

Constellation4 MVP

Functional Overview & User Guide

V1.2

Version History

Version	Date	Author	Description
v1.0	04/06/2022	Attilio Porchia	Initial Draft
v1.1	04/13/2022	Attilio Porchia	Final Version
v1.2	04/14/2022	Attilio Porchia	Final Version

Table of Contents

Table of Contents	1
Introduction	2
Project Overview	2
Entities	2
Post Installation Steps	3
Setup Permission Sets	3
Setup & Configuration	3
Data Loader	3
List Views	4
Practitioners	4
Organizations	5
Locations	6
Healthcare Services	7
Practitioner Roles	8
Data Load Operation	9
Dashboards	17
Monthly Provider Refresh History	17
Providers Count By Status	17
Providers Count By Specialty	18
Providers By State	18
Providers Count By Zipcodes	19

Introduction

The application described in this document allows Health plans and other potential customers to get a native user experience of Pure4 product. Health Plans can perform Provider search on Pure4 provider data, then select those providers and add them to their recruiting campaigns or other needs.

Project Overview

The Pure4 Provider Data Management will create and maintain a system of truth for the Provider life cycle. With proper authority, the user can constantly maintain provider records. In addition, the providers or delegates can maintain their information as well. Within the scope of this MVP, the app will allow:

- ▶ Health Admin to perform an initial data load, loading provider data from Pure4 into Salesforce Pure4 custom tables using Data Loader.
- ▶ Health Admin to provide access to any role for an authorized user to use this App.
- ▶ Display Pure4 provider data from Pure4 custom tables using Provider Search UI.
- ▶ Digest data analytics in the form of dashboards.

Entities

Location: Details and position information for a physical place where services are provided and resources and participants may be stored, found, contained, or accommodated.

Organization: A formally or informally recognized grouping of people or organizations formed for the purpose of achieving some form of collective action. Includes companies, institutions, corporations, departments, community groups, healthcare practice groups, payer/insurer, etc.

Practitioner: A person who is directly or indirectly involved in the provisioning of healthcare.

Practitioner Role: A specific set of Roles/Locations/specialties/services that a practitioner may perform at an organization for a period of time.

Healthcare Service: The details of a healthcare service available at a location.

Post Installation Steps

Before users begin using the Pure4 application, some necessary configuration steps must be taken. Basic Salesforce Administration knowledge, including user administration and object configuration is recommended to better navigate these steps.

Setup Permission Sets

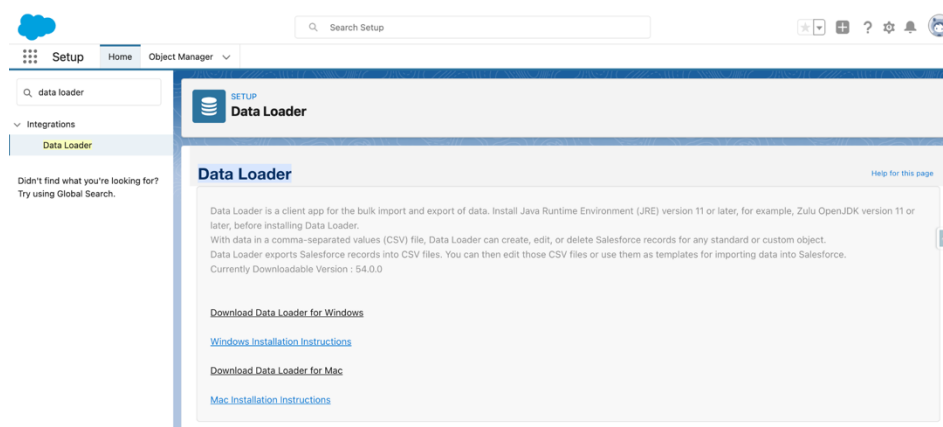
The following table provides a description of the permission sets that come with the Constellation4 application.

Permission Sets	Description
Pure4 Health Plan Admin	Download and install the Pure4 Salesforce App into Health Cloud. Load the Pure4 Provider data into the Health Cloud tables. Create a role and grant access to that role to any authorized user.
Pure4 Client Health Plan Authorized User	Search for Providers in Pure4 custom tables and view Provider search results in a grid view for collections Practitioner, Organization, Locations and Practitioner Roles.

Setup & Configuration

Data Loader

The data load operation is performed using the Data Loader, a Salesforce native client application for the bulk import or export of data. To download and install the application, navigate through the Setup, typing in the Search Bar "data loader".



List Views

Selecting the tabs associated with entities, it is possible to display the relative list views. If by default this is not selected, pin the “All” list view.

