

Care Management Application– Installation Guide

(A system to extend the Care Program Data Model to enable Time Tracking)

Overview

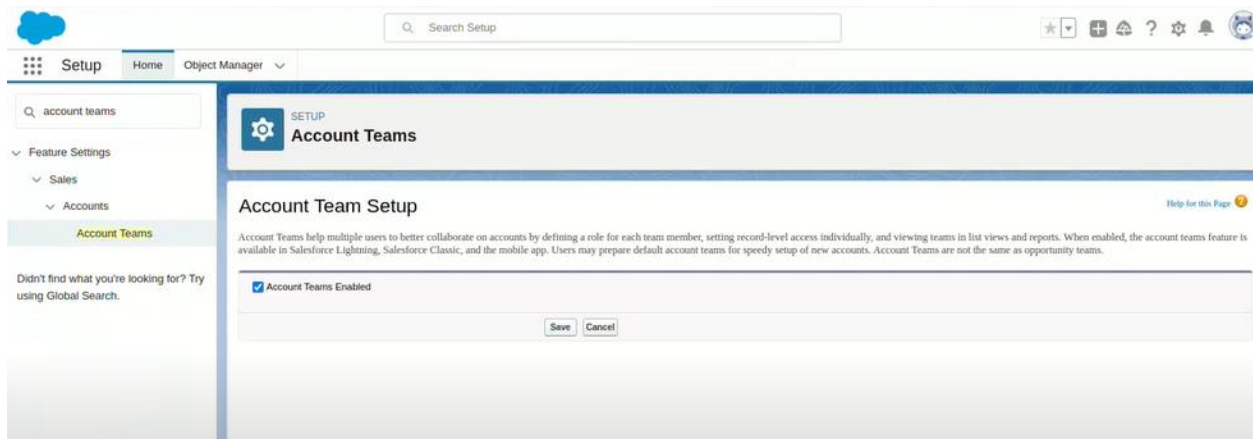
Principal care management is a model for the care of patients with a chronic illness for a period lasting three or more months. According to the CMS definition (via the AACP), the patient must also have had either a recent hospitalization or an acute risk of death, exacerbation or functional decline, or require management that’s “unusually complex due to comorbidities.” Patients with multiple such conditions fall under the Chronic Care Management (CCM) model.

Care Management - CONFIGURATION SETTINGS

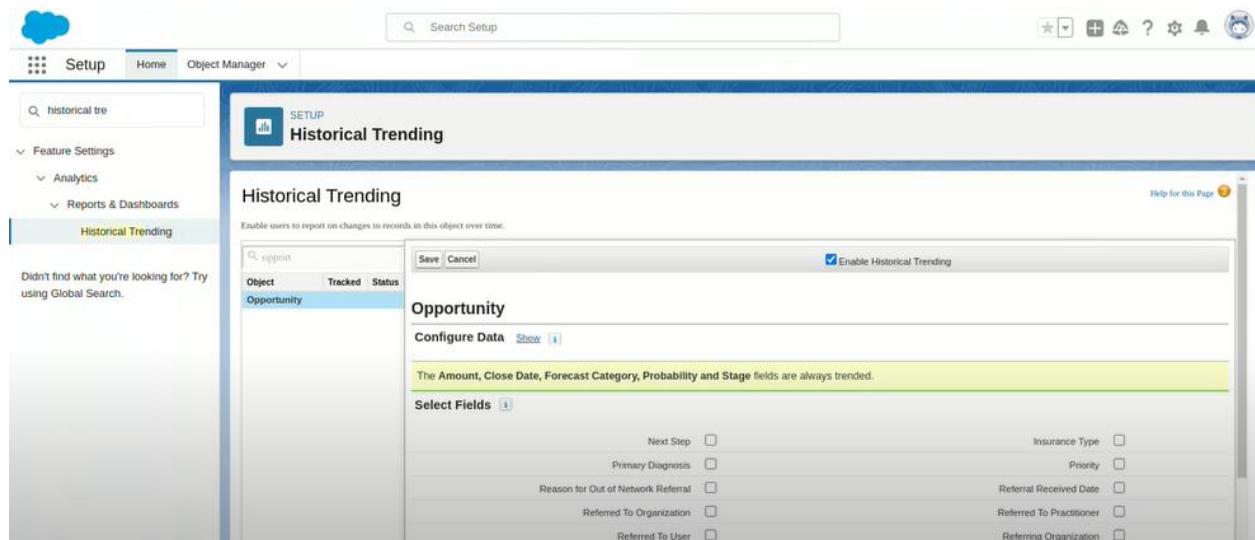
Before getting started with PCM, ensure that you've configured the app settings correctly. The following are the steps to be followed by the administrator installing the application.

