salesforce

Emergency Response Management for Public Health Admin Guide

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CONTENTS

EMERGENCY PROGRAM MANAGEMENT FOR PUBLIC HEALTH

Salesforce Emergency Program Management for Public Health helps you to serve your constituents and communities when they need it most. Provide healthcare to symptomatic patients and trace and monitor potentially exposed individuals. Allocate emergency resources and services with more speed and efficiency than ever before.

Provide Critical Emergency Programs to Your Site

During an emergency, it's critical to get supplies to agencies and essential services that are on the front line. Members of the site who are vulnerable need access to programs and services that provide safety and security during challenging times.

Configure General Org Settings

The configuration steps in this section apply to the majority of the features in Salesforce Emergency Program Management. If you've already completed these steps in your org, feel free to skip them.

Manage and Support Contact Tracing

During a public health emergency, the safety, health, and well-being of your community or employees depends on getting people assessed, enrolled in a care program, and monitored. With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees. With Contact Tracing for Public Health, public health organizations can use data to track the spread of disease, gather details from exposed people, and recommend care plans and services.

Configure Emergency Services

Create emergency services for businesses and individuals. You can configure different services and programs that are available for public agencies and hospitals, such as emergency supply requests. For individuals, create programs such as food delivery services or short-term housing requests.

Configure Volunteer Management

With Volunteer Management, you can manage volunteer projects within Salesforce and make them visible on your Experience website. Volunteers can sign up for volunteer projects on your site and update their time spent on volunteer activities.

Deploy Analytics for Emergency Program Management

Before you create an app from the Analytics for Emergency Program Management template and use the dashboards, deploy Analytics for Emergency Program Management in your Salesforce org.

Analytics for Emergency Program Management

Identify the hotspots in which illness or requests for emergency services are increasing so that you can allocate resources to where they're needed most. Our pre-built dashboards give you actionable insights into the health of your community. Determine which demographic segment is most affected and pay special attention to intake numbers or patients from that segment. Track emergency requests from your community and ensure that you're proactive and effective in providing emergency assistance.

Provide Critical Emergency Programs to Your Site

During an emergency, it's critical to get supplies to agencies and essential services that are on the front line. Members of the site who are vulnerable need access to programs and services that provide safety and security during challenging times.

> **Note:** You may have completed these steps when setting up other parts of the Emergency Program Management app. If you've already done these steps, feel free to skip them.

Emergency Program Management for Public Health

Help your public health department serve its constituents and communities when there's a health emergency. Quickly triage and evaluate patients, provide ongoing engagement and monitoring, and protect communities from further infection with contact tracing.

**Emergency Program Management for Public Sector**

Quickly deploy a single digital destination for constituents and communities to access emergency program information and incident updates. Use the Emergency Response Community site to feature different services and programs that are available to public agencies and hospitals, such as emergency supply requests. People can request permits for building access and apply for assistance programs like food delivery services. Using the mobile Inspection App field, responders can deliver emergency services quickly and efficiently. Businesses can use the site to request permits to reopen to the public. After the permit is approved, your inspector can use the Inspection App to verify that the site complies with local health and safety ordinances.

Emergency Program Management for Public Health

Help your public health department serve its constituents and communities when there's a health emergency. Quickly triage and evaluate patients, provide ongoing engagement and monitoring, and protect communities from further infection with contact tracing.

Community Triage and Evaluate

In the Emergency Public Health Portal, the citizens can take action to help themselves during a public health emergency.
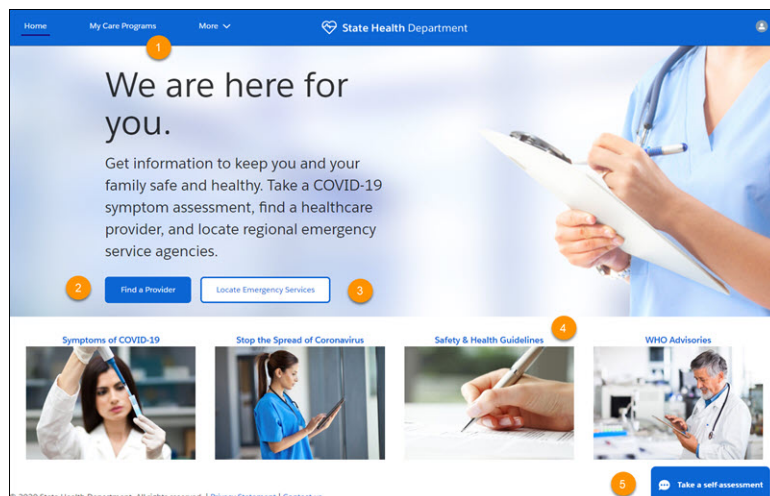
Citizens can see the emergency care programs that they're enrolled in (1) and search for health care providers by specialty, location, and other factors (2). A click of a button gives them the location of the closest emergency services (3) and access to vital information to stay healthy and safe (4). A pre-defined chatbot dialog guides individuals through a self-assessment based on Centers for Disease Control guidelines with the option to schedule an appointment for follow-up.

Patient Engagement and Care

During a public health emergency, efficiency in getting individuals assessed, enrolled in a care program, and monitored is crucial. The first step in helping someone who might be infected is to perform a clinical assessment.
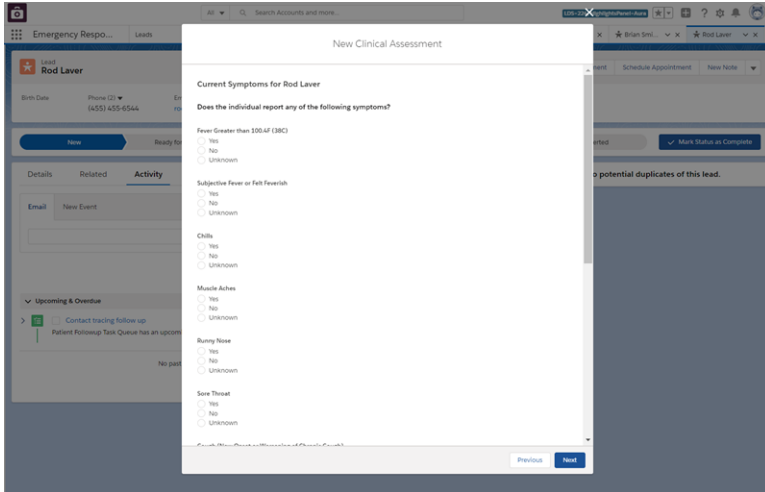
Using the Health Cloud Emergency Management app, create a consistent intake experience using guided workflows and pre-built assessments that can quickly adapt as protocols or guidelines change.

Once a patient is triaged and enrolled in a care program, your care teams can remotely monitor and connect patients to the right care when called for. Care coordinators have all the information they need to make sure that each patient has a program and services tailored to their needs.
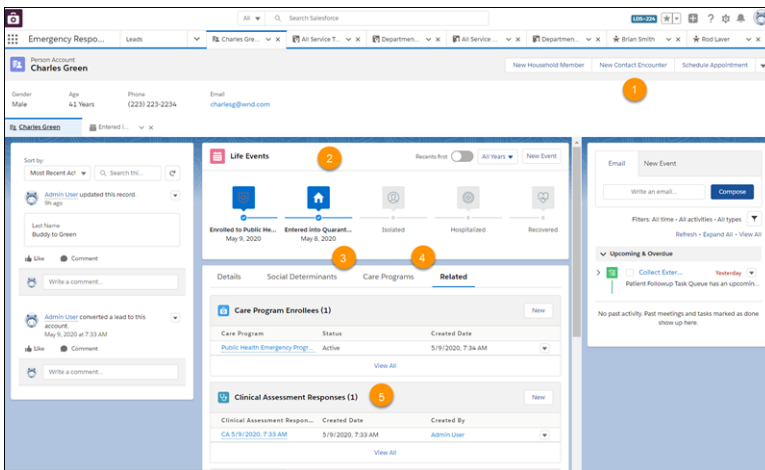
Each patient record shows actionable and comprehensive care and social services plans, personalized to each patient. Add information about individuals the patient has been in contact with (1) and track incidents and milestones to gain insight into the patient's condition (2). Understand the social and environmental factors that define extra services a patient needs (3), and keep tabs on the care program the patient is enrolled in (4). You can check the patient's symptoms and progress as measured through the daily assessments that are sent to patients enrolled in the emergency care program.

Tracing and contacting individuals who may have been exposed to an infected person is one of the most efficient ways of fighting widespread community infection. You can see the exposed contacts for every patient right from the patient record.
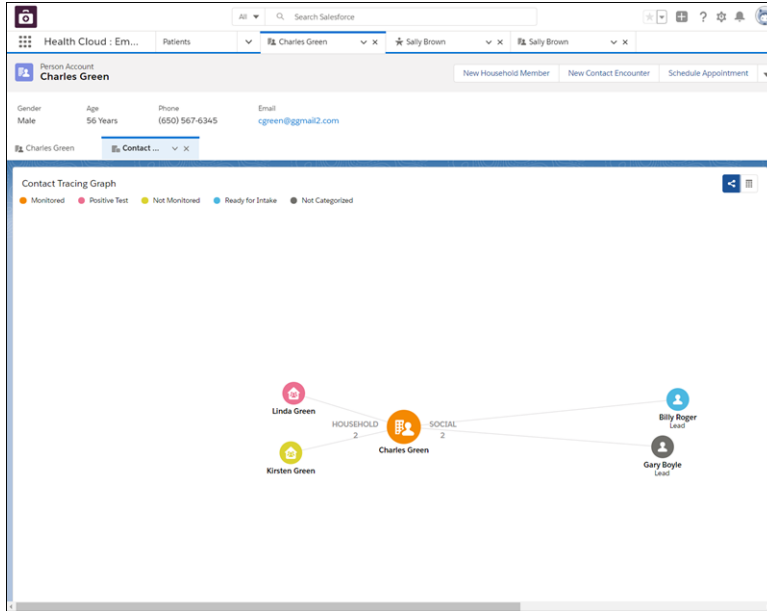
The Contact Tracing Graph gives you a comprehensive view of household members and social relationships so that you can trace infection by people, places, or events. Follow up, assessment, and triage can happen without having to leave the console.

Contact Tracing and Intake Site

With many exposed individuals to contact, it makes sense to bring in workers or volunteers whose job it is to call those exposed contacts.
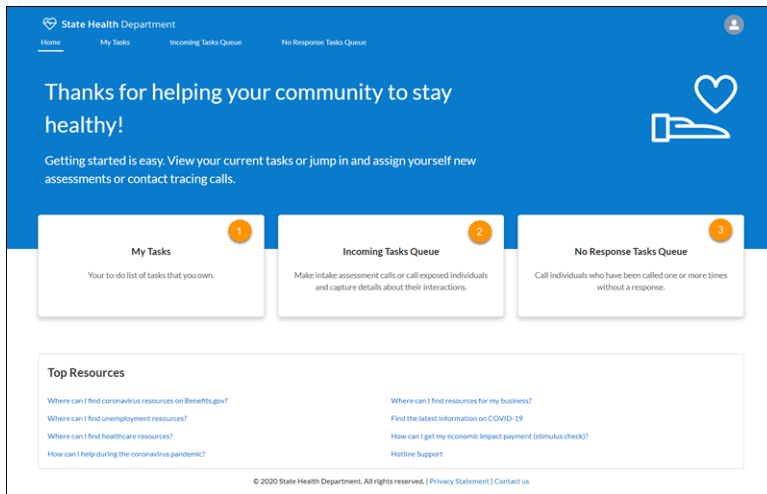
The Contact Tracing Site gives contact tracers an easy and efficient way to pick up contact tracing tasks from a queue and work on them. Tracers can find the tasks that they own (1), pick up new call tasks (2), or add tasks to call contacts who haven't responded (3).

SEE ALSO:

Salesforce Help: Enable Digital Experiences for ERM Sites

Emergency Program Management for Public Sector

Quickly deploy a single digital destination for constituents and communities to access emergency program information and incident updates. Use the Emergency Response Community site to feature different services and programs that are available to public agencies and hospitals, such as emergency supply requests. People can request permits for building access and apply for assistance programs like food delivery services. Using the mobile Inspection App field, responders can deliver emergency services quickly and efficiently. Businesses can use the site to request permits to reopen to the public. After the permit is approved, your inspector can use the Inspection App to verify that the site complies with local health and safety ordinances.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

Emergency Response Community

The pre-configured Emergency Response Community template makes it easy for citizens to request emergency assistance and get information when they need it most.
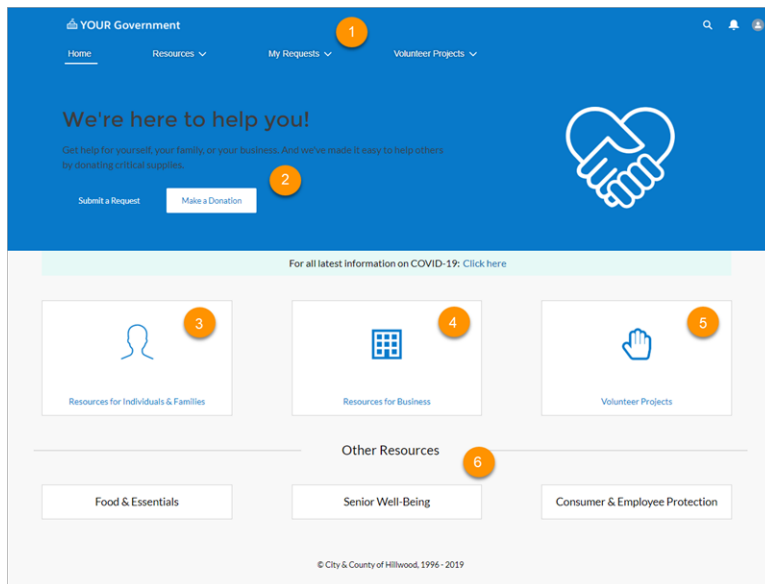
The Emergency Response Community is a hub for your community during an emergency. Citizens and businesses can check the status of existing requests (1) or donate emergency supplies (2). Individuals and families can submit requests for assistance with temporary housing, emergency supply delivery, and wellness checks. Employees can request a permit to access a building or obtain certification for training they've taken (3). Businesses can request a permit to reopen to the public or request critical supplies that enable them to keep employees and customers safe (4). With Volunteer Management, you can create volunteer projects and let people sign up for shifts to help during an emergency (5). And you can add other resources to keep your community informed and protected (6).
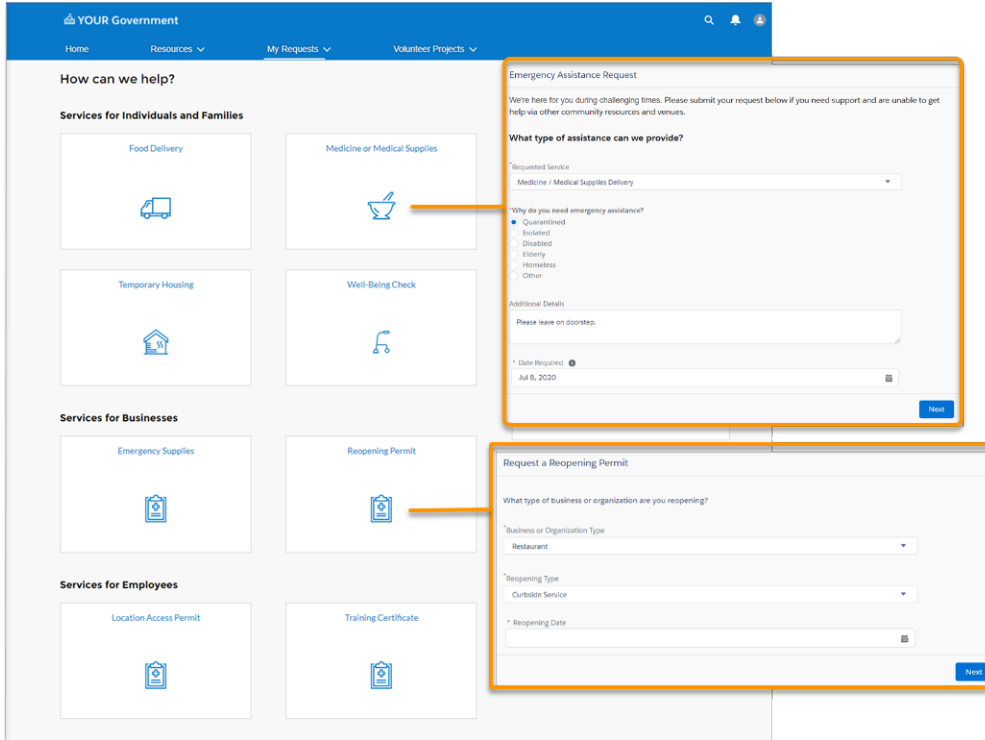
Citizens can fill out a simple online form to request supplies or delivery services. Businesses and other organizations can also request emergency supplies or reopening permits.

Emergency Response Console

Give your staff the power of the Emergency Response Console to triage and evaluate incoming requests from citizens or businesses.
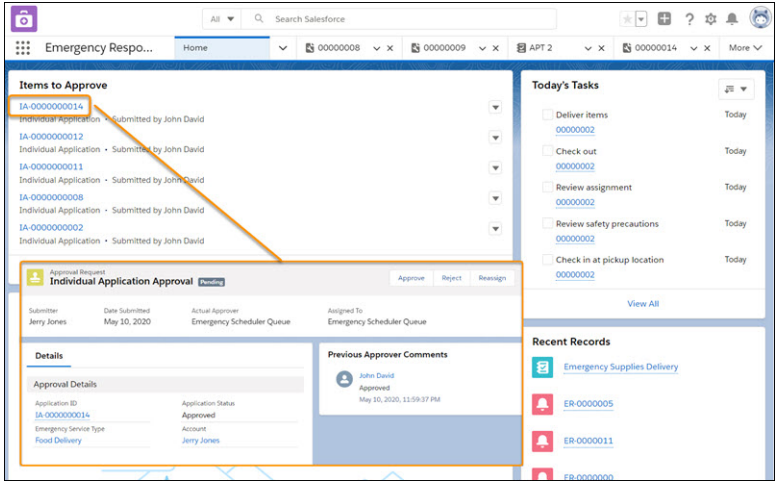
From the Emergency Response Console's home page, your agency can quickly approve requests and then have a dispatcher schedule a delivery or an inspection.

Salesforce Maps and the Mobile Inspection App

Help is on its way in no time when your dispatchers use Salesforce Maps.
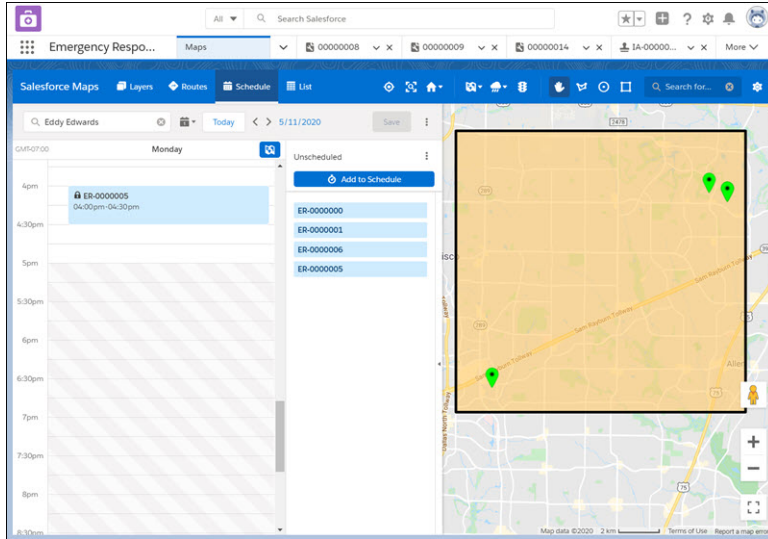
Salesforce Maps injects location intelligence into field operations to make emergency supply delivery more efficient. When an emergency event is created, the Schedule an Emergency Visit process starts a flow that creates the visit record, applies the action plan template, and creates tasks.
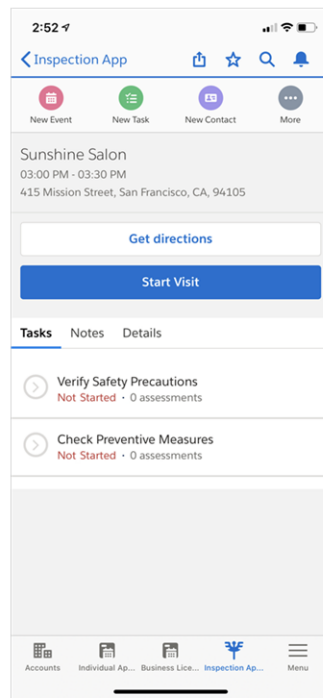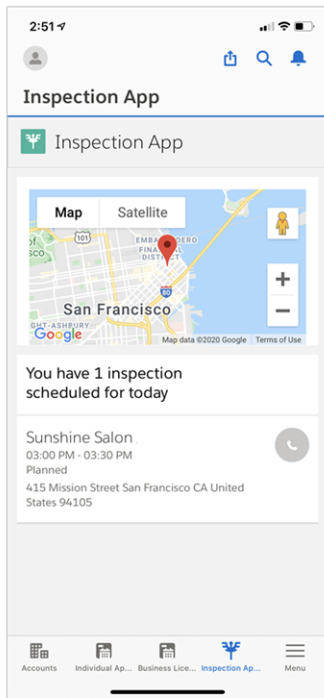
Your field responders can complete an inspection or a delivery right on their mobile phone. Contact information, directions, and a detailed accounting of their tasks are at their fingertips. When an inspection or a delivery and the associated tasks are finished, the inspector or field responder marks the visit as complete and begins the next assignment.

Grants Management

Grants Management helps you launch a Grantee Portal where grant seekers can find funding opportunities. From the portal, organizations can apply for funding, view their application status, and submit ongoing progress reports for awarded grants.

Once you've set up Grants Management, you can create a tile in the Emergency Response site template and link to the Grantee Portal.

Configure General Org Settings

The configuration steps in this section apply to the majority of the features in Salesforce Emergency Program Management. If you've already completed these steps in your org, feel free to skip them.

Get the Prerequisites for Emergency Management in Health Cloud

You'll need to put a few preliminaries in place to take advantage of Health Cloud features for emergency management.

Install Health Cloud

Install the Health Cloud managed package in your org so that you can begin implementing Health Cloud for your users. After that's done, you can install the optional unmanaged packages that extend Health Cloud with extra features.

Enable Digital Experiences for EPM Sites

Enabling Salesforce digital experiences is the first step to creating communities, portals, and sites. This task is required for Contact Tracing for Public Health only.

Protect Your Sensitive Data with Salesforce Shield

Salesforce Shield is a set of security tools you can use to comply with regulations on storing sensitive protected health information. With Platform Encryption and Event Monitoring, you can monitor usage, prevent malicious activity, and protect data at rest while allowing full functionality.

Set Up an Organization-Wide Email Address

Define a list of organization-wide addresses for different user profiles. When they send email from Salesforce, these users can select their own email address or the organization-wide email address for the email's From field. Replies are delivered to the selected address.

Assign Emergency Program Management Permission Set Licenses

Permission set licenses enable users to access features beyond those that are included in their basic user licenses. To enable users to work in the Emergency Program Management app, assign them the necessary permission set licenses.

Emergency Response Management Permission Sets

Emergency Response Management provides special permission sets that give users access to features.

Create Emergency Program Management Users

You can add internal Salesforce users one at a time or in batches of up to 10 users.

Enable Person Accounts

Person accounts store information about individuals by combining certain account and contact fields into one record. Emergency Program Management uses person accounts for personas like individual citizens or patients.

Add an Approval Path to an Application Page

Add an approval path and the applications related list to the Individual Application and the Business License Application pages so that your approvers can process requests efficiently.

Set Up Emergency Program Management Sites

Set up a Experience Builder Site to serve your constituents when they need it most. Provide healthcare to symptomatic patients, trace and monitor potentially exposed individuals, or quickly allocate emergency resources and services.

Create Relationships Between Health Cloud Products and Emergency Request Products

Products that are included in a care program can be requested and delivered as part of an emergency service delivery visit. The Regulatory Authorization Type Product object serves as a junction object for Regulatory Authorization Product and Product objects.

Enable Individuals to Perform Self-Assessments and Schedule Appointments

Managing a quickly evolving and rapidly spreading emergency is more efficient when you crowd-source effort and implement some automation. That's why it's important that to enable individuals to assess themselves, and based on those assessments, to enable them to schedule appointments as well.

Gather Lead Information and Enable Appointment Self-Scheduling

Use the ERM - Schedule an Appointment flow to gather lead information from individuals and to enable them to self-schedule appointments.

Set Up Daily Assessment Using Surveys

Keeping tabs on your patient's condition everyday is key to managing an outbreak. Salesforce Surveys can help you do that. You can configure a survey to gather the information you need and automate its distribution at regular intervals.

Use Flows to Automate Your Processes

To automate the processes and handoffs that manage patients and provide emergency services, we provided flows that you can customize in Flow Builder. Flows collect data and perform actions in your Salesforce org or an external system.

Get the Prerequisites for Emergency Management in Health Cloud

You'll need to put a few preliminaries in place to take advantage of Health Cloud features for emergency management.

1. Make sure Surveys are available to users.

   a. In Setup, find **Company Information**. Under **Permission Set Licenses**, check for Survey Creator User.

   If this license isn't listed, contact your Salesforce representative to request it.

   b. In Setup, on the **Survey Settings** page, switch the slider to **Enabled**.

   c. Assign the Survey Creator permission set to your Admin user or group.

2. Enable Knowledge for the Admin user or group.

   a. In Setup, find **Company Information**. Under **Feature Licenses**, look for Knowledge User.

   If this license isn't listed, contact your Salesforce representative to request it.

   b. In Setup, search for **Users** and select the Admin user.

   c. Select the **Knowledge User** checkbox and save your changes.

3. Make sure the Address object is available.

   a. In Setup, search for **Object Manager** and find the Address object in the list.

   b. If the Address object is not present, contact your Salesforce representative.

4. Make sure you have a license for Salesforce Scheduler.

5. To take advantage of predefined flows, install the Emergency Response Management package for Health Cloud.

   This unmanaged package contains the metadata, record types, page layouts, site templates, and other items to enable the Emergency Response Management suite of features.

   Install it from http://industries.force.com/healthcloudextensionerm.

SEE ALSO:

Salesforce Help: Licenses for Salesforce Scheduler

Install Health Cloud

Install the Health Cloud managed package in your org so that you can begin implementing Health Cloud for your users. After that's done, you can install the optional unmanaged packages that extend Health Cloud with extra features.

1. Install the Health Cloud managed package before you install and configure any of the Health Cloud unmanaged packages.

   This managed package delivers the core features of Health Cloud. You can find the package download URL in the Terms and Conditions section of your contract.

2. Select the Health Cloud unmanaged packages you want to install.

   - **Emergency Program Management**: This unmanaged package contains the metadata, record types, page layouts, community templates, and other items to enable the Emergency Program Management suite of features.

     Install it from http://industries.force.com/healthcloudextensionerm

   - **Health Cloud Unmanaged Package Extension**: This unmanaged package delivers the process that lets care coordinators convert Lead records into Patient records.

     Install it from http://industries.force.com/healthcloudextension.

3. Paste the URL for the package into your browser navigation bar, and press **Enter**.

4. Enter your Salesforce password.

5. Select **Install**.

   If it takes a while, you can select **Done** and move on to something else while installation finishes. Check your email for confirmation that installation was successful.

6. To verify that the package was installed, go to `Installed Packages` in Setup, and look for the name of the package.

🛇 Important: Don't delete any part of the managed package after installing it. Doing so can block automatic upgrades to future releases.

✎ Note: The custom objects, components, classes, and triggers delivered in Health Cloud packages are one API version behind the core Salesforce API. Health Cloud standard objects have the same API version as core Salesforce. So, if your org's API version is 43, the Health Cloud custom objects are API version 42, and the standard Health Cloud objects are API version 43.

Enable Digital Experiences for EPM Sites

Enabling Salesforce digital experiences is the first step to creating communities, portals, and sites. This task is required for Contact Tracing for Public Health only.

✎ Note:

- To access ERM in sites, make sure you have the External Apps license and the Customer Community Plus license.
- After you enable digital experiences, you can't disable it.
- ERM Sites templates are currently only available in English. For digital experiences language support, see Multilingual Sites.

USER PERMISSIONS

To enable digital experiences:
- Customize Application

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **Digital Experiences** > **Settings**.

2. Select **Enable Digital Experiences**.
   Your digital experiences domain is shown. It includes your My Domain name in the format `MyDomainName.my.site.com` for production orgs.

3. Click **Save**.

Protect Your Sensitive Data with Salesforce Shield

Salesforce Shield is a set of security tools you can use to comply with regulations on storing sensitive protected health information. With Platform Encryption and Event Monitoring, you can monitor usage, prevent malicious activity, and protect data at rest while allowing full functionality.

Shield Platform Encryption

Platform Encryption allows you to natively encrypt your most sensitive data at rest, allowing you to address HIPAA requirements for storing sensitive protected health information. Encryption helps you protect PII, PHI, sensitive, confidential, or proprietary data. It enables you to meet both external and internal data compliance policies while keeping critical app functionality—like search, workflow, and validation rules. You keep full control over encryption keys and can set encrypted data permissions to protect sensitive data from unauthorized users. To find more information about supported objects and fields, see Which Standard Fields Can I Encrypt?

The following objects don't support Platform Encryption.

Emergency Response Console Objects

- Business Regulatory Authorization Type
- Business Type
- Individual Application
- Inspection Type
- Regulatory Authorization Type
- Regulatory Authorization Type Product
- Regulatory Authority

Visit Objects

- Action Plan
- Action Plan Item
- Action Plan Template
- Action Plan Template Item Value
- Action Plan Template Item
- Action Plan Template Version
- Assessment Task
- Task
- Visit
- Visitor

Event Monitoring

Event Monitoring gives you access to detailed performance, security, and usage data on all your Salesforce apps. Every interaction is tracked and accessible via API, so you can view it in the data visualization app of your choice. See who is accessing critical business data when, and from where they're getting access. Understand user adoption across your apps. Troubleshoot and optimize performance to improve end-user experience. Event Monitoring data can be easily imported into any data visualization or application monitoring tool like Analytics, Splunk, or New Relic. To get started, check out our Event Monitoring Trailhead module.

Set Up an Organization-Wide Email Address

Define a list of organization-wide addresses for different user profiles. When they send email from Salesforce, these users can select their own email address or the organization-wide email address for the email's From field. Replies are delivered to the selected address.

1. From Setup, enter `Organization-Wide Addresses` in the Quick Find box, then select **Organization-Wide Addresses**.

2. To manage organization-wide addresses, use the available options.

To use an organization-wide address, send an email from Salesforce and choose your organization-wide address from the dropdown list.

Assign Emergency Program Management Permission Set Licenses

Permission set licenses enable users to access features beyond those that are included in their basic user licenses. To enable users to work in the Emergency Program Management app, assign them the necessary permission set licenses.

1. In Setup, use the Quick Find box to find `Users` and select the users who are getting permission set licenses.

   💡 **Tip:** If you have more than a few users, consider creating a Permission Set Group.

2. In the **Permission Set License Assignments** section of the User record, click **Edit Assignments** and review the available permission set licenses.

3. Select one or more permission set licenses to assign.

Permission Set License	Description
Public Sector Community	Provides access to Public Sector data for site users.
Analytics for Emergency Program Management	Provides access to the CRM Analytics template app built for Emergency Response for Public Sector and Emergency Response for Public Health.
Emergency Response for Public Sector	Enables the permission set license for Emergency Program Management.
Health Cloud	Provides access to the standard version of Health Cloud. Users with this license can access to the standard Salesforce objects and Health Cloud custom objects. (Required)

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

USER PERMISSIONS

To assign permission set licenses:
- Manage Users

Permission Set License	Description
Health Cloud for Community	Provides access to Health Cloud objects and features for site users. (Required)
Health Cloud Platform	Provides access to Health Cloud-related standard objects.

4. Click **Save**.

> 💡 **Tip:** To see what permission set licenses are available, go to **Company Settings** in Setup and click **Company Information**. The permission sets available to you depend in part on which features are included in your Salesforce contract.

Emergency Response Management Permission Sets

Emergency Response Management provides special permission sets that give users access to features.

Use the following permission sets to give your users access to the features they need.

ActionPlans

Provides users with access to Action Plans so that they can create action plan templates and assign tasks related to service requests.

EmergencyResponseMgmt

Provides internal users with access to Emergency Response Management features such as approval of emergency requests and scheduling emergency service execution tasks.

Health Cloud ERM

Permissions for Health Cloud Emergency Response Management.

Health Cloud Permission Set Licenses

Permissions for Health Cloud.

Industries Visit

Enables features for visits that are used to deliver emergency supplies and services.

Create Emergency Program Management Users

You can add internal Salesforce users one at a time or in batches of up to 10 users.

> 📝 **Note:** To enable your company's employees to request location access permits or training certificates, add them as internal users with Platform Starter or greater licenses.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.

2. Click **New User** to add a single user or click **Multiple Users** to add up to 10 users at a time.

3. If multiple user license types are available in your organization, select the user license to associate with the users you plan to create.

The user license determines the available profiles.

4. Specify the information for each user, including `Role` and `Profile`.

If you use Salesforce Knowledge articles to manage protocols, enable `Knowledge User` for every user needing access to articles.

5. To email a login name and temporary password to each new user, select **Generate new password and notify user immediately**.

6. To specify more details for the users that you create, edit individual users as needed.

Enable Person Accounts

Person accounts store information about individuals by combining certain account and contact fields into one record. Emergency Program Management uses person accounts for personas like individual citizens or patients.

🛑 **Important:** After Person Accounts is enabled, it can't be disabled. We recommend that you create a sandbox to preview how person accounts affect your Salesforce org.

1. From Setup, enter `Person Accounts` in the Quick Find box, and then select **Person Accounts**.

2. Go through the steps listed on the Setup page.

3. Turn on Person Accounts.

4. After Person Accounts is enabled, a person account record type is created. You can create additional record types for person account if needed.

5. To begin using person accounts in Health Cloud, from Setup, enter `Custom Settings` in the Quick Find box, then select **Custom Settings**.