Practitioners

The following fields are visible:

1. Practitioner Full Name
2. Identifier
3. Gender
4. Mailing Address
5. Telecom
6. Is Active
7. Extension
8. P4 Practitioner Id
9. Practitioner Status
10. Qualification

Practitioner Roles									
All									
50+ Items • Sorted by Healthcare Service • Filtered by All practitioner roles • Updated 2 minutes ago									
	Health...	P4 Healthcare Service Id	L...	P4 Location Id	Practiti...	P4 Practitioner Id	P4 Practitioner Role Id	Resource Type	Practitioner Role Status
1	☐	HCS-0000	[{"reference": "623caf0aa49859f42c2183c6"}]	[{"reference": "623caf0aa49859f42c2183c5"}]		623caf0aa49859f42c2183c4	623caf7eeb0fd05484ec2417	PractitionerRole	CURATION_RECORD_UPSERTED
2	☐	HCS-0001	[{"reference": "623caf0aa49859f42c2183ce"}]	[{"reference": "623caf0aa49859f42c2183cd"}]		623caf0aa49859f42c2183cc	623caf7eeb0fd05484ec241f	PractitionerRole	CURATION_RECORD_UPSERTED
3	☐	HCS-0002	[{"reference": "623caf0aa49859f42c2183d6"}]	[{"reference": "623caf0aa49859f42c2183d5"}]		623caf0aa49859f42c2183d4	623caf7eeb0fd05484ec2427	PractitionerRole	CURATION_RECORD_UPSERTED
4	☐	HCS-0003	[{"reference": "623caf0aa49859f42c2183da"}]	[{"reference": "623caf0aa49859f42c2183d9"}]		623caf0aa49859f42c2183d8	623caf7eeb0fd05484ec242f	PractitionerRole	CURATION_RECORD_UPSERTED
5	☐	HCS-0004	[{"reference": "623caf0aa49859f42c2183de"}]	[{"reference": "623caf0aa49859f42c2183dd"}]		623caf0aa49859f42c2183dc	623caf7eeb0fd05484ec2437	PractitionerRole	CURATION_RECORD_UPSERTED
6	☐	HCS-0005	[{"reference": "623caf0aa49859f42c2183e2"}]	[{"reference": "623caf0aa49859f42c2183e1"}]		623caf0aa49859f42c2183e0	623caf7eeb0fd05484ec243f	PractitionerRole	CURATION_RECORD_UPSERTED
7	☐	HCS-0006	[{"reference": "623caf0aa49859f42c2183e6"}]	[{"reference": "623caf0aa49859f42c2183e5"}]		623caf0aa49859f42c2183e4	623caf7eeb0fd05484ec2447	PractitionerRole	CURATION_RECORD_UPSERTED
8	☐	HCS-0007	[{"reference": "623caf0aa49859f42c2183ea"}]	[{"reference": "623caf0aa49859f42c2183e9"}]		623caf0aa49859f42c2183e8	623caf7eeb0fd05484ec244f	PractitionerRole	CURATION_RECORD_UPSERTED
9	☐	HCS-0008	[{"reference": "623caf72c28afd845dad090"}]	[{"reference": "623caf72c28afd845dad08f"}]		623caf0aa49859f42c2183c4	623cb08cb645bebf346abdd	PractitionerRole	CURATION_RECORD_UPSERTED
10	☐	HCS-0009	[{"reference": "623caf72c28afd845dad098"}]	[{"reference": "623caf72c28afd845dad097"}]		623caf0aa49859f42c2183cc	623cb08cb645bebf346abe2	PractitionerRole	CURATION_RECORD_UPSERTED
11	☐	HCS-0010	[{"reference": "623caf72c28afd845dad0a4"}]	[{"reference": "623caf72c28afd845dad09f"}]		623caf0aa49859f42c2183d4	623cb08db645bebf346abe7	PractitionerRole	CURATION_RECORD_UPSERTED
12	☐	HCS-0011	[{"reference": "623caf72c28afd845dad0a4"}]	[{"reference": "623caf72c28afd845dad0a3"}]		623caf0aa49859f42c2183d8	623cb08db645bebf346abec	PractitionerRole	CURATION_RECORD_UPSERTED
13	☐	HCS-0012	[{"reference": "623caf72c28afd845dad0a8"}]	[{"reference": "623caf72c28afd845dad0a7"}]		623caf0aa49859f42c2183dc	623cb08db645bebf346abf1	PractitionerRole	CURATION_RECORD_UPSERTED
14	☐	HCS-0013	[{"reference": "623caf72c28afd845dad0ac"}]	[{"reference": "623caf72c28afd845dad0ab"}]		623caf0aa49859f42c2183e0	623cb08db645bebf346abf6	PractitionerRole	CURATION_RECORD_UPSERTED
15	☐	HCS-0014	[{"reference": "623caf72c28afd845dad0b0"}]	[{"reference": "623caf72c28afd845dad0af"}]		623caf0aa49859f42c2183e4	623cb08db645bebf346abfb	PractitionerRole	CURATION_RECORD_UPSERTED
16	☐	HCS-0015	[{"reference": "623caf72c28afd845dad0b4"}]	[{"reference": "623caf72c28afd845dad0b3"}]		623caf0aa49859f42c2183e8	623cb08db645bebf346ac00	PractitionerRole	CURATION_RECORD_UPSERTED
17	☐	HCS-0016	[{"reference": "623d6fa5e2c72dac91628077"}]	[{"reference": "623d6fa5e2c72dac91628076"}]	Pract-0008	623d6fa5e2c72dac91628075	623d7010f2f7b2d9e3a4d5fb	PractitionerRole	CURATION_RECORD_UPSERTED
18	☐	HCS-0017	[{"reference": "623d6fa5e2c72dac9162807b"}]	[{"reference": "623d6fa5e2c72dac9162807a"}]	Pract-0009	623d6fa5e2c72dac91628079	623d7010f2f7b2d9e3a4d603	PractitionerRole	CURATION_RECORD_UPSERTED