Pre-Installation Steps

Step 1: Enable Account Team – Go to setup→ Search: Account Teams in Quick Find Box →Enable Account Teams as shown in the screenshot below.



Step 2: Enable Opportunity Historical Trending – Go to setup → Search: Historical Trending in Quick Find Box → Select Opportunity Object and Enable Historical Trending as shown in the screenshot.



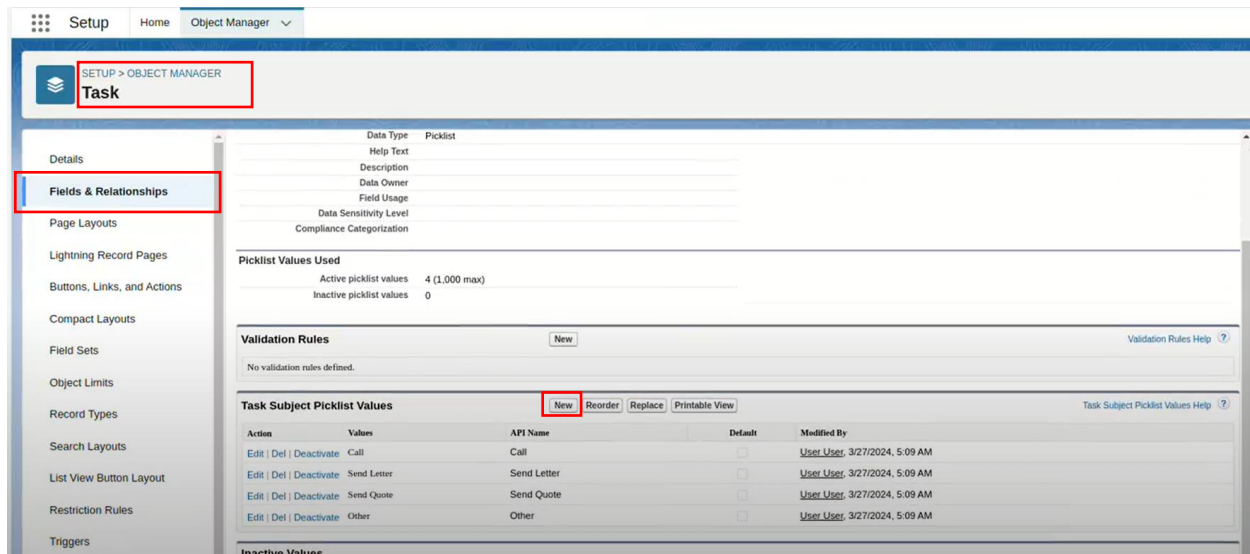
Step 3: Add Picklist Values

List of picklist values for respective objects

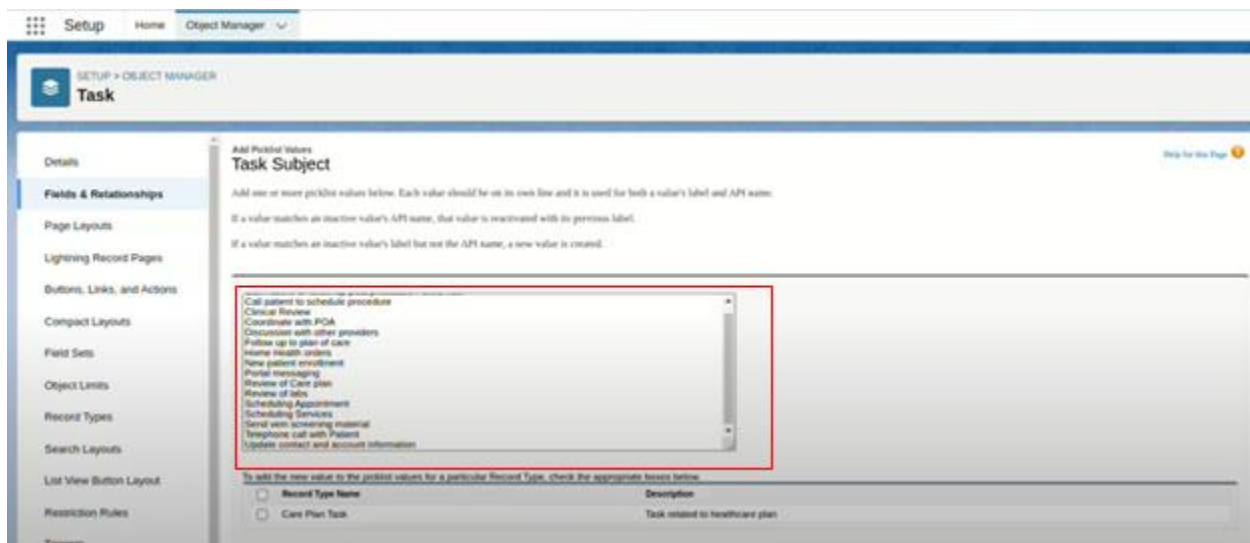
1.Task

- Call Patient to follow-up post procedure / clinic visit
- Call patient to schedule procedure
- Clinical Review
- Coordinate with POA
- Discussion with other providers
- Follow up to plan of care
- Home Health orders
- New patient enrollment
- Portal messaging
- Review of Care plan
- Review of labs
- Scheduling Appointment
- Scheduling Services
- Send vein screening material
- Telephone call with patient
- Update contact and account information

To Add Picklist Values – Go to Setup → Click on Object Manager → Search **Task** in Quick Find Box → Select **Task** Object → Go to Fields and Relationships Section → Search **Subject** in Quick Find Box → Under the Task Subject Picklist Values Click on New → Add Picklist Values as shown in the screenshot.



Add all the picklist values for the task object as shown in the fig.



Step 4: Care Program – Status (Required)

- Active
- Inactive

Go to setup → Object Manager → (search) Care Program → Fields and Relationships → (search) Status. Under Status Picklist Values click ‘New’ button.

The screenshot shows the Salesforce Object Manager interface for the 'Care Program' object. The 'Fields & Relationships' tab is selected in the left sidebar. The main content area displays the 'Status Picklist Values' table. The table has columns for Action, Values, API Name, Default, Chart Colors, and Modified By. The 'New' button is highlighted in the top right corner of the table. The table contains four rows of data, all with 'Assigned dynamically' for Chart Colors and 'User User, 3/27/2024, 5:52 AM' for Modified By.

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	New	New	☒	Assigned dynamically	User User, 3/27/2024, 5:52 AM
Edit Del Deactivate	In Progress	In Progress	☐	Assigned dynamically	User User, 3/27/2024, 5:52 AM
Edit Del Deactivate	Completed	Completed	☐	Assigned dynamically	User User, 3/27/2024, 5:52 AM
Edit Del Deactivate	Cancelled	Cancelled	☐	Assigned dynamically	User User, 3/27/2024, 5:52 AM

Add the picklist values for the care program object as shown in the fig.

The screenshot shows the 'Add Picklist Values' dialog for the 'Status' picklist. The dialog has a title bar 'Add Picklist Values' and a subtitle 'Status'. It contains instructions: '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.' Below the instructions is a large text area for entering values. At the bottom are 'Save' and 'Cancel' buttons.

Step 5: Opportunity – Stage ((Required) Add values as text so that they can be copied)

ADD STEP TO CREATE CUSTOM SALES PROCESS FOR CARE PROGRAM IF NEEDED

Picklist Value	Probability	Type	Forecast category
Not Eligible For Billing	30	Open	Pipeline
Eligible For Billing	70	Open	Pipeline
Charge Slip	50	Open	Pipeline
Billing Revenue cycle management	60	Open	Pipeline
Audit	70	Open	Pipeline
Didn't Qualify For Billing	0	Closed/Lost	Omitted
Billed to customer	90	Closed/Won	Closed

Go to setup → Object Manager → (search) Opportunity → Fields and Relationships -
→ (search) Stage → Under Opportunity Stages Picklist Values click **'New'** button.

The screenshot shows the Salesforce Setup interface for the Opportunity object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Triggers. The main content area is titled 'Opportunity' and shows 'Inactive picklist values: 0'. It contains sections for 'Field Dependencies' (No dependencies defined), 'Validation Rules' (No validation rules defined), and 'Opportunity Stages Picklist Values'. The 'Opportunity Stages Picklist Values' section has a table with columns: Action, Stage Name, API Name, Type, Probability, Forecast Category, Chart Colors, and Modified By. The 'New' button is highlighted with a red box. Below the table, there are links for 'Field Dependencies Help' and 'Validation Rules Help'.

Action	Stage Name	API Name	Type	Probability	Forecast Category	Chart Colors	Modified By
Edit Del Deactivate	Prospecting	Prospecting	Open	10%	Pipeline	Assigned dynamically	User User, 3/27/2024, 5:09 AM
Edit Del Deactivate	Qualification	Qualification	Open	10%	Pipeline	Assigned dynamically	User User, 3/27/2024, 5:09 AM
Edit Del Deactivate	Needs Analysis	Needs Analysis	Open	20%	Pipeline	Assigned dynamically	User User, 3/27/2024, 5:09 AM
Edit Del Deactivate	Value Proposition	Value Proposition	Open	50%	Pipeline	Assigned dynamically	User User, 3/27/2024, 5:09 AM
Edit Del Deactivate	Id. Decision Makers	Id. Decision Makers	Open	60%	Pipeline	Assigned dynamically	User User, 3/27/2024, 5:09 AM
Edit Del Deactivate	Perception Analysis	Perception Analysis	Open	70%	Pipeline	Assigned dynamically	User User, 3/27/2024, 5:09 AM
Edit Del Deactivate	Proposal/Price Quote	Proposal/Price Quote	Open	75%	Pipeline	Assigned dynamically	User User, 3/27/2024, 5:09 AM
Edit Del Deactivate	Negotiation Review	Negotiation/Review	Open	90%	Pipeline	Assigned dynamically	User User, 3/27/2024, 5:09 AM
Edit Del Deactivate	Closed Won	Closed Won	Closed/Won	100%	Closed	Assigned dynamically	User User, 3/27/2024, 5:09 AM
Edit Del Deactivate	Closed Lost	Closed Lost	Closed/Lost	0%	Omitted	Assigned dynamically	User User, 3/27/2024, 5:09 AM