6. In the list of custom settings, click **Manage** next to the Use Person Accounts custom setting.

7. Click **Edit** next to Use Person Account and select **Enable**.

8. Assign the person account record type to user profiles and the system administrator profile.

Add an Approval Path to an Application Page

Add an approval path and the applications related list to the Individual Application and the Business License Application pages so that your approvers can process requests efficiently.

1. On the Individual Application page, click the gear ⚙ icon, and select **Edit Page**.

2. In App Builder, add the Path and the Related List components to the Individual Application page.

3. Save and activate the page.

4. Select the App, Record Type, and Profile tab. Then select **Assign to Apps, Record Types, and Profiles** and **Emergency Response Console**.

5. Click **Save**.

6. Repeat these steps for the Business License Application page.

Set Up Emergency Program Management Sites

Set up a Experience Builder Site to serve your constituents when they need it most. Provide healthcare to symptomatic patients, trace and monitor potentially exposed individuals, or quickly allocate emergency resources and services.

📝 **Note:** ERM Sites templates are currently only available in English. For Sites language support, see Multilingual Sites.

Create an Emergency Program Management Site

Create your Experience Cloud site using a wizard that helps you choose a template that's right for you.

Create Site User Profiles

Depending on which template you're using, you configure the Customer Site Plus user profile a little differently.

Customize the Pages of Your Site

Update the pages of your site to provide the critical information that citizens and volunteers need.

Style Your Community with CSS

Apply CSS to your community to get the right look and feel. We provide a CSS file as a static resource, so you simply copy the CSS and then paste the code into the CSS editor in Experience Builder.

Make Pages Publicly Available

When you create an Emergency Response site or an Emergency Public Health portal, configure the pages of your site to allow public access. When you allow public access, your site pages are available to the public, including unlicensed users. If you don't allow public access, members must log in to access the site.

Set Up Guest User Access for the Emergency Public Health Portal

When you create a site, Salesforce creates a profile, a user record, and sharing mechanisms that are available only to guest users, regardless of whether the site is configured for public access. Each public site or portal uses this guest user profile and record to let unauthenticated users browse the site. All guest visitors to a public site share the same guest user record (one per site) and have the same access level.

Define Trusted Sites for the Emergency Public Health Portal

When you create an Emergency Public Health portal, you must define several trusted sites to ensure that the pages of your Salesforce Experience site are displayed correctly. Lightning sites use Content Security Policy (CSP) directives in trusted URLs to secure your site from malicious resources and component vulnerabilities. CSP is a W3C standard that controls the source of content that can be loaded on your site's pages and helps protect against cross-site scripting (XSS) attacks.

Add Members to Your Site

When you add a profile to an Emergency Program Management site, all users assigned to that profile become members of the site.

Preview Your Site

Before going live, you can preview your Emergency Program Management site to see how it looks in a desktop browser window or on a mobile device.

Publish the Changes to Your Site

After you make the changes you want to your Emergency Program Management site and add members, you're ready to publish it.

Create an Emergency Program Management Site

Create your Experience Cloud site using a wizard that helps you choose a template that's right for you.

1. From Setup, enter `Digital Experiences` in the Quick Find box, select **All Sites**, and then click **New**.
   The Community Creation wizard opens with several Emergency Program Management Community templates for you to choose from.

2. Select the template that you want to use.

   - **Emergency Response Community**: The Emergency Response Community makes it easy for citizens to request emergency assistance and get information when they need it most. Businesses also can request critical supplies that enable them to keep their employees and customers safe and healthy.

   - **Emergency Public Health Portal (for Emergency Program Management for Public Health only)**: With the Emergency Public Health Portal, citizens can help themselves during a public health emergency. Citizens can see the emergency care programs they're enrolled in and search for health care providers.

   - **Contact Tracer Community (for Emergency Program Management for Public Health only)**: The Contact Tracer Community gives contact tracers an easy and efficient way to pick up contact tracing tasks from a queue and work on them.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions

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USER PERMISSIONS

To create, customize, and publish a community:
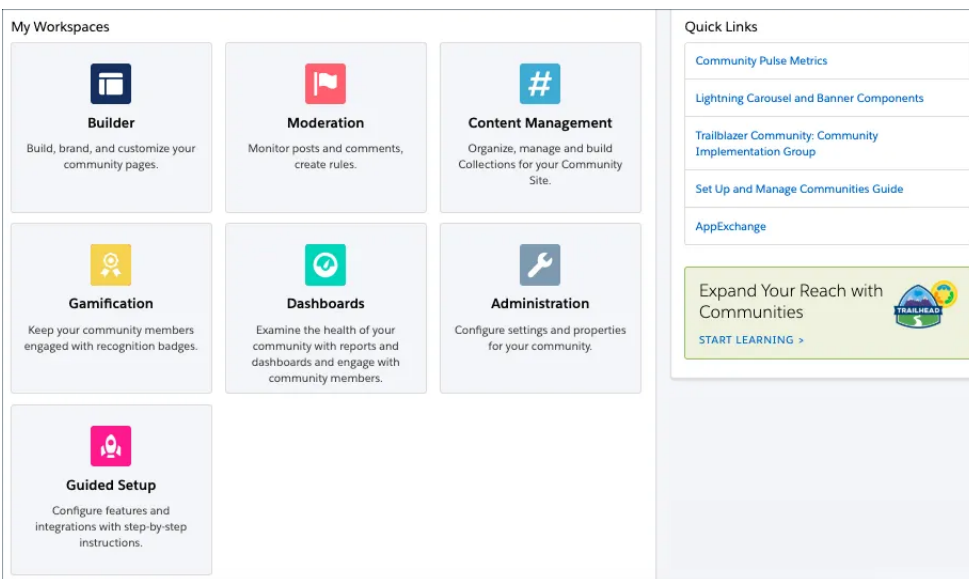- Create and Set Up Communities

  AND

  View Setup and Configuration

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3. Click **Get Started**.

4. Enter a community name.

5. For URL, enter the name of your community.

   This name is appended to the domain that you created when you enabled Communities for this org. For example, if your communities domain name is `CountyPublicHealthDept.my.site.com` and you're creating an Emergency Response community, you can enter *EmergencyResponseCommunity* to create the unique URL `CountyPublicHealthDept.my.site.com/EmergencyResponseCommunity`.

   📝 **Note:** You can create one community that doesn't have a custom URL.

6. Click **Create**.
   Experience Workspaces opens, where you can build and administer your community. Your new community is in Preview status, meaning it's not available to your users yet.

SEE ALSO:

Salesforce Help: Manage Your Site with Experience Workspaces

Salesforce Help: Navigate Experience Builder

Create Site User Profiles

Depending on which template you're using, you configure the Customer Site Plus user profile a little differently.

Create an Emergency Response Community User Profile

Set up a profile for your Emergency Response portal by cloning the Customer Community Plus user profile.

Create an Emergency Public Health Portal User Profile

Set up a profile for your Emergency Public Health site by cloning the Customer Site Plus user profile.

Set up a profile for your Contact Tracer site by cloning the Customer Community Plus user profile.

Create an Emergency Response Community User Profile

Set up a profile for your Emergency Response portal by cloning the Customer Community Plus user profile.

1. Set up organization-wide sharing for the Regulatory Authorization Type.

   a. From Setup, enter `Sharing` in the Quick Find box, select **Sharing Settings**, and click **Edit**.

   b. For the Regulatory Authorization Type object, select **Public Read Only** for both internal and external access.

   c. Save your changes.

2. To clone the Customer Community Plus User profile, enter `Profile` in the Quick Find box, and then select **Profiles**.

3. Click **Clone** next to the Customer Community Plus User profile.

4. Enter a name for the profile, such as `ER Community Plus User`, and click **Save**.

5. In the Find Settings box, enter `Emergency Requests`, and click **Edit**.

   a. Enable **Assigned Record Types** for the following record types:

Object	Record Type
Business License Application	Reopening Permit
Individual Application	Emergency Request (Default), Location Access Permit Request, Training Certificate
Emergency Request	Emergency Assistance Request, Emergency Supplies Request, Emergency Supplies Donation

   b. Enable the **Read** and **Create** object permissions.

   c. Enable **Read Access** and **Write Access** permissions on every field.

6. Also configure the following object permissions:

Object	Access Level
Account	Read, Edit
Addresses	Read, Create
Authorization Application Place	Read, Create
Authorization Location Access Schedule	Read, Create
Business License	Read
Business License Application	Read, Create

Object	Access Level
Business Profile	Read, Create, Edit
Business Type	Read
Contact	Read, Edit
Course Offering	Read
Individual Application	Read, Create (disable Edit and Delete)
Location	Read, Create, Edit
Public Complaint	Read, Create
Regulatory Authorization Type	Read
Training Course	Read
Training Course Participant	Read, Create

7. In the Find Settings box, enter *Flows*, click **Edit**, and enable **Run Flows**. Save your changes.

8. In the Find Settings box, enter *Public Sector*, click **Edit**, and enable **Public Sector data for Community users**. Save your changes.

9. Add this profile to the site members.

10. Assign the cloned profile to your site users.

Create an Emergency Public Health Portal User Profile

Set up a profile for your Emergency Public Health site by cloning the Customer Site Plus user profile.

1. From Setup, enter *Profile* in the Quick Find box, and then select **Profiles**.

2. Click **Clone** beside the Customer Site Plus User profile.

3. Enter a name for the profile, such as *PH Site Plus User*, and click **Save**.

4. In the Find Settings box, enter *Cases*, and click **Edit**.

    a. Enable the **Read** and **Create** object permissions.

    b. Enable **Read Access** and **Write Access** on the Account Name field.

    c. Click **Save**.

5. Configure the following additional object permissions:

> **EDITIONS**
>
> Available in: **Enterprise**, **Performance**, and **Unlimited** editions

> **USER PERMISSIONS**
>
> To create profiles:
> - Manage Profiles and Permission Sets

Object	Access Level
Care Provider Searchable Field	Read
Healthcare Providers	Read

6. In the Find Settings box, enter *View Content*, click **Edit**, and enable **View Content in Portals**. Save your changes.

7. In the Find Settings box, enter `Flows`, click **Edit**, and enable **Run Flows**. Save your changes.

8. Assign the profile to your site users.

Create a Contact Tracer Community User Profile

Set up a profile for your Contact Tracer site by cloning the Customer Community Plus user profile.

1. From Setup, enter `Profile` in the Quick Find box, and then select **Profiles**.

2. Click **Clone** beside the Customer Community Plus User profile.

3. Enter a name for the profile, such as `CT Community Plus User`, and click **Save**.

4. In the Find Settings box, enter `Access Activities`, and then click **Edit**.

    a. Enable **Access Activities**.

    b. Enable **Run Flows**.

    c. Save your changes.

5. Assign the profile to your site users.

Customize the Pages of Your Site

Update the pages of your site to provide the critical information that citizens and volunteers need.

You edit the pages of your site in Experience Builder, where you can add content, create custom pages, and update theme properties such as colors and fonts.

To get to Experience Builder from Setup, enter `All` in the Quick Find box, select **All Sites**, and then click **Builder** beside the site that you want to customize. Or if you're in Experience Workspaces, click the **Builder** tile.
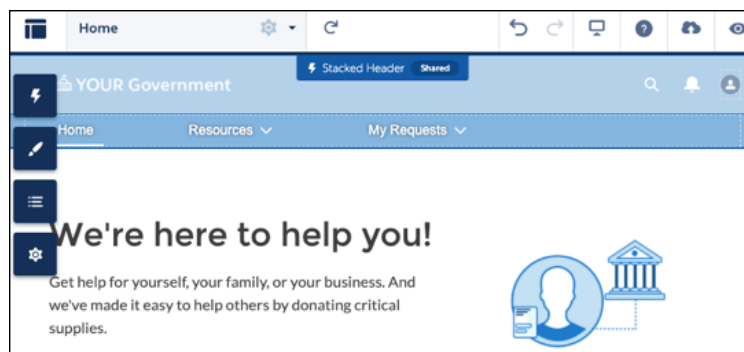
• Look around the Home page and click through the page sections and components.

- When you click an item on the page, its properties panel opens. Update the component's contents or properties as needed.

- Open the Pages menu on the top toolbar and scroll through the pages. To open a page for editing, click the page. To access the properties of a page, click ⚙ ▾ on the top toolbar.
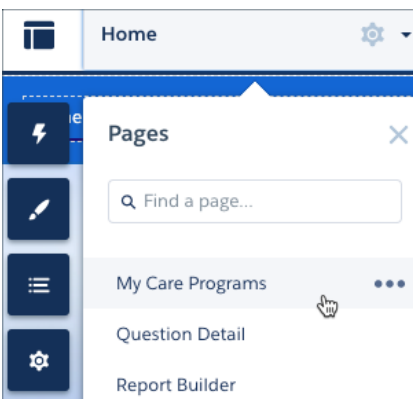
- Click ⚡ to open the Components panel and drag components onto the page.
- To add content to your pages, you can use the Rich Content Editor and the HTML Editor components. Alternatively, you can create content in Salesforce CMS and Salesforce Knowledge and add it to your pages. As a general rule, create content such as blogs, announcements, and news articles in Salesforce CMS. Create help articles such as FAQs and how-tos in Salesforce Knowledge.

💡 **Tip:** Experience Builder takes you on a mini-tour of how to create a site. Step through to get the feel for building a site. If you want to take the tour again later, from the Information menu, click ❓ > **Take a Tour**.

Configure Pages for the Emergency Public Health Portal

The Emergency Public Health Portal includes several preconfigured pages and components that require some additional setup.

Configure Pages for the Contact Tracer Community

The Incoming Tasks Queue, My Tasks, and No Response Tasks Queue pages in the Contact Tracer Community template require some additional setup.

Configure Pages for the Emergency Response Community

The Individual Application page requires some additional setup.

SEE ALSO:

Salesforce Help: Edit Community Pages and Components in Experience Builder

Salesforce Help: Create Custom Pages with Experience Builder

Salesforce Help: Salesforce CMS

Salesforce Help: Organize Experience Cloud with Topics

Configure Pages for the Emergency Public Health Portal

The Emergency Public Health Portal includes several preconfigured pages and components that require some additional setup.

1. From Setup, enter *Provider Search* in the Quick Find box, select **Provider Search Settings**, and enable provider search.

2. Next, enter *All* in the Quick Find box, select **All Sites**, and then click **Builder** beside the site you're configuring.

3. In Experience Builder, open the Pages menu and click the **My Care Programs** page to open it.
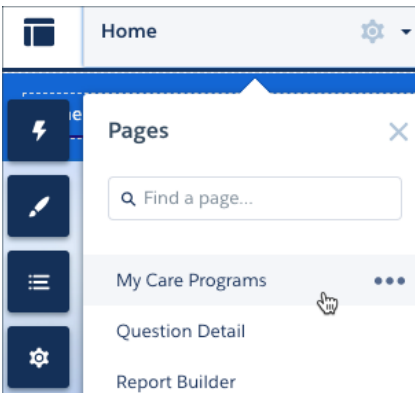
4. From the Components panel, drag a **Care Programs for Health Cloud** component onto the page.


EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions
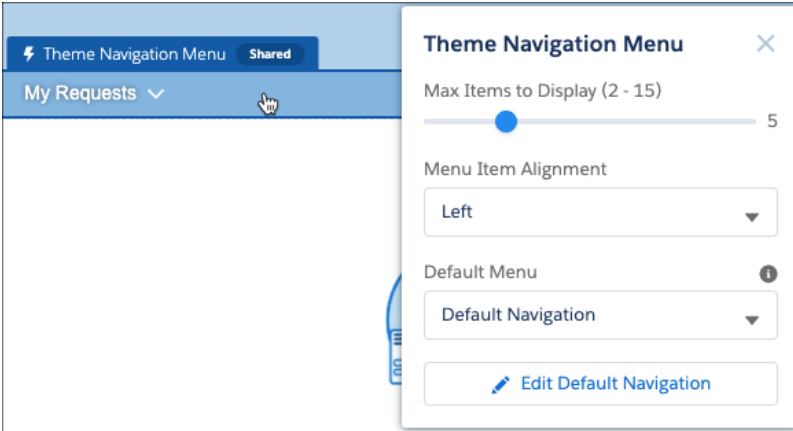
USER PERMISSIONS

To create, customize, and publish a site:
- Create and Set Up Sites

 AND

  View Setup and Configuration
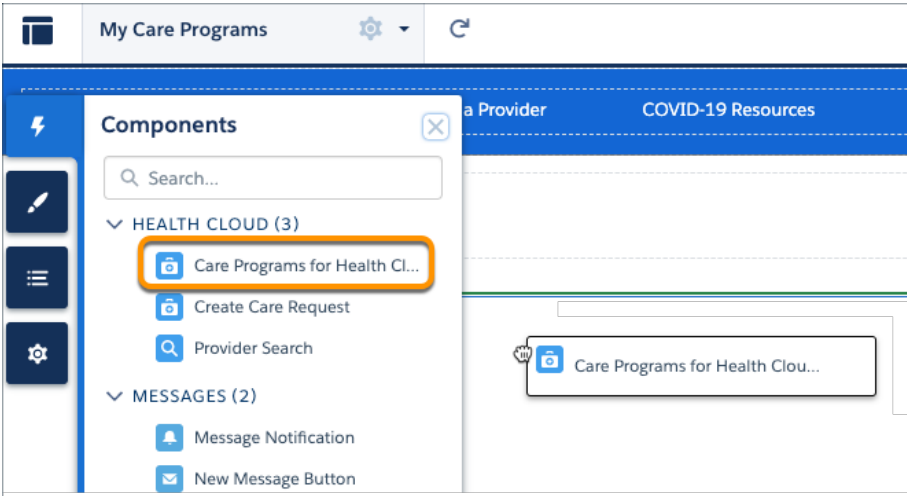
5. Next, to create an Appointment page, click **New Page** in the page menu.

6. Select **Standard Page** and click **New Blank Page**.

7. Select **Flexible Layout** and click **Next**.

8. Enter `Appointment` for the page name and click **Create**.

9. Drag a **Flow** component onto the page.

10. Select the component on the page to open its properties and select the **ERM - Schedule an Appointment** flow.
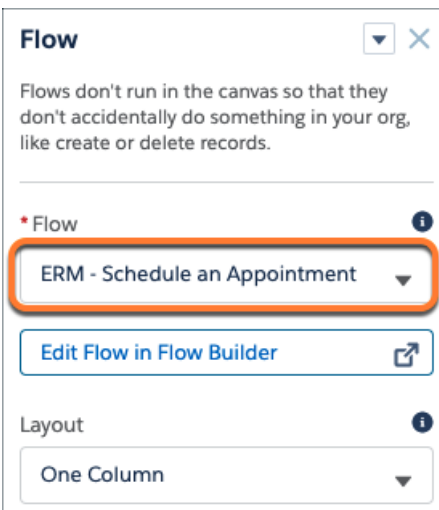
SEE ALSO:

Salesforce Help: Edit Community Pages and Components in Experience Builder

Salesforce Help: Create Custom Pages with Experience Builder

*Salesforce Help*: Create a Flexible Layout

Configure Pages for the Contact Tracer Community

The Incoming Tasks Queue, My Tasks, and No Response Tasks Queue pages in the Contact Tracer Community template require some additional setup.

These three pages each show a list of tasks to volunteers. But the pages use different components to show the tasks depending on whether the user is on a desktop or a mobile device.

For example, if a user views the My Tasks page on a desktop, the page uses a Record List component to show a list of tasks. But for mobile devices, the My Tasks page uses a Report Summary component to display the same information via a report.

To ensure that the pages are displayed correctly in every situation, you must configure both components on each page.

1. From Setup, enter *All* in the Quick Find box, select **All Site**, and then click **Builder** beside the site you're configuring.

2. In Experience Builder, open the Pages menu on the top toolbar.
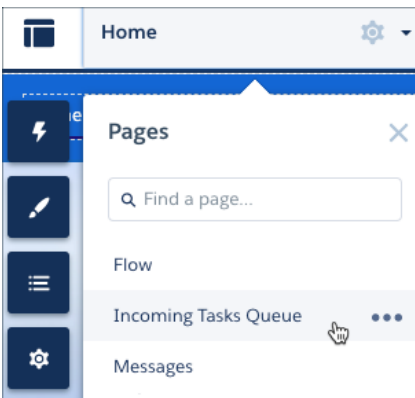
3. To configure the pages and components for desktops:

   a. Select the Incoming Tasks Queue page to open it.

   b. Select the Record List component on the page to open its properties and select **Incoming Tasks Queue** for the Filter Name property.

   c. Repeat for the My Tasks page but select **My Tasks** for the Filter Name. Also repeat these steps for the No Response Tasks Queue page but select **No Response Tasks Queue** for the Filter Name:

4. To configure the pages and components for mobile devices:

   a. From the Reports tab in your Salesforce org, click **All Folders** > **Contact Tracing Reports**.
   The folder contains a report for each of the three pages.

   b. Open each report and copy the ID of the report from the URL, taking note of which report each ID belongs to.

c. Return to Experience Builder and open the Incoming Tasks Queue page.

d. Select the **Report Summary** component to open its properties, and paste ID of the Incoming Task Queue report in the Report Id field.

e. Repeat for the My Tasks and the No Response Tasks Queue pages, making sure to paste the correct ID for each report.

SEE ALSO:

    Salesforce Help: Edit Community Pages and Components in Experience Builder

Configure Pages for the Emergency Response Community

The Individual Application page requires some additional setup.

Create a page layout for Individual Application that is specific to your site users. Make sure to hide fields such as Approval History or any related lists you don't want external users to see.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions

USER PERMISSIONS

To create, customize, and publish a site:
- Create and Set Up Experiences

  AND

  View Setup and Configuration

Style Your Community with CSS

Apply CSS to your community to get the right look and feel. We provide a CSS file as a static resource, so you simply copy the CSS and then paste the code into the CSS editor in Experience Builder.

1. To locate the CSS file, from Setup, enter `Static` in the Quick Find box, and then select **Static Resources**.

2. Click one of the following CSS files as appropriate.

To configure this template:	Use this file:
Emergency Response Community	EmergencyResponseCommunity
Emergency Public Health Portal	Patient_Triage_css
Contact Tracer Community	Contact_Tracing_css

3. Click **View File** and then copy the contents of the file.
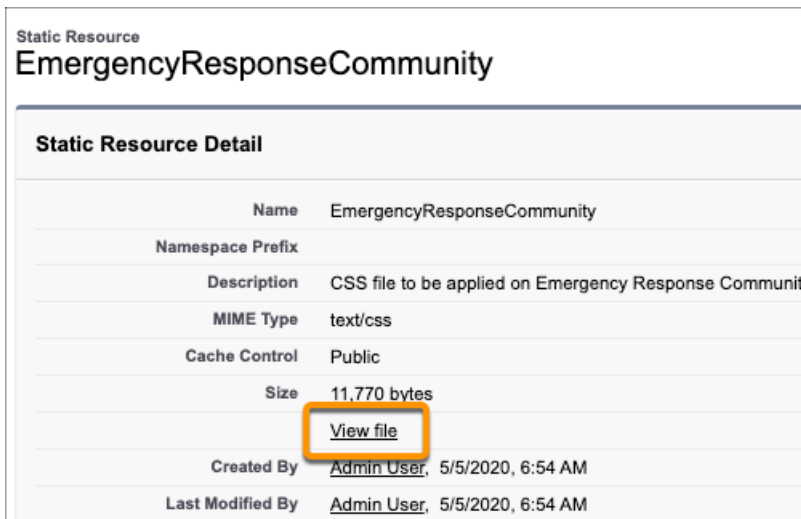
4. Return to Experience Builder. From Setup, enter `All` in the Quick Find box, select **All Communities**, and then click **Builder** beside the community that you're configuring.

5. Open the Theme panel and click ▼ > **Edit CSS**.
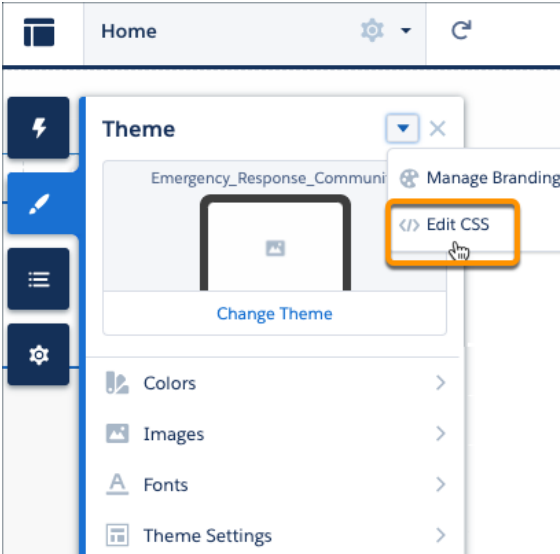
6. Paste the copied CSS into the Edit CSS window and click **Save**.

   Your page refreshes with the newly applied CSS.

   💡 Tip: You can also use Theme properties to update the color, images, and fonts used in your community.

SEE ALSO:

Salesforce Help: Understanding Themes

Make Pages Publicly Available

When you create an Emergency Response site or an Emergency Public Health portal, configure the pages of your site to allow public access. When you allow public access, your site pages are available to the public, including unlicensed users. If you don't allow public access, members must log in to access the site.

If you create a Contact Tracer site, you don't have to configure public access because the pages are private by default.

1. In Experience Builder, click **Settings** and select **Guest users can see and interact with the site without logging in**.
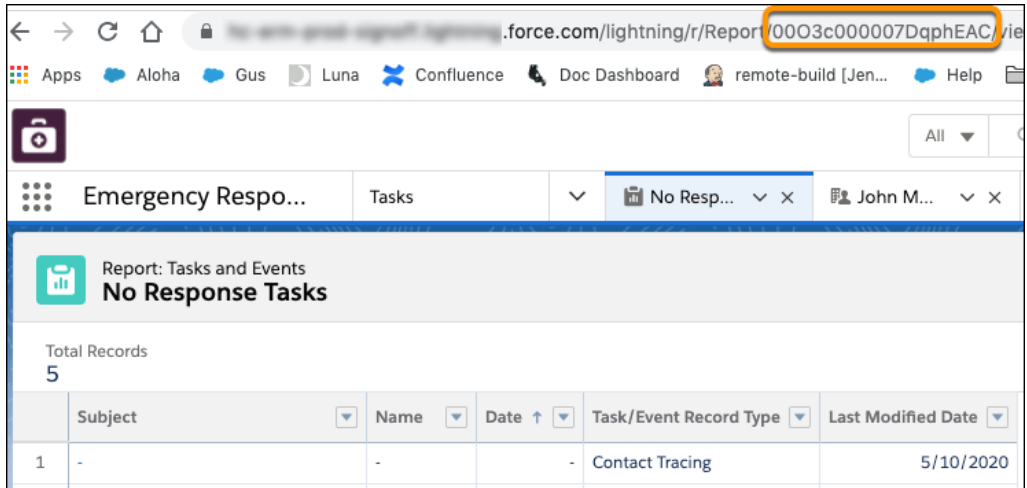
USER PERMISSIONS

To create, customize, and publish a site:
- Create and Set Up Sites

  AND

  View Setup and Configuration
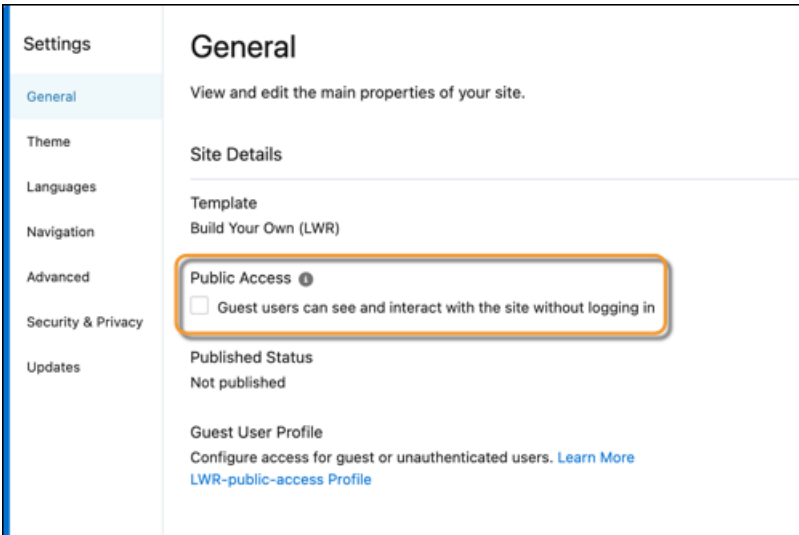
2. For the Emergency Response Site only, set page-level access for the My Submitted Requests and the Raise A Request pages.

   a. Open the Pages menu (1) on the top toolbar and click ⋯ (2) beside the My Submitted Requests page.

   b. In the Page Access dropdown, select **Requires Login**.
      Requires Login makes the page private and requires members to log in, regardless of the site's default setting.

   c. Repeat for the Raise A Request page.

   💡 Tip: For the Emergency Public Health portal, remember to configure the guest user profile to allow unauthenticated users to access the portal and schedule new appointments.

SEE ALSO:

   Salesforce Help: Control Public Access to Your Experience Builder Sites

Set Up Guest User Access for the Emergency Public Health Portal

When you create a site, Salesforce creates a profile, a user record, and sharing mechanisms that are available only to guest users, regardless of whether the site is configured for public access. Each public site or portal uses this guest user profile and record to let unauthenticated users browse the site. All guest visitors to a public site share the same guest user record (one per site) and have the same access level.

   📝 Note: To prevent unauthorized appointment form submissions, we recommend that you use a security mechanism, such as CAPTCHA on your self-registration page. You can also require individuals to log in before they create an appointment.

Configure the Guest User Profile for the Emergency Public Health Portal
Configure the guest profile for your site to let unauthenticated users access the Emergency Public Health portal and schedule new appointments.

Set Up Lightning Scheduler Sharing Rules for the Guest User Profile
Extend sharing access to the objects and fields that are used to create appointments in Lightning Scheduler.

SEE ALSO:

   Salesforce Help: Enable reCAPTCH to Prevent Spam Cases

Configure the Guest User Profile for the Emergency Public Health Portal

Configure the guest profile for your site to let unauthenticated users access the Emergency Public Health portal and schedule new appointments.

1. Set up object access and flow permissions for guest users.

   a. From Setup, in the Quick Find box, enter *Sites*, then select **All Sites**.

   b. On the All Sites page, click **Builder** next to the Emergency Public Health portal that you created.

   c. In Experience Builder, click the settings icon (⚙).

   d. On the General settings page under Guest User Profile, click your portal's guest user profile.

   e. Configure the following settings:

Object	Access Level
Operating Hours	Read
Service Resources	Read
Service Territories	Read
Service Appointments	Read
Work Types	Read
Work Type Groups	Read
Time Slots	Read
Maximum Appointment	Read
Work Group Type	Read
Lead	Read, Create

<div style="float:right">

USER PERMISSIONS

To enable public access to site content:
- Create and Set Up Sites

  AND

  Is a member of the site

</div>

2. In the Find Settings box, enter *Run Flows*, click **Run Flows**, and then click **Edit**.

   a. Enable the Run Flows system permission, and then click **Save**.

3. Set the guest user's default timezone.

   a. Click **Assigned Users**.

   b. Click the full name for the guest user.

   c. On the guest user page, click **Edit**. Under Locale Settings, set the guest user time zone, and then click **Save**.

To give unauthenticated users access to the Inbound New Guest Appointment flow in a Site, add the Flow component to a public site page.

Set Up Lightning Scheduler Sharing Rules for the Guest User Profile

Extend sharing access to the objects and fields that are used to create appointments in Lightning Scheduler.

> 📝 **Note:** Be sure make these additions to the System Administrator profile also.

1. From Setup, in the Quick Find box, enter `Sharing Settings`, then select **Sharing Settings**.

2. In the Manage sharing settings for field, select an object name.

3. For each object, click **New** and configure sharing settings for **Guest user access, based on criteria**.

Object	Field	Operator	Value
Service Resource	Active	equals	true
Service Territory	Active	equals	true
Work Type	Work Type Name	not equal to	" "
Work Type Group	Active	equals	true

4. Share with the **Emergency Public Health Site Guest User**.

5. Select **Read Only** access.

6. Click **Save**.

Define Trusted Sites for the Emergency Public Health Portal

When you create an Emergency Public Health portal, you must define several trusted sites to ensure that the pages of your Salesforce Experience site are displayed correctly. Lightning sites use Content Security Policy (CSP) directives in trusted URLs to secure your site from malicious resources and component vulnerabilities. CSP is a W3C standard that controls the source of content that can be loaded on your site's pages and helps protect against cross-site scripting (XSS) attacks.

When a site is set to use Strict CSP, third-party hosts required for non-script resources such as images, videos, and style sheets must be added to Trusted URLs. The Strict CSP default setting is available in Experience Builder in **Settings** > **Security**.

1. In Setup, add these URLs as Trusted URLs with the relevant CSP directives selected. For details, see Manage Trusted URLs.

Name	URLs
LiveAgent	https://*salesforceliveagent.com
	https://*salesforce-scrt.com
LocationForceCOM	https://location.force.com

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions

USER PERMISSIONS

To create, read, update, and delete:
- Customize Application or Modify All Data

Name	URLs
TestLocation (For sandbox only)	https://test-location.force.com

SEE ALSO:

    Salesforce Help: CSP and Lightning Locker in Experience Builder Sites

    Salesforce Help: Manage Trusted URLs

Add Members to Your Site

When you add a profile to an Emergency Program Management site, all users assigned to that profile become members of the site.

1. From Setup, enter **Sites** in the Quick Find box, and then click **All Sites**.

2. Click **Experience Workspaces** beside your site.

3. Click **Administration** > **Members**.

4. Select the Customer Site Plus User profile that you cloned previously. If you don't see the profile, change the search to **All**.

5. Save your changes.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions

USER PERMISSIONS

To create, customize, and publish a site:
- Create and Set Up Sites

  AND

  View Setup and Configuration

Preview Your Site

Before going live, you can preview your Emergency Program Management site to see how it looks in a desktop browser window or on a mobile device.

- To preview the site in a browser window, click **Preview** on the toolbar.

- In Preview mode, to see the site in its own browser tab as:

  - A logged-in user would see it, click 👁 > **Authenticated User**.

  - An unauthenticated visitor would see it, click 👁 > **Guest User**. As long as your site includes one public page, such as the Home page, you can use the **Guest User** option.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions

USER PERMISSIONS

To create, customize, and publish a site:
- Create and Set Up Sites

  AND

  View Setup and Configuration
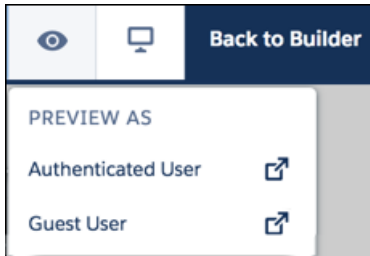
- To preview the site on different devices, use the options in the 🖥 menu.
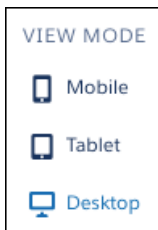
Publish the Changes to Your Site

After you make the changes you want to your Emergency Program Management site and add members, you're ready to publish it.

Publishing a Experience Builder Site for the first time makes the site URL live and enables login access for site members. After that, each time you publish the site you update the live site with your most recent updates.

1. In Experience Builder, preview your site to make sure that your site appears as expected.

2. When you're happy with your changes, click **Publish** on the toolbar.

   ⛔ Important: *All* changes made to a site since the last time it was published are included.

3. Click **Publish** again.
   Your site is now live with all the latest changes.

   💡 Tip: If you want to send out a welcome email to all site members or set up SEO, you must also activate your site.

SEE ALSO:

Salesforce Help: Activate Your Site

Create Relationships Between Health Cloud Products and Emergency Request Products

Products that are included in a care program can be requested and delivered as part of an emergency service delivery visit. The Regulatory Authorization Type Product object serves as a junction object for Regulatory Authorization Product and Product objects.

📝 Note: This functionality is only available for Salesforce orgs with both Emergency Program Management and Health Cloud installed.

When a patient enrolls in an emergency care program, the system checks the Regulatory Authorization Product record for any available care program products. In the care program welcome email, the available products and services are listed and the patient can request the items from the Emergency Response site.

The Standard ERM User permission set must have Read and Edit access on the Name, Product, and Regulatory Authorization Type fields on Regulatory Authorization Type Products. Before performing this step, create related products in the Regulatory Authorization Type Product and Product objects.

📝 Note: Make sure to use the same product name in both Product and Regulatory Authorization Type Product.

1. From the App Launcher, find and open Regulatory Authorization Product and click **New**.

2. Select the product to associate with the new Regulatory Authorization Type Product.

3. Click **Save**.

Enable Individuals to Perform Self-Assessments and Schedule Appointments

Managing a quickly evolving and rapidly spreading emergency is more efficient when you crowd-source effort and implement some automation. That's why it's important that to enable individuals to assess themselves, and based on those assessments, to enable them to schedule appointments as well.

The first step to implement self-assessment is to create a questionnaire that asks about the common symptoms associated with a condition. When you create this questionnaire, it's recommended that you refer to the guidelines released by the Public Health agencies of your country or region.

The next step is to set up the front end that individuals interact with to complete your questionnaire. You can set up this interface any way you want. Here are two options:

• You can use a flow or a Visualforce page to implement this interface.

• If you have the Chatbot license, you can add the chatbot to your sites page, and have it guide individuals through the questionnaire.

  You can get chatbot dialogs from the Health Cloud unmanaged package. However, these dialogs are only templates, and you have to modify them to fit your use cases.

The final step is to have your interface call the ERM - Schedule an Appointment flow if an assessment indicates a positive case.

SEE ALSO:

  Trailhead: Flow Basics

  Trailhead: Flow Builder

Gather Lead Information and Enable Appointment Self-Scheduling

Use the ERM - Schedule an Appointment flow to gather lead information from individuals and to enable them to self-schedule appointments.

Configure the Guest User profile for the Emergency Public Health site, as mentioned in Configure the Guest User Profile for the Emergency Public Health Portal on page 28.

Configure Service Resource and Service Appointment

Configure the Service Resource object to optimize its layout for your users. And configure the Service Appointment object to add the appointment type you need.

Enable Maps and Addresses

If GPS is enabled on a delivery person's mobile device, they can view map images and store addresses. To generate a map image, always include the required address information such as street and city, and either state, postal code, or country. Also, provide latitude and longitude details for the location.

Set Up a Work Type and Work Type Group

Streamline appointment scheduling by creating work type groups (appointment topics) and work types (appointment templates).

Set Up Operating Hours

Create designated operating hours for your facility to make appointments easier to schedule.

Set Up Data for Your Organization

Create an account, assets, service resources, and territories for your organization. These records form the data model for your organization's facilities.

SEE ALSO:

Manage Business Information in Salesforce Scheduler

Configure Service Resource and Service Appointment

Configure the Service Resource object to optimize its layout for your users. And configure the Service Appointment object to add the appointment type you need.

1. Modify the compact layout of Service Resource.

   a. In Setup, go to **Object Manager**, enter `Service Resource` in the Quick Find box, and click **Service Resource**.

   b. From **Compact Layouts**, select **System Default**, and click **Clone**.

   c. Enter a label and name for your new compact layout.

   d. Select the fields your organization needs and save your layout.

      If your needs match the systems default, you don't need a new compact layout.

   e. Click **Compact Layout Assignment** and then, click **Edit Assignment**.

   f. In Primary Compact Layout, select the layout you created.

   g. Save your configurations.

2. Add an appointment type to Service Appointment.

   a. In Setup, go to **Object Manager**, enter `Service Appointment` in the Quick Find box, and click **Service Appointment**.

   b. From **Fields & Relationships**, select **Appointment Type**.

   c. In the Default Appointment Type Picklist Values section, click **New**.

   d. Enter your appointment types and save your changes.

      Our ERM - Schedule an Appointment flow is configured to work with the appointment type Phone. If you create a different appointment type, you must modify this flow accordingly.

Enable Maps and Addresses

If GPS is enabled on a delivery person's mobile device, they can view map images and store addresses. To generate a map image, always include the required address information such as street and city, and either state, postal code, or country. Also, provide latitude and longitude details for the location.

A map image on an address is static, but a field rep can click a map image to open the Google Map app.

📝 **Note:** Delivery workers can use maps only if their devices are online.

1. From Setup, enter `Maps` in the Quick Find box, select **Maps and Location Settings**, then click **Edit**.

2. Check **Enable Maps and Location Services**.

3. Click **Save**.

Set Up a Work Type and Work Type Group

USER PERMISSIONS

To create a Work Type:	Create on Work Type
To view a Work Type:	Read on Work Type
To update or edit a Work Type:	Edit on Work Type
To create a Work Type Group:	Create on Work Type Group
To view a Work Type Group:	Read on Work Type Group
To create, edit, update, or delete work type group members:	Edit on Work Type Group

Streamline appointment scheduling by creating work type groups (appointment topics) and work types (appointment templates).

While we recommend creating a specific work type and work type group, you can always create records with your own values for these objects. But if you do so, you must modify the ERM - Schedule an Appointment flow accordingly. This flow is configured to work with the Work Type Group Clinical Assessment and Work Type Phone.

1. Create a Work Type Group record for Clinical Assessment.

    a. From the **App Launcher**, go to **Work Type Groups** and click **New**.

    b. Enter `Clinical Assessment` as the Work Type Group name.

    c. For Group Type, select **Default**.

    d. Select **Active** and save your work type group.

2. Create a Work Type record for Phone.

    a. From the **App Launcher**, go to **Work Types** and click **New**.

    b. Enter `Phone` as the Work Type name.

    c. For Estimated Duration, enter `30.00` and select **Minutes** as the Duration Type.

    d. Save your work type.

3. Add a Work Type Group Member for Phone.

    a. On the record page for Phone, go to the **Related** tab.

    b. Click **New** for Work Type Group Members.

    c. In Work Type Group, select **Clinical Assessment**.

    d. Save your record.

Set Up Operating Hours

Create designated operating hours for your facility to make appointments easier to schedule.

1. From the **App Launcher**, go to **Operating Hours** and click **New**.

2. Enter a name and description for your record.

3. Select a time zone.

4. Click **Add Row** to add a time slot, and then select a day, start time, and end time for that time slot.

    Repeat this step until you have all the slots you need.

5. Save your operating hours.

Set Up Data for Your Organization

Create an account, assets, service resources, and territories for your organization. These records form the data model for your organization's facilities.

1. Create a business account for your organization.

    a. From the **App Launcher**, go to **Accounts** and click **New**.

    b. For the account type, select **Business** and click **Next**.

    c. Enter the details for your account and save your record.

2. Create service resources of the type Asset.

    a. From the **App Launcher**, go to **Service Resources** and click **New**.

    b. In the Asset field, select **New Asset** to create a related asset.

    c. On the New Asset form, enter the details for your asset.

    d. In the Account field, select the business account you created earlier.

    e. Save your asset.

    f. Back on the New Service Resource page, enter a name for your service resource and select **Active**.

    g. For Resource Type, select **Asset**.

    h. Save your service resource.

3. Create skills and assign them to your service resource.

Assign skills to service resources to indicate the type of appointments appropriate for them.

    a. Create skills

    b. Assign skills to your service resource

4. Create Service Territories for your service resource.

    a. From the **App Launcher**, go to **Service Resources** and select the service resource you created earlier.

    b. Go to the **Related** tab and click **New** for Service Territories.

    c. In Service Territory, click **New Service Territory**.

    d. Enter a name for your service territory and select the operating hours you created earlier for this facility.

    e. Select **Active** and click **Save**.

    f. Back on the New Service Territory Member page, select a territory type, operating hours, and start date.

    g. Save your changes.

5. Associate the work type you created with your service territory.

    a. From the **App Launcher**, go to **Work Types** and select the work type **Phone** you created earlier.

Our ERM - Schedule an Appointment flow is configured to work with the work type Phone. If you created a different work type, you must modify this flow accordingly.

    b. Go to the **Related** tab and click **New** for Service Territory Work Types.

    c. In the Service Territory field, select the service territory that you created and click **Save**.

Set Up Daily Assessment Using Surveys

Keeping tabs on your patient's condition everyday is key to managing an outbreak. Salesforce Surveys can help you do that. You can configure a survey to gather the information you need and automate its distribution at regular intervals.

Setting up this survey requires the following tasks.

1. Enable Surveys

   Enable Surveys to create and send questionnaires to your patients.

2. Create a Survey

   Create a survey with the kind of questions that can help you assess your patient's health condition.

3. Create an Email Template

   Create an email template to standardize the survey emails that you send your patients.

4. Configure Emails in Your Org

    Use Contacts to enable or make sure that you already enabled emails in your Salesforce org..

5. Set Up a Queue to Process Responses

    You can set up a Queue to create follow-up tasks for your survey responses.

6. Configure the Assessment Scheduling Custom Metadata Type

    Configure the AssessmentSchedulingSettings custom metadata type to associate your survey, care program, email template, and task queue.

7. Schedule Apex Jobs

    After the preliminary setup is done, all that's left is to schedule Apex jobs that send out the survey and process the responses.

Enable Surveys

Enable Surveys to create and send questionnaires to your patients.

1. In Setup, enter `Survey` in the Quick Find box, and click **Survey Settings**.

2. Enable Surveys.

3. For the default site, select the site you created using the Emergency Public Health template.

4. To allow survey owners to manage and export responses, enable Survey Owners Can Manage Responses.

Now that you've enabled surveys, it's time to create one.

Create a Survey

Create a survey with the kind of questions that can help you assess your patient's health condition.

1. From the App Launcher, find and select **Surveys**.

2. To open the Survey Builder, click **New**.

3. Enter a name for the survey.

    📝 Note: Use only alphanumeric characters without any spaces in this survey's name. Naming it this way is important for a later part of this setup.

4. Disable the survey's Welcome page by clicking 👁 .

5. To add a question page, click **Add Page** in the sidebar.

6. Click **Add Question** and select **Slider**.

7. Enter a question for your survey, and enter `0` for Minimum, `1` for Interval, and `10` for Maximum.

    The last two steps are important because survey responses are analyzed based on the patient's response to Slider type questions in your survey. If a patient responds with a value less than or equal to seven, then a task is created and added to your queue.

    📝 Note: If you have more than one Slider type question in your survey, and a patient responds to all of those questions, then separate tasks are created for each question. However, all these tasks are added to the same queue.

8. Optionally, click ⚙ ▾ to change the question's properties.

9. Edit the survey's Thank You page.

10. Do one of the following.

    a. Optional: To continue working on the survey later, click **Save**.

    b. Optional: To review how the survey looks, click **Preview**.

    c. To activate the survey so that you can send it to participants, click **Activate**.

Our survey response logic is configured to analyze surveys based on this specific format and values. If you need a different format for your survey, that is, a survey without any Slider questions, then you have to write your own response analysis logic.

SEE ALSO:

    Create and Customize Surveys

    Customize the Survey Invitation Email Templates

Create an Email Template

USER PERMISSIONS		EDITIONS
To create and send email templates:	Lightning Experience User	Available in: **Enterprise**, **Performance**, and **Unlimited** editions.
To attach files to emails or email templates:	Lightning Experience User AND Access to the file you attach AND Edit rights to the email or the email template's folder	
To delete email templates:	Modify All Data, template ownership, or Edit rights to the email template folder OR If the template is in a public folder: Manage Public Lightning Email Templates permission	
To update email templates:	For public email templates: Modify All Data, Manage Public Lightning Email Templates permission, or template ownership For email templates in an Enhanced folder: Modify All data, Edit access to the folder, or template ownership For private email templates: Modify All Data or template ownership	

Create an email template to standardize the survey emails that you send your patients.

1. From the App Launcher, find and select **Email Templates**.

2. Click **New Email Template**.

3. Enter a name for your email template.

> **Note:** Use only alphanumeric characters without any spaces in this template's name. Naming it this way is important for a later part of this setup.

4. Select **Survey Question** for Related Entity Type.

5. For the folder, select **Public Email Folder**.

6. Compose the email you want to use as your template.

7. Add any images you want in the template. Use the **Insert Images** button or copy and paste the image.

8. Click the **Merge** icon and use the merge picker to insert merge fields.

Merge fields let you personalize the template to each recipient. For instance, `{{{Recipient.FirstName}}}` is rendered as the recipients first name when they see the email.

9. To add HTML code, click the **Source** icon.

Make sure you add a link to the survey using the `href` attribute `SURVEY_INVITATION_URL` in your HTML source code.

10. Add any attachments you want in the template.

Once a template is saved, any content document links (Salesforce file links) are converted to content asset links.

11. If you want, select a letterhead from the **Enhanced Letterhead** picklist.

12. Save your template when you're done.

SEE ALSO:

Email Templates

Configure Emails in Your Org

Use Contacts to enable or make sure that you already enabled emails in your Salesforce org..

1. From the App Launcher, find and select **Contacts**.

2. Open a contact record page.

3. On the Chatter component, go to the **Activity** > **Email** subtab.
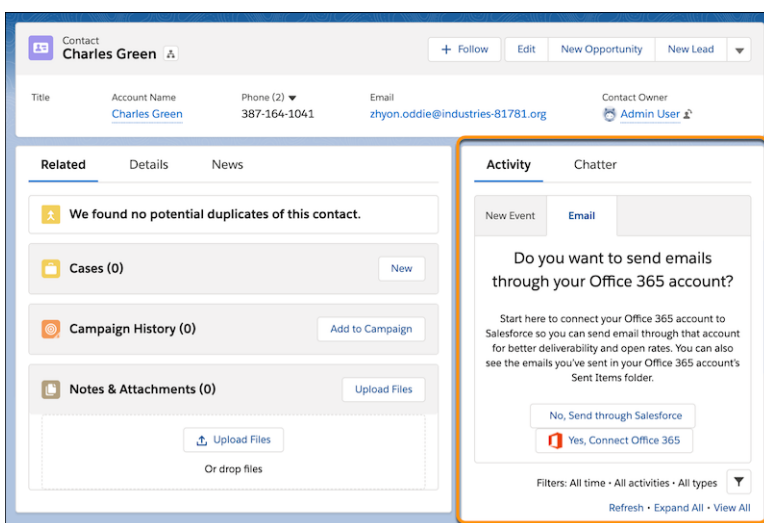
4. If you see the option to select how you want to send your email, select **No, Send through Salesforce**.

If you see the email compose form instead, your org is already set up to send

emails.

Set Up a Queue to Process Responses

You can set up a Queue to create follow-up tasks for your survey responses.

1. In Setup, enter *Queues* in the Quick Find box, and click **Queues**.

2. Click **New**.

3. Enter a name and label for your queue.

4. In the Supported Objects section, add Task to Selected Objects from Available Objects.

5. Save your queue.

Configure the Assessment Scheduling Custom Metadata Type

Configure the AssessmentSchedulingSettings custom metadata type to associate your survey, care program, email template, and task queue.

1. In Setup, enter *Custom Metadata Types* in the Quick Find box, and click **Custom Metadata Types**.

2. Select **AssessmentSchedulingSettings**, and click **Manage AssessmentSchedulingSettings**.

3. Click **New**.

4. Enter the following values for these fields.

Field Name	Field Value
Label	Enter a label for the custom metadata type setting.
AssessmentSchedulingSettings Name	Enter an API name for the custom metadata type setting.
CareProgramId	Enter the ID of the care program your survey is a part of.
EmailTemplate	Enter the name of the email template you created for your survey.
InvitationExpirationDays	Enter how long you want to wait before each survey expires.
PatientCondition	Enter the patient condition your survey is meant for.

Field Name	Field Value
PatientSurveyDurationDays	(Optional) Enter the number of days you want the patient to receive this survey, starting from when the patient is enrolled in the care program. But if the care program has a value for Monitoring in Days, then that value overrides this setting.
SurveyName	Enter the name of your survey.
TaskAssignmentUser	Enter the name of the queue you set up for your survey.

5. Save your settings.

If you have different surveys for different conditions, create more records in AssessmentSchedulingSettings with the corresponding values.

Schedule Apex Jobs

After the preliminary setup is done, all that's left is to schedule Apex jobs that send out the survey and process the responses.

HcSurveyScheduler sends out the survey, and HcSurveyResponseTaskScheduler processes the responses to create tasks.

> 📝 **Note:** The delivered Apex code only applies to the survey that we deliver in the package. If you use a different survey, you must create your own custom Apex code.

1. In Setup, enter `Apex Classes` in the Quick Find box, and click **Apex Classes**.

2. Click the **Schedule Apex** button.

3. Enter a name for the first Apex job. This job sends out the surveys.

4. Click **Apex Class Lookup** icon.

5. Enter `HcSurveyScheduler` in the search box, click **Go**, and select **HcSurveyScheduler**.

6. Enter the frequency, duration, and preferred time you want to run this job.

7. Save your settings.

8. Click the **Schedule Apex** button again.

9. Enter a name for the second Apex job. This job processes the responses.

10. Click **Apex Class Lookup** icon.

11. Enter `HcSurveyResponseTaskScheduler` in the search box, click **Go**, and select **HcSurveyResponseTaskScheduler**.

12. Enter the frequency, duration, and preferred time you want to run this job.

13. Save your settings.

And that's it. You set up recurring surveys to track your patients' condition.

You can verify if your jobs were created successfully by navigating to **Setup** > **Apex Jobs**, and looking for your job there.

> 💡 **Tip:** The default view for this page doesn't show the job name. You can identify your job using the Submitted Date, Submitted By, and Apex Class columns.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

USER PERMISSIONS

To schedule Apex jobs:
- Customize Application

Use Flows to Automate Your Processes

To automate the processes and handoffs that manage patients and provide emergency services, we provided flows that you can customize in Flow Builder. Flows collect data and perform actions in your Salesforce org or an external system.

Pre-Configured Flows Included in Emergency Program Management
We provide some of the basic flows you need to get up and running. You can customize them as you like to suit your needs..

Customize Standard Flow Templates
The flows in Emergency Program Management are installed as standard flow templates. You can customize any of the flows to suit your business needs.

Pre-Configured Flows Included in Emergency Program Management

We provide some of the basic flows you need to get up and running. You can customize them as you like to suit your needs..

Feature Set	Flow Name	Description
Clinical Assessment	Clinical Assessment Flow	Performs an intake assessment that includes health history, potential care barriers, and enrollment into a care program. Optionally, perform assessment for household members and enroll them, as well.
Clinical Assessment	SubFlow: Clinical Assessment Questionnaire	Scores the patient's responses to the initial clinical assessment questions and categorizes the patient based on their condition.
Clinical Assessment	SubFlow: Care Barrier Assessment	Captures care barriers that the patient faces and enroll the patient and the related household into a care program.
Clinical Assessment	SubFlow: ERM- Service Appointment Email	Sends an appointment confirmation email to individuals.
Clinical Assessment	SubFlow: ERM Care Program Enrollment Email	When Emergency Response Services is enabled, sends an email to the patient stating that they're qualified for supplies and services related to their care program.
Contact Tracing	Contact Collection	Takes the patient through a guided interview process and collects both individual and group encounters that the patient has participated in. Details of these encounters are collected and stored for further follow-up and analysis.
Contact Tracing	Contact Collection for Site	Takes a site participant through a guided interview process and collects both individual and group encounters that the patient has participated in. Details of these encounters are collected and stored for further follow-up and analysis.
Contact Tracing	Contact Collection Pick Up Task	Assigns a task from a queue to the user who is invoking this flow.

Feature Set	Flow Name	Description
Contact Tracing	Contact Collection Update Status	When a contact tracer contacts a lead or patient, changes the status of the lead or the patient to reflect the progress on the task.
Emergency Service Request	Create a Visit for Emergency Request Event	Creates a visit and its related tasks whenever an Emergency Service Visit event type is created. This flow runs in the background when the dispatcher selects multiple emergency requests on the SFMaps and adds them to the calendar.
Emergency Service Request	Emergency Assistance Request	Creates an application and related records for an emergency assistance request.
Emergency Service Request	Emergency Supplies Donation	Creates an application and related records for donation request.
Emergency Service Request	Emergency Supplies Request	Creates an application and related records for an emergency supplies request.
Lightning Scheduler	Inbound Cancel Appointment	Walks an authenticated user through canceling an existing appointment.
Lightning Scheduler	Inbound Modify Appointment	Walks an authenticated user through modifying an existing appointment.
Lightning Scheduler	Inbound New Appointment	Walks an authenticated user through creating an appointment with one or more employees.
Lightning Scheduler	Inbound Guest Appointment	Walks an unauthenticated user through creating an appointment with one or more employees.
Lightning Scheduler	Outbound Flow	Walks a user through creating an outbound appointment with one or more employees and a customer.
Lightning Scheduler	Outbound Modify Appointment	Walks a user through modifying an existing outbound appointment.
Patient Intake	ERM - Modify Appointment	Modifies an existing appointment.
Patient Intake	ERM - Schedule an Appointment	Creates a Lightning Scheduler appointment from a lead.

✎ Note: Lightning Scheduler flows are installed when Lightning Scheduler is enabled in your org.

Customize Standard Flow Templates

The flows in Emergency Program Management are installed as standard flow templates. You can customize any of the flows to suit your business needs.

To customize a flow, create a flow based on a standard flow template. Make sure to add the following default variables in each of the flows you use in your org.

Flow Name	Variable	Description
Request a Location Access Permit	Address Type	Add the type of address you use to filter address records for location access requests.
Request a Location Access Permit	Regulatory Authorization Type	Add the name of the regulatory authorization type used for location access requests. The variable associates the individual application with the regulatory authorization type.
Request a Reopening Permit	Regulatory Authorization Type	Add the name of the regulatory authorization type used for reopening permit requests. The variable associates the business license application with the regulatory authorization type.
Request a Training Certificate	Regulatory Authorization Type	Add the name of the regulatory authorization type used for training certificate requests. The variable associates the individual application with the regulatory authorization type.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.

2. Click **New Flow**.

3. In the list of templates, select the template that you want to customize, and click **Create**.

4. Customize the flow according to your business requirements, and then click **Save As** to create a different version of the flow.

5. Activate the flow.

   a. In the list of flows, click the name of the new flow.

   b. Under Flow Versions, next to the latest version of the flow, click **Activate**.

Manage and Support Contact Tracing

During a public health emergency, the safety, health, and well-being of your community or employees depends on getting people assessed, enrolled in a care program, and monitored. With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees. With Contact Tracing for Public Health, public health organizations can use data to track the spread of disease, gather details from exposed people, and recommend care plans and services.

📝 **Note:** For usage restrictions that apply to this product, see the information for Sales and Service Cloud in this document.

Contact Tracing for Public Health

With contact tracing, public health organizations can use data to track the spread of disease, gather details from exposed people, and recommend care plans and services. Set up the objects, metadata type, and queue for contract tracing.

Contact Tracing for Employees

With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees.

Contact Tracing Setup Checklist

Some of these steps are included in setting up Health Cloud or Emergency Program Management for Public Health. If you've already done these steps, feel free to skip them.

Enable Person Accounts

Person accounts store information about individuals by combining certain account and contact fields into one record. Emergency Program Management uses person accounts for personas like individual citizens or patients.

Install Health Cloud and Contact Tracing Packages

Install the Health Cloud and the other contact tracing packages in your org so that you can begin implementing contact tracing for your employees or patients.

Map Employee and Person Account Record Types

Configure the default mapping record types for Person Account and Employee to create records for the employees who are in your contact tracing program. This task is required for Contact Tracing for Employees only.

Assign Contact Tracing Permission Sets and Permission Set Licenses

With permission set licenses, users can get more features than with the basic license. To enable users to work in the Contact Tracing apps, assign them the necessary permission set licenses.

Create a Lead Record Type

Create a lead record type for external contacts. This task is for Contact Tracing for Employees only.

Assign Page Layouts and Record Types to Profiles

Make sure that contact tracers have access to the record types and page layouts they need by assigning the record types, page layouts, and compact page layouts to profiles. A user's profile determines which page layout he or she sees.

Customize Status Group Picklist Values

Add custom picklist values that appear in the Status Group field in accounts and leads.

Activate Apps and Record Pages

To make sure that you have the right consoles and the right lead record pages available for your users, there are a few pages and apps you must activate. For Public Health Contact Tracing, you need to activate Home Page ERM, ERM Person Console, and Triage Lead Record Page. And for Employee Contact Tracing, you need to activate Employee Console and External Contact Tracing Lead Record Page.

Create Lookup Filters for Contacts

To make sure that contact tracers see only employee names when they collect employee contact encounter details, you can define a lookup filter. This task is required for Contact Tracing for Employees only.

Configure the Assessment Scheduling Custom Metadata Type

Configure the AssessmentSchedulingSettings custom metadata type to associate your survey, care program, email template, and task queue.

Configure the Clinical Assessment Flow Setting Custom Metadata

Use the Clinical Assessment Flow Setting custom metadata type to configure your intake assessment that includes health history, potential care barriers, and enrollment into a care program. This task is required for Contact Tracing for Public Health only.

Configure the Patient Task Assignment Queue Custom Metadata

Use the Patient Task Assignment Queue custom metadata type to add tasks from the Contact Collection flow to a queue. This task is required for Contact Tracing for Public Health only.

Configure the Status Group Config Custom Metadata Type

The Status Group Config metadata type controls the appearance of the different statuses on the Contact Tracing Graph.

Configure the Assessment Status Mapping Custom Metadata Type

The Assessment Status Mapping custom metadata type enables you to configure the mapping of the status between the Assessment field in the Employee Crisis Assessment object and the Status Group field in the Person Account object. This task is required for Contact Tracing for Employees only.

Configure the Contact Tracing Settings Custom Metadata Type

The Contact Tracing Settings custom metadata type allows you to configure the associate record types, queues, and other parts of the application. This task is required for Contact Tracing for Employees only.

Help Contract Tracers to Easily Navigate the App

Make it quick and easy for contract tracers to easily get to the information that they need.

Create Queues for Assigning Public Health Contact Tracing Tasks

Set up the queues that contain the tasks that contact tracers pick up to add to their task lists. Create the Incoming Task Queue for all incoming tasks and the No Response Task Queue for contacts whom contact tracers haven't been able to reach. This task is required for Contact Tracing for Public Health only.

Create Queues for Employee Contact Tracing Tasks

Create two separate queues for tracing. One queue is for employee contact tracing and the other is for external contact tracing tasks. This task is required for Contact Tracing for Employees only.

Create an Employee Health Emergency Care Program

To create a care program for your employees, define the program along with the relationships and activities within it. This applies to Contact Tracing for Employees only.

Create a Public Health Emergency Care program and Its Related Products

To create a care program, first define the related products, and then define the program and the relationships and activities within it. This task is required for Contact Tracing for Public Health only.

Associate Consent Documents with an Employee Care Program

To associate new consent documents with a care program, define the relationship in the Data Use Purpose tab. Data Use Purpose is a container for the forms that go with a care program.

Associate Consent Documents with a Public Health Care Program

To associate new consent documents with a care program, define the relationship in the Data Use Purpose tab. Data Use Purpose is a container for the forms that go with a care program.

Create a Care Barrier Type

Your company maintains a list of standard types or classes of barriers that patients or members encounter. You can add barriers to your org when necessary. This task is required for Contact Tracing for Public Health only.

Configure Life Events

Configure life events to include each phase that an affected employee can be in during the employee contract tracing process.

Customize the Contact Tracing Graph Labels

If you want to change the delivered labels for contact tracing in your Salesforce org, here's a quick and easy way to do that. The default labels in your org are designed for Contact Tracing for Public Health. If you're using Contact Tracing for Employees, it's recommended that you change these labels to suit your requirements.

Enable Surveys

Enable Surveys to create and send questionnaires to your patients.

Create the New Clinical Assessment Quick Action Button

Configure and add the New Clinical Assessment quick action to the Lead page layout. The quick actions launch the flow that launches a clinical assessment. This task is required for Contact Tracing for Public Health only.

Create the New Contact Encounter and New Household Member Quick Action Buttons

Create a quick action for new contact encounters and household members. This task is required for Contact Tracing for Public Health only.

Create the Contact Outreach Quick Action Button

Configure and add the Contact Outreach quick action to the page layouts for the Task record types used for contact outreach. This quick action launches the flow that captures information about people who encountered an infected person. This task is required for Contact Tracing for Public Health only.

Create the New Employee Evaluation Quick Action Button

Configure and add the New Employee Evaluation quick action to the Task and Person Account page layouts. The quick actions launch the flow that captures employee contact information. This task is required for Contact Tracing for Employees only.

Create a Lead Process for Status Assignment

Create a process to assign statuses to the lead for the External Contact Tracing record type. This task is required for Contact Tracing for Employees only.

Configure and Activate the Employee Contact Collection Flow

The Employee Contact Collection flow is installed as a standard flow template. Add the life event that the flow creates and activate the flow so you can use it in the employee contact collection process. This task is required for Contact Tracing for Employees only.

Use Process Builder to Convert Leads to Patients

Enable care coordinators to convert leads to patient records within Health Cloud by setting up a simple conversion process in Process Builder. This task is required for Contact Tracing for Public Health only.

Synchronize Employee Records with Person Account Records

You can use Apex to synchronize Employee records with Person Account records.

Configure the Employee Person Account Field Mapping Custom Metadata Type

The Employee Person Account Field Mapping custom metadata type allows you to configure the mapping of the Employee object field to the Person Account object field. We've delivered a set of mappings that you can use without making any changes. You can also customize the mappings, if necessary. This task is required for Contact Tracing for Employees only.

Customize Employee Crisis Assessment Picklist Values

Add custom picklist values that are used in custom metadata and mappings between the Employee Crisis Assessment object and the Assessment object.

Add the Contact Tracing Status Report to the Command Center Dashboard

Add the Contact Tracing Status lightning component to the Command Center dashboard to view a report that shows you the contact tracing and health status of your employees.

Contact Tracing for Public Health

With contact tracing, public health organizations can use data to track the spread of disease, gather details from exposed people, and recommend care plans and services. Set up the objects, metadata type, and queue for contract tracing.

Tracing and contacting people who possibly were exposed to an infected person is one of the most efficient ways of fighting widespread community infection. You can see the exposed contacts for each person right from the patient record. Salesforce recommends making contact tracing functionality available only to users who are trained on privacy best practices. We recommend that you share contact tracing data only on a need-to-know basis.

SEE ALSO:

Salesforce Help: Emergency Response Management Permission Sets

Contact Tracing for Employees

With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees.

Tracing and contacting people who were possibly exposed to an infected person is one of the most efficient ways to fight widespread community infection. Tracers pick up tasks to evaluate employees, gather details about potentially exposed contacts, and enroll employees in care programs. You have the employee's status, a map of exposed contacts, and information on the person's condition consolidated in one place.
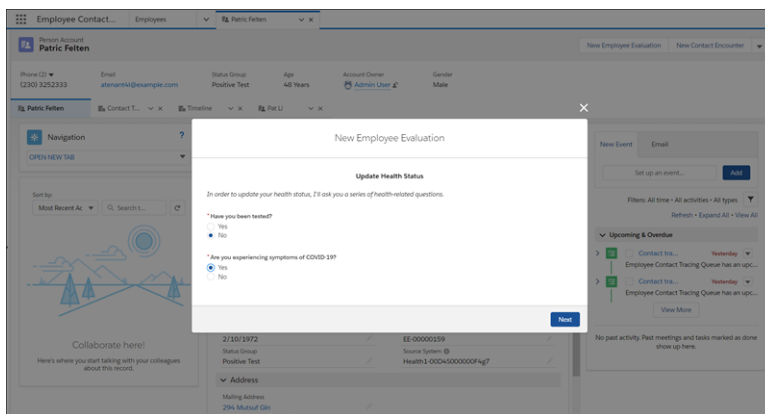
The employee evaluation flow gathers crucial information about a person's condition, so that you can enroll affected employees into a care program and monitor their health.
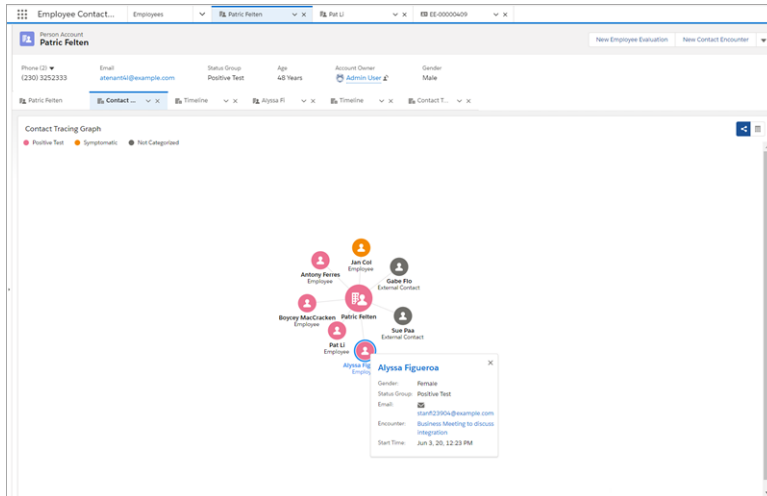
The Contact Tracing Graph gives you a comprehensive view of employees and external contacts so that you can trace infection by people, places, or events. Follow up, assessment, and triage can happen without having to leave the console.

