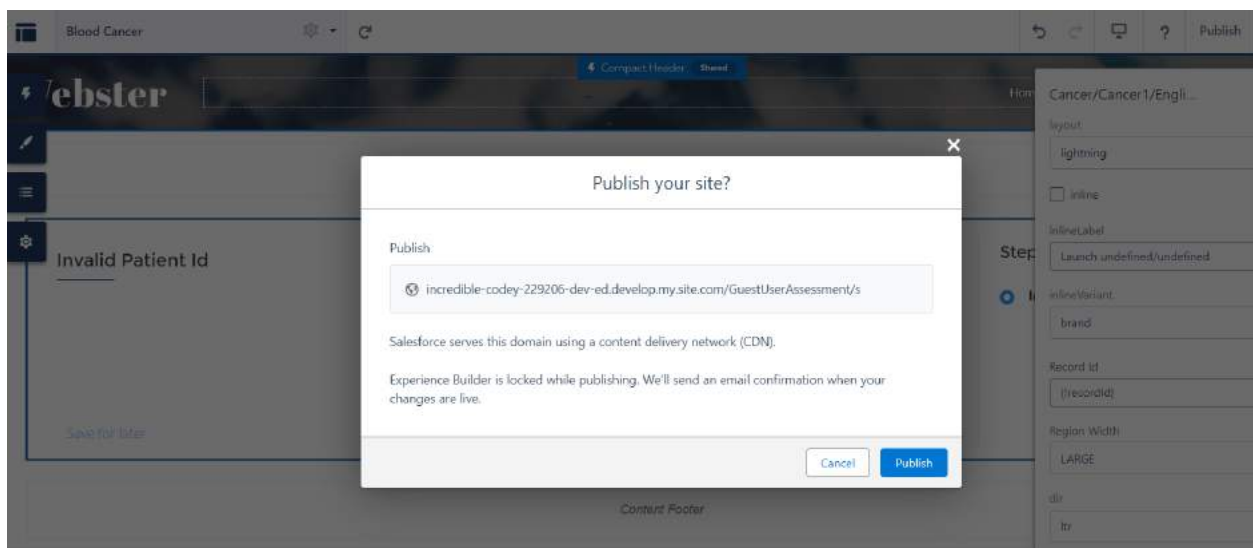
8. Click on **component**, select your **Assessment form** and drag it in **Content** section on your page.



9. Now click on **Publish** button.



10. Click **Publish** again.

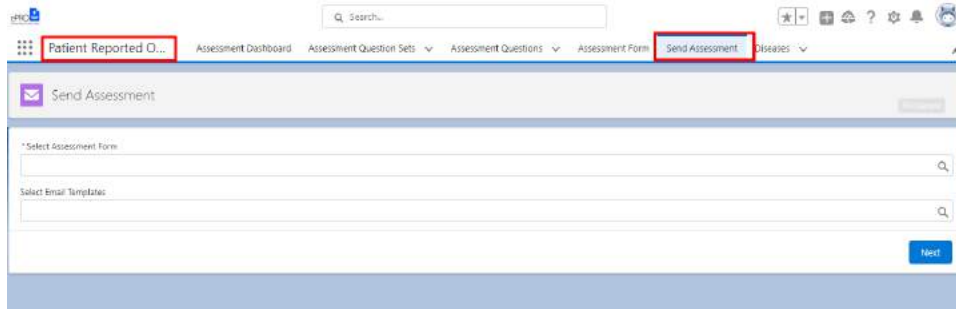


Now you are ready to use Patient Reported Outcome app to send form(s) to patients.

Navigate to Patient Reported Outcome App from the App Launcher.

Send Assessment forms to Patient

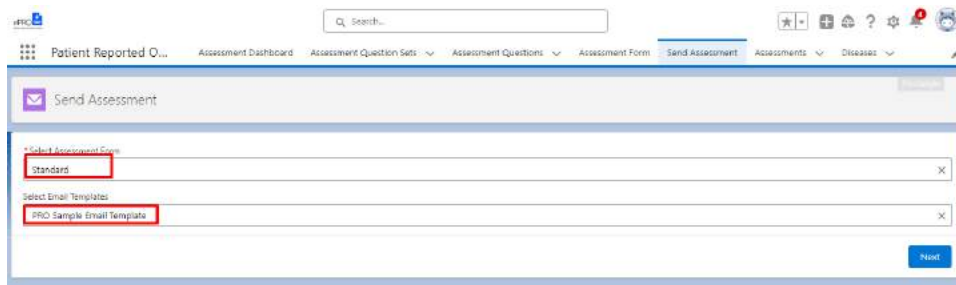
1. Go to **Send Assessment** Tab in Patient Reported Outcome app.