Fill in the details one by one for all the opportunity stages as shown in the fig.

The screenshot shows the 'Opportunity Stages' configuration page in Salesforce Setup. At the top, there's a 'SETUP Object Manager' header. Below it, the title 'Opportunity Stages' is followed by a help link. A yellow warning box states: 'Changing the Type or Forecast Category updates all opportunities that have this stage value. If you change the Type or Forecast Category, this global update can require several hours, depending on the amount of data you have. We send you an email when the process is finished. The process doesn't interrupt your users' work, but it does update the Last Modified By date and time in affected records.' Below the warning, there are 'Save', 'Save & New', and 'Cancel' buttons. The form fields include: 'Stage Name' (text input with 'Eligible For Billing'), 'Type' (dropdown menu with 'Open'), 'Probability' (text input with '70'), 'Forecast Category' (dropdown menu with 'Pipeline'), and 'Chart Color' (text input with 'Assigned dynamically' and a color picker icon). A large text area for 'Description' is also present. At the bottom, a section titled 'To add the new value to the picklist values for a particular Sales Process, check the appropriate boxes below.' contains two checkboxes: 'Sales Processes' and 'Patient Referral', each with a corresponding 'Description' text input field.

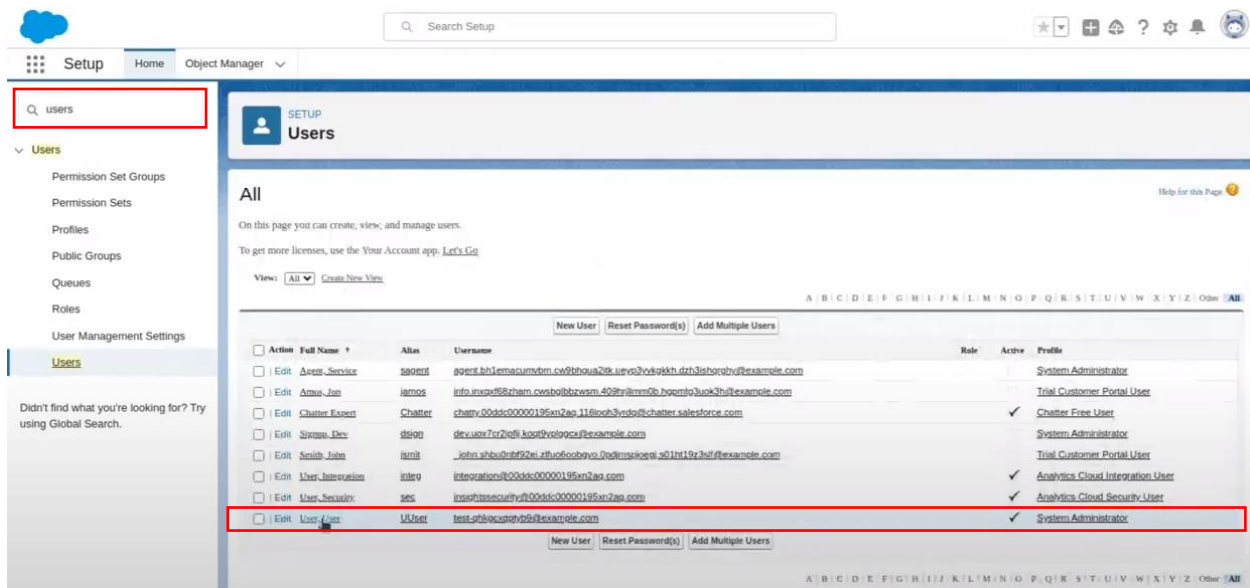
Install Package from AppExchange:

<https://appexchange.salesforce.com/appxListingDetail?listingId=24644bff-d04e-4b05-b0c9-bd4cb293c207>

