UPFRONT

Upfront Healthcare

Admin & User Documentation

V1.1

AQUIVA LABS

Version History

Version	Date	Author	Description
1.0	07.08.2024	Nikolay Ermakov	Initial version
1.1	08.13.2024	Nikolay Ermakov	Survey result flow was added

Summary

The main goal of the Upfront Healthcare application is to help healthcare companies to get psychographic segmentation for patients based on Upfront services. Also, the application provides capabilities to store segmentation results and send segmentation surveys for patients.

Admin Setup

As a System admin of the Upfront healthcare application, there are some necessary setup steps to ensure. To use the application for psychographic segmentation the following steps are required:

1. Assign permissions to users in order to get application access;
2. Define mapping for intelligent default segmentation;
3. Specify the intelligent default segmentation settings;
4. Specify endpoints and API keys;
5. Schedule a batch for periodic Intelligent default segmentation;
6. Add related list layout to patient record;
7. Add Survey component to Experience cloud page;
8. Assign permission for Experience cloud community users;
9. Define template for Survey email;
10. Check the sharing rules for Upfront psychographic and Upfront Segment history objects;
11. Activate Debug mode in case of troubleshooting;

Permission sets

The application includes two different permission sets which should be assigned to all users that use the application. The recommended uses and descriptions are outlined in the table below:

Permission Set	**Description**	**Recommended Assignment**
UpfrontBusinessUser	Includes read access to Upfront objects and classes for getting data about patient segmentation.	• Business users (including Experience cloud users) • Guest user (if it’s used in Experience cloud)
Upfront Admin	Includes full access to Upfront objects and records. This permission set is not intended for typical business users but exists to enable integrations and mappings.	• System admins

Integration settings page - Upfront Admin tab

Object and field mapping

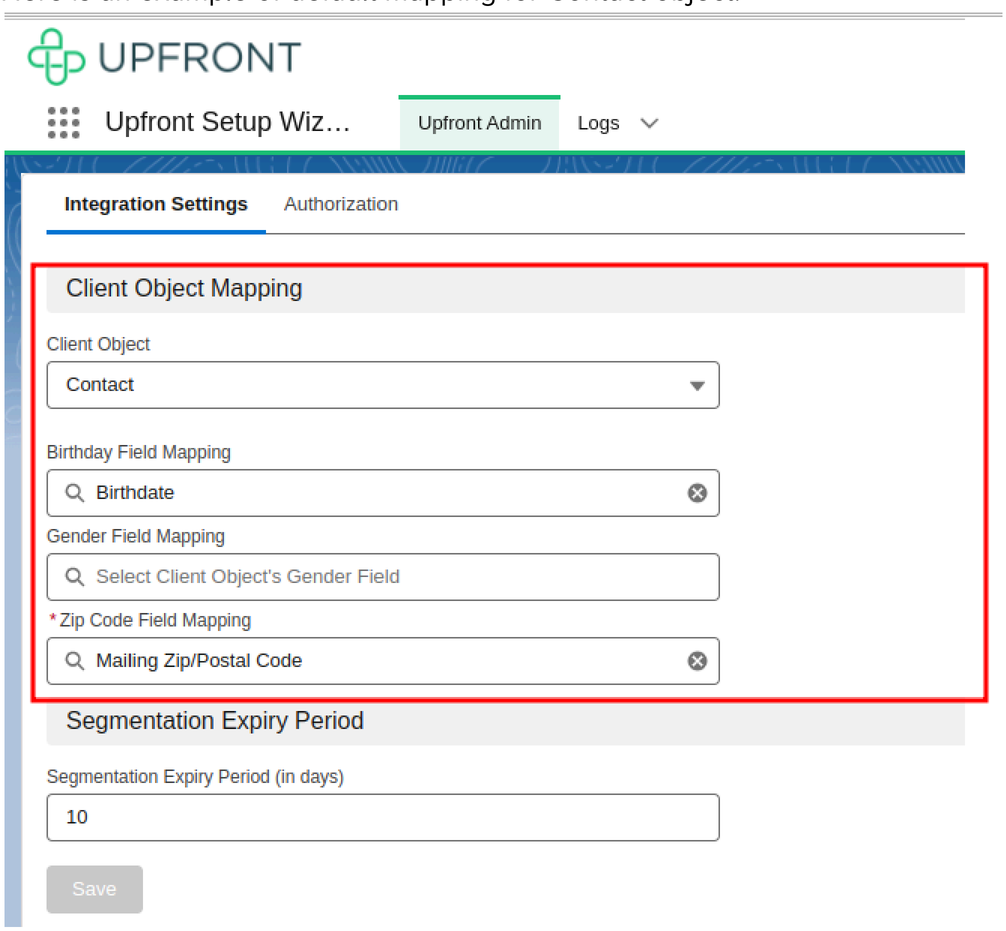
In order to define required mapping for Intelligent default segmentation as a first step you need to select which object represents a patient record. There are two available options:

- Contact;
- Person account;

As soon as a patient object is selected mapping fields will be prepopulated with standard default ones. You need to check the proposed mapping and adjust if it's required.

Note: ZIP code field is mandatory for Intelligent default segmentation and can't be skipped. Patients without ZIP code value will not be added to the batch and will not have Intelligent default segmentation.
Note: Please be aware that access to the default field Gender Identity should be configured in advance(if you are going to use this field for gender mapping). Otherwise it won't be available in the mapping section.

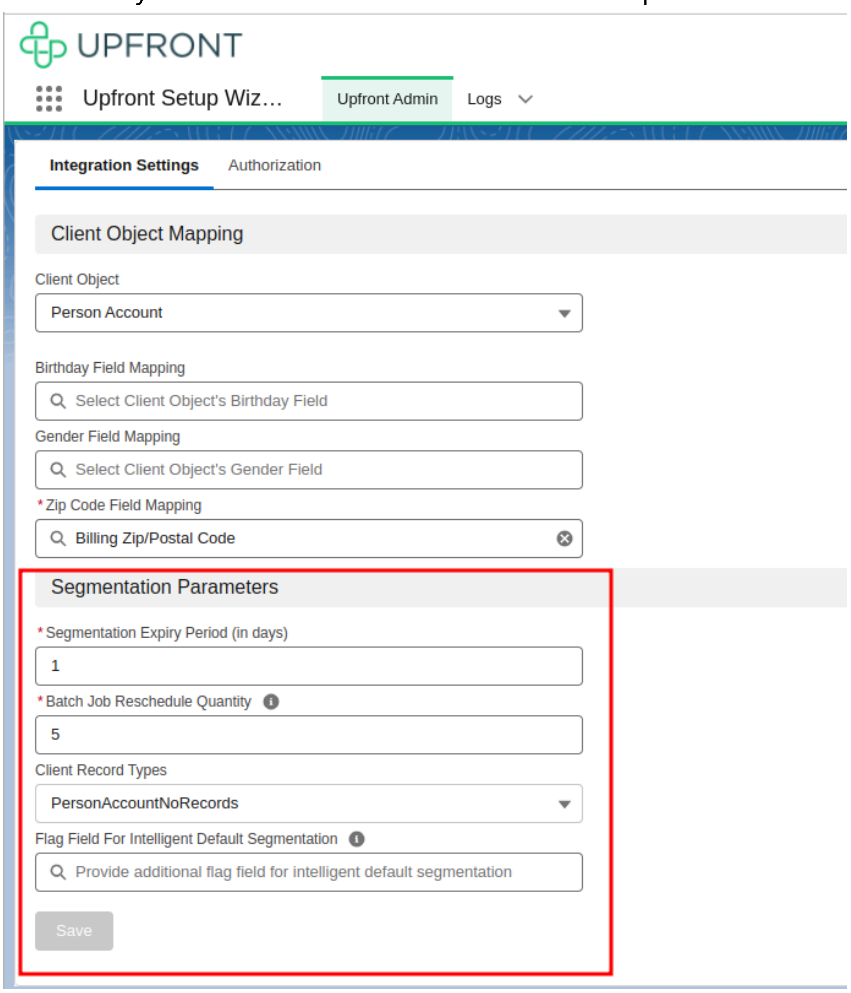
Here is an example of default mapping for Contact object:



Settings for Intelligent default segmentation

There are several parameters which influence on batch job execution:

1. **Segmentation Expiry Period** - it's a period after which intelligent default segmentation will be considered as outdated. After that period patient record will be added to the batch job even if it has intelligent default values. Default value for expiry period is 365 days, but you can adjust it if necessary:
2. **Batch Job Reschedule Quantity** - One batch run will process 20 000 records. Using this parameter you can define how many times a batch job will be auto-rescheduled. For example if value is 3 then you will process 60 000 records in total per one scheduled job. Max value for this setting is 5 or 100 000 records.
3. **Client Record Types** - Using this setting you can define which record types of Contacts/Person Accounts should be queried for the batch job execution. It could help if some record types shouldn't be segmented.
4. **Flag Field for Intelligent default segmentation** - This setting was added in order to provide a flexibility to filter client records. You can use any existing boolean field or create a new formula field with checkbox type on Contact/Person Account object to define your customer filter for Intelligent default segmentation. If this setting is defined with a field only true-valued customer records will be queried for a batch job execution.



Note: After any change in settings please don't forget to use the 'Save' button.

Authorization page - Upfront Admin tab

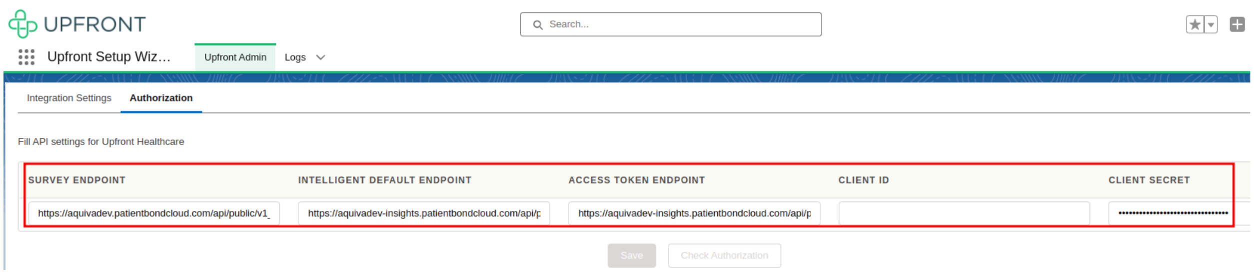
On this page you need to specify your Upfront endpoints:

- Survey result;
- Initial default segmentation;
- Access token;

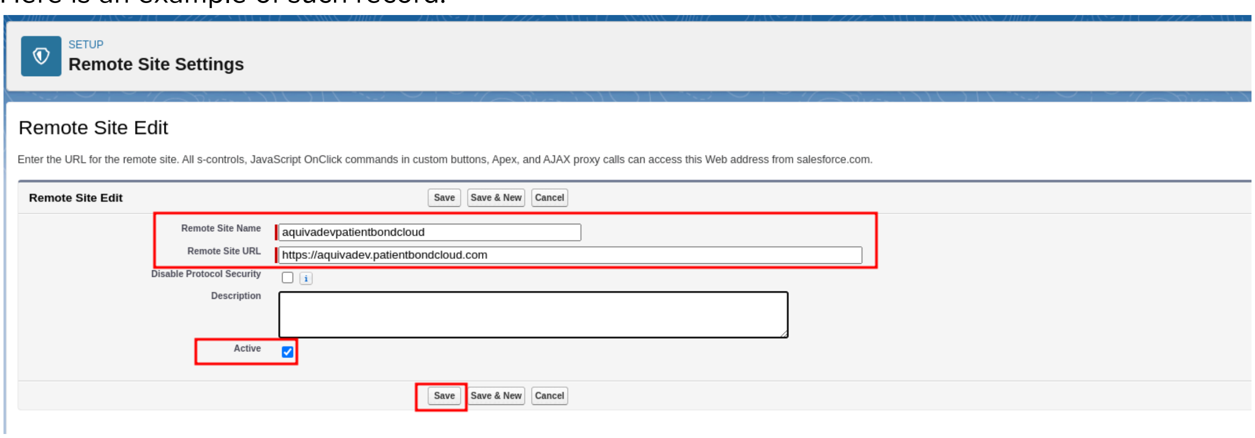
For Access token endpoint you need to specify client id and client secret. You can use the “Check authorization” option to establish a connection and get an access token.

Note: Client secret is stored securely and is not available in UI after the setting is saved. So if you want to change any detail in endpoints you need to enter client secret as well.

Here is an example of saved details of API endpoints:

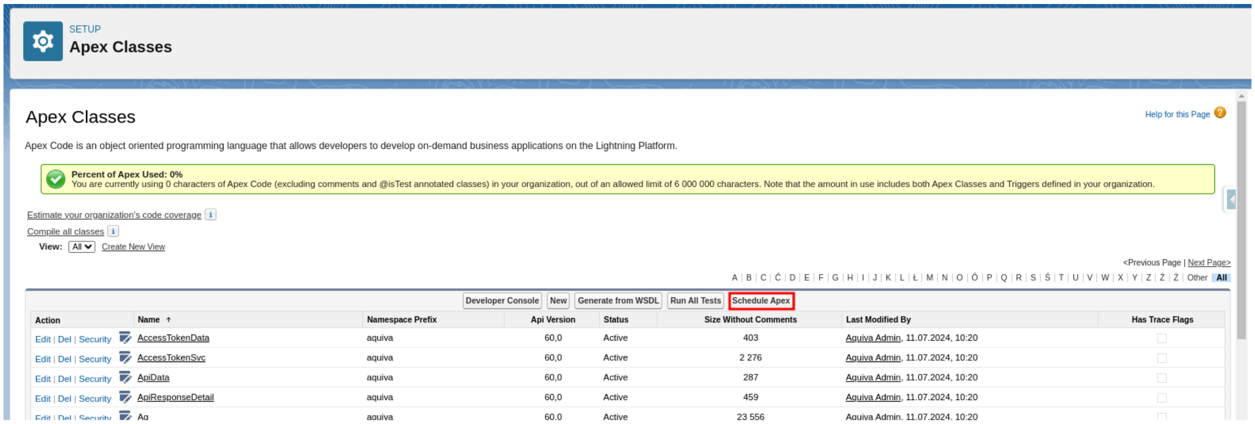


In order to have access to the add endpoints you need to add a record with the endpoint URL to the “**Remote site settings**” in Setup.
Here is an example of such record:



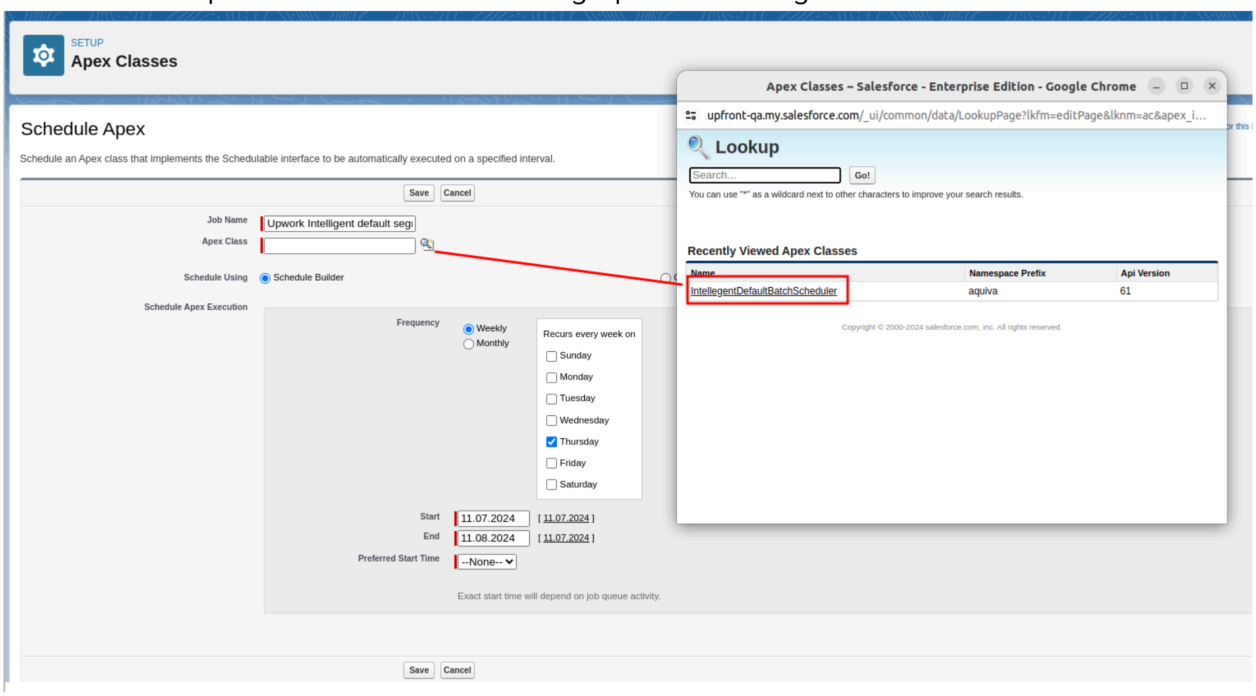
Batch scheduling for Intelligent default segmentation

To start getting Intelligent default segmentation you need to schedule a batch job. In order to do it please use **Setup - Apex Classes - Schedule Apex** option:



Please add Job name, select **IntellegentDefaultBatchScheduler** Apex class and specify the schedule before saving the batch.

Note: It is recommended to schedule a daily batch run
Here is an example how to select class during Apex scheduling:



Note: Batch is processing 20k records per run.

Adding related lists layout for Contact or Person Account

In order to have an option to check psychographic segmentation from a patient record you need to add related lists to your Contact or Person Account layout. There are two objects to be added to related lists: **Upfront psychographics** and **Upfront Segment History**
For **Upfront psychographics** the following fields could be added on related list:

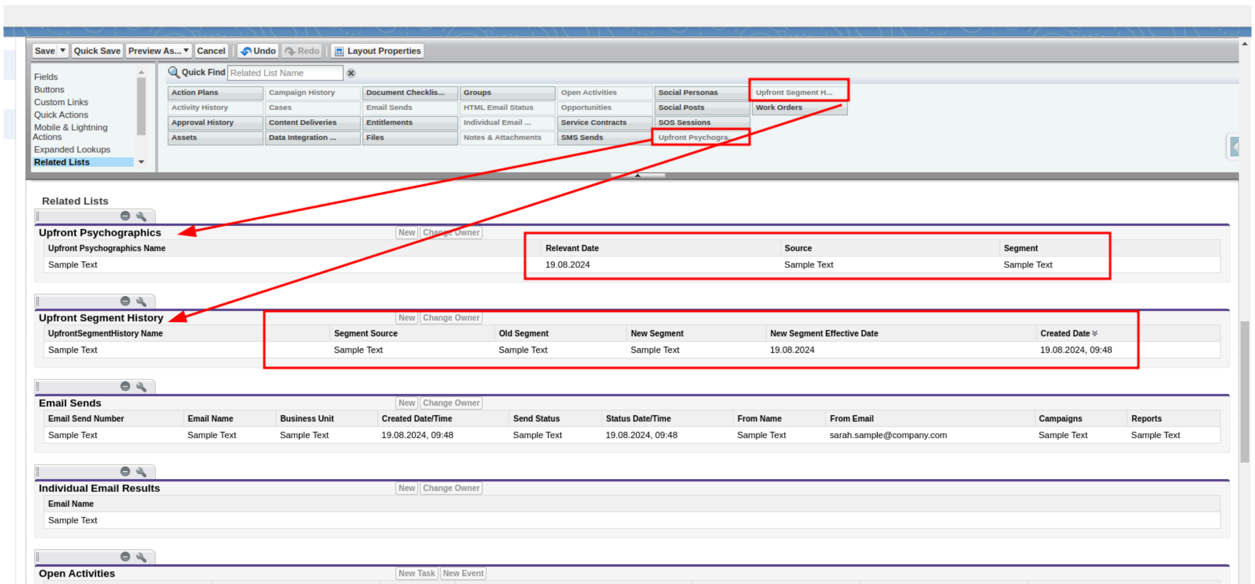
- Upfront psychographics Name;
- Relevant date;
- Source;

- Segment;

For **Upfront Segment History** the following fields could be added on related list:

- Upfront Segment History Name;
- Segment source;
- Old segment;
- New segment;

Here is an example how to add required lists and fields for Contact object (start from object manager):

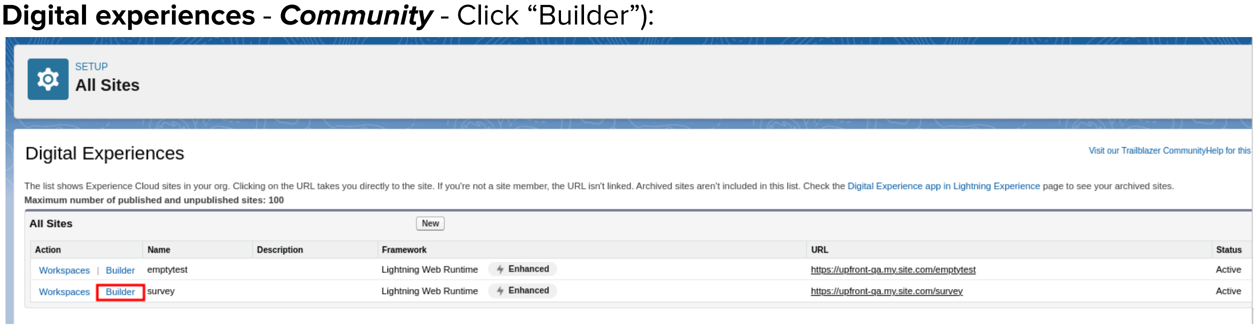


Adding survey component to Experience cloud page

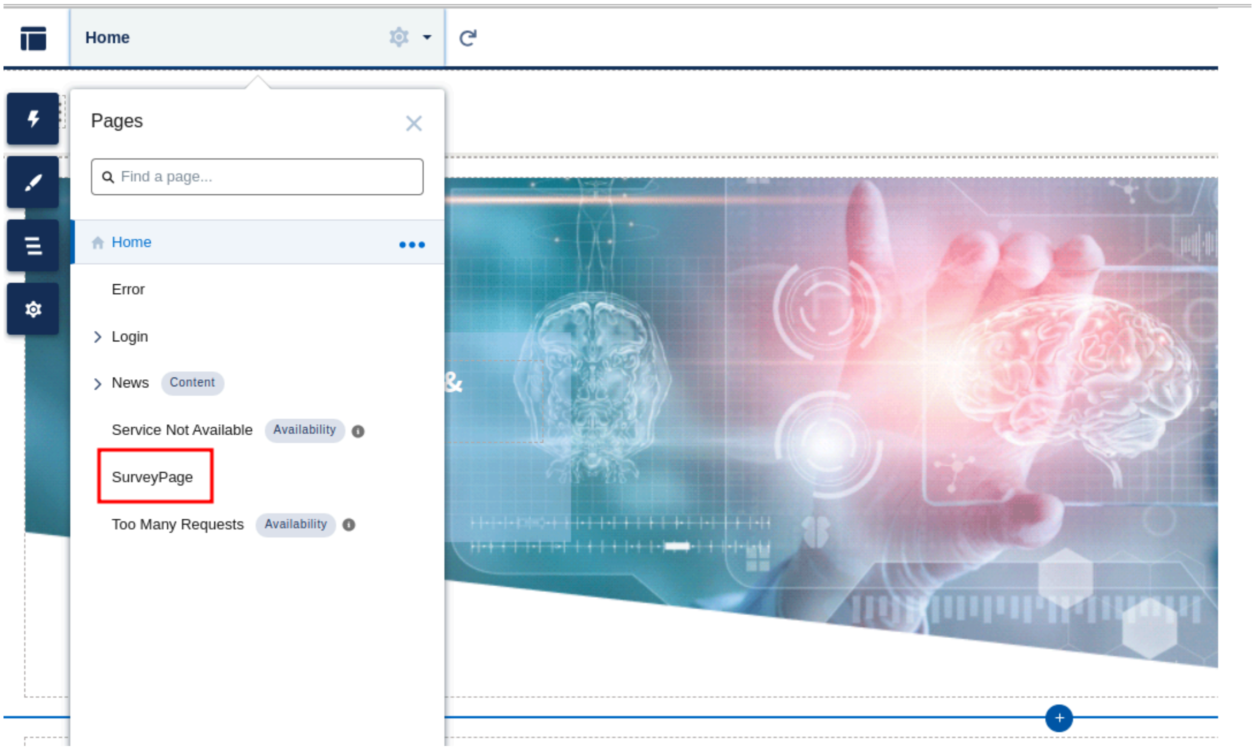
In order to send a link with a survey to a customer you need to publish a page with the required component in your experience cloud.