Organizations

The following fields are visible:

1. Identifier
2. Organization Name
3. Mailing Address
4. Telecom
5. Is Active
6. Extension
7. Other Organization Name
8. P4 Organization Id
9. Organization Status
10. Resource Type.

Organizations

All

New

Import

Change Owner

Printable View

50+ Items • Sorted by Organization Name • Filtered by All organizations • Updated a few seconds ago

Q

Search this list...

	Identifier	Organizatio...	Mailing Addr...	Telecom	Is...	Extension	Other Organiz...	P4 Organizati...	Organization ...	Resource ...
1	["use":"officia...	007 SMILES, I...	["use":"work...	["system":"ph...		["url":"Provid...	["PARKLAND P...	623d6fa8bc1d...	Updated Orga...	Organizati...
2	["use":"officia...	1162 MILITARY...	["use":"work...	["system":"ph...		["url":"Provid...	["LASER EYE C...	623d6fa7bd3c...	Updated Orga...	Organizati...
3	["use":"officia...	183 DENTAL G...	["use":"work...	["system":"ph...				623d6fa619e3...	Updated Orga...	Organizati...
4	["use":"officia...	305 VISION	["use":"work...	["system":"ph...				623d6fa8b575...	Updated Orga...	Organizati...
5	["use":"officia...	3D VISION EYE...	["use":"work...	["system":"ph...		["url":"Provid...	["FERST: FLOR...	623d6fa8164b...	Updated Orga...	Organizati...
6	["use":"officia...	5TH AVENUE ...	["use":"work...	["system":"ph...				623d6fa9f112...	Updated Orga...	Organizati...
7	["use":"officia...	601 DENTAL S...	["use":"work...	["system":"ph...				623d6fa64ac5...	Updated Orga...	Organizati...
8	["use":"officia...	A BETTER VUE...	["use":"work...	["system":"ph...		["url":"Provid...	["DAVID TRAN ...	623d6fa8a1ce...	Updated Orga...	Organizati...
9	["use":"officia...	A FAMILY DEN...	["use":"work...	["system":"ph...		["url":"Provid...	["A FAMILY DE...	623d6fa54a23...	Updated Orga...	Organizati...
10	["use":"officia...	A PLUS DENTA...	["use":"work...	["system":"ph...				623d6fa84a23...	Updated Orga...	Organizati...
11	["use":"officia...	A PLUS SMILE...	["use":"work...	["system":"ph...				623d6fa932a1...	Updated Orga...	Organizati...
12	["use":"officia...	A SAFARI DEN...	["use":"work...	["system":"ph...				623d6fa9deca...	Updated Orga...	Organizati...
13	["use":"officia...	A SMILE RESO...	["use":"work...	["system":"ph...				623d6fab6e3c...	Updated Orga...	Organizati...
14	["use":"officia...	A WINNING S...	["use":"work...	["system":"ph...				623d6fa7a06...	Updated Orga...	Organizati...
15	["use":"officia...	A&B PEDIATRI...	["use":"work...	["system":"ph...				623d6fa74a23...	Updated Orga...	Organizati...
16	["use":"officia...	A&E DENTAL P...	["use":"work...	["system":"ph...		["url":"Provid...	["A&E DENTAL...	623d6faa800d...	Updated Orga...	Organizati...
17	["use":"officia...	A&M DENTAL ...	["use":"work...	["system":"ph...				623d6fa94ac5...	Updated Orga...	Organizati...
18	["use":"officia...	A-1 DENTAL C...	["use":"work...	["system":"ph...				623d6faa164b...	Updated Orga...	Organizati...

Locations

The following fields are visible:

1. Line
2. City
3. State
4. Postal Code
5. Country
6. Telecom
7. Extension
8. Organization
9. P4 Organization Id
10. P4 Location Id
11. Location Status
12. Resource Type


Locations

All ▼

[New](#)
[Import](#)
[Change Owner](#)
[Printable View](#)

50+ items • Sorted by Line • Filtered by All locations • Updated a few seconds ago








☐	Line ↑	City	S...	Postal Co...	C...	Telecom	Extension	Organiz...	P4 Organiz...	P4 Locatio...	Location St...	Resou...
☐	[*1 ACE RD ...	BUTLER	NJ	74051348	US	["system"...	["url":"dpv...	Org-0000	6244210f19...	6244210f19...	CURATED_...	Location
☐	[*1 BALLINS...	ATLANTIC ...	NJ	77161510	US	["system"...	["url":"dpv...	Org-0000	624407da8...	624407da8...	CURATED_...	Location
☐	[*1 BROOK...	BROOKLYN	NY	112123139	US	["system"...	["url":"dpv...	Org-0000	624421175...	624421175...	CURATED_...	Location
☐	[*1 COLUM...	SHINNSTON	WV	264311016	US	["system"...	["url":"dpv...	Org-0000	624421139...	624421139...	CURATED_...	Location
☐	[*1 DOCTO...	ASHEVILLE	NC	288014500	US	["system"...	["url":"dpv...	Org-0000	62442111f4...	62442111f4...	CURATED_...	Location
☐	[*1 GOOD S...	MOUNT VE...	IL	628642402	US	["system"...	["url":"dpv...	Org-0000	6244210f5...	6244210f5...	CURATED_...	Location
☐	[*1 LUMBER...	HOPKINTON	MA	1748	US	["system"...	["url":"dpv...	Org-0000	624407d7c...	624407d7c...	CURATED_...	Location
☐	[*1 MAIN ST]	PELZER	SC	296691503	US	["system"...	["url":"dpv...	Org-0000	624407d93...	624407d93...	CURATED_...	Location
☐	[*1 MEDICA...	ROSEVILLE	CA	956613037	US	["system"...	["url":"dpv...	Org-0000	624407dac...	624407dac...	CURATED_...	Location
☐	[*1 MEDICA...	ROSEVILLE	CA	956613037	US	["system"...	["url":"dpv...	Org-0000	624407db0...	624407db0...	CURATED_...	Location
☐	[*1 MEMORI...	WEST HAR...	CT	61072208	US	["system"...	["url":"dpv...	Org-0000	624407da9...	624407da9...	CURATED_...	Location
☐	[*1 N MARI...	FARMINGT...	WV	265719717	US	["system"...	["url":"dpv...	Org-0000	624421139...	624421139...	CURATED_...	Location
☐	[*1 NE 48T...	LAWTON	OK	735077331	US	["system"...	["url":"dpv...	Org-0000	624407d78...	624407d78...	CURATED_...	Location
☐	[*1 PPG PL ...	PITTSBURGH	PA	152225416	US	["system"...	["url":"dpv...	Org-0000	624407d85...	624407d85...	CURATED_...	Location
☐	[*1 PROFES...	JOHNSON ...	TN	376046909	US	["system"...	["url":"dpv...	Org-0000	624407da3...	624407da3...	CURATED_...	Location
☐	[*1 ROEBLI...	RONKONKO...	NY	117799202	US	["system"...	["url":"dpv...	Org-0000	6244210ff9...	6244210ff9...	CURATED_...	Location
☐	[*1 SILVERC...	NEW ALBANY	IN	471507800	US	["system"...	["url":"dpv...	Org-0000	624421176...	624421176...	CURATED_...	Location
☐	[*1 SISKIN P...	CHATTANO...	TN	374031306	US	["system"...	["url":"dpv...	Org-0000	624407d79...	624407d79...	CURATED_...	Location

Healthcare Services

The following fields are visible:

1. Specialty
2. Specialty Type
3. Specialty Code
4. License State
5. Comment
6. P4 Healthcare Service Id
7. Resource Type
8. Healthcare Service Status

Healthcare Services								
All ▾								
50+ items • Sorted by Specialty Type • Filtered by All healthcare services • Updated a few seconds ago								
Search this list...								
☐	Specialty ▾	Spe... ▴ ▾	Specialty C... ▾	License State ▾	Comment ▾	P4 Healthcare Servi... ▾	Resource Type ▾	Healthcare Service ... ▾
1	☐	ST-0002	207K00000X	ME49057,FL,ME4905...	193400000X MULTIP...	623d6fac6e3c0b520...	HealthcareService	CURATED_RECORD_...
2	☐	ST-0027	207Q00000X	OS14898,FL,OS1489...		623d6fab7a0656ebe...	HealthcareService	CURATED_RECORD_...
3	☐	ST-0028	207QA0401X	ME71349,FL,ME7134...		623d6fa86e3c0b520...	HealthcareService	CURATED_RECORD_...
4	☐	ST-0036	208D00000X	OS12404,FL,OS0166...		623d6fa7800db98d8...	HealthcareService	CURATED_RECORD_...
5	☐	ST-0036	208D00000X	UO2833,FL,OS11958...		623d6fa77a0656ebe...	HealthcareService	CURATED_RECORD_...
6	☐	ST-0036	208D00000X	89092,GA,ME94281,FL		623d6fa86e3c0b520...	HealthcareService	CURATED_RECORD_...
7	☐	ST-0036	208D00000X	ME106007,FL,ME106...		623d6faa6e3c0b520...	HealthcareService	CURATED_RECORD_...
8	☐	ST-0039	207R00000X	125069206,IL,MA287...		623d6fa7800db98d8...	HealthcareService	CURATED_RECORD_...
9	☐	ST-0039	207R00000X	LP01375,RI,D74079...		623d6fa800db98d8...	HealthcareService	CURATED_RECORD_...
10	☐	ST-0039	207R00000X	539231,TX,ME115563...		623d6fa57a0656ebe...	HealthcareService	CURATED_RECORD_...
11	☐	ST-0039	207R00000X	L-263998,MA,ME140...		623d6faa7a0656ebe...	HealthcareService	CURATED_RECORD_...
12	☐	ST-0039	207R00000X	271068,MA,ME14945...		623d6fab7a0656ebe...	HealthcareService	CURATED_RECORD_...
13	☐	ST-0039	207R00000X	125-054586,IL,ME112...		623d6fab6e3c0b520...	HealthcareService	CURATED_RECORD_...
14	☐	ST-0039	207R00000X	91598,FL,91598,FL	193200000X MULTI...	623d6fa57a0656ebe...	HealthcareService	CURATED_RECORD_...
15	☐	ST-0076	204D00000X	OS16173,FL,OS16173...		623d6fa7800db98d8...	HealthcareService	CURATED_RECORD_...
16	☐	ST-0092	207W0000...	ME29113,FL		623d6fa5e2c72dac91...	HealthcareService	CURATED_RECORD_...
17	☐	ST-0092	207W0000...	ME84970,FL		623d6fa5e2c72dac91...	HealthcareService	CURATED_RECORD_...
18	☐	ST-0092	207W0000...	ME0060517,FL		623d6fa5e2c72dac91...	HealthcareService	CURATED_RECORD_...

Practitioner Roles

The following fields are visible:

1. Healthcare Service
2. P4 Healthcare Service Id
3. Location
4. P4 Location Id
5. Practitioner
6. P4 Practitioner Id
7. P4 Practitioner Role Id
8. Resource Type
9. Practitioner Role Status

Practitioner Roles

All

New

Import

Change Owner

Printable View

50+ Items • Sorted by Healthcare Service • Filtered by All practitioner roles • Updated a few seconds ago

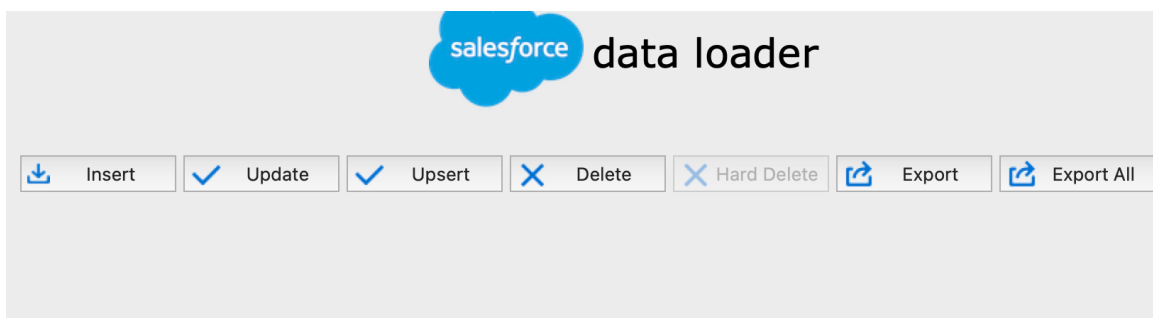
Search this list...

	Health... ↑	P4 Healthcare Serv...	L...	P4 Location Id	Practitio...	P4 Practitioner Id	P4 Practitioner Rol...	Resource Type	Practitioner Role St...
1	HCS-0000	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623caf7eeb0fd0548...	PractitionerRole	CURATION_RECORD...
2	HCS-0001	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623caf7eeb0fd0548...	PractitionerRole	CURATION_RECORD...
3	HCS-0002	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623caf7eeb0fd0548...	PractitionerRole	CURATION_RECORD...
4	HCS-0003	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623caf7eeb0fd0548...	PractitionerRole	CURATION_RECORD...
5	HCS-0004	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623caf7eeb0fd0548...	PractitionerRole	CURATION_RECORD...
6	HCS-0005	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623caf7eeb0fd0548...	PractitionerRole	CURATION_RECORD...
7	HCS-0006	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623caf7eeb0fd0548...	PractitionerRole	CURATION_RECORD...
8	HCS-0007	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623caf7eeb0fd0548...	PractitionerRole	CURATION_RECORD...
9	HCS-0008	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623cb08cb645bebf...	PractitionerRole	CURATION_RECORD...
10	HCS-0009	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623cb08cb645bebf...	PractitionerRole	CURATION_RECORD...
11	HCS-0010	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623cb08db645bebf...	PractitionerRole	CURATION_RECORD...
12	HCS-0011	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623cb08db645bebf...	PractitionerRole	CURATION_RECORD...
13	HCS-0012	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623cb08db645bebf...	PractitionerRole	CURATION_RECORD...
14	HCS-0013	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623cb08db645bebf...	PractitionerRole	CURATION_RECORD...
15	HCS-0014	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623cb08db645bebf...	PractitionerRole	CURATION_RECORD...
16	HCS-0015	[{"reference": "623c...		[{"reference": "623c...		623caf0aa49859f42...	623cb08db645bebf...	PractitionerRole	CURATION_RECORD...
17	HCS-0016	[{"reference": "623d...		[{"reference": "623d...	Pract-0008	623d6fa5e2c72dac9...	623d7010f2f7b2d9e...	PractitionerRole	CURATION_RECORD...
18	HCS-0017	[{"reference": "623d...		[{"reference": "623d...	Pract-0009	623d6fa5e2c72dac9...	623d7010f2f7b2d9e...	PractitionerRole	CURATION_RECORD...

Data Load Operation

The Data Load is an operation performed by the Pure4 Health Plan Admin, using the Data Loader client application.

- ▶ Open the Data Loader application and click "Insert".
- ▶ The following screen will be displayed.



Step 1: Log In

Log in to the Salesforce org that you're importing to or exporting from.



- ▶ Choose "OAuth" as authentication mode and select "Production" in the "Environment" field. Then click on "Log in".
- ▶ The following screen pops up:



The image shows the Salesforce login interface. At the top is the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters. Below the logo are two input fields: "Username" and "Password". The "Username" field is a simple white rectangle with a thin grey border. The "Password" field is a white rectangle with a thin grey border and a small eye icon on the right side to toggle visibility. Below the password field is a blue button with the text "Log In" in white. Underneath the button is a checkbox labeled "Remember me". At the bottom of the form are two links: "Forgot Your Password?" and "Use Custom Domain".

Username

Password

Log In

☐ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

Before inserting your credentials, click “Use Custom Domain” to provide the environment custom domain. To ensure the right domain to input, navigate in Setup under the Platform Tools category and search for Domain (alternatively it can be found navigating through the User Interface > Sites and Domains > Domains).

Step 1: Log In

Log in to the Salesforce org that you're importing to or exporting from.

A screenshot of the Salesforce login interface. At the top, there are two radio buttons: "OAuth" (which is selected with a blue dot) and "Password Authentication". Below these, there is a label "Environment" followed by a dropdown menu showing "Production". To the right of the dropdown, the text "Login successful" is displayed. A "Log in" button is located to the right of the "Login successful" text. At the bottom of the interface, there are four buttons: "< Back", "Next >", "Cancel", and "Finish".

- ▶ Once the login is complete, click on "Next".

Step 2: Select data objects

Select your Salesforce object and your CSV file.