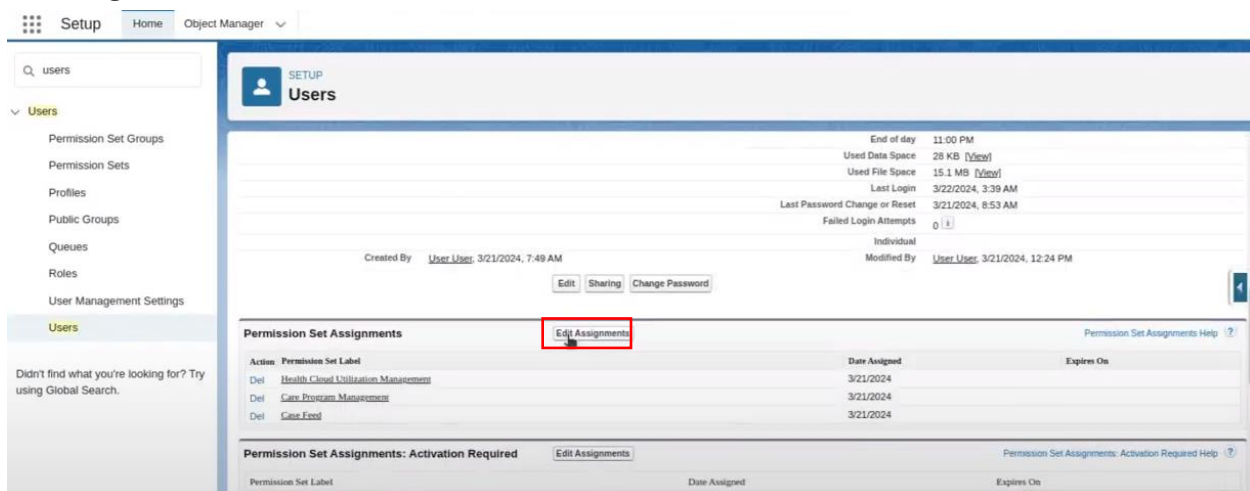
Post Installation Steps

Step 1: After getting the application installed through App Exchange click on gear icon.

Step 2: Go to Setup and search **Users** in quick find box – Select a primary user and proceed (As shown in the fig).

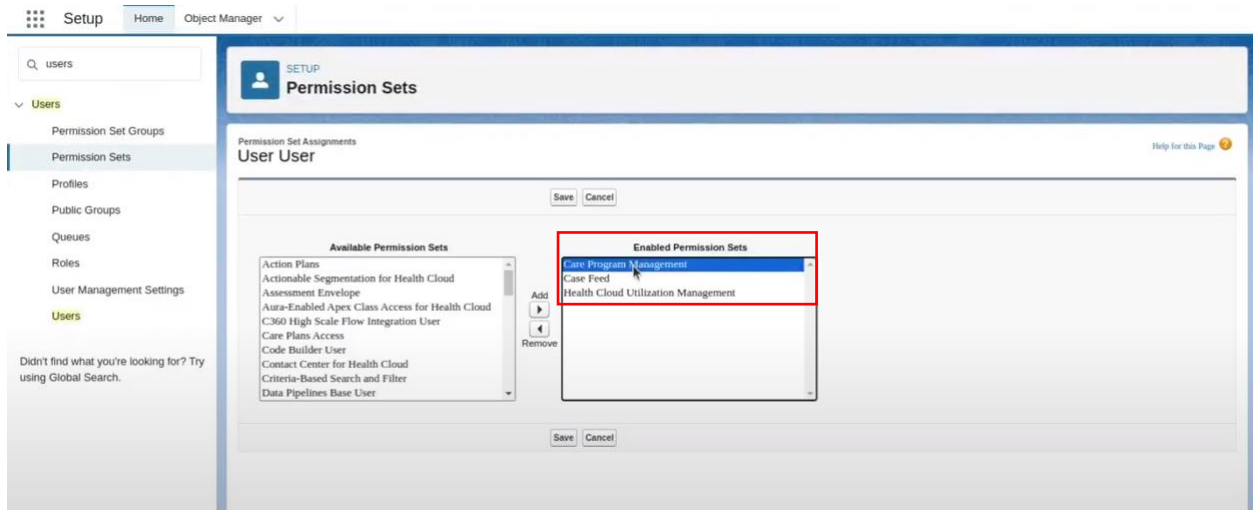


Step 3: Next step is to assign Care Program Management Permission Set to the primary user, scroll down to Permission Set Assignments and click on Edit Assignments as shown in the fig.



Step 4: Here the user must select the following permission sets from Available Permission Sets in the left and move them to Enabled Permission Sets in the right as shown in Fig and hit save.

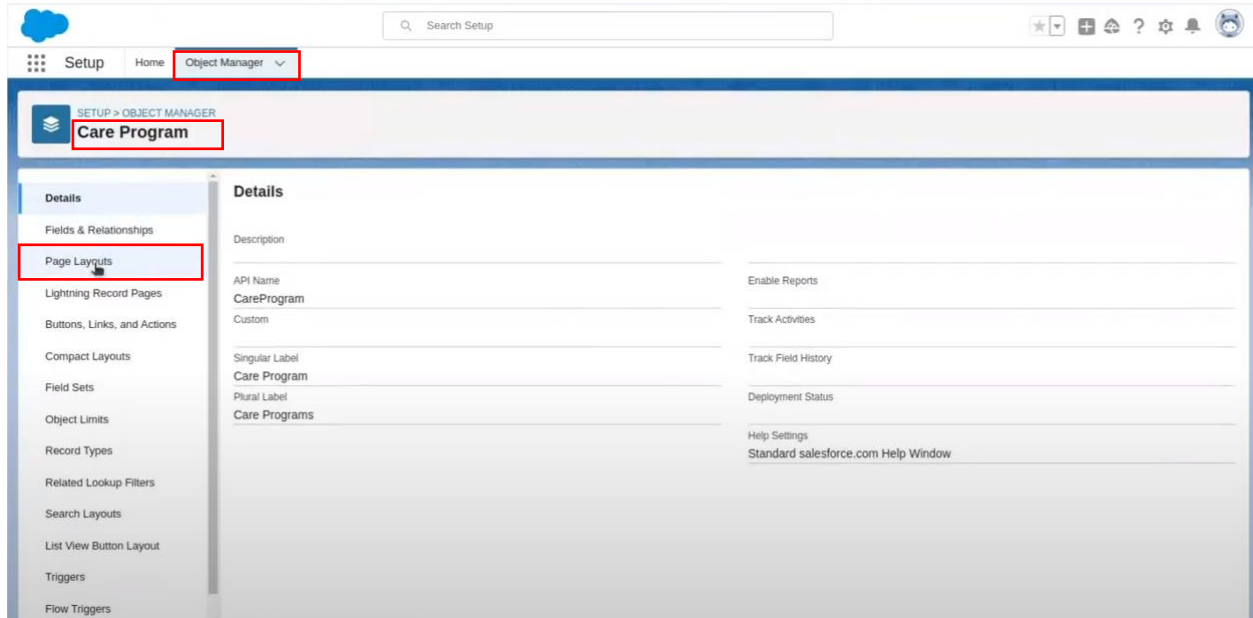
Name of the permission sets to be enabled – **Care Program Management, Case Feed, Health Cloud Utilization Management.**



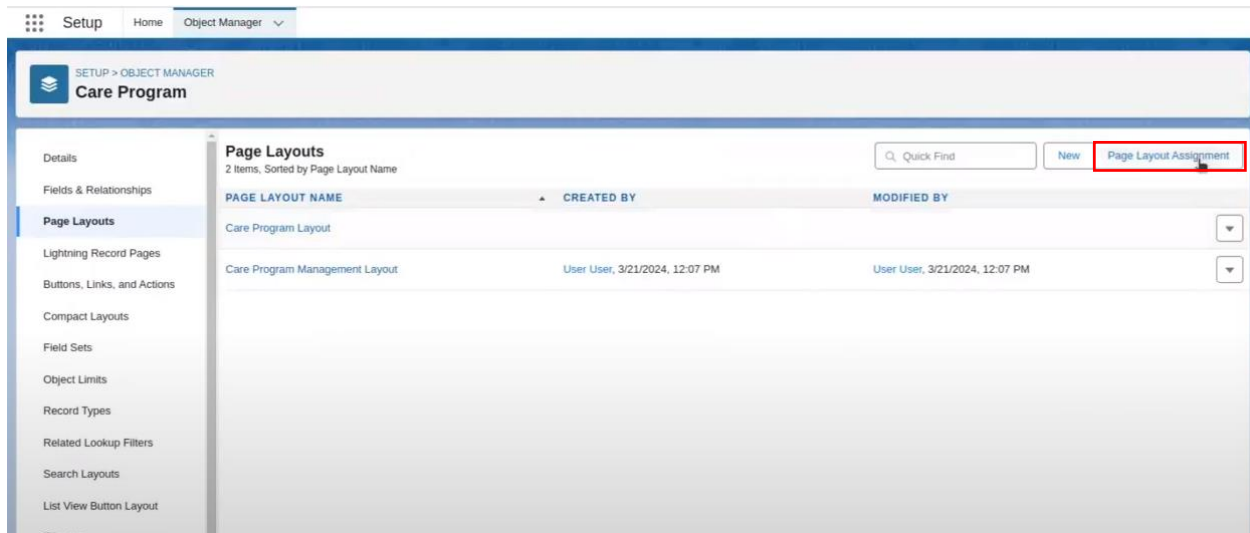
Now the user needs to assign the page layout to the respected objects that have been used in PCM application.

- 1.Care Program
- 2.Opportunity
- 3.Task

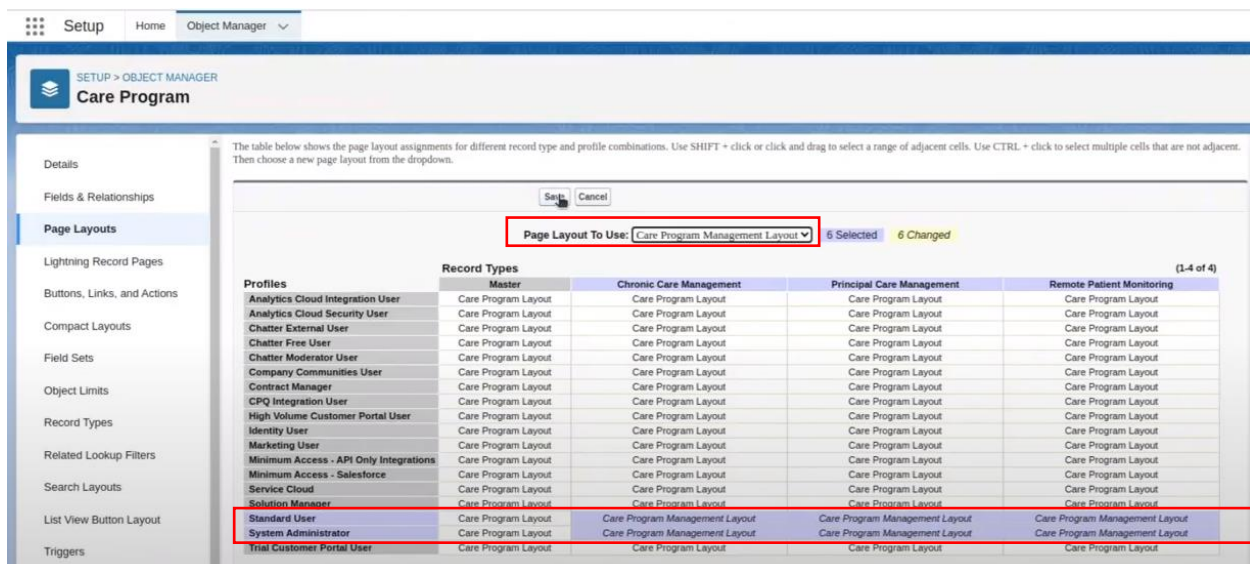
Step 5: Click on Object Manager and search Care Program in the search box. After choosing Care Program, click on Page Layouts as shown in the fig.



Step 6: Select Page Layout Assignment



Step 7: As we require all three record types that have been used on PCM application that is Chronic Care Management, Principal Care Management and Remote Patient Monitoring let's move ahead by assigning these record types to the Profiles as shown in the Fig and hit save.



Step 8: We repeat the process for the second object, that is Opportunity and assign the Care Program Opportunity Layout to the profiles of Standard User and System

Administrator and hit save.

SETUP > OBJECT MANAGER

Opportunity

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Triggers

Flow Triggers

Edit Page Layout Assignment

Opportunity

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the dropdown.

Start Cancel

Page Layout To Use: Care Program Opportunity Layout 2 Selected 2 Changed

Profiles	Master	Care Program Opportunity	Patient Referral
Analytics Cloud Integration User	Opportunity Layout	Opportunity Layout	Opportunity Layout
Analytics Cloud Security User	Opportunity Layout	Opportunity Layout	Opportunity Layout
Contract Manager	Opportunity Layout	Opportunity Layout	Opportunity Layout
CPQ Integration User	Opportunity Layout	Opportunity Layout	Opportunity Layout
Marketing User	Opportunity Layout	Opportunity Layout	Opportunity Layout
Minimum Access - API Only Integrations	Not Assigned	Not Assigned	Not Assigned
Minimum Access - Salesforce	Not Assigned	Not Assigned	Not Assigned
Service Cloud	Opportunity Layout	Opportunity Layout	Opportunity Layout
Solution Manager	Opportunity Layout	Opportunity Layout	Opportunity Layout
Standard User	Opportunity Layout	Care Program Opportunity Layout	Opportunity Layout
System Administrator	Opportunity Layout	Care Program Opportunity Layout	Opportunity Layout

Save Cancel

Step 9: Same process goes for the Third Object as well that is Task as here, we assign Care Program Task Layout to the Standard User and System Administrator Profile.

SETUP > OBJECT MANAGER

Task

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Search Layouts

List View Button Layout

Restriction Rules

Triggers

Flow Triggers

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the dropdown.

Save Cancel

Page Layout To Use: Care Program Task Layout 2 Selected 2 Changed

Profiles	Master	Care Plan Task	Care Program Task
Analytics Cloud Integration User	Task Layout	Task Layout	Task Layout
Analytics Cloud Security User	Task Layout	Task Layout	Task Layout
Chatter External User	Task Layout	Task Layout	Task Layout
Chatter Free User	Task Layout	Task Layout	Task Layout
Chatter Moderator User	Task Layout	Task Layout	Task Layout
Company Communities User	Task Layout	Task Layout	Task Layout
Contract Manager	Task Layout	Task Layout	Task Layout
CPQ Integration User	Task Layout	Task Layout	Task Layout
High Volume Customer Portal User	Task Layout	Task Layout	Task Layout
Identity User	Task Layout	Task Layout	Task Layout
Marketing User	Task Layout	Task Layout	Task Layout
Minimum Access - API Only Integrations	Not Assigned	Not Assigned	Not Assigned
Minimum Access - Salesforce	Not Assigned	Not Assigned	Not Assigned
Service Cloud	Task Layout	Task Layout	Task Layout
Solution Manager	Task Layout	Task Layout	Task Layout
Standard User	Task Layout	Task Layout	Care Program Task Layout
System Administrator	Task Layout	Task Layout	Care Program Task Layout
Trial Customer Portal User	Task Layout	Task Layout	Task Layout

Save Cancel

Step 10: Next step is to search Custom Metadata Types in quick find box, and click on PCM Configuration

Search Setup

Setup Home Object Manager

custom meta

Custom Code

Custom Metadata Types

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

Custom Metadata Types

Manage Records	Individual Record Type Mapper	HealthCloud	HealthCloudGA	Public	HealthCloudGA__IndividualRecordTypeMapper__mdt	1741	
Manage Records	Job Flow Data Mapping	HealthCloud	HealthCloudGA	Public	HealthCloudGA__JobFlowDataMapping__mdt	375	Source to Target field mapping for objects created in Job Flow
Manage Records	Job Flow Setting	HealthCloud	HealthCloudGA	Public	HealthCloudGA__JobFlowSetting__mdt	677	
Manage Records	Label Config	HealthCloud	HealthCloudGA	Public	HealthCloudGA__LabelConfig__mdt	541	
Manage Records	Lead Converted Status Mapping	HealthCloud	HealthCloudGA	Public	HealthCloudGA__LeadConvertedStatusMapping__mdt	501	Defines the Converted status for a Lead Record Type in Health Cloud
Manage Records	Lead Referral Record Type	HealthCloud	HealthCloudGA	Public	HealthCloudGA__LeadReferralRecordType__mdt	246	Defines the Record Type for Lead Referrals in Health Cloud
Manage Records	Opportunity Referral Record Type	HealthCloud	HealthCloudGA	Public	HealthCloudGA__OpportunityReferralRecordType__mdt	246	Defines the Record Type for Opportunity Referrals in Health Cloud
Def / Manage Records	PCM Configuration			Public	pcm_configuration__mdt	651	
Manage Records	Patient Task Assignment Queue	HealthCloud	HealthCloudGA	Public	HealthCloudGA__Patient_Task_Assignment_Queue__mdt	191	
Manage Records	Risk Score Age Band Continued Enrollee	HealthCloud	HealthCloudGA	Public	HealthCloudGA__RiskScoreAgeBandContinuedEnrollee__mdt	219	Lookup table for continued enrollees with scores for Age bands
							Lookup table with scores for Age bands for

Step 11: Click on New to create a default PCM configuration

Search Setup

Setup Home Object Manager

custom meta

Custom Code

Custom Metadata Types

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

Custom Metadata Types

PCM Configurations

View: All Create New View

New

Label PCM Configuration Name Namespace Prefix

No records to display.

Step 12: Fill in the details such as label Physician Roles and Non-Physician Roles available.

Setup Home Object Manager

Search Setup

custom meta

Custom Code

Custom Metadata Types

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

SETUP Custom Metadata Types

PCM Configuration

PCM Configuration Edit

Save Save & New Cancel

Information

Label default

PCM Configuration Name default

Physician Roles Care Coordinator xyz

Protected Component ☐

Non-Physician Roles Program Manager xyz

Save Save & New Cancel

Here we are all set with the PCM Configuration and can get started with the application.

Setup Home Object Manager

Search Setup

custom meta

Custom Code

Custom Metadata Types

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

SETUP Custom Metadata Types

PCM Configuration

PCM Configuration Detail

Edit Delete Clone

Label default

PCM Configuration Name default

Physician Roles Care Coordinator xyz

Protected Component ☐

Namespace Prefix

Non-Physician Roles Program Manager xyz

Created By User User, 3/22/2024, 3:43 AM

Last Modified By User User, 3/22/2024, 3:43 AM

Edit Delete Clone