Please do the following steps:

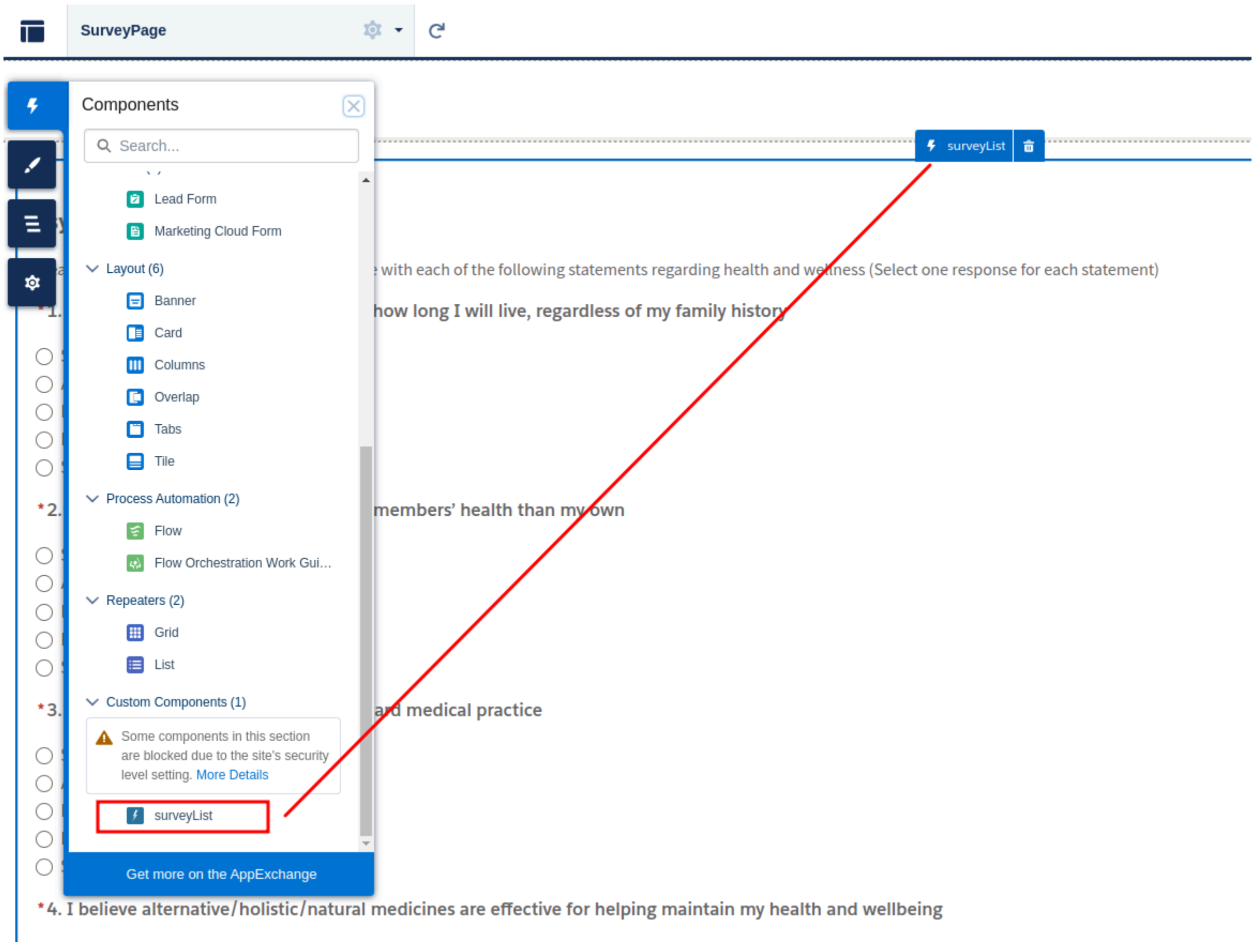
1. Define in which Experience cloud you are going to add a page and open Builder (**Setup** - **Digital experiences** - ***Community*** - Click “Builder”):



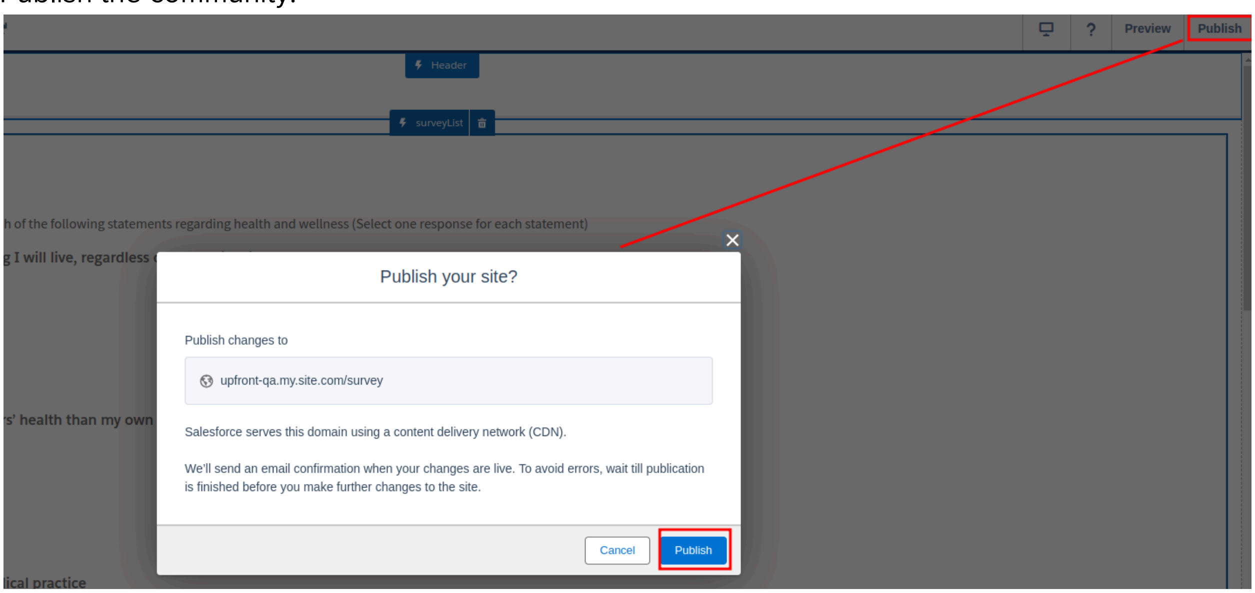
2. Create or select a page where the Survey should be located.
   Here is an example of a page with name “SurveyPage” added to the community:



3. Add **SurveyList** component from the Custom components to the page layout:



4. Publish the community:

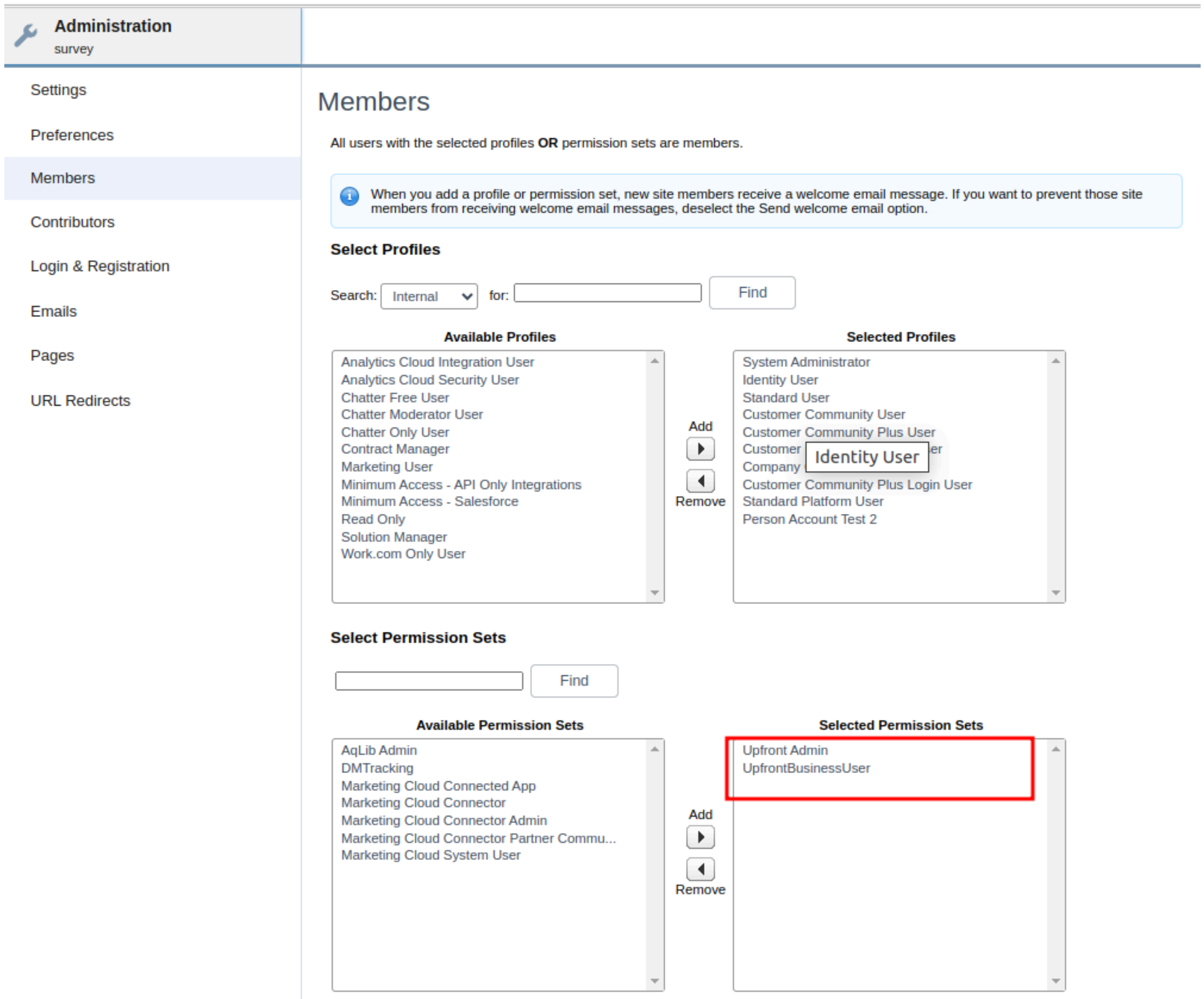


Your page is ready to process survey results.

Add required permissions to work with survey for community users

In order to submit surveys you Experience cloud users should have appropriate access to Upfront objects:

1. Add Upfront permissions sets (**Upfront Admin**, **Upfront Business User**) as members of your community (Administration - Members):