A screenshot of a web interface for selecting Salesforce objects. At the top, it says "Select Salesforce object:". Below this is a checkbox labeled "Show all Salesforce objects". Underneath is a search bar with a magnifying glass icon and the word "Search". A dropdown menu is open, showing a list of objects: "Account (Account)", "Case (Case)", "Contact (Contact)", "Event (Event)", "Healthcare Service (HealthcareService__c)", and "Lead (Lead)". Below the search bar is a section labeled "Choose CSV file:" with a text input field and a "Browse..." button. At the bottom of the interface are four buttons: "< Back", "Next >", "Cancel", and "Finish".

The next step consists of selecting the data objects we are uploading and the relative csv file. The following order needs to be respected during the upload process:

1. Practitioner
2. Location
3. Organization
4. Healthcare Service
5. Practitioner Role

- ▶ Select the first data object as per the image below and then click on "Browse" to select the related csv file. Once the file is selected click on "Next".

Step 2: Select data objects

Select your Salesforce object and your CSV file.



Select Salesforce object:

☐ Show all Salesforce objects

Q Pract

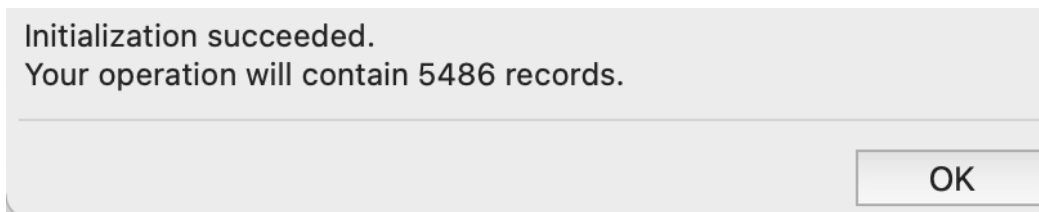
Practitioner (Practitioner__c)

Practitioner Role (PractitionerRole__c)

Choose CSV file:

< Back Next > Cancel Finish

- ▶ If the upload operation is successful, the following message will display:



- ▶ To map the field, upload the related mapping file, clicking on "Choose an Existing Map":

Step 3: Mapping

Map your fields (CSV columns) to the Salesforce object.



Current Field Mapping:

File Column Header	Name
identifier	
qualification	
extension	
address	
gender	
name	
CuratedPractitionerStatus	
active	

- Once the file is selected it is possible to verify the field mapping:

Step 3: Mapping

Map your fields (CSV columns) to the Salesforce object.



Current Field Mapping:

File Column Header	Name	
identifier	Identifier__c	
qualification	Qualification__c	
extension	Extension__c	
address	Address__c	
gender	Gender__c	
CuratedPractitionerStatus	CuratedPractitionerStatus__c	
name	Name__c	
active	Active__c	

- ▶ To complete the operation, click on “Next”.
- ▶ In the last screen, select the directory where the success and error files will be saved.

Step 4: Finish

Select the directory where your success and error files will be saved.



Directory:

< Back Next > Cancel Finish

- ▶ Click then on “Finish”. A message will display the status of the operation:

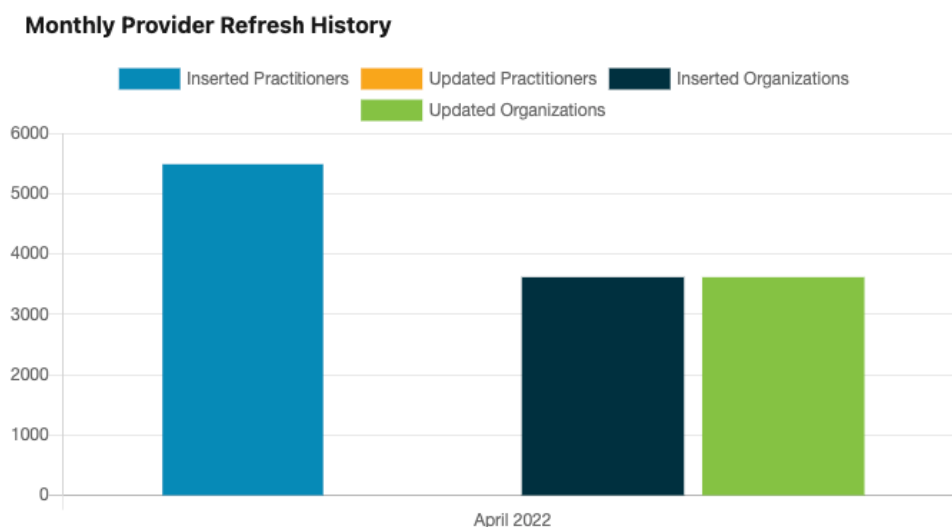
The operation has fully completed. There were 5486 successful inserts and 0 errors.

Dashboards

The landing page of the application presents five dashboards containing data analytics. Below a description of the content displayed by each dashboard.

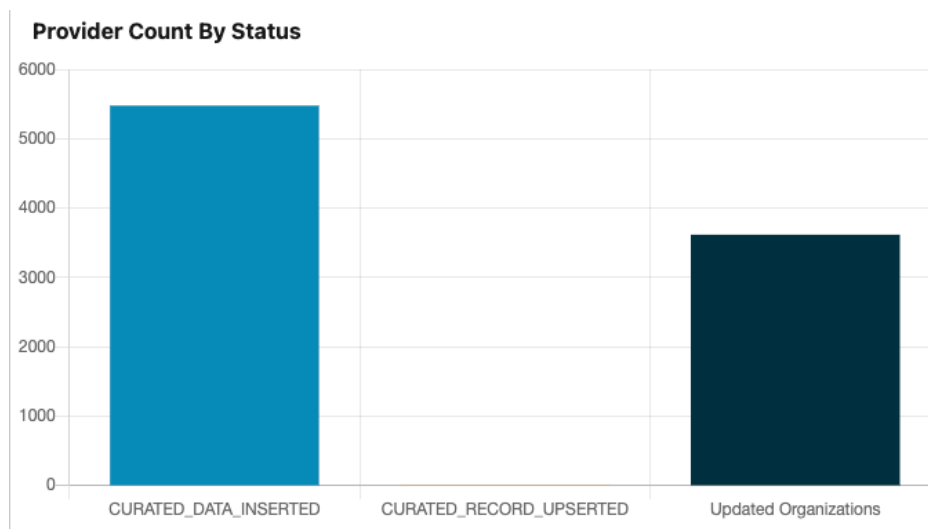
Monthly Provide Refresh History

Vertical bar chart with Practitioner and Organizations insertions and updates broken by month of the year.



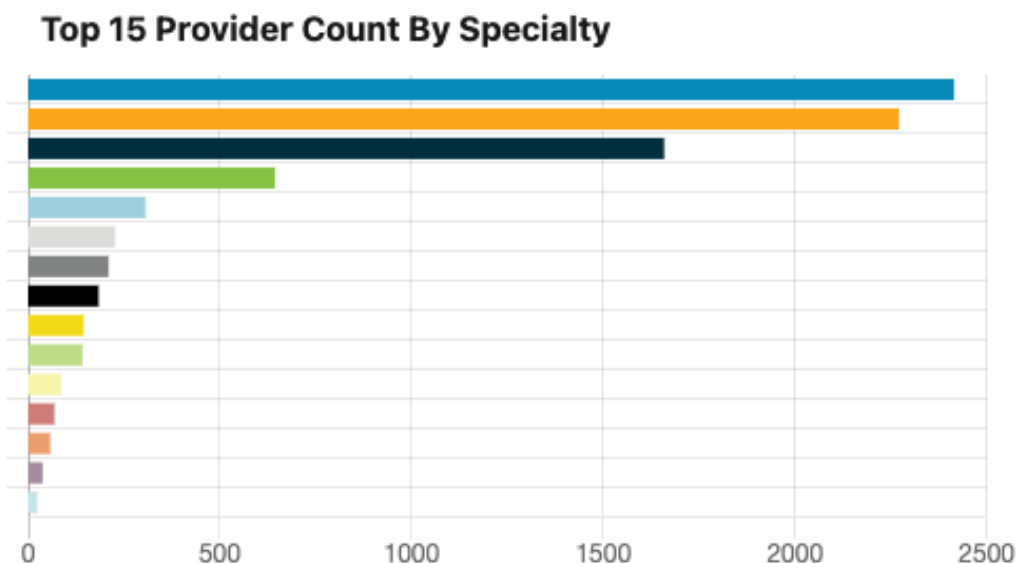
Providers Count By Status

Vertical bar chart displaying count of validated data for Practitioner and Organizations.



Providers Count By Specialty

Horizontal bar chart presenting the Top 15 Providers by Specialty. Calculation performed with the count of all the Specialty Type codes found among all the Healthcare Services.



Providers By State

Donut chart displaying Top 15 Providers broken by states. Calculation performed counting all the States found among all the Location that contains Organization.

Top 15 Provider Count By State



Providers Count By Zipcodes

Horizontal bar chart presenting Top 15 Providers broken by zip codes. The calculation is based on the count of Postal Code found among all the Locations that contain Organization.

Top 15 Provider Count By Zipcodes