Salesforce recommends that you make contact tracing functionality available only to users who are trained on privacy best practices. We recommend that you share contact tracing data only on a need-to-know basis.

Contact Tracing Setup Checklist

Some of these steps are included in setting up Health Cloud or Emergency Program Management for Public Health. If you've already done these steps, feel free to skip them.

Setup Prerequisites

- Enable Person Accounts

  The app uses person accounts to gather contact tracing information for your employees and the people they've been in contact with.

- Install Health Cloud and Contact Tracing Packages

  Install the required packages to begin implementing Contact Tracing for Employees and Contact Tracing for Public Health.

- Map Employee and Person Account Record Types (Contact Tracing for Employees Only)

  The mappings are used by the system to create records for the employees who are in your contact tracing program.

- Enable Surveys

  Use surveys to create and send questionnaires to employees and patients.

- Protect Your Sensitive Data with Salesforce Shield

  Salesforce Shield is a set of security tools you can use to comply with regulations on storing sensitive protected health information.

- Enable Digital Experiences for EPM Sites (Contact Tracing for Public Health Only)

  Enabling Salesforce Communities is the first step to creating communities.

- Set Up Tracking and Storage of Certain Data Privacy Preferences

  Let your users store and track certain data privacy preferences for your customers.

- Assign Contact Tracing Permission Sets and Permission Set Licenses

  To enable users to work in the contact tracing apps, assign them the necessary permission set licenses.

- Customize Health Cloud Labels

  Rename the custom label for navigation component from Patient Navigation to Navigation.

Configure Page Layouts and Record Types

- Create a Lead Record Type (Contact Tracing for Employees Only)

  Create a Lead record type to hold information on external contacts.

- Assign Page Layouts and Record Types to Profiles

  Make sure that users have access to the page layouts they need by assigning the page layouts and compact page layouts to profiles.

- Customize Status Group Picklist Values

  Add custom picklist values that appear in the Status Group field in accounts.

- Activate Apps and Record Pages

  Activate the consoles and record pages to make them available to your users.

- Create Lookup Filters for Contacts (Contact Tracing for Employees Only)

  Make sure that contact tracers see only employee names when they collect employee contact encounter details.

Set Custom Metadata and Custom Settings

- Configure the Assessment Scheduling Custom Metadata Type

  Configure the AssessmentSchedulingSettings custom metadata type to associate your survey, care program, email template, and task queue.

- Configure the Clinical Assessment Flow Setting Custom Metadata (Contact Tracing for Public Health Only)

  Use the Clinical Assessment Flow Setting custom metadata type to configure your intake assessment that includes health history, potential care barriers, and enrollment into a care program.

- Configure the Patient Task Assignment Queue Custom Metadata (Contact Tracing for Public Health Only)

  Use the Patient Task Assignment Queue custom metadata type to add tasks from the Contact Collection flow to a queue.

- Configure the Status Group Config Custom Metadata Type

  Set up the different statuses on the Contact Tracing Graph.

- Configure the Assessment Status Mapping Custom Metadata Type (Contact Tracing for Employees Only)

  Keep the employee's status and the assessment status in sync by configuring the mapping between the Assessment Status and the Status Group fields.

- Configure the Contact Tracing Settings Custom Metadata Type (Contact Tracing for Employees Only)

  Configure the custom metadata type to map the flow to queues, assign a care program, and record types.

- Configure the Employee Person Account Field Mapping Custom Metadata Type (Contact Tracing for Employees Only)

  Configure the mapping of the Employee object field to the Person Account object field

- Help Contract Tracers to Easily Navigate the App

  Customize the navigation component to suit your company's needs.

Create Queues

- Create Queues for Assigning Public Health Contact Tracing Tasks (Contact Tracing for Public Health Only)

  Set up the queues that contain the tasks that contact tracers pick up and add to their lists.

- Create Queues for Employee Contact Tracing Tasks (Contact Tracing for Employees Only)

  Create one queue for employee contact tracing tasks and one for external contact tracing tasks.

Configure Care Programs and Surveys

- Create an Employee Health Emergency Care Program (Contact Tracing for Employees Only)

  Define the program for employees along with the relationships and activities within it.

- Create a Public Health Emergency Care program and Its Related Products (Contact Tracing for Public Health Only)

  Define a care program and its related products.

- Associate Consent Documents with an Employee Care Program (Contact Tracing for Employees Only)

  Associate new consent documents with a care program by defining the relationship in the Data Use Purpose tab.

- Associate Consent Documents with a Public Health Care Program (Contact Tracing for Public Health Only)

  Associate new consent documents with a care program by defining the relationship in the Data Use Purpose tab.

- Create a Care Barrier Type (Contact Tracing for Public Health Only)

  Create a list of standard types or classes of barriers that patients or members encounter

- Set Up Daily Assessment Using Surveys

  Set up custom metadata, create a queue, and configure a survey to gather employee health status and automate its distribution at regular intervals.

- Customize Life Events to Show a Patient's Condition History

  Show a visual history including the status of events pertaining to an employee's current condition.

- Personalize Life Events with Custom Icons

  Change the default icon associated with a life event type.

Customize the Contact Tracing Graph

- Customize the Contact Tracing Graph Labels

  Change the delivered labels for the Contact Tracing Graph in your Salesforce org.

Configure Quick Actions, Processes, and Flows

- Create the New Clinical Assessment Quick Action Button (Contact Tracing for Public Health Only)

Configure and add the New Clinical Assessment quick action to the Lead page layout.

- Create the New Contact Encounter and New Household Member Quick Action Buttons (Contact Tracing for Public Health Only)

  Create a quick action for new contact encounters and household members.

- Create the Contact Outreach Quick Action Button (Contact Tracing for Public Heath Only)

  Create the quick action to launch the flow that captures information about people who have engaged in an encounter with an infected person.

- Create the New Employee Evaluation Quick Action Button (Contact Tracing for Employees Only)

  Configure the quick action that starts the contact collection flow.

- Create a Lead Process for Status Assignment (Contact Tracing for Employees Only)

  Create a process that enables you to assign statuses to the lead for the External Contact Tracing record type.

- Configure and Activate the Employee Contact Collection Flow (Contact Tracing for Employees Only)

  After you activate the flow, you can use it to collect employee contact information.

- Use Process Builder to Convert Leads to Patients (Contact Tracing for Public Health Only)
- Enable user to convert leads to patient records.

Additional Setup Steps for Contact Tracing for Employees with Work.com

- Synchronize Employee Records with Person Account Records

  Configure wrapper Apex class and schedule the job that creates person accounts from employee records.

- Configure the Employee Person Account Field Mapping Custom Metadata Type

  Configure mapping from Employee fields to Person Account fields.

- Customize the Employee Crisis Assessment Picklist Values

  Add custom picklist values that are used in custom metadata and mappings between the Employee Crisis Assessment object and the Assessment object

- Add the Contact Tracing Status Report to the Command Center Dashboard

  Create a report that shows you the health status of your employees.

- Resync Person Accounts using Concierge Settings

  Resync person accounts. This step is only required if setting up Contact Tracing in an org with Employee Concierge installed.

Enable Person Accounts

Person accounts store information about individuals by combining certain account and contact fields into one record. Emergency Program Management uses person accounts for personas like individual citizens or patients.

🛑 Important: After Person Accounts is enabled, it can't be disabled. We recommend that you create a sandbox to preview how person accounts affect your Salesforce org.

1. From Setup, enter `Person Accounts` in the Quick Find box, and then select **Person Accounts**.
2. Go through the steps listed on the Setup page.

3. Turn on Person Accounts.

4. After Person Accounts is enabled, a person account record type is created. You can create additional record types for person account if needed.

5. To begin using person accounts in Health Cloud, from Setup, enter `Custom Settings` in the Quick Find box, then select **Custom Settings**.

6. In the list of custom settings, click **Manage** next to the Use Person Accounts custom setting.

7. Click **Edit** next to Use Person Account and select **Enable**.

8. Assign the person account record type to user profiles and the system administrator profile.

Install Health Cloud and Contact Tracing Packages

Install the Health Cloud and the other contact tracing packages in your org so that you can begin implementing contact tracing for your employees or patients.

1. Install the Health Cloud managed package before you install and configure any of the related unmanaged packages.

   This managed package delivers the core features of Health Cloud. You can find the package download URL in the Terms and Conditions section of your contract.

2. Install the additional managed packages to set up contact tracing.

   To set up Contact Tracing for Employees, install the managed package. This task is for Contact Tracing for Employees only. Install the package from: http://Industries.force.com/healthcloudcontacttracingemployees

   To set up Contact Tracing for Public Health, install the Emergency Program Management unmanaged package. This is for Contact Tracing for Public Health only. Install the package from: http://industries.force.com/healthcloudextensionerm

3. Paste the URL for the package into your browser navigation bar and press **Enter**.

4. Enter your Salesforce password.

5. Select **Install**.

   If it takes a while, you can select **Done** and move on to something else while installation finishes. Check your email for confirmation that installation was successful.

6. To verify that the package was installed, go to `Installed Packages` in Setup and look for the name of the package.

⛔ Important: Don't delete any part of the managed package after installing it. Doing so can block automatic upgrades to future releases.

☑ Note: The custom objects, components, classes, and triggers delivered in Health Cloud packages are one API version behind the core Salesforce API. Health Cloud standard objects have the same API version as core Salesforce. So, if your org's API version is 43, the Health Cloud custom objects are API version 42, and the standard Health Cloud objects are API version 43.

Map Employee and Person Account Record Types

Configure the default mapping record types for Person Account and Employee to create records for the employees who are in your contact tracing program. This task is required for Contact Tracing for Employees only.

1. From Setup, enter `Custom Metadata` in the `Quick Find` box, then select **Custom Metadata Types**.

2. In the list of custom metadata types, click `Manage Records` next to the `Individual Record Type Mapper` custom settings.

3. Click **New** and enter the following information to create mappings for Person Account.

Field	Value
Label	Person Account
Individual Record Type Mapper Name	Person_Account
Account Record Type	PersonAccount

4. Leave the `Contact Record Type` field blank.

Person accounts don't use the contact record type.

5. Leave the Record Type Namespace (Contact) field blank.

6. Save your work.

7. Repeat these steps to create a mapping record for Employee.

Field	Value
Label	Employee
Individual Record Type Mapper Name	Employee
Account Record Type	Employee
Record Type Namespace (Account)	emptracing

🛇 **Important:** If you're configuring Contact Tracing in an org that already has Employee Concierge installed, you must resync person accounts. Resyncing ensures existing person accounts use the employee record type in this org. To resync person accounts, use the Sync option in Concierge Settings.

Assign Contact Tracing Permission Sets and Permission Set Licenses

With permission set licenses, users can get more features than with the basic license. To enable users to work in the Contact Tracing apps, assign them the necessary permission set licenses.

1. In Setup, use the Quick Find box to find `Users`, and select the users who are getting permission set licenses.

2. In the Permission Set License Assignments section of the User record, click **Edit Assignments**, and review the available permission sets and permission set licenses.

3. Select one or more permission set licenses to assign.

Contact Tracing for Employees	Contact Tracing for Public Health	Permission Set License	Description
Required	Required	Health Cloud	Provides access to the standard version of Health Cloud. Users with this

Contact Tracing for Employees	Contact Tracing for Public Health	Permission Set License	Description
			license can access to the standard Salesforce objects and Health Cloud custom objects. (Required)
N/A	Required	Health Cloud for Community	Provides access to Health Cloud objects and features for community users.
Required with Health Cloud license	Required	Health Cloud Platform	Provides access to Health Cloud-related standard objects.
Required (Only if you've licensed Contract Tracing for Employees without licensing Health Cloud)	N/A	Contact Tracing for Employees	Provides access to Health Cloud objects and components required for Employee Contact Tracing.
Required with Work.com Command Center license	N/A	Workplace Command Center	When the Command Center is licensed, provides access to the Crisis, Employee, EmployeeCrisisAssessment, and InternalOrganizationUnit objects. This license needs to be assigned to the contact tracer so that they can access these objects.

4. Select the Health Cloud Contact Tracer permission set for users who are contact tracers.

Contact Tracing for Employees	Contact Tracing for Public Health	Permission Set	Description
N/A	Required	Health Cloud ERM	Gives users access to Health Cloud Emergency Program Management objects and records.
Required	Required	Health Cloud Permission Set License	Gives access to other features not covered under the Health Cloud Standard permission set.
Required	N/A	Health Cloud Contact Tracer	Gives contact tracers access to the Salesforce objects and records used in contact tracing.

5. Click **Save**.

> 💡 Tip: To see what permission set licenses are available, go to Company Settings in Setup, and click **Company Information**.
> The permission sets available to you depend in part on which features are included in your Salesforce contract.

Create a Lead Record Type

Create a lead record type for external contacts. This task is for Contact Tracing for Employees only.

1. From Setup, open **Object Manager**, select **Lead**, and then **Record Types**.

2. Click **New**.

3. Choose **Master** from the Existing Record Type drop down list to copy all available picklist values, or choose an existing record type to clone its picklist values.

4. Enter a record type label that's unique within the object, such as `External Contact Tracing`.

5. Enter `External_ContactTracing` as the record type name.

6. Enter a description.

7. Select the **Contact Tracing** lead process.

8. Select **Active** to activate the record type.

9. Select **Enable for Profile** next to a profile to make the record type available to users with that profile. Select the checkbox in the header row to make it available for all profiles.

10. For enabled profiles, select **Make Default** to make it the default record type for users of that profile. Select the checkbox in the header row to make it the default for all profiles.

11. Click **Next**.

12. Choose a page layout option that determines which page layout displays for records with this record type:

    a. To apply a single page layout for all profiles, select **Apply one layout to all profiles** and choose the page layout from the dropdown list.

    b. To apply different page layouts based on user profiles, select **Apply a different layout for each profile** and choose a page layout for each profile.

13. Click **Save**.

📝 Note: On the Lead object, create a picklist valued named `Contact Tracing` for the Lead Source field.

Assign Page Layouts and Record Types to Profiles

Make sure that contact tracers have access to the record types and page layouts they need by assigning the record types, page layouts, and compact page layouts to profiles. A user's profile determines which page layout he or she sees.

You can assign page layouts from the following places.

*   The object's customize page layout
*   The original or enhanced profile user interface.

To verify that users have the correct access to fields based on the page layout and field-level security, you can check the field accessibility grid. From Setup, enter `Field Accessibility` in the Quick Find box, then select **Field Accessibility**. From this page, choose a particular object to view and then select whether you want to check access by profiles, record types, or fields.

Add or enable the following record types and layouts for the corresponding objects, and then assign the layouts to the appropriate user profiles.

Table 1: Account

Layout	Record Type	Contact Tracing for Employees	Contact Tracing for Public Health
Employee Account Layout	Employee	Required	N/A
Employee Compact Layout	Employee	Required	
ERM Patient Layout	ERM Patient	N/A	Required
ERM Patient Compact	ERM Patient		Required
	Person Account	Required	Required

Table 2: Lead

Layout	Record Type	Contact Tracing for Employees	Contact Tracing for Public Health
External Contact Tracing Layout	External Contact	Required	N/A
External Contact Lead Layout	External Contact	Required	N/A
Triage Layout	Triage	N/A	Required
Triage Compact Layout	Triage	N/A	Required

Table 3: Task

Layout	Record Type	Contact Tracing for Employees	Contact Tracing for Public Health
Contact Tracing	Contact Tracing	N/A	Required
Contact Tracing Compact Layout	Intake Contact Tracing	N/A	Required
Intake	Intake	N/A	Required
Employee Contact Tracing Task Layout	Employee Contact Tracing	Required	N/A
External Contact Tracing Task Layout	External Contact Tracing	Required	N/A
Employee Contact Tracing Compact Layout	Employee Contact Tracing	Required	N/A

Customize Status Group Picklist Values

Add custom picklist values that appear in the Status Group field in accounts and leads.

1. In Setup, go to the Object Manager and select **Accounts**.

2. Click **Fields & Relationships** and select Status Group.

3. Click **New** and add picklist values with the following API names.

Feature	Picklist Values
Contact Tracing for Employees	*Exposed*, *Monitored*, *NotMonitored*, *PositiveTest*, *Symptomatic*, and *Unknown*
Contact Tracing for Public Health	*Monitored*, *NotMonitored*, *PositiveTest*, *ReadyForIntake*, and *Unknown*

> 📝 **Note:** These picklist values need to be enabled in the Status Group fields in both the Account and Lead objects.

4. Select the record types you want to enable these values for and click **Save**.

5. To use a custom label for a picklist value, click **Edit** for that value.

6. Replace the label with the label you want to use and click **Save**. But make sure you don't change the API name.

7. Now repeat steps 1-6 for the Lead object.

If your Salesforce org includes picklist values used by Emergency Program Management for Public Health, you must configure values that work in both instances of contact tracing.

SEE ALSO:

  Salesforce Help: Assign Page Layouts and Record Types to Profiles

Activate Apps and Record Pages

To make sure that you have the right consoles and the right lead record pages available for your users, there are a few pages and apps you must activate. For Public Health Contact Tracing, you need to activate Home Page ERM, ERM Person Console, and Triage Lead Record Page. And for Employee Contact Tracing, you need to activate Employee Console and External Contact Tracing Lead Record Page.

If you need to make any changes to these pages, you can clone them and activate the clones instead.

1. From Setup, enter `Lightning App Builder` in the Quick Find box, select **Lightning App Builder**, and then click **Edit** next to the Home Page ERM.

2. In the Lightning App Builder, click **Activation**.

3. Select the App, profile, and record type.

4. Click **Activate**.

5. Repeat these steps with ERM Person Console and Triage Lead Record Page to activate them. Similarly, if you're using Contact Tracing for Employees, follow these steps with Employee Console and External Contact Tracing Lead Record Page instead.

Create Lookup Filters for Contacts

To make sure that contact tracers see only employee names when they collect employee contact encounter details, you can define a lookup filter. This task is required for Contact Tracing for Employees only.

1. In Setup, go to the Object Manager and select **Contact Encounter Participant**.

2. Under **Fields & Relationships**, select **Contact**. Click **Edit**.

3. In the Lookup Filter section, select **Contact: Account: Account Record Type**.

4. Select **equals** as the operator and **Value** as the value.

5. Select **Employee** as the field.

6. Select the **Required** radio button and customize the error message, if necessary.

7. Click **Save**.

Configure the Assessment Scheduling Custom Metadata Type

Configure the AssessmentSchedulingSettings custom metadata type to associate your survey, care program, email template, and task queue.

1. In Setup, enter `Custom Metadata Types` in the Quick Find box, and click **Custom Metadata Types**.

2. Select **AssessmentSchedulingSettings**, and click **Manage AssessmentSchedulingSettings**.

3. Click **New**.

4. Enter the following values for these fields.

Field Name	Field Value
Label	Enter a label for the custom metadata type setting.
AssessmentSchedulingSettings Name	Enter an API name for the custom metadata type setting.
CareProgramId	Enter the ID of the care program your survey is a part of.
EmailTemplate	Enter the name of the email template you created for your survey.
InvitationExpirationDays	Enter how long you want to wait before each survey expires.
PatientCondition	Enter the patient condition your survey is meant for.
PatientSurveyDurationDays	(Optional) Enter the number of days you want the patient to receive this survey, starting from when the patient is enrolled in the care program. But if the care program has a value for Monitoring in Days, then that value overrides this setting.
SurveyName	Enter the name of your survey.
TaskAssignmentUser	Enter the name of the queue you set up for your survey.

5. Save your settings.

If you have different surveys for different conditions, create more records in AssessmentSchedulingSettings with the corresponding values.

Configure the Clinical Assessment Flow Setting Custom Metadata

Use the Clinical Assessment Flow Setting custom metadata type to configure your intake assessment that includes health history, potential care barriers, and enrollment into a care program. This task is required for Contact Tracing for Public Health only.

1. In Setup, enter `Custom Metadata Types` in the Quick Find box, and click **Custom Metadata Types**.
2. Select **Clinical Assessment Flow Setting**, and click **Manage Clinical Assessment Settings**.
3. Click **Edit**.
4. Enter the following values for these fields.

Field Name	Field Value
Label	Enter a label for the custom metadata type setting.
Clinical Assessment Setting Name	Enter an API name for the custom metadata type setting.
Assessment Task Queue	The label of the queue you set up for the flow. 📝 Note: You need to use this same queue when you configure the Patient Task Assignment Queue custom metadata type. However, you use the API name of this queue in that custom metadata type.
Care Program	The name of the care program you created for the flow.
Minor Child Age Limit	The age below which a person is considered as a minor.
Consent Auth Data Form Use	The name of the Authorization Form Consent record you created.
Household Consent Auth Data Form Use	The name of the Authorization Form Consent record for household members.
Consent Data Use Purpose	The name of the Authorization Form Data Use record you created.
Patient RecordType Name	ERM Patient
Prescribed Quarantine Days	The recommended number of days for quarantine.

5. Save your settings.

Configure the Patient Task Assignment Queue Custom Metadata

Use the Patient Task Assignment Queue custom metadata type to add tasks from the Contact Collection flow to a queue. This task is required for Contact Tracing for Public Health only.

1. In Setup, enter *Custom Metadata Types* in the Quick Find box, and click **Custom Metadata Types**.

2. Select **Patient Task Assignment Queue**, and click **Manage Patient Task Assignment Queues**.

3. Click **New**.

4. Enter the following values for these fields.

Field Name	Field Value
Label	Enter a label for the custom metadata type setting. This can be anything.
Patient Task Assignment Queue Name	*Default_Patient_Task_Assignment_Queue* 📝 Note: You must use this exact value. If you don't the configuration won't work.
Queue Dev Name	The API name of the queue you need to use. 📝 Note: You need to use the same queue you used when you configured the Clinical Assessment Settings custom metadata type. However, in that custom metadata type, you had to use the label of the queue, while you have to use the API name of the queue in this one.

5. Save your settings.

SEE ALSO:

   Salesforce Help: Configure the Clinical Assessment Flow Setting Custom Metadata

Configure the Status Group Config Custom Metadata Type

The Status Group Config metadata type controls the appearance of the different statuses on the Contact Tracing Graph.

1. In Setup, enter *Custom Metadata Types* in the Quick Find box, and click **Custom Metadata Types**.

2. Select **Status Group Configs**, and click **Manage Status Group Configs**.

3. Ensure that the following values are defined, based on whether you're using Contact Tracing for Employees or Contact Tracing for Public Health.

Label Name	Status Group Config Name	Applies To
Monitored Mapping	Monitored	Both

Label Name	Status Group Config Name	Applies To
Not Monitored Mapping	`NotMonitored`	Both
Positive Test Mapping	`PositiveTest`	Both
Unknown	`Unknown`	Both
Ready for Intake Mapping	`ReadyForIntake`	Contact Tracing for Public Health only
Exposed	`Exposed`	Contact Tracing for Employees only
Symptomatic	`Symptomatic`	Contact Tracing for Employees only
STATUS GROUP DEFAULT	`STATUS_GROUP_DEFAULT`	NA

You can change the color mapping of the values and define new values. When you define a new value, you must also define the new value in the picklist for Status Group on the Account and Lead objects. Ensure that the API name of the picklist value matches the Status Group Config Name listed in the table.

4. Save your settings.

Configure the Assessment Status Mapping Custom Metadata Type

The Assessment Status Mapping custom metadata type enables you to configure the mapping of the status between the Assessment field in the Employee Crisis Assessment object and the Status Group field in the Person Account object. This task is required for Contact Tracing for Employees only.

These mappings connect an assessment status update created by a wellness survey to a status group for contact tracing. The mappings are also used to update the assessment status when an employee's health status is updated during an employee evaluation.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

1. In Setup, enter *Custom Metadata Types* in the Quick Find box, and click **Custom Metadata Types**.

2. Select **Assessment Status Mapping**, and click **Manage Assessment Status Mappings**.

3. Make sure that the following four mappings are defined with the values listed here. Edit the mappings installed with the package to align with these values, and add the ones that aren't already installed with the package.

Label	Assessment Status Mapping Name	Assessment Status	Status Group	Enable Contact Tracing
COVID-19 NoTracing	NotMonitored	COVID-19 No Symptoms	`NotMonitored`	Not Selected
COVID-19 Symptoms or Exposed	COVID_19_Symptoms_or_Exposed	COVID-19 Symptoms or Exposed	`Symptomatic`	Selected
COVID-19 Test Positive	COVID_19_Test_Positive	COVID-19 Test Positive	`PositiveTest`	Not Selected
Exposed	Exposed	Exposed	`Exposed`	Not Selected

When selected, the **Enable contact tracing** checkbox determines whether a task is created for contact tracing when the assessment value is updated.

> **Note:** Make sure that the values you specify for Assessment Status here are valid picklist values in the Assessment field in the Employee Crisis Assessment object. Similarly, the values in Status Group here must be valid values in the Status Group field in the Person Account object.

4. Save your settings.

Configure the Contact Tracing Settings Custom Metadata Type

The Contact Tracing Settings custom metadata type allows you to configure the associate record types, queues, and other parts of the application. This task is required for Contact Tracing for Employees only.

1. In Setup, enter `Custom Metadata Types` in the Quick Find box, and click **Custom Metadata Types**.

2. Select **Contact Tracing Setting**, and click **Manage Contact Tracing Settings**.

3. Click **Contact Tracing Application Settings**.

4. Ensure that the following values are defined.

Label Name	Value
Employee Contact Tracing Task Queue	The name of the employee contact tracing task queue, such as Employee_ContactTracing_Queue.
External Contact Tracing Task Queue	The name of the queue that contains tasks for tracing external contacts, such as External_ContactTracing_Queue.
Employee Person Account Record Type	The name of the employee person account record type, such as Employee.
External Contact Tracing Lead Record Type	The name of the external contact tracing lead record type, such as External_ContactTracing.
Employee Contact Tracing Task Record Type	The name of the employee contact tracing task record type, such as Employee_ContactTracing.
External Contact Tracing Task Record Type	The name of the external contact tracing task record type, such as External_ContactTracing.
Care Program Name	The care program name to which an affected employee is enrolled.
Crisis Name	The name of the crisis that the employee crisis assessment record is associated with.

5. Save your settings.

Help Contract Tracers to Easily Navigate the App

Make it quick and easy for contract tracers to easily get to the information that they need.

The Navigation component lets contact tracers jump to the pages they need without leaving the Person Account console. You can customize the items that appear in the Navigation component. And you can add a navigation item to one of the default menu categories. You can also add a category with new child navigation options.

You can configure the tab navigation menu to open standard and custom pages or URLs as either primary or secondary tabs. Clicking an item in the menu opens a new tab or subtab related to that contact's records.

Customize the items that appear in the tab navigation list using custom settings. You can add a navigation item to a default menu category or add a category with new child navigation options.

📝 **Note:** All navigation menu elements appear in alphabetical order. Categories and the subcategories that follow are listed in alphabetical order.

1. From Setup, enter `Custom Settings` in the **Quick Find** box, then select **Custom Settings**.

2. In the list of custom settings, click **Manage** next to the **CardView Dropdown** custom settings.

3. Create the **Contact Tracing Graph** Card View Dropdown.

    a. Click **New**.

    b. In the Name field, enter `Contact Tracing Graph`.

    c. In the Category Name field, enter `Contact Tracing Graph`.

    d. Ensure that the Default Subtab checkbox is selected.

    e. In the Tab Type field, enter `Subtab`.

    f. In the Subcategory Name field, enter `Contact Tracing Graph`.

    g. In the Page Type field, enter `LWC`.

    h. In the URL field, enter `HealthCloudGA:contactTracing`.

    i. Save your changes.

4. Edit the **Timeline** Card View Dropdown option and ensure that the **Default Subtab** checkbox is selected.

5. Delete all other Card View Dropdown options.

📝 **Note:** You can rename the custom label for the navigation component from Patient Navigation to Navigation or another label that suits your company's needs.

SEE ALSO:

Salesforce Help: Customize Health Cloud Labels

Create Queues for Assigning Public Health Contact Tracing Tasks

Set up the queues that contain the tasks that contact tracers pick up to add to their task lists. Create the Incoming Task Queue for all incoming tasks and the No Response Task Queue for contacts whom contact tracers haven't been able to reach. This task is required for Contact Tracing for Public Health only.

1. From Setup, enter *Queues* in the `Quick Find` box, then select **Queues**.

2. Click **New**.

3. Enter *Incoming Task Queue* as the queue label and *Incoming_Task_Queue* as the queue name. The label is the name of the list view that users work from.

    📝 **Note:** Make sure to include the developer name in the Incoming Task Queue custom metadata type. The Contact Collection flow uses the custom metadata type to assign tasks to the correct task queue.

4. Choose whom to notify when new records are added to the queue.

5. If your org uses divisions, select the queue's default division.

6. Select **Task** as the object to include in the queue.

7. Add queue members. Members can be individuals, roles, public groups, territories, connections, or partner users.

8. Save the queue.

9. Follow these steps to set up the No Response Tasks Queue.

<div style="float:right">

USER PERMISSIONS

To create or change queues:
- Customize Application

    AND

    Manage Public List Views

To change queues created by other users:
- Customize Application

    AND

    Manage Public List Views and Manage Users

</div>

Create Queues for Employee Contact Tracing Tasks

Create two separate queues for tracing. One queue is for employee contact tracing and the other is for external contact tracing tasks. This task is required for Contact Tracing for Employees only.

1. From Setup, enter *Queues* in the `Quick Find` box, then select **Queues**.

2. Click **New** and enter the following information for the Employee Contact Tracing Queue.

3. Enter *Employee Contact Tracing Queue* as the queue label and *Employee_ContactTracing* as the queue name. The label is the name of the list view that users work from.

4. Choose whom to notify when new records are added to the queue.

5. Select **Task** as the object to associate with the queue.

6. Add queue members. Members can be individuals, roles, public groups, territories, connections, or partner users.

7. Save the queue.

8. Repeat the steps and create the queue with the label *External Contact Tracing Queue* and a queue name of *External_ContactTracing*.

<div style="float:right">

USER PERMISSIONS

To create or change queues:
- Customize Application

    AND

    Manage Public List Views

To change queues created by other users:
- Customize Application

    AND

    Manage Public List Views and Manage Users

</div>

📝 **Note:** Make sure to include the developer names for both queues in the Contact Tracing Settings custom metadata type. The Contact Tracing flow uses the custom metadata type to assign tasks to the correct task queue.

Create an Employee Health Emergency Care Program

To create a care program for your employees, define the program along with the relationships and activities within it. This applies to Contact Tracing for Employees only.

1. On the Care Programs tab, click **New**.

2. Enter a name like *Employee Health Emergency Program* along with the start date and other important details about the program.

3. If you're setting up Emergency Program Management for Public Sector, from the App Picker, select Products. Enter details of products related to your program such as *Food Delivery* or *Surgical Masks*.

4. If you're setting up Emergency Response Management for Public Sector, on the Care Program Products tab, click **New** and enter the product's name. Next, select the related product from the Product field.

5. On the Care Program Provider tab, click **New** and enter the provider's name, account, and related care plan product.

6. Optionally, configure the following records based on how your company uses care programs.

   - Care Program Eligibility Rules: Define the criteria for participation in a care program by associating a care program with an enrollment eligibility criteria record.

   - Care Program Enrollee: Create records for participants enrolled in a care program.

   - Care Program Enrollee Product: Create records that associate care program enrollees with care program products, care program providers, or both.

   - Care Program Enrollment Card: Create a care program membership card that includes the enrollee's name and a membership card number.

   - Care Program Team Member: Create records for people who deliver services under a program, such as a program manager or care coordinator.

Create a Public Health Emergency Care program and Its Related Products

To create a care program, first define the related products, and then define the program and the relationships and activities within it. This task is required for Contact Tracing for Public Health only.

1. On the Care Programs tab, click **New**.

2. Enter a name like *Public Health Emergency Program* along with the start date and other important details about the program.

3. From the App Picker, select Products and enter the details of products related to your program, such as *Food or meal support*.

4. On the Care Program Products tab, click **New** and enter the product's name, and then select the related product from the Product field.

5. On the Care Program Provider tab, click **New** and enter the provider's name, account, and related care plan product.

6. Optionally, configure the following records based on how your company uses care programs.

   - Care Program Eligibility Rules: Define the criteria for participation in a care program by associating a care program with an enrollment eligibility criteria record.

   - Care Program Enrollee: Create records for participants enrolled in a care program.

   - Care Program Enrollee Product: Create records that associate care program enrollees with care program products, care program providers, or both.

   - Care Program Enrollment Card: Create a care program membership card that includes the enrollee's name and a membership card number.

- Care Program Team Member: Create records for people who deliver services under a program, such as a program manager or care coordinator.

Associate Consent Documents with an Employee Care Program

To associate new consent documents with a care program, define the relationship in the Data Use Purpose tab. Data Use Purpose is a container for the forms that go with a care program.

Make sure to upload the care program consent documents using the Files tab before you begin associating the documents with the care program.

1. Navigate to the Data Use Purpose tab and create a record for the care program.

2. Select **New**.

3. Enter a name for the data use purpose, such as *Employee Emergency Program Consent Forms*.

    Note: The Legal Basis field and the checkbox that lets users opt out of the consent process aren't used for care programs.