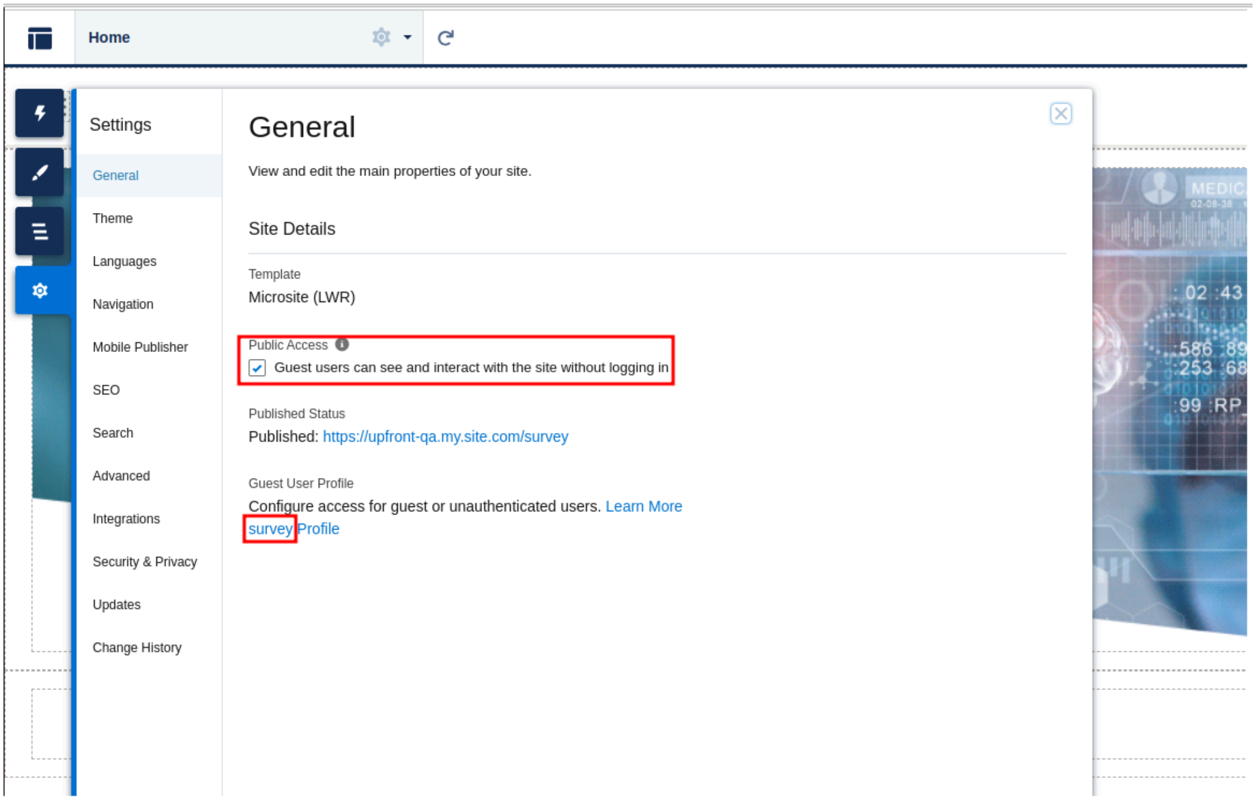


2. Add permission set **Upfront Business User** to the users of your Experience cloud.

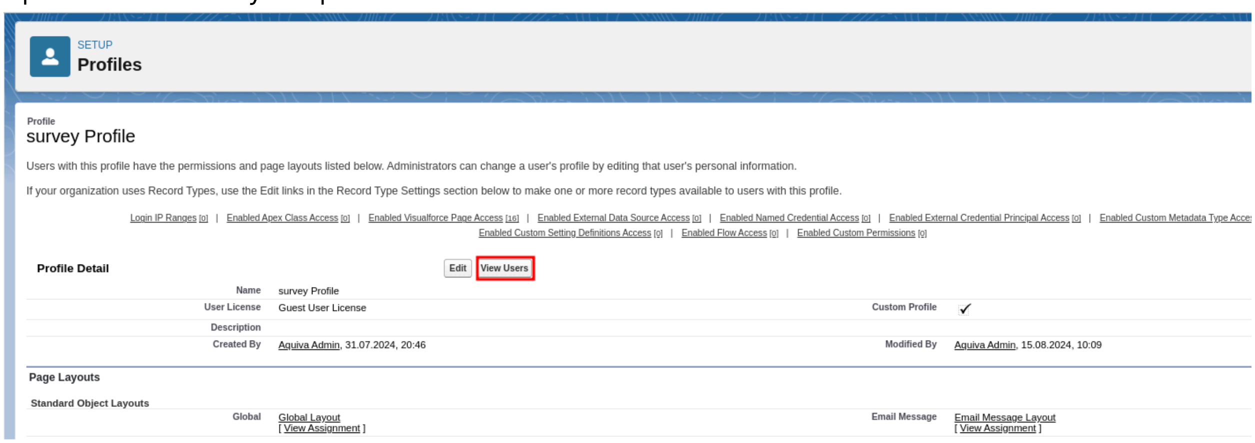
Note: If the guest mode is not enabled then you can assign permissions to users in standard way. If the guest mode is enabled please follow the instructions below.

Here is an example of how to add permission set to the quest user:

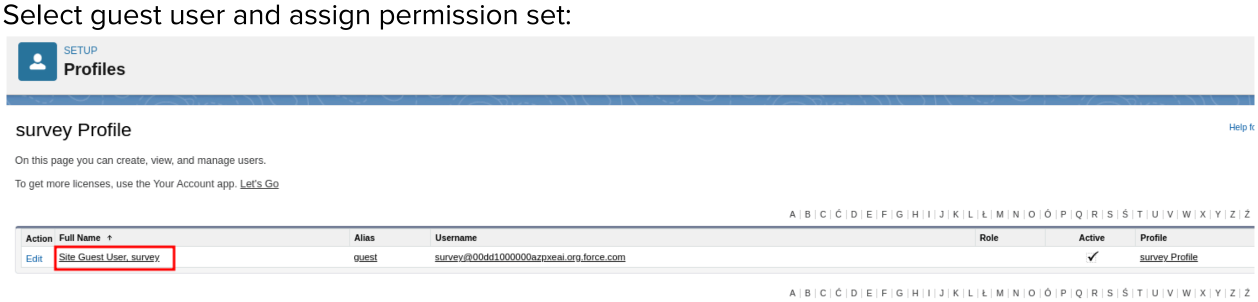
1. Open the profile which is used for guest account (**Builder** - **Settings** - *Guest profile*)

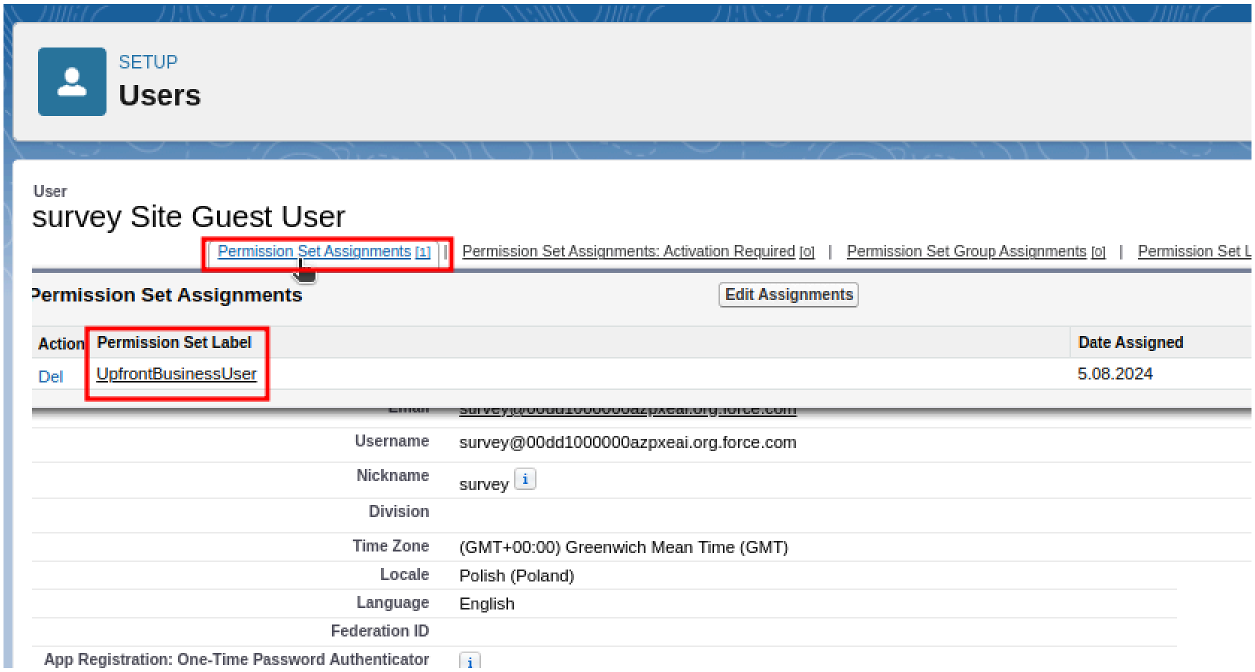


2. Open list of users by the profile:



3. Select guest user and assign permission set:



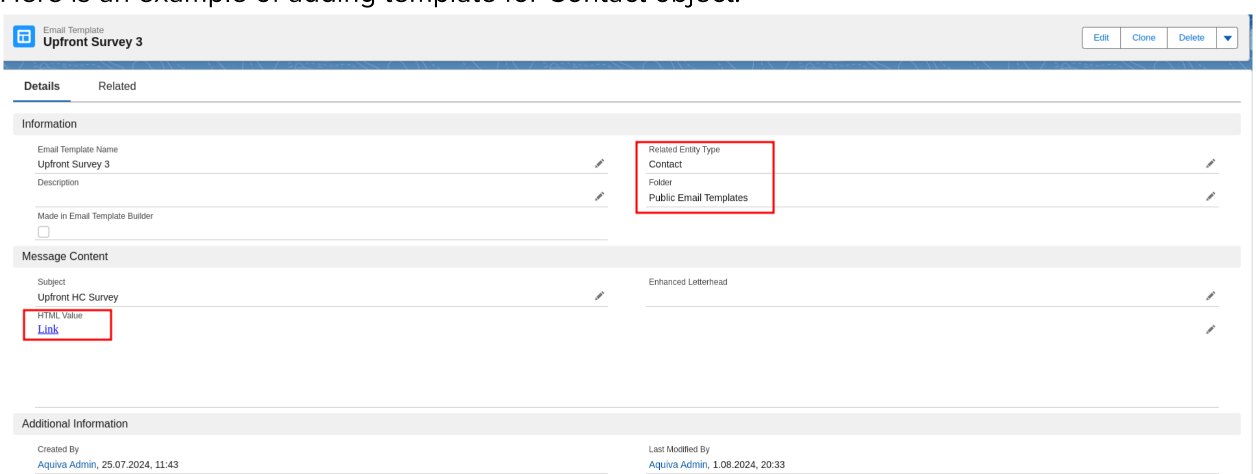


Define a template for survey email

In order to provide your client a link for a survey you need to prepare an email template with a link to your survey page within this template.