2. Select your **Assessment Form**
3. Select **Email Template** as "PRO Sample Email Template" which is provided in the app package.

Note: If you want to create your custom email template then you can create it by following the steps which are provided after this section.

4. Click **Next**



User can choose to change the email if for (From) or keep it as is. The email is by default of the user who is logged into the Salesforce org.

5. User can then select single patient or multiple patients. User can also type disease name in search list and patients associated with only that disease will show up.
6. Due date can then be added as per user convenience, by default it is 7 days after whatever the current date is.

Send Assessment

From: dhiraj.k@advantz101.com

Select patients to send
Showing 8 of 8 items • 1 item selected

Patient Name	Symptoms	Disease Name	Email
☐ aditya bangre	very tired	Diabetes	dhirajkoparkar4@gmail.com
☒ Charles Green	Have numb or tingling hands or feet	Diabetes	dhiraj.k@advantz101.com
☐ Debbie Min	Have numb or tingling hands or feet	Diabetes	dhiraj.k@advantz101.com
☐ Dhiraj Koparkar	Diarrhea	Typhoid	dhiraj.k@advantz101.com
☐ Jane Foster	Blood in Vomit	Cancer	dhiraj.k@advantz101.com
☐ Lisa Green	Weakness	Cancer	nuchika.t@advantz101.com
☐ Nouman Danish	Fever	Typhoid	nouman.d@advantz101.com
☐ Violet Macleod	Pain in feet	Diabetes	dhiraj.k@advantz101.com

Due Date: 01-Nov-2023

Send Now Send Later

7. Then click **Send Now** or **Schedule Later**.

Send Assessment

Successfully Sent Email

Summary

To: Showing 1 of 1 item

Account Name	Email
Charles Green	dhiraj.k@advantz101.com

Close

Assessment form sent successfully.

The identity of this sender has not been verified. [Click here to learn more](#)

DK dhiraj koparkar via uviqi1ip4df43uw8.uvk.5j-c7daieaz.ap27.bnc.salesforce.com
To: Dhiraj Koparkar Wed 25-10-2023 12:53

Hi,
Charles Green

You have Assessment to be completed!
To get started, go to
<https://curious-appy-217126-dev-ed.develop.my.site.com/GuestUserAssessment/s/standard/?rec=0004th0015j0000147X5ctytyffbfcv>

Reply Forward

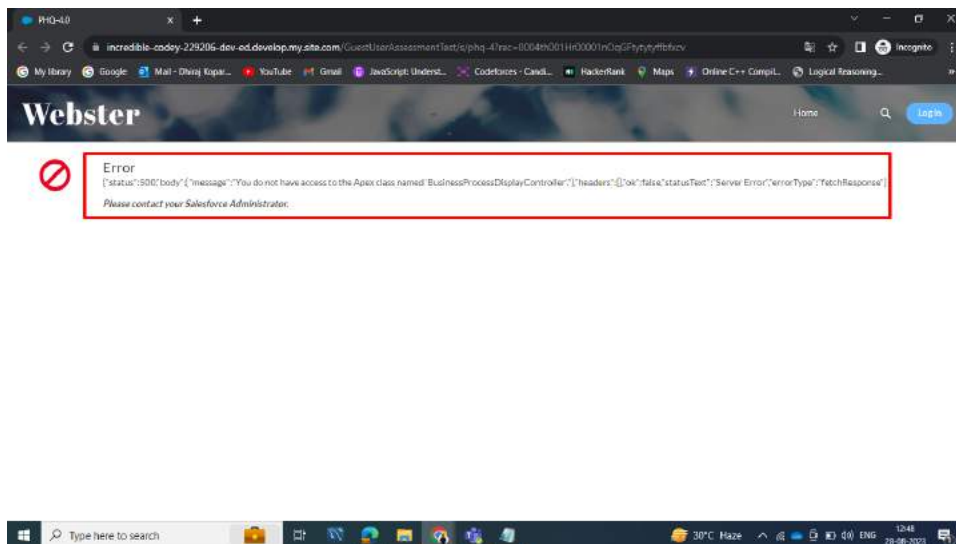
When user will click on URL provided in email, user will be redirected to your assessment form page and from there they can submit the form.

The screenshot shows a web application interface for Webster. At the top is a dark navigation bar with the Webster logo on the left and links for Home, My Requests, My Appointments, Knowledge Center, and Applications on the right. There are also search and notification icons. Below the navigation bar is the main content area. On the left, under the heading "Write your general question here", there are four dropdown menus with the following labels: "Feeling tired or having little energy", "Stomach Pain", "Trouble sleeping", and "Not being able to stop or control everything". A blue "Next" button is located at the bottom right of this section. On the right side of the main content area, there is a "Steps" sidebar. It shows a progress indicator with two steps: "Write your general question here" (which is the current step, marked with a blue circle and a plus icon) and "Confirmation" (marked with a grey circle and a plus icon).

Error Handling

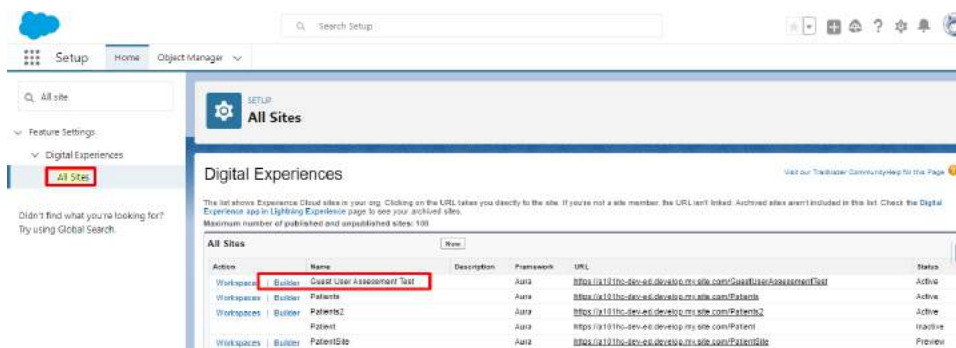
If you face an error of the following type:

("status":500,"body":{"message":"You do not have access to the Apex class named '**Business ProcessDisplayController**':"headers":{"ok":false,"statusText":"Server Error",
errorType": "fetchResponse"} Please contact your Salesforce Administrator.

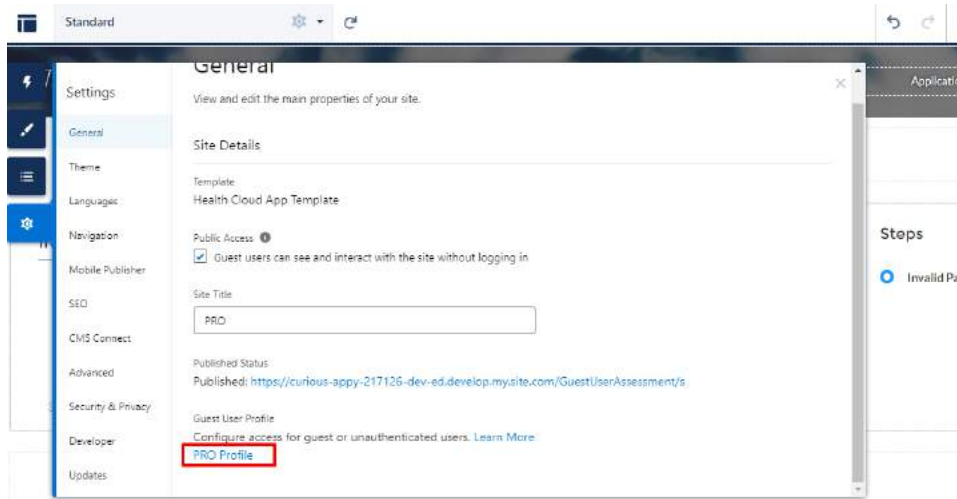


Give apex class permission to guest user(s) using the following steps.

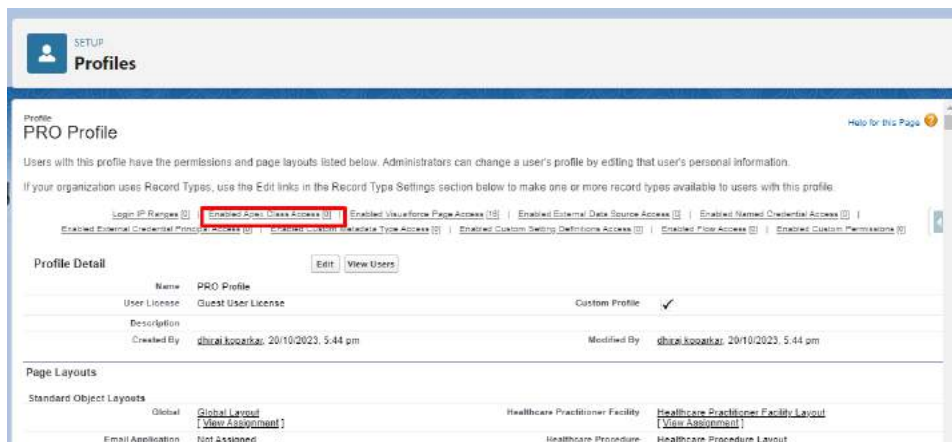
1. Go to All Sites
2. Click on builder of your experience site.



3. Select **Guest User** profile from setting



4. Click on **Enabled Apex class access**



5. Edit Enabled Apex class Access



6. Search that class and move to Enabled Apex classes.

SETUP
Profiles

Enable Apex Class Access

Select the Visualforce pages that you want to make accessible at this Salesforce site.

Save Cancel

Available Apex Classes

- omnistudio.VlocityContinuationIntegration
- omnistudio.VlocityDocsUtils
- omnistudio.VlocityErrorLoggingService
- omnistudio.VlocityOpenInterface
- omnistudio.VlocityOpenInterface2
- omnistudio.VlocityOpenInterfaceExecutor
- omnistudio.VlocityScheduledJobTriggerHandler
- omnistudio.VlocityTrackingEntryMigrationBatch
- omnistudio.VlocityTrackingService
- omnistudio.VlocityTrackingServiceFieldMappings
- omnistudio.XmlToJson
- omnistudio.Zippex
- trihdtps.tt_UtilController
- omnistudio.BusinessProcessDisplayController

Add

Remove

Enabled Apex Classes

- omnistudio.NewportUtilities

7. Click **Save**

Enable Apex Class Access

Select the Visualforce pages that you want to make accessible at this Salesforce site.

Save Cancel

Available Apex Classes

- omnistudio.VlocityBatchSObjectJob
- omnistudio.VlocityContinuationIntegration
- omnistudio.VlocityDocsUtils
- omnistudio.VlocityErrorLoggingService
- omnistudio.VlocityOpenInterface
- omnistudio.VlocityOpenInterface2
- omnistudio.VlocityOpenInterfaceExecutor
- omnistudio.VlocityScheduledJobTriggerHandler
- omnistudio.VlocityTrackingEntryMigrationBatch
- omnistudio.VlocityTrackingService
- omnistudio.VlocityTrackingServiceFieldMappings
- omnistudio.XmlToJson
- omnistudio.Zippex
- trihdtps.tt_UtilController

Add

Remove

Enabled Apex Classes

- omnistudio.NewportUtilities
- omnistudio.BusinessProcessDisplayController

If you face similar error for different classes, follow the above steps for that apex class as well.

SETUP
Profiles

Login IP Ranges [New](#) [Login IP Ranges Help](#)

No login IP ranges specified. Users from any IP address are allowed to log in.

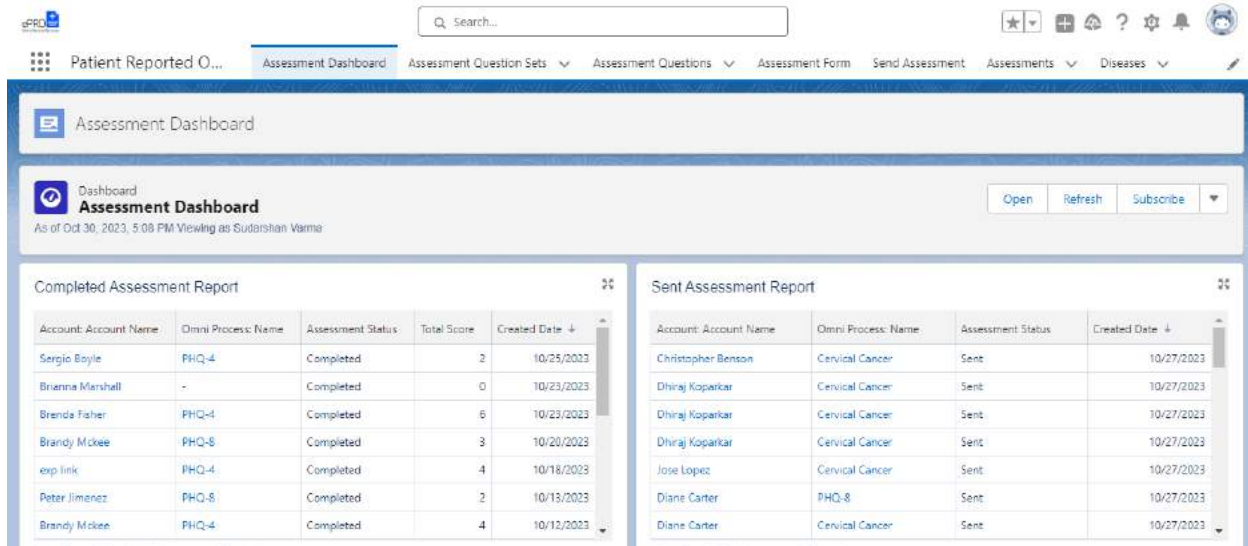
Enabled Apex Class Access [Edit](#) [Enabled Apex Class Access Help](#)

Apex Class Name	AppExchange Package Name
omnistudio.BusinessProcessDisplayController	OmniStudio
omnistudio.NewportUtilities	OmniStudio

Assessment Dashboard

Under the **Assessment Dashboard** tab, there are few components for completed and sent statuses, scores by forms, assessment status, Patients per Disease, and Delayed assessment reports.

1. **Completed Assessment Report** shows all records of assessments with status as **Completed**.
2. **Sent Assessment Report** shows all records of assessments with status as **Sent**.



The screenshot shows the 'Assessment Dashboard' interface. At the top, there is a navigation bar with a search bar and several icons. Below the navigation bar, the 'Assessment Dashboard' tab is selected. The dashboard displays two reports:

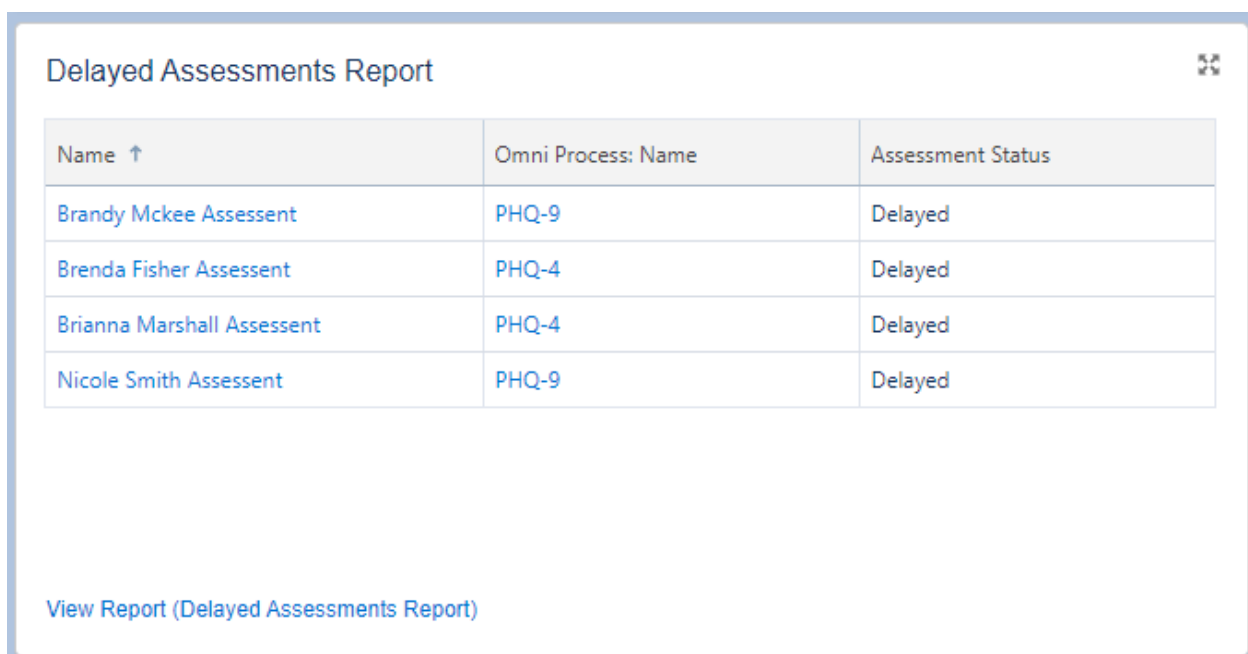
Completed Assessment Report

Account: Account Name	Omni Process: Name	Assessment Status	Total Score	Created Date
Sergio Boyle	PHQ-4	Completed	2	10/25/2023
Brianna Marshall	-	Completed	0	10/23/2023
Brenda Fisher	PHQ-4	Completed	6	10/23/2023
Brandy Mckee	PHQ-8	Completed	3	10/20/2023
exp link	PHQ-4	Completed	4	10/18/2023
Peter Jimenez	PHQ-8	Completed	2	10/13/2023
Brandy Mckee	PHQ-4	Completed	4	10/12/2023

Sent Assessment Report

Account: Account Name	Omni Process: Name	Assessment Status	Created Date
Christopher Benson	Cervical Cancer	Sent	10/27/2023
Dhiraj Koparkar	Cervical Cancer	Sent	10/27/2023
Dhiraj Koparkar	Cervical Cancer	Sent	10/27/2023
Dhiraj Koparkar	Cervical Cancer	Sent	10/27/2023
Jose Lopez	Cervical Cancer	Sent	10/27/2023
Diane Carter	PHQ-8	Sent	10/27/2023
Diane Carter	Cervical Cancer	Sent	10/27/2023

3. **Delayed Assessment Report** shows all the assessments with status as **Delayed**

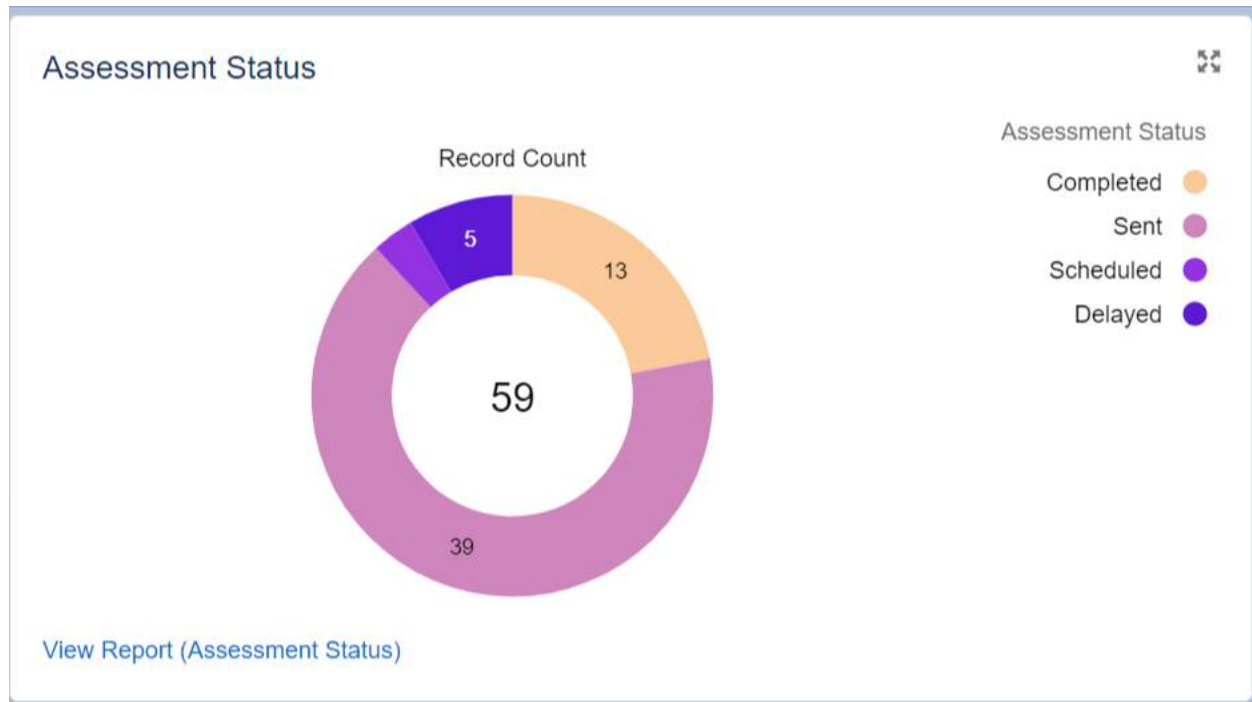


The screenshot shows the 'Delayed Assessments Report' table. The table has three columns: Name, Omni Process: Name, and Assessment Status.

Name	Omni Process: Name	Assessment Status
Brandy Mckee Assesment	PHQ-9	Delayed
Brenda Fisher Assesment	PHQ-4	Delayed
Brianna Marshall Assesment	PHQ-4	Delayed
Nicole Smith Assesment	PHQ-9	Delayed

At the bottom of the report, there is a link: [View Report \(Delayed Assessments Report\)](#)

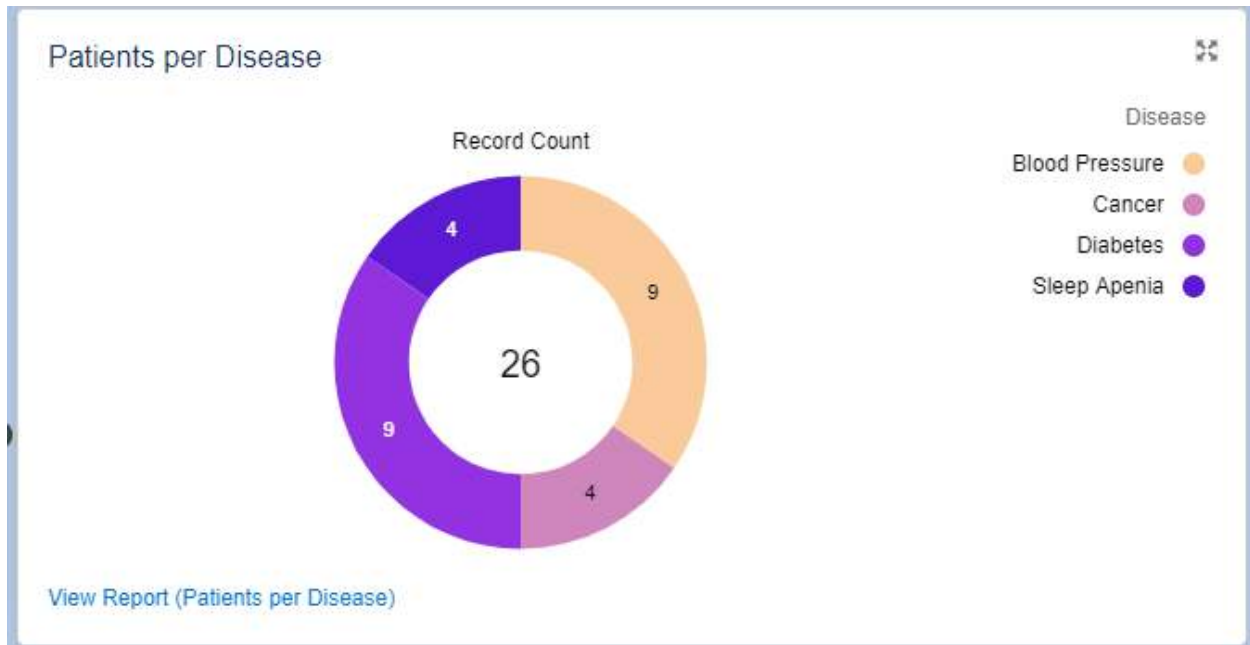
4. **Assessment status** is a Pie Chart which shows statuses of all the assessments.



5. **Score by Forms** is a component which shows the average score of each assessment to evaluate performance.

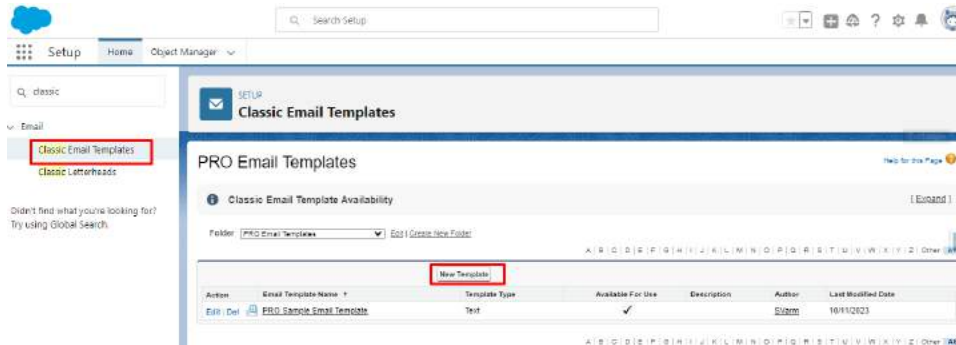


6. **Patients per Disease** report shows number of patients per disease.



Custom email template for Send Assessment functionality

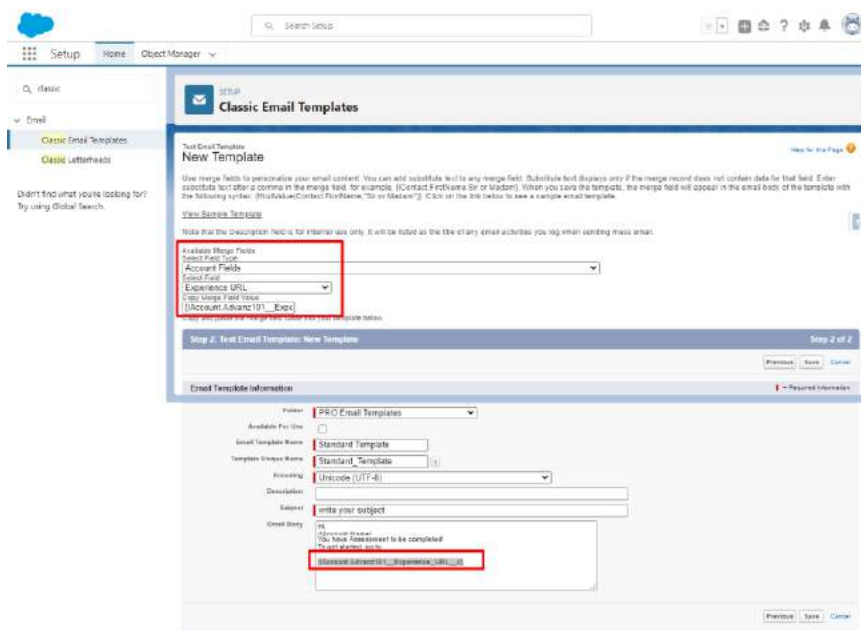
1. Go to setup -> find classic email template in quick find box -> New Template



2. Select **Text** and click on next button.



3. Add subject and body according to requirement



User is required to copy merge field value `{!Account.Advanz101__Experience_URL__c}` and paste it in Email body so that clickable URL is visible when email is sent.

Other Apps by Advanz101

- **SplitEase**
Split Service Contract into multiple contracts manually to avoid large cart errors.
- **AutoSplit**
Split Service Contract into multiple contracts to avoid large cart errors.
- **MergeEase**
Merge multiple service contracts.
- **PartEase**
User can select Contract Line Items available in Service Contract and Renew only selected Contract Line Items.
- **MoveEase**
User can transfer assets from one account to another account.
- **EaseQuotePDF**
Automate quote PDF generation on status change.
- **CaseAutoMail**
Transform case communication with CaseAutoMail.
- **AccountMerge**
Merge accounts and contacts with added functionality like smart filtering, previewing before merging and retaining critical data on merge.

Hope you find our Patient Reported Outcome App useful. We would love to hear about our app from you. In case of any query or further clarification, please feel free to reach us at info@advanz101.com

Please keep following us as many new apps are under development. Follow us at www.advanz101.com

About Advanz101

ADVanz101 Business Systems Inc. is a registered Salesforce partner providing best-in-class solutions for global business houses and brands. Our team is equipped to meet the SaaS demands of modern enterprises with due diligence in today's business landscape of hybrid IT.

For additional information, please feel free to connect with us on info@advanz101.com