4. Select the name of the care program from the Purpose field.

5. Next, navigate to the Authorization Form tab to provide information about each consent form and click **New**.

6. Enter the name, revision number, and effective dates of the consent form.

7. Navigate to the Authorization Form Text tab to manage the text associated with the consent form and click **New**.

    You can create multiple text versions for the same consent form to support different languages, regions, and situations. You can also include a summary to describe the form's purpose and display to customers when asking for their consent.

8. Enter the name of the text for the consent form. For example, *Consent for Enrollment in Employee Emergency Health Program*.

    You can also include a summary to describe the form's purpose and display to customers when asking for their consent.

9. Select the associated authorization form and select the uploaded consent form in the Content Document field.

10. Select the locale for the content document.

    Note: Make sure that the value in the Locale field matches the language of the org or the site where the form is viewed. The consent form doesn't appear when the Locale field is incorrect. Create an authorization form text record for each language supported in your org.

11. Navigate to Authorization Form Data Use tab, and click **New** to connect the consent form with the care program.

12. Enter the name of the form in the Authorization Form field the name of the care program in the Data Use Purpose field.

Associate Consent Documents with a Public Health Care Program

To associate new consent documents with a care program, define the relationship in the Data Use Purpose tab. Data Use Purpose is a container for the forms that go with a care program.

Note: There are two consent documents to configure. One consent document is used when the individual agrees to be enrolled in a care program. The other consent document is used when the individual consents to have household members enroll in a program. Configure consent documents for both types of consent.

1. Navigate to the Data Use Purpose tab and create a record for each care program.

2. Select **New**.

3. Enter a name for the data use purpose, such as *Public Health Emergency Program Consent Forms.*

4. Select the name of the care program from the Purpose field.

   > 📝 Note: The Legal Basis field and the checkbox that lets users opt out of the consent process aren't used for care programs.

5. Next, navigate to the Authorization Form tab to provide information about each consent form.

6. Enter the name, revision number, and effective dates of the consent form.

7. Navigate to the Authorization Form Text tab to manage the text associated with the consent form.

   You can create multiple text versions for the same consent form to support different languages, regions, and situations. You can also include a summary to describe the form's purpose and display to customers when asking for their consent.

8. Enter the name of the text for the consent form. For example, *Consent for Enrollment in Public Health Emergency Program.*

   You can also include a summary to describe the form's purpose and display to customers when asking for their consent.

9. Select the associated authorization form and select the uploaded consent form in the Content Document field.

10. Select the locale for the content document.

    > 📝 Note: Make sure that the value in the Locale field matches the language of the org or the community where the form is viewed. The consent form doesn't appear when the Locale field is incorrect. Create an authorization form text record for each language supported in your org.

11. Navigate to Authorization Form Data Use tab, and click **New** to connect the consent form with the care program.

12. Enter the name of the form in the Authorization Form field the name of the care program in the Data Use Purpose field.

Create a Care Barrier Type

Your company maintains a list of standard types or classes of barriers that patients or members encounter. You can add barriers to your org when necessary. This task is required for Contact Tracing for Public Health only.

1. From the App Launcher, find and select **Care Barrier Types**, and click **New**.

2. Enter a name for the barrier type such as *Lack of access to transportation* or *Low household income*.

3. To make the barrier type available to use, select **Active**.

4. Optionally, select a code type and code to associate the barrier type with a code.

5. Save your changes.

Configure Life Events

Configure life events to include each phase that an affected employee can be in during the employee contract tracing process.

Customize Life Events to Show a Patient's Condition History

Show a visual patient history including the status of events pertaining to the patient's current condition. You can use different statuses to show when the patient enrolls in a program, is hospitalized, or recovers.

Personalize Life Events with Custom Icons

You can change the default icon associated with a life event type. Upload an SVG file to replace the icon.

Customize Life Events to Show a Patient's Condition History

Show a visual patient history including the status of events pertaining to the patient's current condition. You can use different statuses to show when the patient enrolls in a program, is hospitalized, or recovers.

When someone enrolls in a care program after participating in a clinical assessment, the Life Events component shows status as **Enrolled**. Users can select the next event for the patient or you can write a trigger that updates the component when a new milestone or event occurs.

1. From Setup, open **Object Manager**.

2. In the Quick Find box, enter `Person Life Event`, and then select **Person Life Event**.

3. Click **Fields & Relationships**, and then select **Event Type**.

4. Under Event Type Picklist Values, click **New**, and then add the new event types: `Enrolled`, `Quarantined`, `Isolated`. `Hospitalized`, and `Recovered`.

    ✏ Note: Use `Hospitalized` in Contact Tracing for Public Health only. Don't use this value in Employee Contact Tracing.

5. Save your changes.

Personalize Life Events with Custom Icons

You can change the default icon associated with a life event type. Upload an SVG file to replace the icon.

1. From Setup, in the Quick Find box, enter `Icons`, and then select **Icons**.

2. Select **Life Events and Business Milestones**.

3. For the icon that you want to change, click 🔻, and select **Change Icon**.

4. Click **Upload Files**, and select the SVG file for the icon. The SVG file must be a single path SVG file.

5. Save your changes.

Customize the Contact Tracing Graph Labels

If you want to change the delivered labels for contact tracing in your Salesforce org, here's a quick and easy way to do that. The default labels in your org are designed for Contact Tracing for Public Health. If you're using Contact Tracing for Employees, it's recommended that you change these labels to suit your requirements.

The Contact Tracing Graph comes with the default labels Patient for internal users and Lead for external contacts. If you want to change the labels, you can't edit them but you can create a local translation version to override the default labels.

1. From Setup, enter `Custom Labels` in the Quick Find box, then select **Custom Labels**.

2. Select the name of the custom label to open.

    a. CT_Graph_Contact

    b. CT_Graph_Contact_Plural

    c. CT_Graph_Lead

    d. CT_Graph_Lead_Plural

3. Click the **New Local Translation/Overrides** button.

4. Select the preferred language and enter the new label.

EDITIONS

To override custom labels, you must enable the Translation Workbench and add English as a supported language.

For example, using CT_Graph_Lead, change **Lead** to a label such as **External Contact** or any label that suits your needs.

Complete these steps for each label and you're all set.

Enable Surveys

Enable Surveys to create and send questionnaires to your patients.

1. In Setup, enter *Survey* in the Quick Find box, and click **Survey Settings**.

2. Enable Surveys.

3. For the default site, select the site you created using the Emergency Public Health template.

4. To allow survey owners to manage and export responses, enable Survey Owners Can Manage Responses.

Now that you've enabled surveys, it's time to create one.

Create the New Clinical Assessment Quick Action Button

Configure and add the New Clinical Assessment quick action to the Lead page layout. The quick actions launch the flow that launches a clinical assessment. This task is required for Contact Tracing for Public Health only.

1. In Setup, go to the Object Manager and select **Lead**.

2. Under **Buttons, Links, and Actions**, click **New Action**.

   a. For Action Type, select **Flow**.

   b. In the Flow field, select the name of the flow, such as *Clinical Assessment Flow*.

   c. In the Label field, provide the label the user sees, such as *New Clinical Assessment*.

   d. In the Name field, type *New_Clinical_Assessment*.

3. Click **Save**.

4. Repeat these steps to configure an identical New Clinical Assessment quick action on the Account object.

5. Add the quick actions to the page layouts for the Triage Layout for Lead and ERM Patient Layout of Account.

Create the New Contact Encounter and New Household Member Quick Action Buttons

Create a quick action for new contact encounters and household members. This task is required for Contact Tracing for Public Health only.

1. In Setup, go to the Object Manager and select **Account**.

2. Under **Buttons, Links, and Actions**, click **New Action**.

   a. In the Label field, provide the label the user sees, such as *New Contact Encounter*.

   b. In the Name field, type *New_Contact_Encounter*.

   c. For Action Type, select **Flow**.

   d. In the Flow field, select the name of the flow, such as *Contact Collection*.

3. Click **Save**.

4. Repeat these steps to configure an identical New Household Member quick action on the Account object.

5. Add the quick actions to the page layouts for the ERM Patient Layout of Person Account.

Create the Contact Outreach Quick Action Button

Configure and add the Contact Outreach quick action to the page layouts for the Task record types used for contact outreach. This quick action launches the flow that captures information about people who encountered an infected person. This task is required for Contact Tracing for Public Health only.

1. In Setup, go to the Object Manager, and select **Task**.

2. Under **Buttons, Links, and Actions**, click **New Action**.

    a. For Action Type, select **Flow**.

    b. In the Flow field, select **Contact Outreach**.

> 📝 Note: If you do not see the **Contact Outreach** option in the Flow field, activate the Contact Outreach flow, and then perform this step.

    c. In the Label field, provide the label the user sees, such as *Contact Outreach*.

    d. In the Name field, type *Contact_Outreach*.

3. Click **Save**.

4. Add the quick action to the page layouts for the Task record types used for contact outreach.

Create the New Employee Evaluation Quick Action Button

Configure and add the New Employee Evaluation quick action to the Task and Person Account page layouts. The quick actions launch the flow that captures employee contact information. This task is required for Contact Tracing for Employees only.

1. In Setup, go to the Object Manager and select **Account**.

2. Under **Buttons, Links, and Actions**, click **New Action**.

    a. For Action Type, select **Flow**.

    b. In the Flow field, select the name of the flow that you created for employee contact collection.

    c. In the Label field, provide the label the user sees, such as *New Employee Evaluation*

    d. In the Name field, type *New_Employee_Evaluation*.

3. Click **Save**.

4. Repeat these steps to configure an identical New Employee Evaluation quick action on the Task object.

5. Add the quick actions to the page layouts for the Task and Person Account record types used for tracing employee contacts.

Create a Lead Process for Status Assignment

Create a process to assign statuses to the lead for the External Contact Tracing record type. This task is required for Contact Tracing for Employees only.

> 📝 **Note:** There is no conversion process for the lead records associated with external contact tracing record types. This process enables you to assign different statuses to leads.

1. From Setup, enter `Lead Process` in the `Quick Find` box, select **Lead Processes**, and then click **New**.

2. Select **Master** in the Existing Lead Process field.

3. Enter `External Contact Tracing` in the Lead Process Name field.

4. Enter a description for the process such as `Process to add status to leads`.

5. Click **Save**.

6. Add or remove statuses based on your company's needs.

Configure and Activate the Employee Contact Collection Flow

The Employee Contact Collection flow is installed as a standard flow template. Add the life event that the flow creates and activate the flow so you can use it in the employee contact collection process. This task is required for Contact Tracing for Employees only.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.

2. Click the name of the **Employee Contact Collection** flow.

3. Click **Save As** to clone the managed flow so that you can edit it.

4. Enter a new name for the flow and click **Save**.

5. From the Manager tab, search for the Person Life Event variable and open it.

6. In the Name field, replace the existing text with `Enrolled in program`.

7. If you're using Contact Tracing without the rest of Work.com, you need to disable the `EVOKE_EMPLOYEE_CRISIS_ASSESSMENT_APEX_ACTION` variable.

   a. In the Manager tab, find and select the `EVOKE_EMPLOYEE_CRISIS_ASSESSMENT_APEX_ACTION` variable.

   b. Change the default value to `{!$GlobalConstant.False}`.

   c. Click **Done**.

   If you don't have the rest of Work.com and you don't disable this variable, your flow won't work.

8. Save your changes and activate the flow.

You may see warnings when you save the flow. They don't keep the flow from running and may not be applicable to your org.

Use Process Builder to Convert Leads to Patients

Enable care coordinators to convert leads to patient records within Health Cloud by setting up a simple conversion process in Process Builder. This task is required for Contact Tracing for Public Health only.

1. From Setup, enter `Process Builder` in the `Quick Find` box, select **Process Builder**, and then click **New**.

   You can also modify an existing active process by cloning a new inactive copy of it. The copy can be a new process or a new version of the current process.

2. Fill out these fields that define your process.

Field	Description
Process Name	The name for your process, such as `Lead to Patient`.
	This name appears in the process management page, so consider naming your process so that you can differentiate it from other processes.
API Name	The name that's used by the API and managed packages.
	This name must be unique across all processes and flows. The name must begin with a letter and use only alphanumeric characters and underscores. It can't include spaces, end with an underscore, or have two consecutive underscores.
	After it's saved, `API Name` can't be changed for the process.
Description	Optional. A description for your process.
	The description also appears in the process management page. It's intended to help you differentiate between processes, such as to understand what a process does.
The process starts when	Select the option to start this process when `A record changes`.

3. Click **Save**.

4. In the new process, associate the process with an object, and specify when to start the process.

   a. Click `Add Object` and type `Lead`, then select the Lead object.

   b. In the `Start the process` field, select **when a record is created or edited**.

5. Click **Save**.

6. Next, define the criteria that must be true before the process can execute the associated actions.

   a. Click **Add Criteria**.

   b. Type `Not Converted` in the Criteria Name field.

   c. Select `Conditions are met` as the criteria for executing the action.

   d. Set these conditions.

Field	Operator	Type	Value
Converted	Equals	Boolean	False
IsMarkedForPatientConversion	Equals	Boolean	True

    e. For `Conditions`, select `All of the conditions are met (AND)`.

    f. Click **Save**.
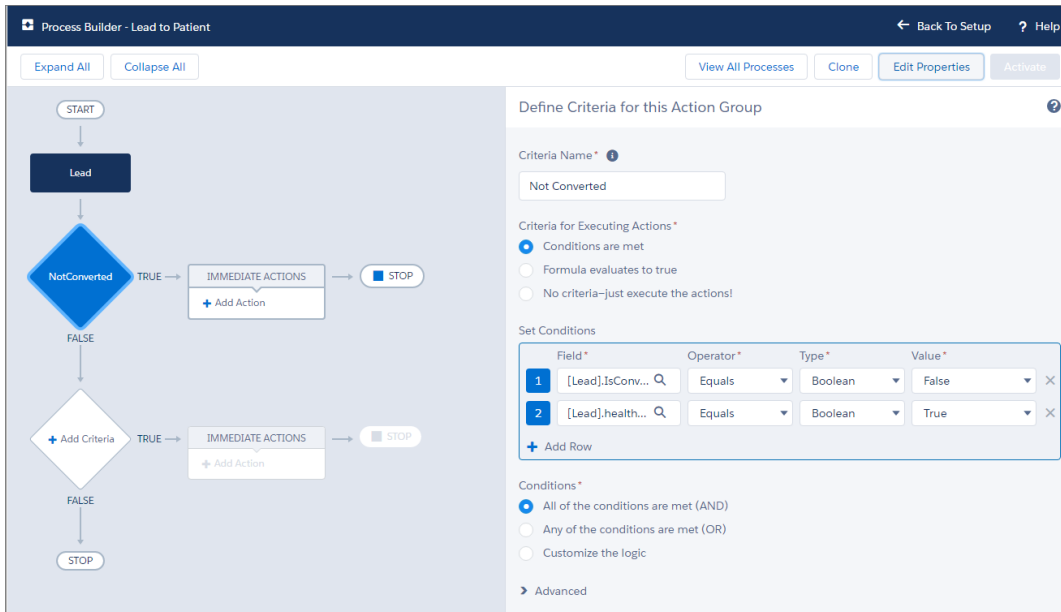
7. Next, define the actions that are executed when the criteria are met.

    a. Click **Add Action**.

    b. Select `Apex` in the Action Type field.

    c. In the Action Name field, type *Lead to Individual*.

    d. Select the Lead to Individual Conversion apex class.

    e. In the **Set Apex Variables** field, select these options.

Field	Type	Value
leadIds	Field Reference	Lead ID

    f. Click **Save.**

    g. Repeat the previous steps and create another Apex action type named *Create Care Plan* and associate it with the Create Care Plan and Care Team Apex class.

       In the **Set Apex Variables** field, select these options.

Field	Type	Value
leadIds	Field Reference	Lead ID

    h. Click **Save**.
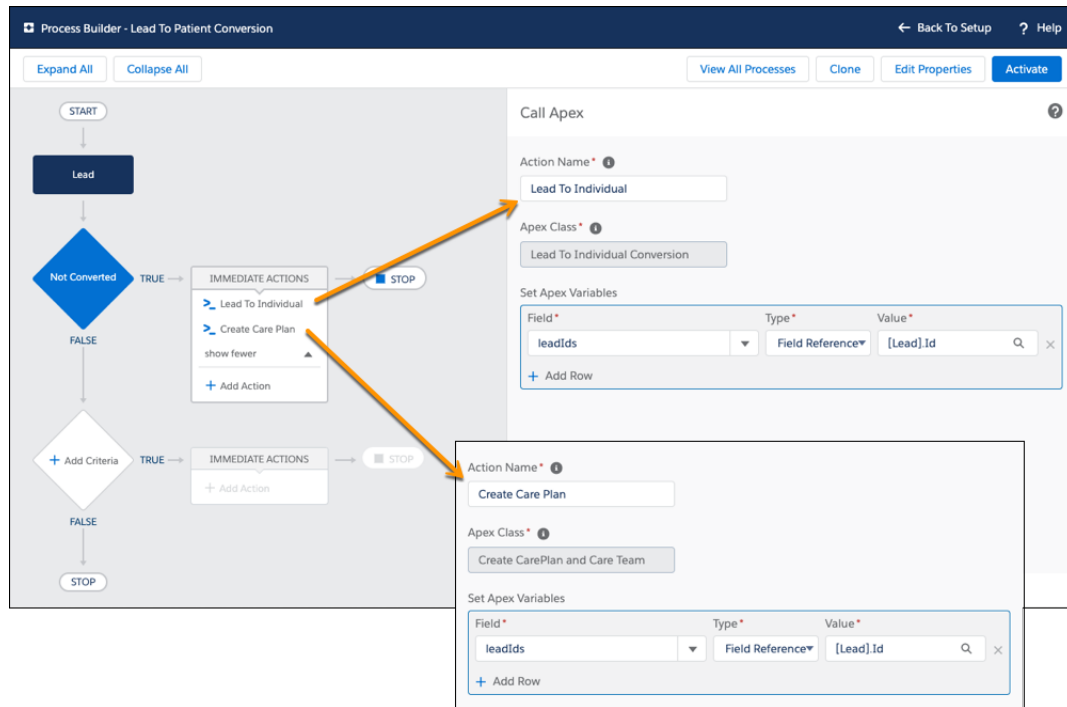
8. Click `Activate` to begin using the process. Salesforce doesn't start using a process to evaluate records as they're created or edited until you activate it.

Synchronize Employee Records with Person Account Records

You can use Apex to synchronize Employee records with Person Account records.

> 📘 **Note:** If you use Employee Concierge, the employee and person account synchronization is performed by the Employee Concierge application and not by Contact Tracing. Employee Concierge users don't have to perform these setup actions. Instead, use the Employee to Person Account Field Mapping for Employee Concierge to map those fields.

Use Record IDs to Synchronize Records

Apex Global Class

```
Map<String, List<Database.SaveResult>> syncPersonAccountsFromEmployees(Set<Id>
employeeRecordIds);
```

- Recommended for batch processing.
- Performs an update transaction on PersonAccount records when the record exists based on the EmployeeNumber value in the SourceSystemId field of the PersonAccount object.
- Processes only Employee records when the EmployeeNumber field has a value.

- Returns the map of SaveResult.
- Mapping of the fields from Employee to Person Account is configured in the Employee_PersonAccount_FieldMapping custom metadata.

Use Employee Records to Synchronize Records

Apex Global Class

```
Map<String, List<Database.SaveResult>> syncPersonAccountsFromEmployees(List<SObject>
employeeList);
```

- Recommended in insert or update trigger processing.
- Performs an update transaction on PersonAccount records when the record exists based on the EmployeeNumber value in the SourceSystemId field of the PersonAccount object.
- Processes only Employee records with the EmployeeNumber field.
- Mapping of the fields from Employee to Person Account is configured in the Employee_PersonAccount_FieldMapping custom metadata.
- Each Employee record must contain all the fields configured in the Employee_PersonAccount_FieldMapping custom metadata.
- Uses the value provided in the input instead of querying the Employee object.

⊘ Important:

  - If you use Employee Concierge, the employee and person account synchronization is performed by the Employee Concierge application and not by Contact Tracing.
  - If you need to update employee numbers for employees that already have person accounts, make sure that you update the employee numbers in their person account records first before updating their employee records. If you don't update the person account records first, then the person account sync job in Contact Tracing creates new person account records for those employees.

Synchronize Employee Crisis Assessments

Apex Global Class

```
Map<String, List<Database.SaveResult>> syncAssesmentStatus(List<SObject> crisisAssessments);
```

- Recommended in insert or update trigger processing.
- Performs an update transaction on the Status Group field in PersonAccount records based on the Assessment field value in the Employee Crisis Assessment object.
- Processes only Employee records with the EmployeeNumber field.
- Mapping of the status values from Employee Crisis Assessment (Field: Assessment) to Person Account (Field: Status Group) is configured in the AssessmentStatusMappings custom metadata.
- If Enable Contact Tracing is enabled in the AssessmentStatusMappings custom metadata, a task for Employee Contact Tracing follow up is created.

Batch Processing Sample Code

Sample code for using Record IDs to synchronize records.

```
public class SyncEmployeesBatchable implements Database.Batchable<sObject>{

   public Database.QueryLocator start(Database.BatchableContext BC){
      return Database.getQueryLocator('Select Id from Employee');
   }

   public void execute(Database.BatchableContext BC, List<Employee> scope){
       Set<Id> empIds = new Set<String>();
       for(Employee emp: scope) {
           empIds.add(emp.Id);
       }
       {NameSpace}.EmployeeService empService = new {NameSpace}__EmployeeService();
       empService.syncPersonAccountsFromEmployees(empIds);
   }

   public void finish(Database.BatchableContext BC){
   }
}
```

Scheduled Apex Sample Code

Sample code for using Employee records to synchronize records.

```
public class SyncEmployeesInBatchesSchedule implements Schedulable {
    public void execute(SchedulableContext ctx) {
        SyncEmployeesBatchable syncEmployees = new SyncEmployeesBatchable();
        Database.executeBatch(syncEmployees);
    }
}
```

Employee Trigger Sample Code

Sample code for creating or updating person accounts based on employee record changes. Person accounts are used in the Employee Contact Tracing app.

Create a trigger on the Employee object. This trigger creates or updates a person account with an employee record type every time an employee record is created or updated. The Employee Person Account Field Mapping custom metadata type holds the mappings between the Employee object and the Person Account object. We recommend that you create a test class to test this trigger in a sandbox environment before deploying the trigger in a production org.

```
trigger SyncPersonAccount on Employee (after insert, after update) {
    emptracing.EmployeeService empService = new emptracing.EmployeeService();
    empService.syncPersonAccountsFromEmployees(Trigger.New);
}
```

Employee Crisis Assessment Trigger Sample Code

Sample code for updating the Status Group field value of the Person Accounts object based on the employee crisis assessment record changes. Create a trigger on the Employee Crisis Assessment object.

This trigger updates the Status Group field on a person account when a new employee crisis assessment record is added. The Assessment Status Mapping custom metadata type holds the mappings between the employee crisis assessment record and the Status Group field on the person account record. When the Enable contact tracing field is selected in the mapping, the trigger creates a task and associates it with the person account.

📝 Note: Make sure that Completed (Closed) isn't the default picklist value of the Status field on the Task object for employee contact tracing record types. When **Completed (Closed)** is the default Status field picklist value, the trigger fails.

We recommend that you create a test class to test this trigger in a sandbox environment before deploying the trigger in a production org.

```
trigger SyncEmployeeCrisisAssessment on EmployeeCrisisAssessment (after insert, after
update) {
    emptracing.EmployeeService empService = new emptracing.EmployeeService();
    empService.SyncAssesmentStatus(Trigger.New);
}
```

Configure the Employee Person Account Field Mapping Custom Metadata Type

The Employee Person Account Field Mapping custom metadata type allows you to configure the mapping of the Employee object field to the Person Account object field. We've delivered a set of mappings that you can use without making any changes. You can also customize the mappings, if necessary. This task is required for Contact Tracing for Employees only.

If you use Employee Concierge, the employee and person account synchronization is performed by the Employee Concierge application and not by Contact Tracing. Employee Concierge users don't have to perform these setup actions. Instead, use the Employee to Person Account Field Mapping for Employee Concierge to map those fields.

1. In Setup, enter `Custom Metadata Types` in the Quick Find box, and click **Custom Metadata Types**.

2. Select **Employee Person Account Field Mapping**, and click **Manage Employee Person Account Field Mappings**.

3. Ensure that the following values are defined.

Label Name	Description
Employee Field	The Employee object field name that the Person Account object field is mapped to.
Person Account Field	The Person Account object field name that the Employee object field name is mapped to.
Active	Indicates whether this configuration is active.

4. Save your settings.

📝 Note: Make sure that your employee records have an employee number recorded in the Employee Number field. This value is used for the Employee-Person Account synchronization process, and without it, the Employee Contact Collection flow will not work.

Customize Employee Crisis Assessment Picklist Values

Add custom picklist values that are used in custom metadata and mappings between the Employee Crisis Assessment object and the Assessment object.

1. In Setup, go to the Object Manager and select **Employee Crisis Assessment**.

2. Click **Fields & Relationships** and select Assessment.

3. Click **New** and add picklist values for COVID-19 No Symptoms, COVID-19 Symptoms or Exposed, COVID-19 Test Positive, Declined, and Exposed.

   Make sure to move the values to the Selected Values column.

Add the Contact Tracing Status Report to the Command Center Dashboard

Add the Contact Tracing Status lightning component to the Command Center dashboard to view a report that shows you the contact tracing and health status of your employees.

Contact Tracing Status

Location Name	Status Group	Summary Count
	Not Monitored	1
Landmark-F1	Exposed	1
	Symptomatic	1

View Report
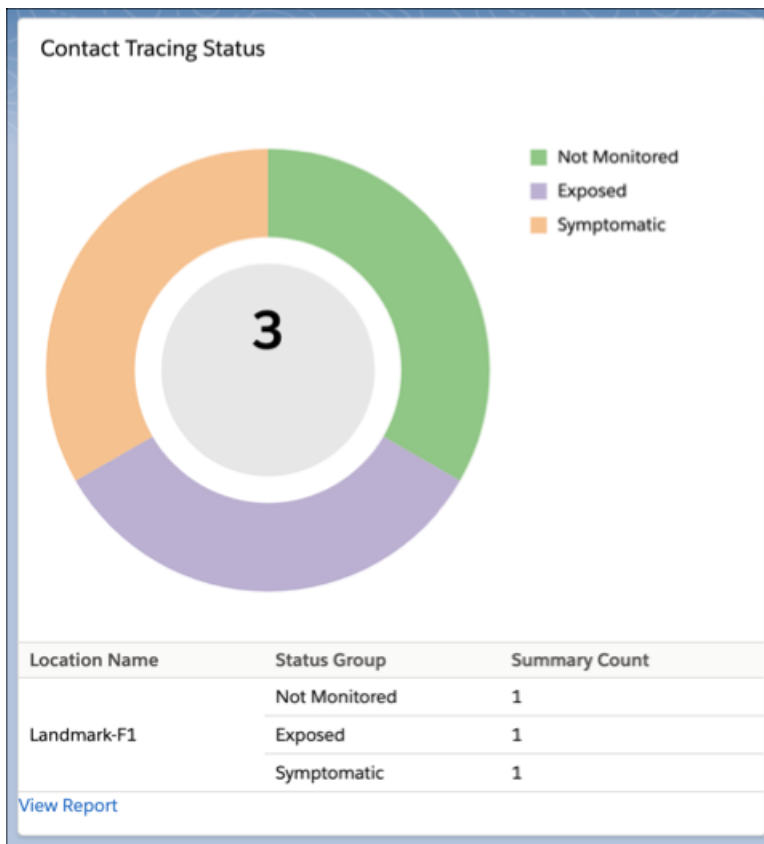
🛇 Important: The Contact Tracing Status report is designed to show employee counts by location. To show accurate results in your report, pick a location in the Workplace Command Center that meets any one of these criteria:

- The topmost location in the hierarchy
- The lowest location in the hierarchy
- The immediate parent location of the lowest location in the hierarchy

1. Edit the Command Center home page in Lightning App Builder.

2. In Lightning App Builder, add the Contact Tracing Status component to the page.

3. Save the page.

4. Activate the page for the applicable apps and profiles.

Configure Emergency Services

Create emergency services for businesses and individuals. You can configure different services and programs that are available for public agencies and hospitals, such as emergency supply requests. For individuals, create programs such as food delivery services or short-term housing requests.

📝 **Note:** To test your implementation, make sure to log in as a user to create a service request. Requests are associated with person accounts, and the flow can't run correctly for someone logged in as an admin.

Create Person Accounts for Self-Registering Site Users

Make it easy for your users to self-register in your emergency services community. Instead of creating users as contacts under a single business account, you can assign each self-registering user to a person account.

Add Related Lists to Page Layouts

Add related lists to page layouts so your users have the information they need at their fingertips.

Add Custom Visit Priorities

Track the priority of your visits by creating custom priority picklist values.

Customize Picklist Values for Emergency Services

Add a custom picklist value and remove unnecessary picklist values for the Service Category field.

Create a Queue for Incoming Service Requests

Set up the queue for incoming emergency service requests so that they can be reviewed and assigned to be fulfilled.

Configure Emergency Service Applications

Create service applications for businesses and individuals.

Set Up an Approval Process for Service Request Applications

Configure an automated process to track and approve service request applications.

Set Up Inspections

When you set up inspections, your agency can create inspections for businesses and organizations, manage violations, and implement enforcement actions. Use assessment indicators that the inspector using the inspection app can access.

Set Up Service Execution for Field Responders

After setting up emergency response applications, configure action plans and Visits so your field responders can complete service requests.

Deliver Emergency Supplies

When someone requests a delivery of food or medicine, make sure that you can deliver it quickly and efficiently.

Create Training Courses

Create records for classes authorized by a government authority that qualify a license or permit.

Give emergency supplies delivery personnel precise location information so that they can get important emergency supplies to the people who request it. Salesforce Maps injects location intelligence into field operations to make emergency supply delivery services more efficient. The Create a Visit for Emergency Request Event flow ties the emergency request record to the event. When an emergency event is created, the Schedule an Emergency Visit process starts the flow. The flow creates the visit record, applies the action plan template, and creates the tasks.

Create Person Accounts for Self-Registering Site Users

Make it easy for your users to self-register in your emergency services community. Instead of creating users as contacts under a single business account, you can assign each self-registering user to a person account.

📝 **Note:** Before you follow these steps, enable Person Accounts.

You set up self-registration for person accounts from your site's Login & Registration page. Under Registration, select **Allow external users to self-register**. Make sure that the **Account** field is empty. When you remove the Account information, new users are created as person accounts.

Salesforce creates a separate person account for each self-registering user. You can specify a default profile while setting up the self-registration. You can also customize the self-registration functionality with the self-registration Apex controller (`CommunitiesSelfRegController`), but it's not required.

Add Related Lists to Page Layouts

Add related lists to page layouts so your users have the information they need at their fingertips.

1. From Setup, open **Object Manager**, and use Quick Find to select the object to change.

2. Click **Page Layouts** and **Related Lists**.

   Add these related lists to the page layouts.

Object	Related List
Account	Business License, Business License Application, Individual Application, Emergency Request, Public Complaint
Assessment Task	Notes, Files
Authorization Application Place	Authorization Location Access Schedule
Business License Application	Approval History, Attachments, Files, Visits
Case	Individual Application, Visits
Individual Application	Emergency Request Layout: Approval History, Emergency Request, Visits Location Access Permit Layout: Approval History, Attachments, Authorization Application Place, Files Training Certificate Layout: Approval History, Attachments, Files
Inspection Assessment Indicator	Files, Regulatory Code Violation

Object	Related List
Person Account	Business License, Emergency Request, Individual Application, Training Course Participants
Public Complaint	Visits
Regulatory Code Violation	Files, Violation Enforcement Action
Visit	Action Plan, Assessment Tasks, Notes, Regulatory Code Violation, Visitors, Visited Parties

3. Click **Save**.

Add Custom Visit Priorities

Track the priority of your visits by creating custom priority picklist values.

Plan carefully when you create task types so that there aren't too many choices in the picklist.

1. From Setup, enter `Visit` in the `Quick Find` box.

2. Click **Fields & Relationships** and select **Visit Priority**.

3. In the Picklist Values section, click **New**.

4. Add one or more picklist values in the text box, such as `High`, `Medium`, or `Low`. Put each value on its own line.

5. Click **Save**.

6. To change the order in which the values display in the picklist, click **Reorder**.

7. To specify a default value for the picklist, select the `Default` checkbox for that task type.

Customize Picklist Values for Emergency Services

Add a custom picklist value and remove unnecessary picklist values for the Service Category field.

1. In Setup, go to the Object Manager and select **Regulatory Authorization Type** .

2. Click **Fields & Relationships** and select **Category**.

3. In the Service Categories Picklist Values section, deactivate the License and Permit picklist values.

4. Click **New** and add the picklist value `Emergency Service` as the default value.

Create a Queue for Incoming Service Requests

Set up the queue for incoming emergency service requests so that they can be reviewed and assigned to be fulfilled.

1. From Setup, enter `Queues` in the `Quick Find` box, then select **Queues**.

2. Click **New**.

3. Enter Incoming Case Default Queue the queue label and Incoming_Case_Default_Queue as the queue name. The label is the name of the list view that users work from.

4. Choose whom to notify when new records are added to the queue.

5. If your org uses divisions, select the queue's default division.

6. Select **Case** as the object to include in the queue.

7. Add queue members. Members can be individuals, roles, public groups, territories, connections, or partner users.

8. Save the queue.

Configure Emergency Service Applications

Create service applications for businesses and individuals.

Create Records for Emergency Service Organizations

Regulatory authorities are the government agencies that provide emergency services.

Create an Emergency Request

Citizens or businesses submit requests for emergency assistance using the Emergency Response site.

Create Records for Different Types of Emergency Services

Create records for the type of emergency services your agency or other agencies offer. For example, create a service type for temporary housing requests or medicine or food delivery.

Create a Business Type

Create a business type to capture the activities of a business or an individual applying for a license or a permit.

Create Records for Different Types of Emergency Services

Create records for the type of emergency services your agency or other agencies offer. For example, create a service type for temporary housing requests or medicine or food delivery.

Create an Inspection Type for Emergency Services

Inspection types define the scope of how you deliver the services that your agency offers. For example, `Prescription Drug Delivery` defines the kind of visit that your dispatcher can to a delivery person.

Create Emergency Service Authorizations

Use authorizations to approve specific types of applications such as for recurring financial assistance payments or allocation of equipment and supplies.

Create Records for Emergency Service Products

Create a catalog of products that are associated with the types of emergency services you provide. You can include products from Health Cloud care programs in the products you provide as part of a service request.

[Create Record Types for Each Application Type](#)

Create record types for business and individual applications so that you can have different application statuses, categories, and information for each application type. It's a best practice to use the same name for record types as the application types.

[Customize Application Status Picklist Values](#)

Add custom picklist values that appear in the Application Status field for individual and business license applications.

Create Records for Emergency Service Organizations

Regulatory authorities are the government agencies that provide emergency services.

1. From the App Launcher, find and open **Regulatory Authority**, and then click **New**.

2. Enter the name and description of the government agency.

3. Click **Save**.

SEE ALSO:

[RegulatoryAuthority](#)

Create an Emergency Request

Citizens or businesses submit requests for emergency assistance using the Emergency Response site.

1. From the App Launcher, find and open **Emergency Requests**, and then click **New**.

2. Complete the following fields, as necessary.

Field	Description
Account	Account name for the applicant.
Business License Application	Identifier of the business application.
Date Required	Date that the service is required.
Delivery Address	Address to which the service must be delivered.
Delivery Health or Safety Concerns	Health and safety instructions for the delivery person.
Delivery Instructions	Instructions for the delivery person.
Disinfectant Quantity	Amount of disinfectant requested.
Drop-Off Donation	Indicates whether the donation can be dropped off.
Email	Applicant's email address.
Face Shield Quantity	Number of face shields requested.
Gloves Quantity	Number of gloves requested.
Gowns Quantity	Number of gowns requested.
Hand Sanitizer Quantity	Number of bottles of hand sanitizer requested.
Individual Application	Identifier for the application.

Field	Description
Individual Application	Identifier of the individual application.
Masks Quantity	Number of masks requested.
Organization Address	Address of the requesting organization.
Organization Name	Name of the requesting organization.
Organization Type	Type of business or organization, such as Adult Day Health Care or Surgical Clinic.
Owner	Name of the person who submitted the request.
Phone	Applicant's phone number.
Primary Contact Name	Name of the primary contact associated with the request.
Primary Contact Phone	Phone number for the primary contact.
Request Details	Details regarding the request.
Requested Length of Stay	For temporary housing requests, the number of days requested for housing.
Requested Service	Type of service requested in the application.
Requested Start Date of Stay	For temporary housing requests, the first day temporary housing is requested.
Requestor Name	Name of the person requesting the service.
Requestor Name	Name of the person requesting an emergency service.
Request Reason	Reason that the applicant is requesting assistance.
Respirator Quantity	Number of respirators requested.
Safety or Protective Goggles Quantity	Number of protective goggles requested.
Secondary Contact Name	Name of a second person to contact.
Secondary Contact Phone	Phone number of the second person to contact.
Status	Application's status in the system, such as Ready for Distribution.
Ventilator Quantity	Number of ventilators requested.

3. Click **Save**.

Create Records for Different Types of Emergency Services

Create records for the type of emergency services your agency or other agencies offer. For example, create a service type for temporary housing requests or medicine or food delivery.

Create the following records, as necessary, for the way your org is set up.

- Emergency PPE Donation

- Emergency PPE Supply
- Food Delivery
- Medicine or Medical Supply Delivery
- Temporary Housing
- Well-Being Check

1. From the App Launcher, find and open **Regulatory Authorization Type**, and then click **New**.
2. Complete the following fields.

Field	Description
Name	Name of the type of service your agency offers.
Description	Description of the emergency service.
Regulatory Authorization Code	Identifier for the service.
Jurisdiction	Name of the area served by your agency.
Issuing Department	Name of the department that manages the service.
Processing Time	Average time it takes to process the service.
Measurement	Type of measurement used to account for processing time. For example, days or months.

3. Click **Save**.

After creating the service types, edit the Emergency Assistance Request, Emergency Supplies Donation, and Emergency Supplies Request flows per your requirement. For example, for the Emergency Assistance Request flow, edit the Type of Assistance Screen, and add your service types in the Requested Service field. Configure the flow path per your requirement.

Create a Business Type

Create a business type to capture the activities of a business or an individual applying for a license or a permit.

1. From the App Launcher, find and open **Business Types**, and then click **New**.
2. Complete the following fields.

Field	Description
Name	Name of the business.
Description	Description of the business.
Industry	Business category in which the business operates.
Activity Code	Type of entity performing the activity.
Authorization Activity Type	Category under which the business is authorized to operate.

3. Click **Save**.

Create Records for Different Types of Emergency Services

Create records for the type of emergency services your agency or other agencies offer. For example, create a service type for temporary housing requests or medicine or food delivery.

Create the following records, as necessary, for the way your org is set up.

- Emergency PPE Donation
- Emergency PPE Supply
- Food Delivery
- Medicine or Medical Supply Delivery
- Temporary Housing
- Well-Being Check

1. From the App Launcher, find and open **Regulatory Authorization Type**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	Name of the type of service your agency offers.
Description	Description of the emergency service.
Regulatory Authorization Code	Identifier for the service.
Jurisdiction	Name of the area served by your agency.
Issuing Department	Name of the department that manages the service.
Processing Time	Average time it takes to process the service.
Measurement	Type of measurement used to account for processing time. For example, days or months.

3. Click **Save**.

After creating the service types, edit the Emergency Assistance Request, Emergency Supplies Donation, and Emergency Supplies Request flows per your requirement. For example, for the Emergency Assistance Request flow, edit the Type of Assistance Screen, and add your service types in the Requested Service field. Configure the flow path per your requirement.

Create an Inspection Type for Emergency Services

Inspection types define the scope of how you deliver the services that your agency offers. For example, `Prescription Drug Delivery` defines the kind of visit that your dispatcher can to a delivery person.

1. From the App Launcher, find and open **Inspection Type**, and then click **New**.

2. Enter a name and a description for the inspection type.

3. Click **Save**.

Create Emergency Service Authorizations

Use authorizations to approve specific types of applications such as for recurring financial assistance payments or allocation of equipment and supplies.

1. From the App Launcher, find and open **Business License**, and then click **New**.

2. Complete the following fields.

Field	Description
Regulatory Authorization Type	Name of the type of emergency service.
Individual or Business Type	Indicates whether the application is from an individual or a business.
Country	Name of the county.
State	Name of the state.
Other	Other information.

3. Click **Save**.

Create Records for Emergency Service Products

Create a catalog of products that are associated with the types of emergency services you provide. You can include products from Health Cloud care programs in the products you provide as part of a service request.

1. From the App Launcher, find and open **Regulatory Authorization Type Product**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	Name of the product associated with the emergency service.
Product	Name of the product.
Regulatory Authorization Type	Name of the type of emergency service this product is associated with.

3. Click **Save**.

Create Record Types for Each Application Type

Create record types for business and individual applications so that you can have different application statuses, categories, and information for each application type. It's a best practice to use the same name for record types as the application types.

1. From the management settings for the appropriate application object, go to Record Types.

2. Click **New**.

3. Choose **Master** from the Existing Record Type dropdown list to copy all available picklist values, or choose an existing record type to clone its picklist values.

4. Enter a record type label that's unique within the object.

5. Enter a record type name.

6. Enter a description.

7. Select **Active** to activate the record type.

8. Select **Make Available** next to a profile to make the record type available to users with that profile. Select the checkbox in the header row to make it available for all profiles.

9. For enabled profiles, select **Make Default** to make it the default record type for users of that profile. Select the checkbox in the header row to make it the default for all profiles.

10. Click **Next**.

11. Choose a page layout option that determines which page layout displays for records with this record type:

    a. To apply a single page layout for all profiles, select **Apply one layout to all profiles** and choose the page layout from the dropdown list.

    b. To apply different page layouts based on user profiles, select **Apply a different layout for each profile** and choose a page layout for each profile.

12. Click **Save** to edit the values of items like application statuses and application type picklists available for the record type.

Customize Application Status Picklist Values

Add custom picklist values that appear in the Application Status field for individual and business license applications.

1. In Setup, go to the Object Manager, and select **Individual Application**.

2. Click **Fields & Relationships**, and select **Application Status**.

3. Click **New**, and add picklist values for applications such as `Submitted`, `In Review`, or `Approved`.

4. Repeat these steps for the Business License Application object.

Set Up an Approval Process for Service Request Applications

Configure an automated process to track and approve service request applications.

Create Locations for Location Access Permits

When site users request a permit to access a building or a place, you can provide them with a set of locations and addresses from which to choose.

Customize Emergency Service Application Status Values

Add custom picklist values that appear in the application status path.

Enable Paths

Create Paths to guide users and reviewers along the application statuses in a review process.

Create Paths to Track Application Statuses in the Review Process

Create a path for each record type so that your users can see the next step in the application lifecycle.

Add an Approval Path to an Application Page

Add an approval path and the applications related list to the Individual Application and the Business License Application pages so that your approvers can process requests efficiently.

Create an Application Queue for Reviewers

Use a queue for reviewers to manage their application review backlog.

Create an Approval Process for Applications

Automate the emergency service application review and approval processes by creating an approval process.

Use Process Builder to Submit Requests or Applications

Use Process Builder to automate your processes like scheduling an emergency visit or approving applications.

Create an Email Template with a QR Code

Use email templates to save time and standardize email sent by you or others in your organization. Use merge fields or enhanced letterhead if you need them. Templates you create are automatically private, but you can make them available for use by others in your organization.

Create Locations for Location Access Permits

When site users request a permit to access a building or a place, you can provide them with a set of locations and addresses from which to choose.

> **EDITIONS**
>
> Available in: **Enterprise**, **Performance**, and **Unlimited** editions

1. From the App Launcher, find and open **Location**, and then click **New**.

2. Enter the name of the location, such as `City Hall` and select a location type such as Municipal Building.

3. Save your work.

4. In the New Visitor Address field on the Details tab, select an address or click **New Address** and in the Parent field, select a location such as **City Hall**.

5. Select the location type and the address type for the address. (In our example, select **Municipal Building** for Location Type and **Secured Location** for Address Type.

6. Search for the address and enter any other optional information.

7. Save your work.

Customize Emergency Service Application Status Values

Add custom picklist values that appear in the application status path.

1. In Setup, go to the Object Manager and select **Individual Application**.

2. Click **Fields & Relationships** and select **Application Status**.

3. Click **New** and add picklist values for Distribution and Closed. The Submitted and the In Review status are available by default.

Enable Paths

Create Paths to guide users and reviewers along the application statuses in a review process.

To create a path, you must enable Paths.

1. From Setup, enter `Path Settings` in the Quick Find box.

2. Click **Enable**.

Create Paths to Track Application Statuses in the Review Process

Create a path for each record type so that your users can see the next step in the application lifecycle.

1. From Setup, use the Quick Find box to find **Path Settings**.

2. In Step 1 of path setup, enter basic information about the path, and click **Next**.

   a. Enter a unique name for the path.

   b. Optionally, change the API reference name.

   c. Select the Individual Application object for the path.

   d. Select **Master** as the record type.

   e. Select the **Application Status** picklist so that you can use its values in the path.

   f. Click **Next**.

3. In Step 2 of path setup, select key fields, enter guidance, and then click **Next**.

   a. For each step on the path, select up to five key fields.

   b. For each step on the path, enter up to 1,000 characters of guidance.

4. In Step 3 of path setup, to display an animation when the application reaches designated statuses, enable on-screen confetti. Decide whether to activate the path immediately, and click **Finish**. To activate the path later, return to Path Settings.

Add an Approval Path to an Application Page

Add an approval path and the applications related list to the Individual Application and the Business License Application pages so that your approvers can process requests efficiently.

1. On the Individual Application page, click the gear ⚙ icon, and select **Edit Page**.

2. In App Builder, add the Path and the Related List components to the Individual Application page.

3. Save and activate the page.

4. Select the App, Record Type, and Profile tab. Then select **Assign to Apps, Record Types, and Profiles** and **Emergency Response Console**.

5. Click **Save**.

6. Repeat these steps for the Business License Application page.

Create an Application Queue for Reviewers

Use a queue for reviewers to manage their application review backlog.

1. From Setup, enter Queues in the Quick Find box, and then select **Queues**.

2. Click **New**.

3. Enter a label and queue name. The label is the name of the list view that users work from.

4. Choose whom to notify when new records are added to the queue.

5. Add the Business Application object to Selected Objects field for business applications and Individual Application object to Selected Objects field for individual service requests.

6. Add queue members.

7. Save your changes.

8. If you need additional queues, repeat steps 2 to 7.

Create an Approval Process for Applications

Automate the emergency service application review and approval processes by creating an approval process.

There are several types of approval processes associated with Emergency Program Management for Public Sector. Depending on your needs, you can set up approval processes for each application type.

Object	Approval Process	Value for Specify Entry Criteria
Business License Application	Business Reopen Permit	Business License Application: Record Type equals Reopening Permit Request
Individual Application	Location Access Permit	Individual Application: Record Type equals Permit Request
Individual Application	Training Certificate	Individual Application: Record Type equals Training Certificate
Individual Application	Emergency Request	
Business License Application	Business Reopening Permit	

1. From Setup, enter `Approval Processes` in the Quick Find box, and then select **Approval Processes**.

2. For Manage Approval Processes For, select **Individual Application** or **Business License Application**.

3. Select **Create New Approval Process | Use Jump Start Wizard**.

4. For Name, enter the name of the approval process.

5. Accept the unique name.

6. For Specify Entry Criteria, select the field, operator, and value listed in the table and click **Next**.

7. For Select Approver, select **Automatically assign to queue** and select the name of the reviewer queue.

8. Save your changes.

9. Click **View Approval Process Detail Page**.

10. Complete the following steps to add an inspection as an approval step to each application.

    a. Click **New Approval Step**.

    b. Enter a name for the inspection step.

    c. Accept the unique name.

    d. Enter the step number.

    e. Select **All records should enter this step**.

    f. For Select Approver, select **Automatically assign to queue** and select the queue name.

    g. Select **Perform all rejection actions for this step AND all final rejection actions. (Final Rejection)**.

    h. Save your changes.

11. On the Approval Process page, click **Activate**.

Use Process Builder to Submit Requests or Applications

Use Process Builder to automate your processes like scheduling an emergency visit or approving applications.

1. From Setup, enter `Process Builder` in the Quick Find box, select **Process Builder**, and then click **New**.

2. Enter a name for the process. Accept the API name.

3. For `The process starts when`, select **A record changes**.

4. Click **Add Object**.

5. In Object, enter the name of the object the process is based on.

6. Select **when a record is created or edited**.

7. Click **Save**.

8. Next, configure the process to submit each Emergency Service Type to its corresponding Approval Process.

   a. Click **Add Criteria**.

   b. Enter a name for the criteria. Select **Conditions are met**.

   c. Set the conditions.

Process	Object	Field	Operator	Type	Value
Reopening Permit	BusinessLicenseApplication	BusinessLicense	Equals	String	Reopening_Permit_Request
Emergency Visit	IndividualApplication	IndividualApplication	Equals	String	Emergency_Request
Training Certification	IndividualApplication	IndividualApplication	Equals	String	Training_Certificate
Location Access Permit	IndividualApplication	IndividualApplication	Equals	String	Location_Access_Permit

   d. Select the radio button specifying that all of the conditions are met.

   e. Click **Save**.

   f. Click **Add Action**.

   g. For Action Type, select **Submit for Approval**.

   h. Enter a name for the action.

   i. For Approval Process, choose **Specific approval process** and enter the name of an approval process for this Regulatory Authorization Type.

   j. Click **Save**.

9. Click **Activate**.

Create an Email Template with a QR Code

Use email templates to save time and standardize email sent by you or others in your organization. Use merge fields or enhanced letterhead if you need them. Templates you create are automatically private, but you can make them available for use by others in your organization.

1. From the App picker, navigate to Email Templates and click **New**.

2. Enter a name for the template and select the related entity type.

3. Select the folder in which to store the template.

4. Compose the subject and body of the email.

5. Click the **Merge** icon and use the merge picker to insert merge fields.

6. Click the **Source** icon to add HTML code.

   Include the QR code for the permit by adding the following URL to the HTML inside of an image tag. `(<img src= "https://<your domain>/qrcode/{{{BusinessLicense.Id}}}" alt="QRCode"/>)`

7. Save your work.

Sample email template.

Sample HTML code.

```
<html style="overflow-y: hidden;">
<head>
<title></title>
</head>
<body style="height: auto; min-height: auto;"><br />
```

```
Hello, <br />
<br />
Your training certificate request is approved! Here are the details and your QR code:<br
/>
<br />
<table><tbody>
<tr><td><b>Name:</b></td><td> {!BusinessLicense.Name}</td>
<tr><td><b>Authorization Id:</b></td><td> {!BusinessLicense.Identifier}</td>
<tr><td><b>Issuer:</b></td><td> {!BusinessLicense.Issuer}</td>
<tr><td><b>Period Start:</b></td><td> {!BusinessLicense.PeriodStart}</td>
<tr><td><b>Period End:</b></td><td> {!BusinessLicense.PeriodEnd}</td>
<tbody></table>
<br />
Use the QR code to show the status of your permit.<br />
<br />
<img src="https://<your domain name>/qrcode/{{{BusinessLicense.Id}}}" alt="QR Code" />
<br />
Thanks,<br />
City & County of Hillwood</div>
</body>
</html>
```

SEE ALSO:

> *Salesforce Help*: Email Templates in Lightning Experience

Set Up Inspections

When you set up inspections, your agency can create inspections for businesses and organizations, manage violations, and implement enforcement actions. Use assessment indicators that the inspector using the inspection app can access.

Enable Notes
Enable Notes so that your users can add notes during inspections.

Add the Inspections App to the List of Navigation Items
Add the Inspection App to the items your users can access from the navigation bar.

Customize Inspection App Picklist Values
Add custom picklist values that appear in the Inspection App.

Create an Emergency Service Regulatory Code
Create regulatory code records for the different codes that pertain to reopening locations or permitting people to access locations.

Create an Emergency Service Assessment Indicator Definition
Each assessment indicator definition is a regulatory standard parameter that the inspector can check during an inspection.

Create an Emergency Service Regulatory Code Assessment Indicator
Assessment indicators are relevant regulatory standards that are applicable to businesses. Each assessment indicator definition is a regulatory standard parameter that the inspector can check during an inspection. For example, an assessment indicator for a reopening permit can include ensuring that tables in a restaurant are outside and more than 6 feet apart.

Create Assessment Tasks
Assessment tasks are the individual tasks that are performed during an inspection.

An assessment task definition associates an assessment task with an assessment indicator definition.

Create violation type records for different types of violations recorded during inspections.

Create violation enforcement action records to track enforcement actions related to a violation. For example, if a restaurant doesn't have proper social distancing measures, they can be fined or asked to close.

Create inspection type records for the different types of inspections required to issue license and permits.

Create action plan templates with different sets of tasks. You can then use the action plan template to create multiple inspections. For example, you create an action plan template for different license types such as restaurants, hair salons, or retail stores.

Add the tasks tot be performed for similar inspections to an action plan template. You can then use the template to create multiple inspections. For example, for a restaurant license action plan, include fire safety check tasks and hygiene safety check tasks.

Add the tasks tot be performed for similar inspections to an action plan template. You can then use the template to create multiple inspections. For example, for a restaurant license action plan, include fire safety check tasks and hygiene safety check tasks.

Enable Notes

Enable Notes so that your users can add notes during inspections.

1. From Setup, enter `Notes Settings` in the `Quick Find` box, then select **Notes Settings**.

2. Make sure **Enable Notes** is selected.

3. Click **Save**.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To enable Notes:
- Customize Application

  View Setup and Configuration

Add the Inspections App to the List of Navigation Items

Add the Inspection App to the items your users can access from the navigation bar.

1. From App Manager, find the Emergency Response Console app and click **Edit**.

2. Click **Navigation Items**, select the Inspection App and move it to Selected Items.

   📝 Note: If Visits is in the Selected Items column, move it back to the unselected column.

3. Save your work.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions

Customize Inspection App Picklist Values

Add custom picklist values that appear in the Inspection App.

Object	Field	Sample Values
Address	Location Type	Municipal Building, Skilled Nursing Facility, School
Address	Address Type	Mailing, Secured Area
Inspection Assessment Indicator	Result	Pass, Fail, Issue Make sure to select at least one value as a violation

1. In Setup, go to the Object Manager, and select the object to configure.
2. Click **Fields & Relationships**, and select the picklist field.
3. Click **New**, and add picklist values for that field.
4. Repeat these steps for remaining objects.

Create an Emergency Service Regulatory Code

Create regulatory code records for the different codes that pertain to reopening locations or permitting people to access locations.

1. From the App Launcher, find and open **Regulatory Codes**, and then click **New**.
2. Complete the following fields.

Field	Description
Name	Name of the regulatory code.
Subject	Subject of the code.
Description	Description of the code.
Active	Select the checkbox to activate the record.
Effective From	Date from which the code is effective.
Effective To	Date on which the code is no longer effective.

3. Click **Save**.

Create an Emergency Service Assessment Indicator Definition

Each assessment indicator definition is a regulatory standard parameter that the inspector can check during an inspection.

1. From the App Launcher, find and open **Assessment Indicator Definitions**, and then click **New**.
2. Complete the following fields.

Field	Description
Name	Name of the definition, such as `Employees Provided with PPE`.
Description	Description of the indicator definition, such as `Verify that all employees are provided with masks and gloves.`
Indicator Field Type	Data type of the field that contains the assessed value. For example, if the definition can be answered with true or false, then the data type is Boolean.

> 📝 **Note:** Only Boolean and String (Text) data types are supported for the **Indicator Field Type** field.

3. Click **Save**.

Create an Emergency Service Regulatory Code Assessment Indicator

Assessment indicators are relevant regulatory standards that are applicable to businesses. Each assessment indicator definition is a regulatory standard parameter that the inspector can check during an inspection. For example, an assessment indicator for a reopening permit can include ensuring that tables in a restaurant are outside and more than 6 feet apart.

1. From the App Launcher, find and open **Regulatory Code Assessment Indicators**, and then click **New**.

2. Complete the following fields.

Field	Description
Regulatory Code	Name of the regulatory code.
Assessment Indicator Definition	The name of the assessment indicator definition, such as `Outdoor Table Spacing.`

3. Click **Save**.

Create Assessment Tasks

Assessment tasks are the individual tasks that are performed during an inspection.

1. From the App Launcher, find and open **Assessment Task**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	The name of the task, such as `Observe tables being sanitized.`
Task Type	The type of the task to be performed during the inspection.
Assessment Task Definition	The name of the associated assessment task definition.
Parent	The visit associated with the assessment task.
Description	The description of the task to be performed during the inspection.

Field	Description
Status	The status of the task.
Sequence	The sequence in which the task must be performed.
Required	Indicates that the task must be performed to complete the inspection.

3. Click **Save**.

Create Assessment Task Definitions

An assessment task definition associates an assessment task with an assessment indicator definition.

1. From the App Launcher, find and open **Assessment Task Definition**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	The name of the assessment task definition.
Task Type	The type of the task to be performed during the inspection.
Assessment Task Definition Task Type	The name of the associated assessment task definition task type.
Assessment Task Definition Description	Description of the assessment task definition.

3. Click **Save**.

Create an Emergency Service Violation Type

Create violation type records for different types of violations recorded during inspections.

1. From the App Launcher, find and open **Violation Type**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	Name of the violation.
Description	Description of the violation.
Type	Type of violation, such as *Health and Safety*.
Severity	Severity of the violation, such as *Major Violation* or *Minor Violation*.

3. Click **Save**.

Create a Violation Enforcement Action

Create violation enforcement action records to track enforcement actions related to a violation. For example, if a restaurant doesn't have proper social distancing measures, they can be fined or asked to close.

1. From the App Launcher, find and open **Violation Enforcement Action**, and then click **New**.

2. Complete the following fields.

Field	Description
Description	Description of the enforcement action.
Date Created	Date when the action was created.
Type	Type of the enforcement action.
Compliance Due Date	Last date for compliance.
Status	Status of the enforcement action.
Date Resolved	Date when the action was resolved.
Priority	Importance of the enforcement action.
Resolution Notes	Notes related to the action resolution.
Violation	Regulatory code violation.

3. Click **Save**.

Create an Inspection Type

Create inspection type records for the different types of inspections required to issue license and permits.

1. From the App Launcher, find and open **Inspection Type**, and then click **New**.

2. Enter a name and description of the inspection type.

3. Click **Save**.

Create an Inspection Action Plan Template

Create action plan templates with different sets of tasks. You can then use the action plan template to create multiple inspections. For example, you create an action plan template for different license types such as restaurants, hair salons, or retail stores.

1. From the App Launcher, find and open **Action Plan Templates**, and then click **New**.

2. Enter a name and a description for the template.

3. Select the **Target Object** as **Visit**.

4. Select the **Action Plan Type** as **Visit Execution**.

5. Click **Save**.

Associate Tasks with an Action Plan Template

Add the tasks tot be performed for similar inspections to an action plan template. You can then use the template to create multiple inspections. For example, for a restaurant license action plan, include fire safety check tasks and hygiene safety check tasks.

> 📝 **Note:** Ensure that you added the required tasks before you publish a template because you can't add tasks to published templates.

1. From the App Launcher, find and open **Action Plan Templates**.

2. Select the required template.

3. Click **Add Tasks**.

4. Select an assessment task definition.

5. Select **Is Required** if you want to make the task mandatory to perform.

6. Click **Save**.

7. Click **Publish Template**.

Associate Tasks with an Action Plan Template

Add the tasks tot be performed for similar inspections to an action plan template. You can then use the template to create multiple inspections. For example, for a restaurant license action plan, include fire safety check tasks and hygiene safety check tasks.

> 📝 **Note:** Ensure that you added the required tasks before you publish a template because you can't add tasks to published templates.

1. From the App Launcher, find and open **Action Plan Templates**.

2. Select the required template.

3. Click **Add Tasks**.

4. Select an assessment task definition.

5. Select **Is Required** if you want to make the task mandatory to perform.

6. Click **Save**.

7. Click **Publish Template**.

Set Up Service Execution for Field Responders

After setting up emergency response applications, configure action plans and Visits so your field responders can complete service requests.

Create an Action Plan Template
Create action plan templates with different sets of tasks. You can then use the action plan template to create multiple visits. For example, you can have an action plan template for each type of emergency service you provide, such as emergency supplies or disaster food delivery.

Publish a Template
To use an action plan template to create visits, publish a template. Make sure to add the required tasks before you publish a template as you can't add tasks to published templates.

Create an Action Plan Template

Create action plan templates with different sets of tasks. You can then use the action plan template to create multiple visits. For example, you can have an action plan template for each type of emergency service you provide, such as emergency supplies or disaster food delivery.

1. From the App Launcher, find and open **Action Plan Templates**, and then click **New**.

2. Enter a name and a description for the template.

3. Select the **Target Object** as **Visit**.

4. Select the **Action Plan Type** as **Visit Execution**.

5. Click **Save**.

Publish a Template

To use an action plan template to create visits, publish a template. Make sure to add the required tasks before you publish a template as you can't add tasks to published templates.

1. From the App Launcher, find and open the **Action Plan Templates** item.

2. Select the required template.

3. Review the tasks that you added to the template and click **Publish Template**.

Deliver Emergency Supplies

When someone requests a delivery of food or medicine, make sure that you can deliver it quickly and efficiently.

Configure and Customize Visits
Configure and customize emergency supply dispatch and delivery. Add Action Plans to the Visit page

Add Create New Visit Quick Action Button
Add the Create New Visit button to the Emergency Request page so that you can create a delivery visit and fulfill the request.

Configure the Visit Flow Custom Metadata Type

Use the Emergency Request Visit Flow Setting custom metadata type to update the name of the action plan template for a visit using Salesforce Maps.

Create a Visit

A visit assigns when a delivery is made and who makes the delivery.

Add Action Plans to the Visit Page

Add the Action Plan component to the Visit page so that you can define the tasks associated with an emergency service request.

Configure and Customize Visits

Configure and customize emergency supply dispatch and delivery. Add Action Plans to the Visit page

1.
   Click ⚙ and select **Edit** on the Visit page layout.

   In App Builder, select the Action Plans List and drag the component onto the Visit Record Page. Click **Save** and **Activate**.

Add Create New Visit Quick Action Button

Add the Create New Visit button to the Emergency Request page so that you can create a delivery visit and fulfill the request.

1. In Setup, go to the Object Manager and select **Emergency Request**.

2. Under **Buttons, Links, and Actions**, click **New Action**.

   a. For **Action Type**, select Create Record.

   b. For **Target Object**, select Visit

   c. For **Label**, provide the label the user sees, such as *Request Supplies*

   d. For **Name**, type *Create Visit*.
      For example, *New Visit.*

3. Click **Save**.

Configure the Visit Flow Custom Metadata Type

Use the Emergency Request Visit Flow Setting custom metadata type to update the name of the action plan template for a visit using Salesforce Maps.

1. In Setup, enter *Custom Metadata Types* in the Quick Find box, and click **Custom Metadata Types**.

2. Select **Emergency Request Visit Flow Setting**.

3. Update the name of the action plan template to be used when scheduling a visit from Salesforce Maps.

4. Update the event type value to associate with the emergency request in SFMaps Custom Events setting.

5. Save your settings.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

Create a Visit

A visit assigns when a delivery is made and who makes the delivery.

1. From the App Launcher, find and open **Visits**, and then click **New** or create a visit from an individual application.

2. Select and address or a location from the **Place** field. Then select the location for which you are creating the visit.

3. Set a **Visit Priority**.

4. Optionally, select the account to which the location belongs.

5. Select whether the delivery is related to an individual or a business request in the Context field.

6. Select the type of visit.

7. Set the date and time that you expect the visit to start. The actual start time can vary based on runtime activity of the driver.

8. Set the date and time that you expect the visit to end.

9. Provide **Special Instructions** to the delivery person.

10. Select **People** from the **Visitor** list. Then select the name of the field responder that you want to assign for this visit.

11. Click **Save**.

Add Action Plans to the Visit Page

Add the Action Plan component to the Visit page so that you can define the tasks associated with an emergency service request.

1.
   Click ⚙ and select **Edit** on the Visit page to launch Lightning App Builder.

   In App Builder, select the Action Plans List and drag the component onto the Visit Record Page. Click **Save** and **Activate**.

2. Set the page as the org default page so that it's used for all Visit records.

3. Select **Desktop** as the form factor for the default page.

Create Training Courses

Create records for classes authorized by a government authority that qualify a license or permit.

1. From the App Launcher, find and open **Training Course**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	The name of the course, such as `Returning to Workplace`.
Description	The description of the course.
Status	Status of the course offering such as `Active`.
Total Credits	Number of credits offered for the course.
Total Hours	Hours required to complete the course.

3. Click **Save**.

Use Salesforce Maps for Efficient Emergency Service Delivery

Give emergency supplies delivery personnel precise location information so that they can get important emergency supplies to the people who request it. Salesforce Maps injects location intelligence into field operations to make emergency supply delivery services more efficient. The Create a Visit for Emergency Request Event flow ties the emergency request record to the event. When an emergency event is created, the Schedule an Emergency Visit process starts the flow. The flow creates the visit record, applies the action plan template, and creates the tasks.

Install Salesforce Maps

Get the Salesforce Maps managed package installed before you configure it for your users.

Create Base Objects to Plot on Maps

In addition to the commonly used base objects that Salesforce Maps plots for you, you can add other objects that help your reps in the field. Base objects can represent either Salesforce objects that include addresses, or Salesforce objects that look up to ones that include addresses.

Configure the Visit Flow Custom Metadata Type

Use the Emergency Request Visit Flow Setting custom metadata type to update the name of the action plan template for a visit using Salesforce Maps.

Additional Configurations for Salesforce Maps

Follow these steps for extra configurations required to use Salesforce Maps in Emergency Program Management.

Create Shape Layers

To see and manage geographic areas on a map, select and filter shape layers.

SEE ALSO:

Salesforce Help: Salesforce Maps Products for Managers and Administrators

Install Salesforce Maps

Get the Salesforce Maps managed package installed before you configure it for your users.

1. Click the installation URL that you received in an email message after you submitted the Salesforce Maps order form email. Then log in to Salesforce.

2. Select **Install for Admins Only**.

3. Click **Install**.

4. Select **Yes, grant access to these third party websites** and click **Continue**.

5. If a message indicates that the installation is taking longer than expected, click **Done**.

    We send you an email notification after the installation finishes. The installed package appears as a trial for up to 72 hours.

Create Base Objects to Plot on Maps

In addition to the commonly used base objects that Salesforce Maps plots for you, you can add other objects that help your reps in the field. Base objects can represent either Salesforce objects that include addresses, or Salesforce objects that look up to ones that include addresses.

1. From Setup, enter `Installed Packages` in the Quick Find box, and then select **Installed Packages**.

2. Click **Configure** next to the Salesforce Maps package.

3. Select **Base Object** > **Create New**.

4. Select the Emergency Request object.

5. Enter a name. Then select an address location based on either the corresponding Salesforce object or a related Salesforce record's ID.

6. Select the address and coordinate the options that you want maps to reference. Select among standard and custom address fields.

7. Save your changes.

Configure the Visit Flow Custom Metadata Type

Use the Emergency Request Visit Flow Setting custom metadata type to update the name of the action plan template for a visit using Salesforce Maps.

1. In Setup, enter `Custom Metadata Types` in the Quick Find box, and click **Custom Metadata Types**.

2. Select **Emergency Request Visit Flow Setting**.

3. Update the name of the action plan template to be used when scheduling a visit from Salesforce Maps.

4. Update the event type value to associate with the emergency request in SFMaps Custom Events setting.

5. Save your settings.

Additional Configurations for Salesforce Maps

Follow these steps for extra configurations required to use Salesforce Maps in Emergency Program Management.

1. Create Salesforce Maps base objects for the emergency request.

2. In Object Manager, select the Event object and add the value `Emergency Request Visit` to the Type field picklist. Set the field access to **Read Only** for users and **Visible** for the System Administrator.

3. Schedule and activate the Schedule an Emergency Visit process in Process Builder.

4. From Setup, enter `Flow` in the `Quick Find` box, then select **Flows**. Select and activate the Create a Visit for Emergency Request Event flow.

5. Associate the Emergency Request Visit type events to the Emergency Request.

   Specify that the event type is `Emergency Request Visits`.

6. Create records for Emergency Request and a Marker layer in Salesforce Maps that uses Emergency Request as the base object.

   a. Navigate to the Maps tab in Salesforce Maps.

   b. To save the marker layer privately so only you can see it, click **Saved** | **Personal**.

   c. Hover over New and select **Marker Layer**.

   d. Select Emergency Request as the base object

   e. Select filters, if necessary.

Create Shape Layers

To see and manage geographic areas on a map, select and filter shape layers.

1. Click **Layers**.

2. To save the shape layer privately so only you can see it, click **Saved** > **Personal**. Or, to share the shape layer with other maps users, click **Saved** > **Corporate**.

3. Hover over **New** and select **Shape Layer**.
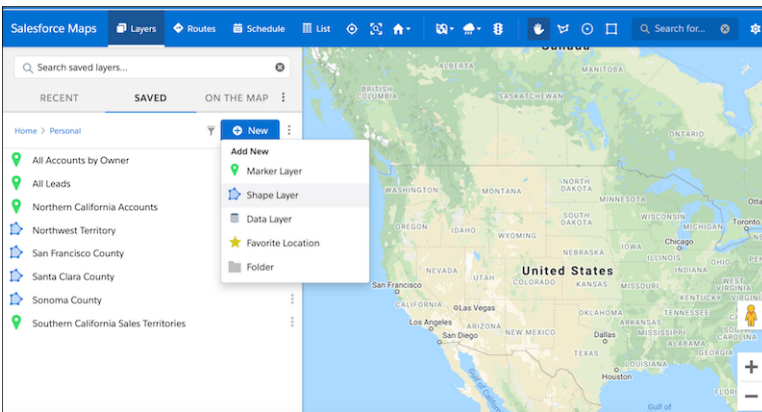
4. Enter a name and description.

5. Click **Next**.

6. Select a shape using filters, drawing on the map, or pasting postal codes.

   For example, to see all the neighborhoods in San Francisco, select **United States** > **Neighborhoods**, and then add a county filter.
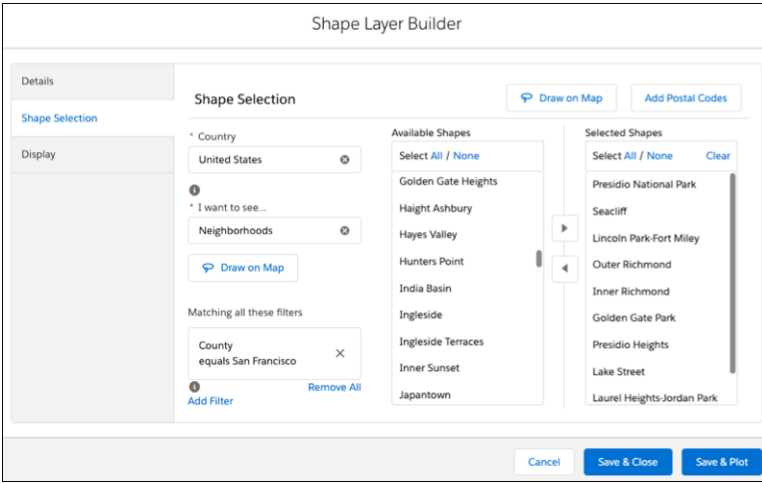
7. To create a label, adjust colors, and change other options for how your shape layer looks, click **Display**.
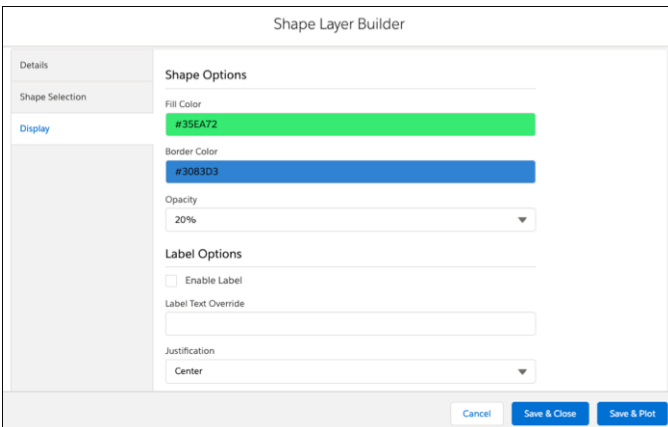
8. Save and plot your changes.
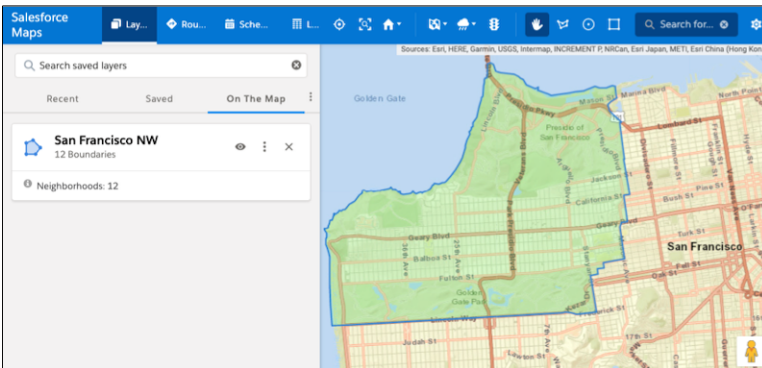
Configure Volunteer Management

With Volunteer Management, you can manage volunteer projects within Salesforce and make them visible on your Experience website. Volunteers can sign up for volunteer projects on your site and update their time spent on volunteer activities.

Volunteer Management helps you manage volunteer projects at scale and amplify reach by sharing volunteering opportunities to external experience sites. You can identify, create, and publish volunteer project information on your site. You can also easily assign a contact to a volunteer project within Salesforce.
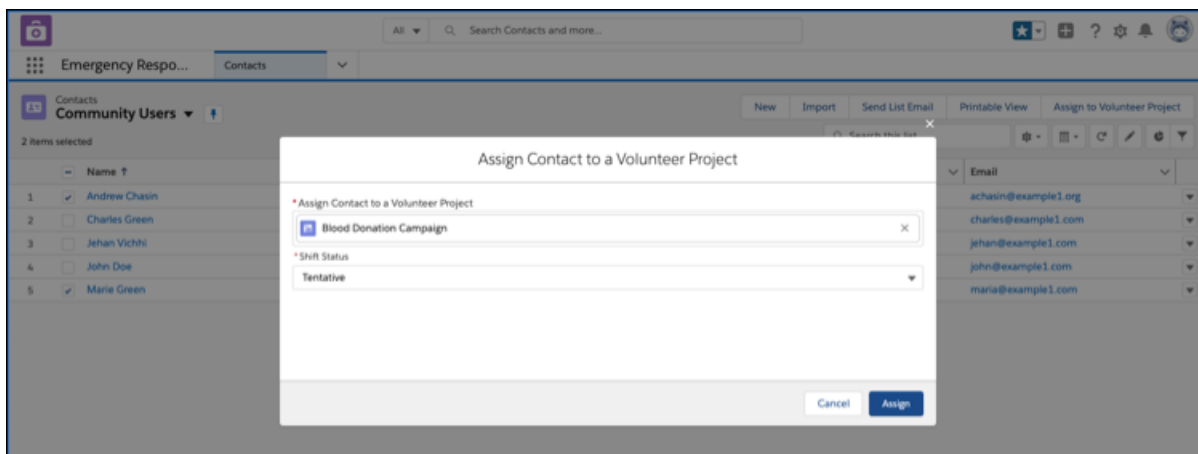
Volunteers can easily search the list of available volunteer projects, sign up for those that they're interested in, or accept assignments.
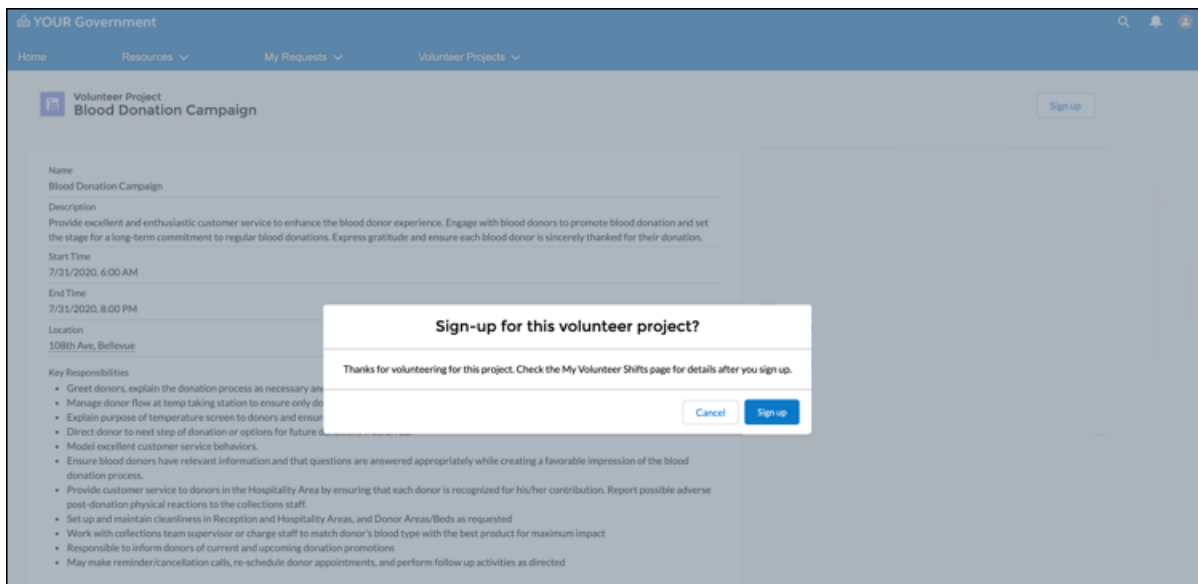
With just a few clicks, volunteers can view and update information about activities they signed up for. They can update the start and end times, add completed hours, or add information about a project.

Assign Permission Sets and Permission Set Licenses

With permission set licenses, users can get more features than with the basic license. To enable users to work with Volunteer Projects and Volunteer Shifts, assign them the necessary permission set licenses.

Assign User Profile and User License for Volunteers

To enable volunteers to work with Volunteer Projects and Volunteer Shifts, assign them the necessary user profile and user license.

Set Up Volunteer Management for Your Site

Set up your Emergency Response site to include Volunteer Projects and Volunteer Shifts. Allow volunteers to view and sign up for volunteer projects. Enable volunteers to view and perform various volunteer-shift-related updates such as updating completed hours, changing the status, or uploading a file attachment.

Configure the Standard ERM User Profile

Enable access for ERM users who coordinate Volunteer Management projects and shifts.

Configure Volunteer Shift Cancellation Settings

Automatically update the number of registered volunteers and volunteers needed when shifts are canceled.

Configure the Default Shift Status

Set the default status for the shift record when a volunteer signs up for a volunteer project from the experience site.

Assign Permission Sets and Permission Set Licenses

With permission set licenses, users can get more features than with the basic license. To enable users to work with Volunteer Projects and Volunteer Shifts, assign them the necessary permission set licenses.

1. In Setup, in the Quick Find box select **Users**, and then click the user name that you want to assign permission set licenses to.

2. In the Permission Set License Assignments section of the User record, click **Edit Assignments**.

3. Select one or more permission set licenses to assign.

    For volunteers (site users), make sure to select the Public Sector For Community permission set license.

    For government employees (internal Salesforce users), make sure to select the Emergency Response for Public Sector permission set license.

4. Save your changes.

    💡 Tip: To see what permission set licenses are available, go to Company Settings in Setup and click **Company Information**. The permission sets available to you depend in part on which features are included in your Salesforce contract.

5. For government employees (internal Salesforce users), make sure to assign the EmergencyResponseMgmt permission set.

    a. In Setup, in the Quick Find box select **Users** and then click the user name that you want to assign the permission set to.

    b. In the Permission Set Assignments section of the User record, click **Edit Assignments**.

    a. Add the EmergencyResponseMgmt permission set.

    a. Save your changes.

Assign User Profile and User License for Volunteers

To enable volunteers to work with Volunteer Projects and Volunteer Shifts, assign them the necessary user profile and user license.

To give volunteers (site users) access to the information they need, assign them the following:

- Customer Community Plus user license

- ERM Customer Community Plus user profile

- Public Sector For Community permission set license

1. In Setup, in the Quick Find box select **Users**, and click the username that you want to configure the user profile and user license for, and then click **Edit**.

2. In the User License field, select Customer Community Plus.

3. In the Profile field, select ERM Customer Community Plus User.

4. Save your changes.

Set Up Volunteer Management for Your Site

Set up your Emergency Response site to include Volunteer Projects and Volunteer Shifts. Allow volunteers to view and sign up for volunteer projects. Enable volunteers to view and perform various volunteer-shift-related updates such as updating completed hours, changing the status, or uploading a file attachment.

Prerequisites

Complete the setup and configuration of the Emergency Program Management site before setting up Volunteer Management for your site.

Create Page Layouts

Create page layouts for your Volunteer Project and Volunteer Shift pages. Page layouts control the organization of components on a page such as fields, buttons, custom links, and lists. Page layouts also help determine which fields are visible, read only, and required.

Configure the Community User Profile

Configure the Community User Profile to enable access to the tabs and page layouts that the volunteers can work with.

Configure the Guest User Profile

You can use a guest user profile to control public access to data, content, and objects in your site that don't require authentication. For example, you can configure the Guest User Profile to enable existing and potential volunteers to view volunteer projects without logging in to the site.

Set Up Self-Registration for Your Site

Enable self-registration so unlicensed guest users can join your site.

Configure the Volunteer Management Site Pages

Update the pages of your site to provide critical information for volunteers.

Configure the Location Type Picklist

Enable access for ERM users who coordinate Volunteer Management projects and shifts.

Configure Sharing Settings

Make automatic exceptions to your organization-wide sharing settings and give access to a defined set of users.

Configure Default Navigation Access Levels

Set up the default navigation access levels to make required pages publicly available.

Create Page Layouts

Create page layouts for your Volunteer Project and Volunteer Shift pages. Page layouts control the organization of components on a page such as fields, buttons, custom links, and lists. Page layouts also help determine which fields are visible, read only, and required.

Prerequisites

You must complete the setup and configuration for the Emergency Program Management site before creating page layouts for Volunteer Management.

Create the Volunteer Project Page Layout

The Volunteer Project page lets volunteers view and sign up for volunteer projects. Configure the layout and organization of components on the Volunteer Project page such as fields, buttons, custom links, and lists.

Create the Volunteer Shift Page Layout

The Volunteer Shift page lets volunteers view and update their volunteer activity information (Shift object). Configure the layout and organization of the components on the Volunteer Shift page such as fields, buttons, custom links, and lists.

Create the Volunteer Project Page Layout

The Volunteer Project page lets volunteers view and sign up for volunteer projects. Configure the layout and organization of components on the Volunteer Project page such as fields, buttons, custom links, and lists.

Complete the setup and configuration for the Emergency Program Management site before creating page layouts for Volunteer Management.

1. From Setup, open **Object Manager**, and use Quick Find to search for the Volunteer Project object.

2. Click **Page Layouts** and then click **New**.

3. Enter a name for this page layout and select an existing page layout to clone, if desired.

4. Save your changes.

5. Customize and organize the page layout. Add fields, buttons, custom links, and lists that you want to include on the Volunteer Project site page.

6. In the Volunteer Project Detail section, make sure that the Sign up button is included in the list of standard buttons.

7. Save your changes.

Create the Volunteer Shift Page Layout

The Volunteer Shift page lets volunteers view and update their volunteer activity information (Shift object). Configure the layout and organization of the components on the Volunteer Shift page such as fields, buttons, custom links, and lists.

Complete the setup and configuration for the Emergency Program Management site before creating page layouts for Volunteer Management.

1. From Setup, open **Object Manager**, and use Quick Find to search for the Shift object.

2. Click **Page Layouts** and then click **New**.

3. Enter a name for this page layout, and select an existing page layout to clone, if desired.

4. Save your changes.

5. Customize and organize the page layout. Add fields, buttons, custom links, and lists per your requirement for the Volunteer Shift site page.

6. In the Shift Detail section, ensure that the Edit button is included in the list of standard buttons.

7. Save your changes.

Configure the Community User Profile

Configure the Community User Profile to enable access to the tabs and page layouts that the volunteers can work with.

Complete setting up and configuring a profile for your Emergency Response portal by cloning the Customer Community Plus user profile.

1. In Setup, find **Profiles** and select the user profile that you created for your Emergency Response portal.

2. Assign the following page layouts.
   - >Edit the Volunteer Profile page layout assignment and assign the Volunteer Project page layout.
   - >Edit the Shift page layout assignment and assign the Volunteer Shift page layout.

3. Configure the following object permissions:

Object	Access Level
Volunteer Projects	Read
Shifts	Read, Create, Edit
Service Resource	Read, Create (disable Edit and Delete)
Location	Read
Address	Read

4. Configure these record type settings.

Record Type Setting	Selected Record Types
Shift	Volunteer Shift
Service Resource	Volunteer

5. In General User Permissions, for Emergency Requests, select **Provides access to Public Sector data for Community users**.

6. Save your changes.

Configure the Guest User Profile

You can use a guest user profile to control public access to data, content, and objects in your site that don't require authentication. For example, you can configure the Guest User Profile to enable existing and potential volunteers to view volunteer projects without logging in to the site.

Use care when sharing data with guest users. Salesforce defaults are most restrictive for guest users, and it's your choice if and when to share data with guests. To secure your site for guest users, consider all the use cases and implications and implement security controls that you think are appropriate for the sensitivity of your data.

1. In Salesforce Setup, enter `All Sites` in the Quick Find box and select **All Sites**.

2. Next to the site that you want to access, click **Builder**.

3. In Experience Builder, click the Settings icon and select **General**.

4. Under Guest User Profile, click the guest user profile link.

5. Scroll to the Page Layouts section, edit the Volunteer Project page layout assignment, and assign the Volunteer Project page layout.

> 📝 Note: If you're unable to see the Volunteer Project object while configuring the guest user profile, ensure that you enabled **Enhanced Profile User Interface** in the User Management Settings.

6. Scroll to the Standard Object Permissions section, and change the object permissions to meet your business needs. Ensure that you configure the following object permissions:

Object	Access Level
Volunteer Projects	Read
Location	Read
Address	Read

> 📝 **Note:** If you're unable to see the Volunteer Project object while configuring the guest user profile, ensure that you enabled Enhanced Profile User Interface in the User Management Settings.

7. Save your changes.

Set Up Self-Registration for Your Site

Enable self-registration so unlicensed guest users can join your site.

You must complete setting up and configuring a profile for your Emergency Response portal by cloning the Customer Community Plus user profile.

1. Configure Your Self-Registration Page.

2. Configure Person Accounts for Self-Registration.

> 📝 **Note:** In the Profile field, select the profile that you created for your Emergency Response portal by cloning the Customer Community Plus user profile, and leave the Account field blank.

Configure the Volunteer Management Site Pages

Update the pages of your site to provide critical information for volunteers.

You edit the pages of your site in Experience Builder, where you can add content, create custom pages, and update theme properties such as colors and fonts.

To get to Experience Builder from Setup, enter `All` in the Quick Find box, select **All Sites**, and then click **Builder** next to the site that you want to customize. Or if you're in Experience Workspaces, click the **Builder** tile.

- Explore the Home page and click through the page sections and components.

- When you click an item on the page, its properties panel opens. Update the component's contents or properties as needed.

- Open the Pages menu on the top toolbar and scroll through the pages. To open a page for editing, click the page. To access the properties of a page, click ⚙ ▾ on the top toolbar.

- Click 🗲 to open the Components panel and drag components onto the page.

- To add content to your pages, you can use the Rich Content Editor and the HTML Editor components. Alternatively, you can create content in Salesforce CMS and Salesforce Knowledge and add it to your pages. As a rule, create content such as blogs, announcements, and news articles in Salesforce CMS. Create help articles such as FAQs and how-tos in Salesforce Knowledge.

Configure the Volunteer Project Page
Configure the Volunteer Project page to provide the list of volunteer projects available.

Configure the Shifts Page

Configure the Shifts page to provide the list of all volunteer shifts.

Configure the Volunteer Project Details Page

Set up the Volunteer Project Details page to customize the page layout and provide volunteer project details for your volunteers.

Configure the Volunteer Shift Details Page

Configure the Volunteer Shift Details page to customize the page layout and provide shift details for your volunteers.

Configure the Volunteer Project Page

Configure the Volunteer Project page to provide the list of volunteer projects available.

1. In the Emergency Response Console, navigate to the Volunteer Projects page.

2. Create a list view.

   a. Under List View Controls, select **New**. Or, click **Clone** to make a copy of the current list view.

   b. Give your list a name and a unique API name.

   c. Choose who can see this list view. Select **All users can see this list view**.

   d. Save your changes.

3. Add and set filters to view only available volunteer projects. You have different options depending on the field you want to filter and the operator you choose.

   a. Click **Add Filter**.

   b. Select the field to filter, an operator, and a value. Add these filter criteria:

      - Status equals Active
      - Publish to community equals True
      - Volunteers Still Needed greater than 0

      Depending on the type of field you selected, you can either select a value or enter a value.

   c. Click **Done**.

   d. Save your changes. The view appears in the list view dropdown list so you can access it later.

4. Optionally, choose and order the columns in your list view.

   a. From the List View Controls menu, click **Select Fields to Display**.

   b. Use the arrows to add, remove, and reorder your visible fields.

   c. Save your changes.

5. In Experience Builder, update the Record List settings for the Volunteer Projects page.

   a. From the Pages menu in the top toolbar, select the Volunteer Projects page.

   b. To edit the properties for the record list, select it on the main page canvas or on the Page Structure panel. The Record List pane appears.

   c. In the Filter Name field, select the filter list view that you created in Step 2 to display the list of available volunteer projects.

6. In Experience Builder, make sure that the Volunteer Project page is publicly available.

Configure the Shifts Page

Configure the Shifts page to provide the list of all volunteer shifts.

1. In the Emergency Response Console, navigate to the Volunteer Shifts page.

2. Create a list view.

   a. Under List View Controls, select **New**. Or, click **Clone** to make a copy of the current list view.

   b. Give your list a name and unique API name.

   c. Choose who can see this list view. Select **Share list view with groups of users** and share the list only with the customer portal group of users.

   d. Save your changes.

3. Edit the filter to list all shift details.

   a. In the Filters pane, click **Filter by Owner**, and then click **All volunteer shifts**.

   b. Click **Done**.

   c. Save your changes. The view appears in the list view dropdown list so you can access it later.

4. As the list filter does not show fields with a Polymorphic value, create a custom formula field that uses the value of the Related To field.

5. Optionally, choose and order the columns in your list view.

   a. From the List View Controls menu, click **Select Fields to Display**.

   b. Add the custom formula field that you created in step 4.

   c. Use the arrows to add, remove, and reorder your visible fields.

   d. Save your changes.

6. In Experience Builder, update the Record List settings for the Volunteer Shifts page.

   a. From the Pages menu in the top toolbar, select the My Volunteer Shifts page.

   b. To edit the properties for the record list, select it on the main page canvas or on the Page Structure panel. The Record List pane appears.

   c. In the Filter Name field, select the filter list view that you created in Step 2 to display all shift details.

7. In Experience Builder, make sure that the Volunteer Project page requires that members log in to the site and the page is not publicly available.

Configure the Volunteer Project Details Page

Set up the Volunteer Project Details page to customize the page layout and provide volunteer project details for your volunteers.

1. In Experience Builder, open the Pages menu on the top toolbar.

2. Click **New Page** at the bottom of the Pages menu.

3. Click **Object Pages**.

4. Select **Volunteer Project** from the list of pages, and then click **Create**.

5. Add and configure the page components and page layout.

   a. Update the Record Information tabs to show relevant content. In Experience Builder, open the Pages menu on the top toolbar, and click the **Volunteer Project** object. Click the Volunteer Project Details page that you created, and update the record information tabs.

   b. Optionally, in Experience Builder, in the Volunteer Project Details page properties, select **HomePage** as the theme layout.

   c. Optionally, in Object Manager, create a new compact layout for the Volunteer Project object to be visible in the site. Make sure that only relevant fields are added. Set this layout as the primary compact layout by updating the compact layout assignment.

6. In Experience Builder, make sure that the Volunteer Project Details page is publicly available.

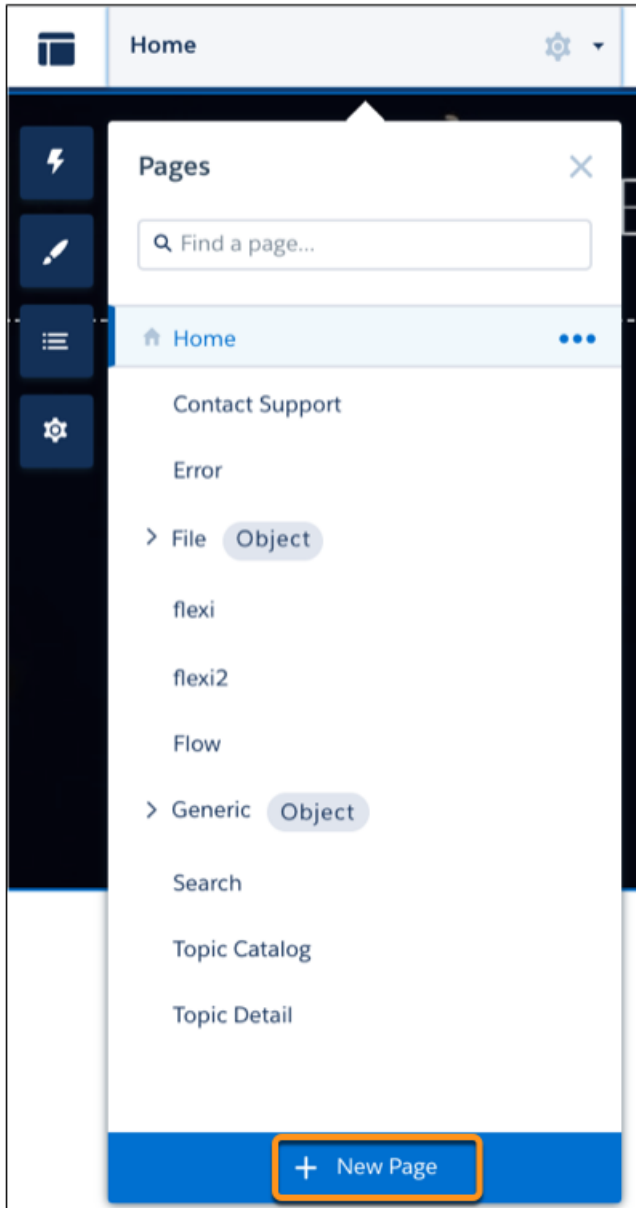7. Preview and publish your site.

Configure the Volunteer Shift Details Page

Configure the Volunteer Shift Details page to customize the page layout and provide shift details for your volunteers.

1. In Experience Builder, open the Pages menu on the top toolbar.
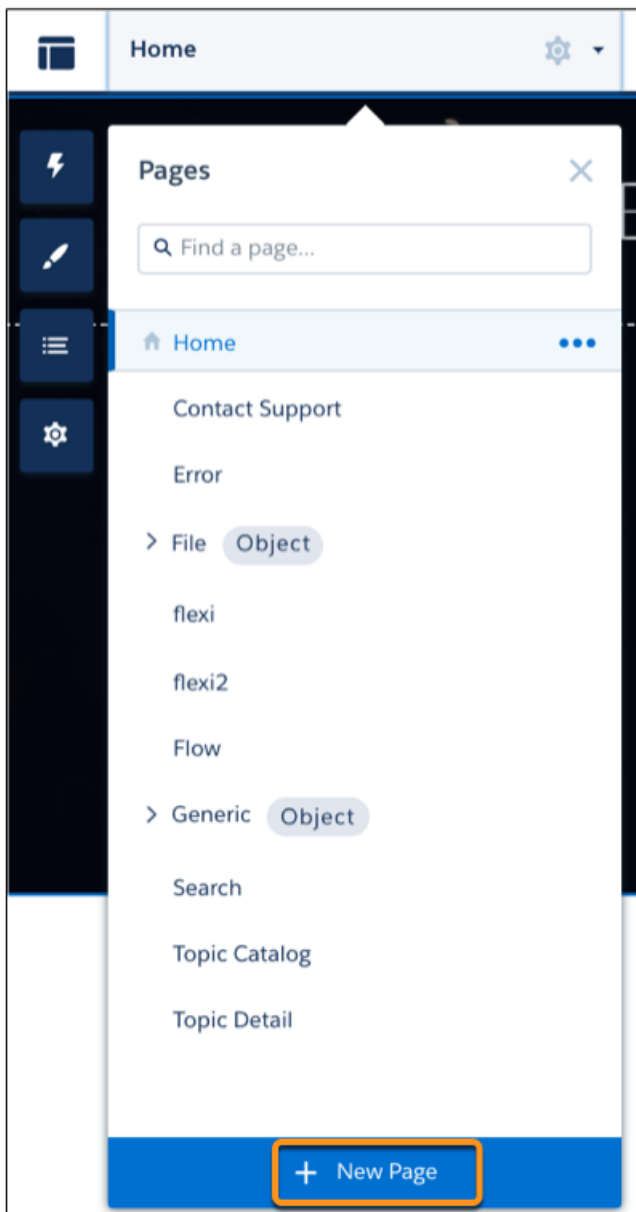
2. Click **New Page** at the bottom of the Pages menu.

3. Click **Object Pages**.

4. Select **Shift** from the list of pages, and then click **Create**.

5. Add and configure the page components and page layout.

     a. Update the Record Information tabs to show relevant content. In Experience Builder, open the Pages menu on the top toolbar, and click the **Volunteer Shift** object. Click the Volunteer Shift Details page that you created, and update the record information tabs.

     b. Optionally, in Experience Builder, in the Volunteer Shift Details page properties, select **HomePage** as the theme layout.

     c. Optionally, in Object Manager, create a new compact layout for the Shift object to be visible in the site. Make sure that only relevant fields are added. Set this layout as the compact layout by updating the compact layout assignment.

6. In Experience Builder, make sure that the Volunteer Shift Details page requires that members log in to the site and the page is not publicly available.

7. Preview and publish your site.

Configure the Location Type Picklist

Enable access for ERM users who coordinate Volunteer Management projects and shifts.

1. In Setup, click the Object Manager tab, and then select the **Location** object.

2. Click **Fields & Relationships**, and then select the **Location Type** picklist.

3. In the Location Type Picklist Values section, click **New**.

4. Add one or more picklist values for the volunteering location.

5. Save your changes.

Configure Sharing Settings

Make automatic exceptions to your organization-wide sharing settings and give access to a defined set of users.

Complete configuring the Location Type picklist before configuring sharing settings.

1. Create the Volunteer Project sharing rule for guest site users.

     a. From Setup, enter `Sharing Settings` in the Quick Find box, then select **Sharing Settings**.

     b. In the Volunteer Project Sharing Rules section, click **New**.

     c. Enter the label name and rule name. The label name appears on the user interface. The rule name is a unique name used by the API and managed packages.

     d. Optionally, enter a description of the sharing rule, up to 1,000 characters.

     e. Select the **Guest user access based on criteria** rule type.

     f. Specify the field, operator, and value criteria that records must match to be included in the sharing rule. Specify the following criteria:

Field	Operator	Value
Status	equals	0
Publish to community	equals	True

     g. In the Share with field, select the guest user profile.

h. In the Access Level field, select **Read Only**.

i. Save your changes.

2. Create the Volunteer Project sharing rule for site users who log on to the site.

   a. On the Sharing Settings page, scroll to the Volunteer Project Sharing Rules section, and then click **New**.

   b. Enter the label name and rule name. The label name appears on the user interface. The rule name is a unique name used by the API and managed packages.

   c. Optionally, enter a description of the sharing rule, up to 1,000 characters.

   d. Select the **Based on criteria** rule type.

   e. Specify the field, operator, and value criteria that records must match to be included in the sharing rule. Specify the following criteria:

Field	Operator	Value
Publish to community	equals	True

   f. In the Share with field, select **Public Groups** and **All Customer Portal Users**.

   g. In the Access Level field, select **Read Only**.

   h. Save your changes.

3. Create the Location sharing rule for guest site users.

   a. On the Sharing Settings page, scroll to the Location Sharing Rules section, and then click **New**.

   b. Enter the label name and rule name. The label name appears on the user interface. The rule name is a unique name used by the API and managed packages.

   c. Optionally, enter a description of the sharing rule, up to 1,000 characters.

   d. Select the **Guest user access based on criteria** rule type.

   e. Specify the field, operator, and value criteria that records must match to be included in the sharing rule. Specify the following criteria:

Field	Operator	Value
Location Type	equals	One or more values set in the Location Type picklist that are volunteering locations.

   f. In the Share with field, select the guest user profile.

   g. In the Access Level field, select **Read Only**.

   h. Save your changes.

4. Create the Location sharing rule for site users who log on to the site.

   a. On the Sharing Settings page, scroll to the Location Sharing Rules section, and then click **New**.

b. Enter the label name and rule name. The label name appears on the user interface. The rule name is a unique name used by the API and managed packages.

c. Optionally, enter a description of the sharing rule, up to 1,000 characters.

d. Select the **Based on criteria** rule type.

e. Specify the field, operator, and value criteria that records must match to be included in the sharing rule. Specify the following criteria:

Field	Operator	Value
Location Type	equals	One or more values set in the Location Type picklist that are volunteering locations.

f. In the Share with field, select **Public Groups** and **All Customer Portal Users**.

g. In the Access Level field, select **Read Only**.

h. Save your changes.

Configure Default Navigation Access Levels

Set up the default navigation access levels to make required pages publicly available.

1. In Experience Builder, click the Settings icon.

2. In the Settings pane, click **Navigation**.

3. Click the arrow next to **Default Navigation**, and then click **Edit**.

4. In the Menu Structure, click **Volunteer Projects** and make sure that **Publicly available** is selected.

5. Click **Available Volunteer Projects** and make sure that **Publicly available** is selected.

6. Click **My Volunteer Shifts** and make sure that **Publicly available** is not selected.

7. Save your changes.

Configure the Standard ERM User Profile

Enable access for ERM users who coordinate Volunteer Management projects and shifts.

Complete configuring the Standard ERM User Profile.

1. In Setup, find **Profiles** and select the Standard ERM User Profile.

2. Assign the following page layouts.

- Edit the Volunteer Profile page layout assignment and assign the Volunteer Project page layout.
- Edit the Shift page layout assignment and assign the Volunteer Shift page layout.

3. Configure the following object permissions:

Object	Access Level
Volunteer Projects	Read, Create, Edit, Delete
Shifts	Read, Create, Edit, Delete
Service Resource	Read, Create, Edit, Delete

4. Configure the following record type settings:

Record Type Setting	Selected Record Types
Shift	Volunteer Shift
Service Resource	Volunteer

5. Configure the following field-level security settings:

Object	Field Name	Access Level
Volunteer Project	Volunteers Registered	Read, Edit
Volunteer Project	Volunteers Still Needed	Read
Shift	Volunteer	Read, Edit

6. Save your changes.

Configure Volunteer Shift Cancellation Settings

Automatically update the number of registered volunteers and volunteers needed when shifts are canceled.

1. Configure the Volunteer Shift Cancellation Status custom metadata type.

    a. In Setup, enter `Custom Metadata Types` in the Quick Find box, and click **Custom Metadata Types**.

    b. Select **Volunteer Shift Cancellation Status**, and click **Manage Volunteer Shift Cancellation Statuses**.

    c. Click **New**.

    d. Enter the following values for these fields.

Field Name	Field Value
Label	Enter a label for the custom metadata type setting.
Volunteer Shift Cancellation Status Name	Enter an API name for the custom metadata type setting.
Status	Enter a value that indicates cancellation of a shift. For example, `Canceled`.

    e. Save your changes.

2. Create an Apex trigger or update an existing Apex trigger on the Shift object.

    a. In Setup, enter Apex Classes in the Quick Find box, and click VolunteerProjUserManager.

    b. Make a note of the class name and namespace prefix. You need this information for the class name in the trigger code.

    c. In the Developer Console, click **File | New | Apex Trigger**.

    d. Enter a name for this trigger, and then select **Shift** in the sObject field. Click **Submit**.

    e. Replace the sample code with the following code:

```
trigger UpdateVolunteersRegistered on Shift (after insert, after update, after delete)

{NamespacePrefix.VolunteerProjUserManager.updateVolunteersRegisteredCount(Trigger.operationType,
 Trigger.Old, Trigger.oldMap, Trigger.New, Trigger.newMap);}
```

> 📝 Note: Replace NamespacePrefix with the namespace prefix that you noted in Step 2.b.

    f. Save your changes.

We recommend creating a flow to cancel Volunteer Shift records when the associated volunteer project gets canceled.

Configure the Default Shift Status

Set the default status for the shift record when a volunteer signs up for a volunteer project from the experience site.

1. In Setup, enter *Custom Metadata Types* in the Quick Find box, and click **Custom Metadata Types**.

2. Select **Volunteer Shift Default Status**, and click **Manage Volunteer Shift Default Statuses**.

3. Click **New**.

4. Enter these values for these fields.

USER PERMISSIONS

To create or edit custom metadata:
- Customize Application

Field Name	Field Value
Label	Enter a label for the custom metadata type setting.
Status	Enter the default status for the shift record when a volunteer signs up for a volunteer project from the site. For example, *Planned*.
Volunteer Shift Default Status Name	Enter an API name for the custom metadata type setting.

5. Save your changes.

Deploy Analytics for Emergency Program Management

Before you create an app from the Analytics for Emergency Program Management template and use the dashboards, deploy Analytics for Emergency Program Management in your Salesforce org.

💡 **Tip:** Follow the steps in the order shown to deploy Analytics for Emergency Program Management. If you haven't used CRM Analytics before, learn about it here: Salesforce Help.

Enable CRM Analytics

Before you create an app from the Analytics for Emergency Program Management template, enable CRM Analytics in your Salesforce org.

Assign Analytics for Emergency Program Management Administrator Permissions

Enable admins to create and manage Analytics for Emergency Program Management app by assigning the relevant permissions.

Grant Permission to the Analytics Integration User

If your org is using Health Cloud or Emergency Program Management for Public Health, assign the Health Cloud ERM permission set to the Analytics Integration User.

The Data Needed to Create the Analytics for Emergency Program Management App

Data in your Salesforce org has to meet specific requirements before you can create Analytics for Emergency Program Management.

Set Field-Level Security to Enable Creation of the Analytics for Emergency Program Management App

Before you create the Analytics for Emergency Program Management app, make sure that the Analytics Cloud Integration User profile has access to all fields in the app.

Create an App from the Analytics for Emergency Response Template

Create an app from the Analytics for Emergency Program Management template.

Share the Analytics for Emergency Response Template App

After you create the app, share it with users in your organization. You can share it only with users assigned the admin or user permission sets for Analytics for Emergency Program Management.

Schedule the Dataflow for the App

The app creation process includes a dataflow that imports the latest data to CRM Analytics. Schedule the app refresh to run every day to ensure that your app uses up-to-date data.

Understand Analytics for Emergency Program Management Limitations

The Analytics for Emergency Program Management app gives you access to most CRM Analytics capabilities and features, but with limitations.

Enable CRM Analytics

Before you create an app from the Analytics for Emergency Program Management template, enable CRM Analytics in your Salesforce org.

📝 **Note:** If you see the Launch CRM Analytics button, CRM Analytics is already enabled. You can skip to Assign Analytics for Emergency Program Management Administrator Permissions.

1. From Setup, enter `Getting Started` in the Quick Find box, and then select **Getting Started** under Analytics.

2. Click **Enable CRM Analytics**.

Assign Analytics for Emergency Program Management Administrator Permissions

Enable admins to create and manage Analytics for Emergency Program Management app by assigning the relevant permissions.

1. From Setup, enter *Users* in the Quick Find box, and then select **Users**.
2. Click the name of a user with the System Administrator profile.
3. Click **Permission Set Assignments** and then click **Edit Assignments**.
4. Select both the **CRM Analytics Plus Admin** and **ERM Analytics Admin** permission sets.
5. Click **Add**, then click **Save**.
6. Repeat Steps 2–5 for all users who create and manage the Analytics for Emergency Program Management app.

   Note: For Analytics Cloud Integration User, add the Action Plan permission set.

Grant Permission to the Analytics Integration User

If your org is using Health Cloud or Emergency Program Management for Public Health, assign the Health Cloud ERM permission set to the Analytics Integration User.

1. From Setup, enter *Users* in the Quick Find box, and then select **Users**.
2. Select the Analytics Integration User.
3. Go to Permission Set Assignments and then click **Edit Assignments**.
4. Select the **Health Cloud ERM Analytics** permission set.
5. Click **Add**, then click **Save**.

The Data Needed to Create the Analytics for Emergency Program Management App

Data in your Salesforce org has to meet specific requirements before you can create Analytics for Emergency Program Management.

Your org must have at least one record in each of the following objects:

- Account
- Lead (for Emergency Program Management for Public Health only)
- Emergency Request
- Individual Application

While creating the app, if your org's data doesn't meet the minimum requirements, you see a message describing what to fix.

Set Field-Level Security to Enable Creation of the Analytics for Emergency Program Management App

Before you create the Analytics for Emergency Program Management app, make sure that the Analytics Cloud Integration User profile has access to all fields in the app.

If users don't have proper field-level security permissions when they run a dataflow, the dataflow can fail. Here's how to set Salesforce field-level security to enable the Analytics Integration User to see all fields used in the app.

1. In Setup, go to **Object Manager**.

2. In the Quick Find search box, enter the name of the object whose field-level security you want to edit.

3. Select the object, then select **Fields & Relationships**.

4. Select the field you want to edit, then select **Set Field-Level Security**.

5. For the Analytics Cloud Integration User profile, select **Visible**, and click **Save**.

6. Repeat Steps 5 and 6 for all the fields you want to use.

7. Refresh your browser cache.

You can now create the Analytics for Emergency Program Management app.

SEE ALSO:

    Salesforce Help: Field-Level Security

    Salesforce Help: Field-Level Security

Create an App from the Analytics for Emergency Response Template

Create an app from the Analytics for Emergency Program Management template.

> **Note:** Make sure that the HealthCloudERM permission set is assigned to the Analytics Integration User before creating the app.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

1. Navigate to **Analytics Studio**.

2. Click **Create**, then select **App**.

3. Click **Create App from Template**.

4. Select **Analytics for Emergency Program Management**, then click **Continue**.

5. Take a quick look at the preview page, then click **Continue** to open the configuration wizard.

6. If you want to create an app or use settings from an existing app, make a selection and click **Continue**.

7. CRM Analytics performs a compatibility check of your org's data. If it uncovers any issues, you see error messages with instructions about how to address them. Fix the issues and try app creation again. If it completes successfully, click **Looks good, next**.

8. If you have Emergency Program Management for Public Health, then the next page of the wizard asks you to make one selection.

9. The first wizard question asks if you'd like to add dashboards for public health overview. If you choose **Yes**, analytics for public health and emergency requests are created in the app. If you choose **No**, analytics for emergency requests and visits only are available.

10. Click **Looks good, next**.

11. Name your app, then click **Create**.

12. View the status of the app creation on the next screen. The process takes a minute or two. After it's complete, refresh the page to see your app

> **Note:** If you see an error saying the Analytics Integration User can't access selected fields, edit field-level security.

Share the Analytics for Emergency Response Template App

After you create the app, share it with users in your organization. You can share it only with users assigned the admin or user permission sets for Analytics for Emergency Program Management.

1. Open your app if it's not already open. If you navigated away from CRM Analytics Studio, go back to it, select **All Items**, find your app, and click it.

2. Click ⬛ .

3. In the next screen, use the search field under **Invite others:** to find other users in your org.

4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

5. Click **Add**, then click **Save**.

> 📝 Note: If you see an error saying the Analytics Integration User can't access selected fields, edit field-level security.

SEE ALSO:

　　Salesforce Help: Field-Level Security

　　Salesforce Help: Manage Data Access

　　Salesforce Help: Field-Level Security

Schedule the Dataflow for the App

The app creation process includes a dataflow that imports the latest data to CRM Analytics. Schedule the app refresh to run every day to ensure that your app uses up-to-date data.

To schedule your app, see Schedule Data Refresh for a CRM Analytics App. Select a time outside normal work hours so the data refresh doesn't interrupt business activities.

Understand Analytics for Emergency Program Management Limitations

The Analytics for Emergency Program Management app gives you access to most CRM Analytics capabilities and features, but with limitations.

Capability	Supports
Data sources	Salesforce and external data
Object support	Standard and custom objects
Data volume	10 billion rows for Analytics Plus.
Customize existing dashboards?	Yes
Create new dashboards?	Yes
Customize existing datasets?	Yes
Create new datasets?	Yes
Create custom Analytics apps?	Yes
Supports Einstein Discovery and Experience Cloud integration?	Yes

Capability	Supports
Supports bulk actions and APEX steps?	Yes
Supports Sales Cloud Einstein AI features?	No
Supports Salesforce Inbox?	No

Analytics for Emergency Program Management

Identify the hotspots in which illness or requests for emergency services are increasing so that you can allocate resources to where they're needed most. Our pre-built dashboards give you actionable insights into the health of your community. Determine which demographic segment is most affected and pay special attention to intake numbers or patients from that segment. Track emergency requests from your community and ensure that you're proactive and effective in providing emergency assistance.

Emergency Response Overview Dashboard

The Emergency Response Overview dashboard provides insights into the total picture of your community's health. View data for existing patients, individuals who have reported themselves as being affected, contacts who've been exposed, and emergency requests. Filter data and drill down into each area to discover more details.
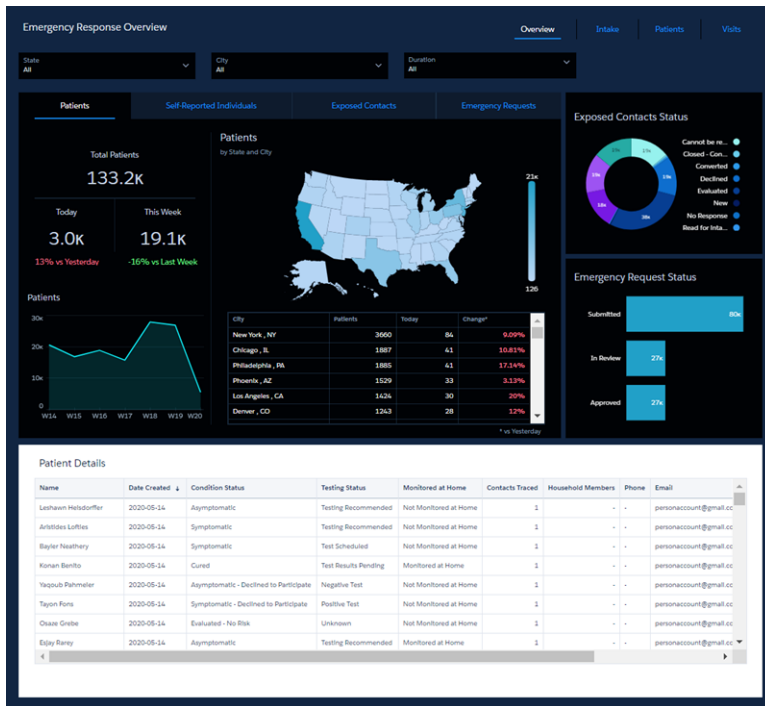
Intake Dashboard

See how the age in days of leads that are new, the increase or decrease of patients over time, and the count of exposed patients.

Patient Details Dashboard

See the number of patients that fall into categories based on metrics like condition, testing status, number of traced contacts, and how many individuals are being monitored at home.
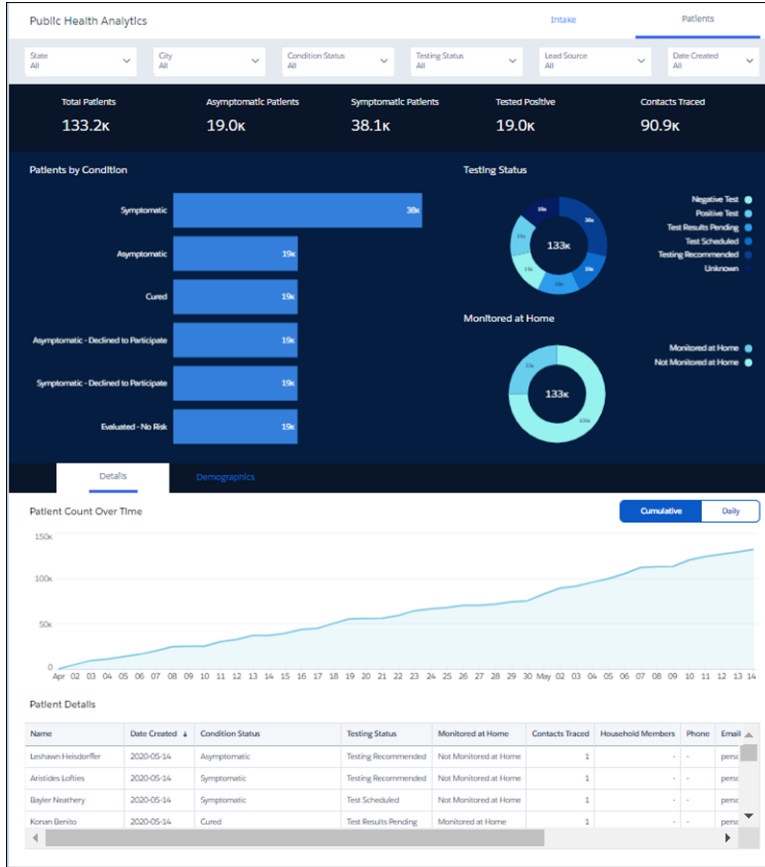
Patient Demographics Dashboard

Monitor trends in age, gender, or location so that you can see hotspots or areas of recovery and allocate resources accordingly.
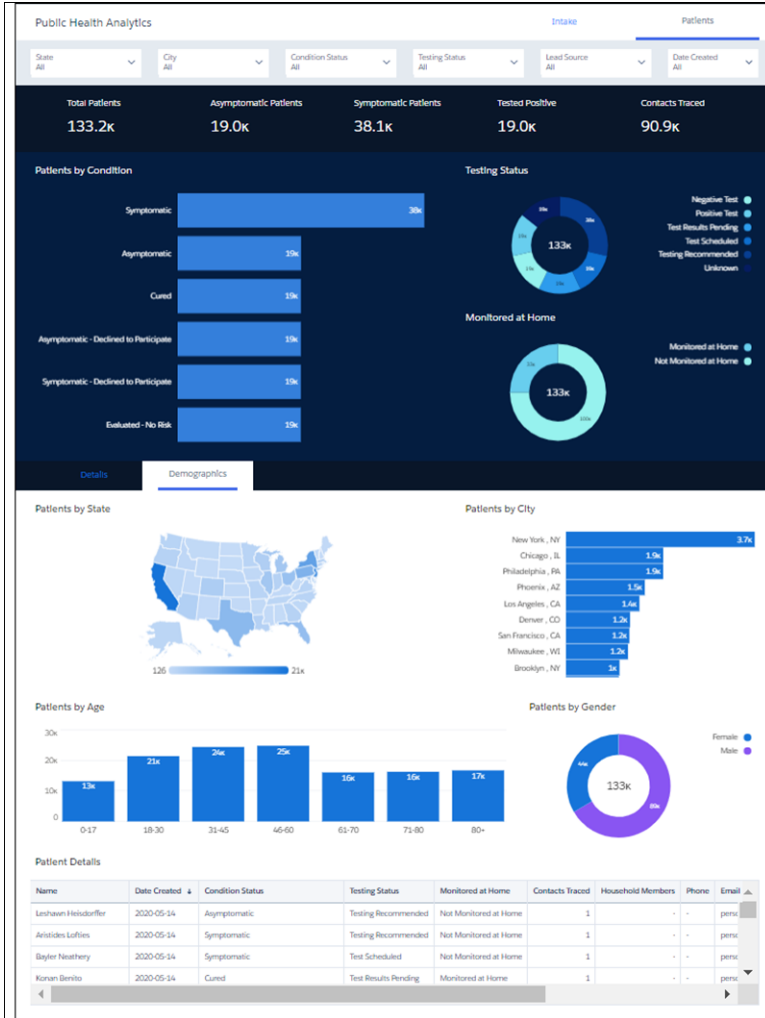
Visits Dashboard

Manage the delivery of emergency services by gaining insights into the total number of visits your agency has completed over time.

Know more about key metrics shown in Analytics for Emergency Response for Public Health dashboards.
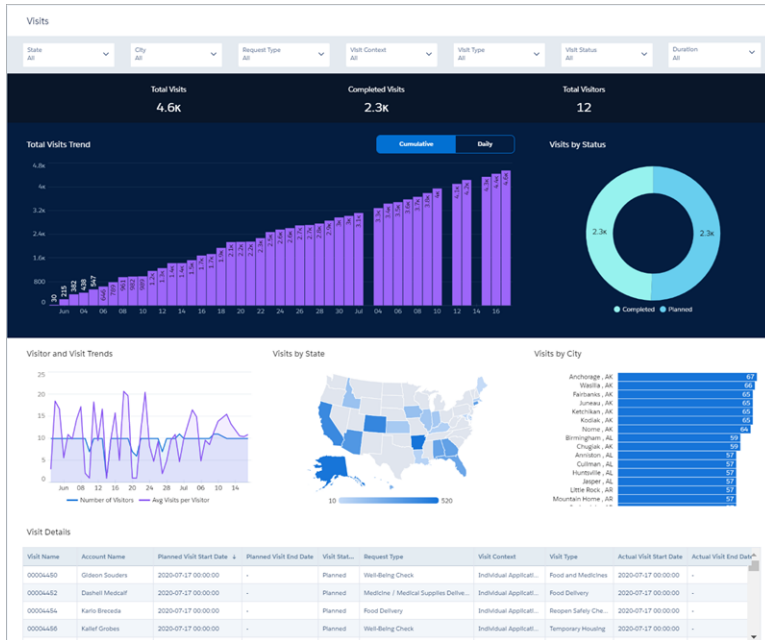
Analytics Metrics Definitions

Know more about key metrics shown in Analytics for Emergency Response for Public Health dashboards.

> 📝 **Note:**
>
> - Current week means the start of the week until today. For example, if the start of the week is Sunday and today is Friday, current week means Sunday to Friday.
> - Last week means the start of the last week with the same number of days. For example, if the start of the week is Sunday and today is Friday, last week means last week's Sunday to last week's Friday.

Emergency Response Overview

Filters: State, City, and Duration

Metric	Description	Calculation
Total Patients	Total number of patients	Count of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date within the selected duration filter.
Today Patients	Total number of patients on the current date	Count of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date as Today.

Metric	Description	Calculation
Change in Patients Today compared to Yesterday	Percentage change in the number of patients today compared to the previous day	(Count of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date as Today) - (Count of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date as Yesterday) / (Count of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date as Yesterday).
This Week Patients	Total number of patients in the current week	Count of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date within the current week.
Change in Patients This Week compared to Last Week	Percentage change in the number of patients in the current week compared to the the previous week	(Count of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date within the current week) - (Count of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date within the previous week) / (Count of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date as as the previous week).
Patients by State and City	Count of patients grouped by the state and city	Count of records related to the Person Account where the Record Type is 'ERM Patient', based on the MailingState and MailingCity fields from the Contact entity and the creation date within the selected duration filter.
Total Self-Reported	Total number of self-reported intake	Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date within the selected duration filter.
Today Self-Reported	Total number of self-reported intake on the current date	Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date as Today.
Change in Self-Reported Today compared to Yesterday	Percentage change in the number of self-reported intake today compared to the previous day	(Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date as Today) - (Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date as Yesterday) / (Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date as Yesterday).
This Week Self-Reported	Total number of self-reported intake in the current week	Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date within the current week.

Metric	Description	Calculation
Change in Self-Reported This Week compared to Last Week	Percentage change in the number of self-reported intake in the current week compared to the previous week	(Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date within the current week) - (Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date within the previous week) / (Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date within the previous week).
Self-Reported by State and City	Count of self-reported intake grouped by the state and city	Count of records based on the State and City fields in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date within the selected duration filter.
Total Exposed Contacts	Total number of exposed contacts intake	Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date within the selected duration filter.
Today Exposed Contacts	Total number of exposed contacts intake on the current date	Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date as Today.
Change in Exposed Contacts Today compared to Yesterday	Percentage change in the number of exposed contacts intake today compared to the previous day	(Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date as Today) - (Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date as Yesterday) / (Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date as Yesterday).
This Week Exposed Contacts	Total number of exposed contacts intake in the current week	Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date within the current week.
Change in Exposed Contacts This Week compared to Last Week	Percentage change in the number of exposed contacts intake in the current week compared to the previous week	(Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date within the current week) - (Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date within the previous week) / (Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date within the previous week).
Exposed Contacts by State and City	Count of exposed contacts intake grouped by the state and city	Count of records based on the State and City fields in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date within the selected duration filter.
Total Requests	Total number of emergency requests	Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is within the selected duration filter.

Metric	Description	Calculation
Today Requests	Total number of emergency requests on the current date	Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Today.
Change in Requests Today compared to Yesterday	Percentage change in the number of emergency requests today compared to the previous day	(Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Today) - (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Yesterday) / (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Yesterday).
This Week Requests	Total number of emergency requests in the current week	Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the current week.
Change in Requests This Week compared to Last Week	Percentage change in the number of emergency requests in the current week compared to the previous week	(Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the current week) - (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the previous week) / (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the previous week).
Requests by State and City	Count of emergency requests grouped by the state and city	Count of Emergency Requests, based on the State and City fields from the Address entity where the Applied Date field from the related Individual Application entity is within the selected duration filter.
Exposed Contacts Status	Count of exposed contacts grouped by the status	Distribution of Lead Status from Lead entity where the Lead Source is Contact Tracing and the lead creation time is within the selected duration filter.
Request Status	Count of emergency requests grouped by the status	Distribution of records from Emergency Requests entity, based on the Individual Application Status where the Applied Date field from the related Individual Application entity is within the selected duration.

Public Health Overview

Filters: State, City, Status, Source, and Duration

Metric	Description	Calculation
Total Intake	Count of self-reported and exposed contacts	Count of records in the Lead entity having the Lead Source as 'Self Reported' or Contact Tracing, based on

Metric	Description	Calculation
		the lead creation date within the selected duration filter.
Enrolled as Patient as a percent of Total Intake	Count of intake that were converted to patients	Count of records in the Lead entity having the Lead Source as 'Self Reported' or Contact Tracing and isConverted is 'True', based on the lead creation date within the selected duration filter.
Today Total Intake	Total number of intake for the current date	Count of records in the Lead entity having the Lead Source as 'Self Reported' or Contact Tracing, based on the lead creation date as Today.
Change in Total Intake Today compared to Yesterday	Percentage change in the total intake today compared to the previous day	(Count of records in the Lead entity having the Lead Source as 'Self Reported' or Contact Tracing, based on the lead creation date as Today) - (Count of records in the Lead entity having the Lead Source as 'Self Reported' or Contact Tracing, based on the lead creation date as Yesterday) / (Count of records in the Lead entity having the Lead Source as 'Self Reported' or Contact Tracing, based on the lead creation date as Yesterday).
Total Self-Reported	Total number of self-reported intake	Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date within the selected duration filter.
Self-Reported as % of Total Intake	Percentage of Self-Reported individuals as compared to the total intake.	(Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date within the selected duration filter) / (Count of records in the Lead entity having the Lead Source as 'Self Reported' or Contact Tracing, based on the lead creation date within the selected duration filter).
Today Self-Reported	Total number of self-reported intake for the current date	Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date as Today.
Change in Self-Reported Today compared to Yesterday	Percentage change in the self-reported Intake today compared to the previous day	(Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date as Today) - (Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date as Yesterday) / (Count of records in the Lead entity having the Lead Source as 'Self Reported', based on the lead creation date as Yesterday).
Total Exposed Contacts	Total number of exposed contacts intake	Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date within the selected duration filter.

Metric	Description	Calculation
Exposed Contacts as % of Total Intake	Percentage of Exposed Contacts as compared to the total intake	(Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date within the selected duration filter) / (Count of records in the Lead entity having the Lead Source as 'Self Reported' or Contact Tracing, based on the lead creation date within the selected duration filter).
Today Exposed Contacts	Total number of exposed contacts intake for the current date	Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date as Today.
Change in Exposed Contacts Today compared to Yesterday	Percentage change in the exposed contacts intake today compared to the previous day	(Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date as Today) - (Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date as Yesterday) / (Count of records in the Lead entity having the Lead Source as 'Contact Tracing', based on the lead creation date as Yesterday).
Flow of Intake Source to Current Status	Distribution of intake status, based on the intake source	Distribution of intake status, based on the intake source
Intake Over Time (Cumulative)	Rolling sum of self-reported and exposed contacts	Rolling sum of records in the Lead entity having the Lead Source as 'Self Reported' or Contact Tracing, based on the lead creation date within the selected duration filter.
Intake Over Time (Daily)	Count of self-reported and exposed contacts on a daily basis	Count of records in the Lead entity having the Lead Source as 'Self Reported' or Contact Tracing, based on the lead creation date within the selected duration filter.
Days in New Status	Count of intake with the status as new, grouped by the number of days since it was created	Count of records in the Lead entity having the Lead Status as New and the Lead Source as 'Self Reported' or Contact Tracing, grouped by the number of days between today and the lead creation date where the lead creation date is within the selected duration filter.
Intake by State	Count of intake grouped by the state	Count of records based on the State field in the Lead entity having the Lead Source as 'Self Reported' or 'Contact Tracing', based on the lead creation date within the selected duration filter.
Intake by City	Count of intake grouped by the city	Count of records based on the City field in the Lead entity having the Lead Source as 'Self Reported' or 'Contact Tracing', based on the lead creation date within the selected duration filter.
Exposed Contacts by Patients	Count of exposed contacts per patient	Count of records from Lead entity having the Lead Source as 'Contact Tracing' and the lead creation date within the selected duration filter, grouped by the

Metric	Description	Calculation
		Patient (Person Account) from the Contact Encounter Participant entity for this lead.

Public Health Analytics: Patients

Filters: State, City, Condition Status, Testing Status, Lead Source, and Duration

Metric	Description	Calculation
Total Patients	Total number of patients	Count of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date within the selected duration filter.
Asymptomatic Patients	Count of asymptomatic patients	Count of records in the Person Account entity where the Record Type is 'ERM Patient', the Condition Status of the contact is 'Asymptomatic', and the creation date is within the selected duration filter.
Symptomatic Patients	Count of symptomatic patients	Count of records in the Person Account entity where the Record Type is 'ERM Patient', the Condition Status of the contact is 'Symptomatic', and the creation date is within the selected duration filter.
Symptomatic Patients	Count of symptomatic patients	Count of records in the Person Account entity where the Record Type is 'ERM Patient', the Condition Status of the contact is 'Symptomatic', and the creation date is within the selected duration filter.
Tested Positive	Count of patients that were tested positive	Count of records in the Person Account entity where the Record Type is 'ERM Patient', the Testing Status of the contact is 'Positive Test', and the creation date is within the selected duration filter.
Contacts Traced	Count of exposed contacts	Count of Leads from the ContactEncounterParticipant entity where the ContactEncounterId field matches with the ContactEncounterId field for the Person Account's Contact, grouped by the Person Account where the RecordType is ERMPatient, and the creation date is within the selected duration filter.
Patients by Condition	Count of patients distributed by the condition status	Count of records in the Person Account entity where the Record Type is 'ERM Patient' grouped by the Condition Status field from the related Contact entity where the creation date is within the selected duration filter.
Testing Status	Count of patients distributed by the testing status	Count of records in the Person Account entity where the Record Type is 'ERM Patient' grouped by the Testing Status field from the related Contact entity

Metric	Description	Calculation
		where the creation date is within the selected duration filter.
Monitored at Home	Count of patients distributed by the monitored at home status	Count of records in the Person Account entity where the Record Type is 'ERM Patient' grouped by the Monitored At Home field from the related Contact entity where the creation date is within the selected duration filter.
Patient Count over Time (Cumulative)	Rolling sum of patients	Rolling sum of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date within the selected duration filter.
Patient Count over Time (Daily)	Count of patients on a daily basis	Count of records in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date within the selected duration filter.
Patients by State	Count of patients grouped by the state	Count of records based on the MailingState field from Contact entity related to Person Account where the Record Type is 'ERM Patient', based on the creation date within the selected duration filter.
Patients by City	Count of patients grouped by the city	Count of records based on the MailingCity field from Contact entity related to Person Account where the Record Type is 'ERM Patient', based on the creation date within the selected duration filter.
Patients by Age	Count of patients distributed by the age groups	Count of records based on the Age calculated using the Birthdate field in the Person Account entity where the Record Type is 'ERM Patient', based on the creation date within the selected duration filter.
Patients by Gender	Count of patients grouped by the gender	Count of records based on the Gender field from Contact entity related to the Person Account where the Record Type is 'ERM Patient', based on the creation date within the selected duration filter.

Visits Dashboard

Global Filters: State, City, Request Type, Visit Context, Visit Type, Visit Status, and Duration

Metric	Description	Calculation
Total Visits	Count of visits	Count of records from the Visit entity where the Planned Start Time is within the selected duration filter.
Completed Visits	Count of completed visits	Count of records from the Visit entity where the Visit Status is Completed and the

Metric	Description	Calculation
		Planned Start Time is within the selected duration filter.
Total Visitors	Count of visitors	Count of the unique Visitor Id field from the Visit entity where the Planned Start Time is within the selected duration filter.
Total Visits Trend (Cumulative)	Rolling sum of visits	Rolling sum of records from the Visit entity where the Planned Start Time is within the selected duration filter.
Total Visits Trend (Daily)	Count of visits on a daily basis	Count of records from the Visit entity where the Planned Start Time is within the selected duration filter.
Visits by Status	Count of visits distributed over the visit status	Count of records from the Visit entity grouped by the Status where the Planned Start Time is within the selected duration filter.
Visitor and Visits Trend	Count of visits and visitors over time	**Count of Visitors:** Count of the unique Visitor Id field from the Visit entity where the Planned Start Time is within the selected duration filter **Avg Visits per Visitor:** (Count of records from the Visit entity where the Planned Start Time is within the selected duration filter) / (Count of the unique Visitor Id field from the Visit entity where the Planned Start Time is within the selected duration filter).
Visits by State	Count of visits grouped by the state	Count of records from the Visit entity grouped by the State field from the Address where the Planned Start Time is within the selected duration filter.
Visits by City	Count of visits grouped by the city	Count of records from the Visit entity grouped by the City field from the Address where the Planned Start Time is within the selected duration filter.

Emergency Requests Overview

Global Filters: State, City, and Duration

Metric	Description	Calculation
Total Requests	Total number of emergency requests	Count of records in the Emergency Requests entity where the Applied Date field from the

Metric	Description	Calculation
		related Individual Application entity is within the selected duration filter.
Today Requests	Total number of emergency requests for the current date	Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Today.
Change in Requests Today compared to Yesterday	Percentage change in the number of emergency requests today compared to the previous day	(Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Today) - (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Yesterday) / (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Yesterday).
This Week Requests	Total number of emergency requests for the current week	Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the current week.
Change in Requests This Week compared to Last Week	Percentage change in the number of emergency requests in the current week compared to the previous week	(Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the current week) - (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the previous week) / (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the previous week).
Requests by State and City	Count of emergency requests grouped by the state and city	Count of Emergency Requests, based on the State and City fields in Address from Emergency Requests entity where the Applied Date field from the related Individual Application entity is within the selected duration filter.
Request Status	Count of emergency requests grouped by the status	Distribution of records from the Emergency Requests entity, based on the Individual Application Status where the Applied Date field from the related Individual Application entity is within the selected duration.

Metric	Description	Calculation
Requests by Type	Count of emergency requests grouped by the type	Distribution of records based on the Emergency Service Request Type field from Individual Application where the applied date is within the selected duration filter.

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