Step 1: Create an email template:

Here is an example of adding template for Contact object:



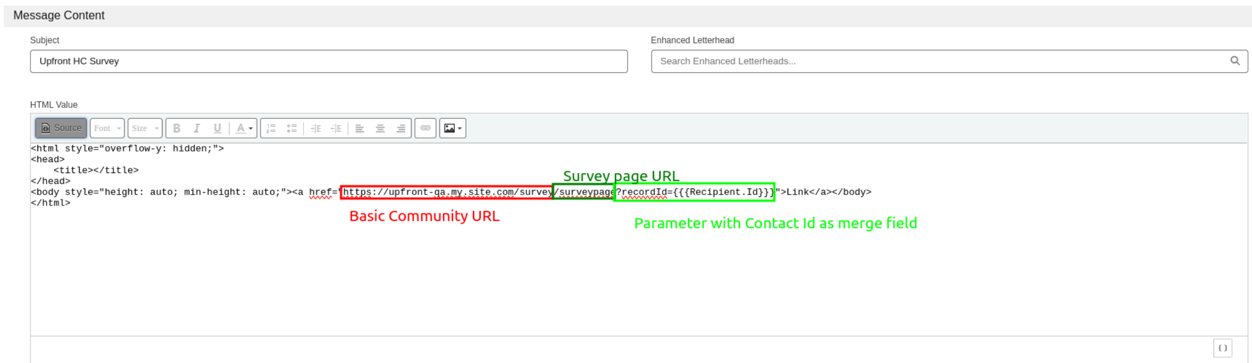
Note: Please be sure that template is shared properly and assign to correct customer object

Step 2: Add the correct link with specific format:

Note: You can form a template in any way you want according to your branding and internal rules. The only requirement is to have a link somewhere inside the template.

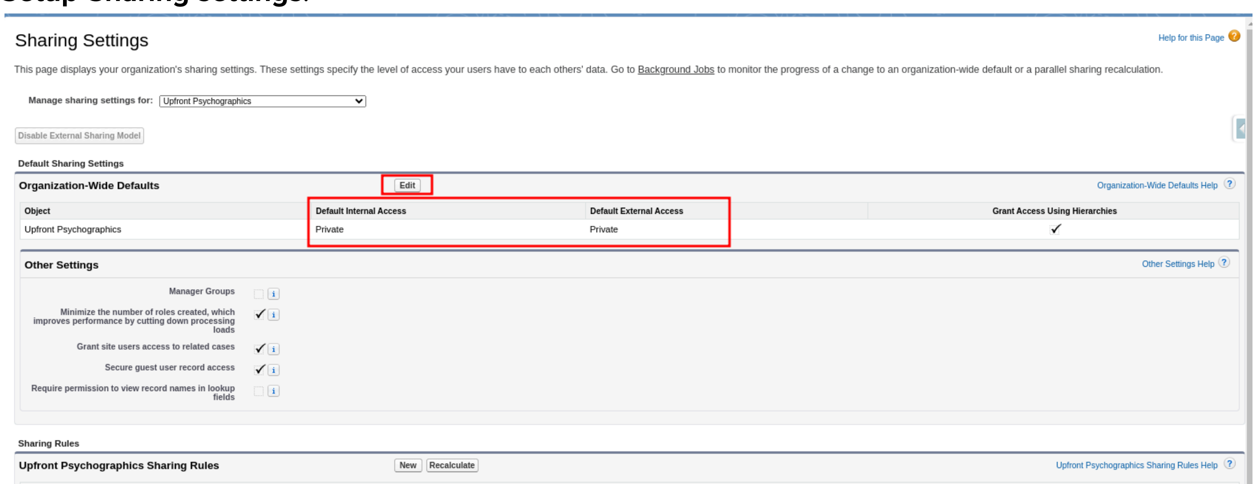
Link format: ***"Basic Community URL"\"Path to Survey Page"*****?recordId={{{Recipient.Id}}}**
{{{Recipient.Id}}} - it is a standard merge field which is used in email templates. In our case it represents Contact or Person Account ID.
?recordId= -it is a fixed part of the string and used to get the record ID as parameter. Please be informed that it is case sensitive.

Here is an example of such link:



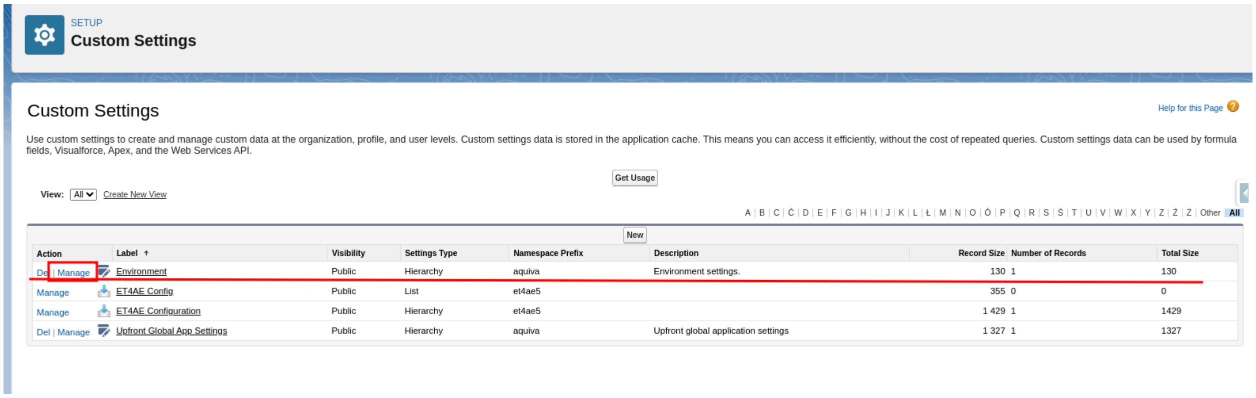
Check the sharing rules for Upfront psychographics and Upfront Segment History

By default both objects have a private sharing setting. If you need to change it please use **Setup-Sharing settings**:

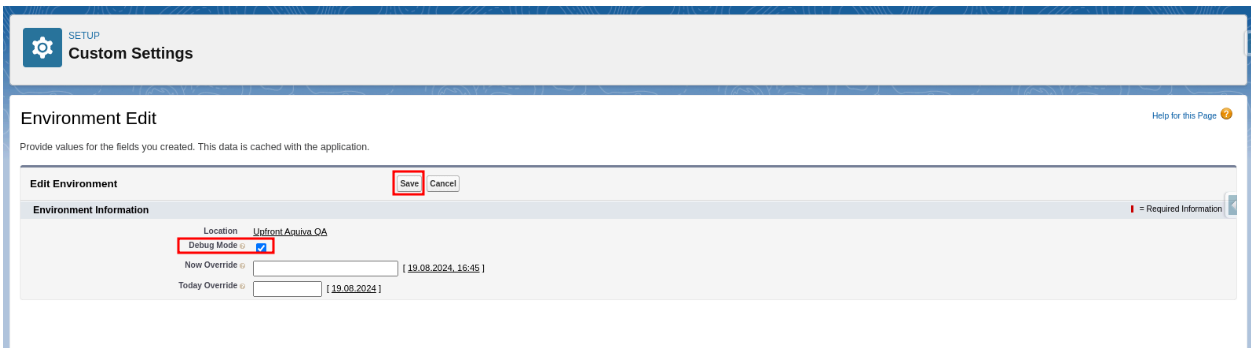


Debug mode in Environment setting

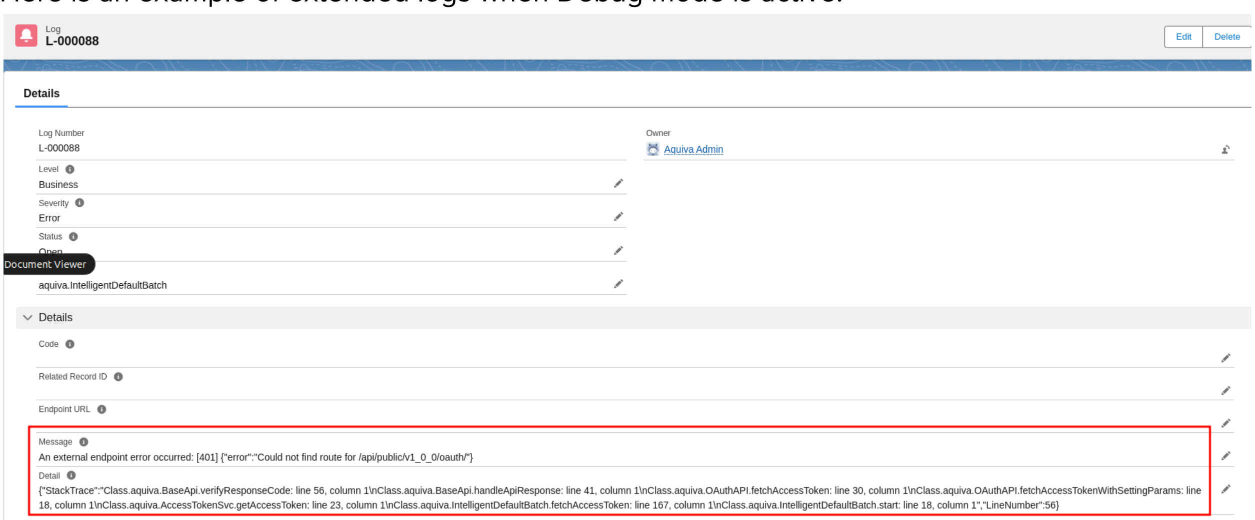
In case of troubleshooting API integration endpoints you can activate the Debug mode in Upfront application.
In order to activate it and add additional logs you need to adjust Environment setting in Setup - Custom settings and click "Manage":



In Envoirent setting you need to activate Debug mode:



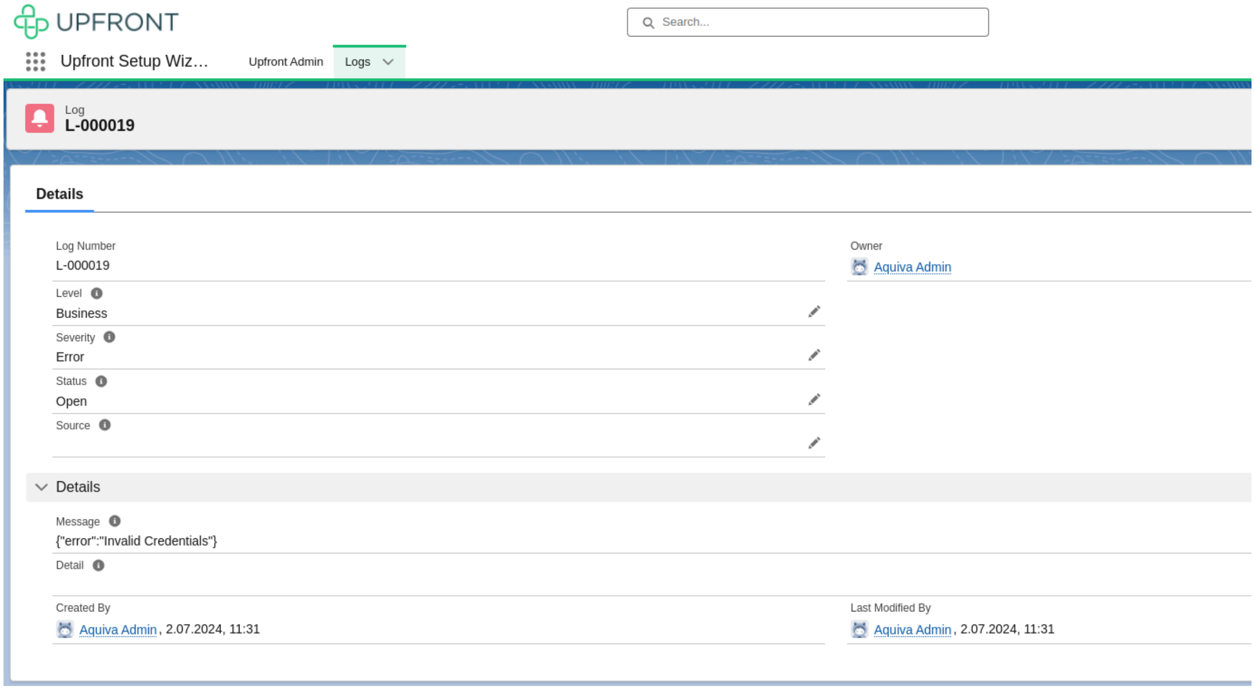
Here is an example of extended logs when Debug mode is active:



Logs tab

On this tab admin could find all logs from the Upfront HC application. Log records could be used in troubleshooting.

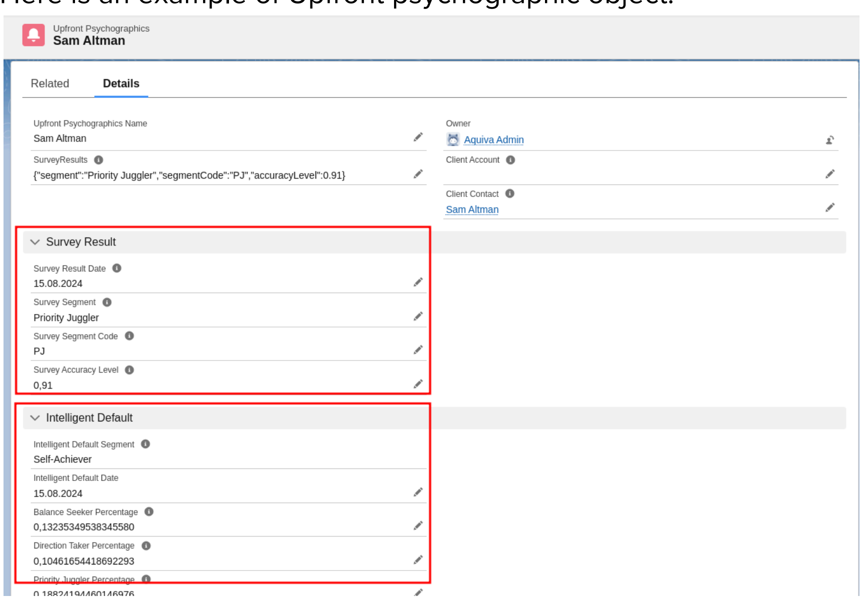
Here is an example of log record:



Business user

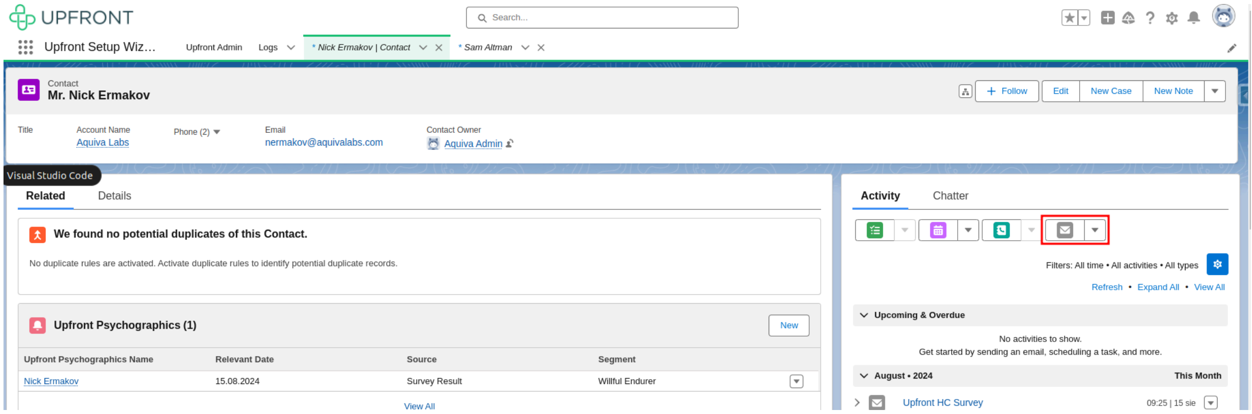
Business users have an ability to check results of segmentation. Based on this knowledge the user could adjust the communication plan for each client.

Here is an example of Upfront psychographic object:



Intelligent default segmentation is defined automatically basic on batch job runs.

On the other hand, to get the survey result you need to get answers from a client. In order to do that you can send survey using standard functionality:



Here is an example of how to select predefined email template with link to the survey: