PHASE-1

Project Title: Healthcare Appointment & Patient Engagement System

Problem Statement: Healthcare clinics and hospitals often face challenges in managing patient appointments and communication due to:

- Manual scheduling leading to double bookings or missed slots.
- Lack of automated reminders causing high no-show rates.
- Limited visibility into doctor availability and patient history.
- No centralized system for appointment tracking, treatment follow-ups, and patient engagement.

Proposed Solution:

A Salesforce-based Healthcare Appointment & Patient Engagement System addresses these challenges by:

- Centralizing doctor, patient, and appointment records.
- Automating scheduling, confirmations, and reminders.
- Syncing appointments with Google Calendar for real-time availability.
- Providing dashboards for doctors (daily schedules) and management (appointment trends, patient engagement).
- Using AI (Agentforce/Einstien Bots) for patient FAQs, visit summaries, and predictive reminders.

Requirement Gathering:

- Manage patient records (demographics, history, contact details).
- Manage doctor records (specialty, availability, working hours).
- Enable patients to book/cancel appointments via guided Flows.
- Automate email/SMS reminders before appointments.
- Track treatment follow-ups and feedback.
- Provide dashboards for doctors (appointments) and admins (overall performance).
- Integrate with Google Calendar for slot management.
- Ensure scalability and user-friendliness.

Stakeholder Analysis:

Primary Stakeholders (Direct Users):

1. Front Desk / Reception Staff – Create patient records, book appointments, reschedule/cancel slots.
2. **Nursing / Care Coordinators** – Track follow-ups, assign patients to doctors, manage treatment notes.
3. **Customer Support / Patient Helpdesk** – Handle incoming calls/messages, answer FAQs, log issue
4. **Hospital Administration Team** – Monitor daily appointments, patient flow, and staff workload.

Secondary Stakeholders (Indirect Users):

5. **Doctors / Specialists –** Consume appointment schedules (synced via calendar/email), receive summaries (but not direct Salesforce users).
6. **Hospital Management / Executives** – Review dashboards on patient volumes, cancellations, and engagement metrics.
7. **IT/Support Teams** – Maintain system integrations (Google Calendar, SMS APIs, Agentforce bots).

Business Process Mapping:

- Patient record is created (Account/Contact).

- Appointment record is created and linked to doctor + patient.
- System sends confirmation email + reminder before visit.
- Doctor conducts consultation and updates treatment record.
- Follow-up tasks/appointments are auto-created if required.
- Feedback email is sent to patient.
- Dashboards display doctor schedules, patient engagement, and appointment trends.

Use Case:

1.Patient Onboarding & Management
- Capture patient details via self-service flow or front-desk entry.
- Maintain medical history and contact information.

2.Appointment Scheduling
- Screen Flow allows booking based on doctor availability.
- Auto-blocks slots in Google Calendar..

3.Reminders & Notifications
- Email/SMS reminders 24 hrs before appointment.
- Notify doctor of last-minute cancellations.

4.Treatment & Follow-up
- Doctors add notes/prescriptions after consultation.
- Auto-create follow-up appointment or task.

5.Reporting & Dashboards
- Doctor's daily schedule dashboard.
- Appointment trend reports (weekly/monthly).
- Patient engagement dashboard (no-shows, cancellations, follow-ups).

AppExchange Exploration:

1. **Smart Calendar (Astrea IT Services) –** To provide staff with calendar views and reminders for upcoming patient appointments, reducing missed slots.

2. **Docs Made Easy (HIC Global Solutions)** – To generate PDF or DOCX visit summaries, prescriptions, or appointment confirmations directly from Salesforce.
3. **Time Warp** – To visualize patient history and doctor appointments on interactive timelines, improving case tracking.
4. **Events (Salesforce Labs)** – To manage internal events like health camps or patient workshops alongside standard appointments.
5. **User Access and Permissions Assistant (Salesforce Labs)** – To simplify managing role-based access for front desk, coordinators, and support staff.
6. **Field Trip** – To analyze data completeness in patient and appointment records, ensuring reliable reporting.

PHASE-2

Salesforce Edition: Used **Developer Edition** as a **development environment** as it free to use and practice, if the product would have been in real world it need **Enterprise Edition.**

Company Profile Setup:

Company Information configured with:
- Company Name: Enclave
- Default Locale: English(India)
- Default Time Zone: (GMT +05:30) India Standard Time (Asia/Kokalta)
- Currency Locale: USD (As I have learned that Salesforce only changes the Symbol ,not do currency rate conversion)

Business Hours & Holidays

Business Hours: Monday - Saturday (8:00 AM - 8:00 PM)
                              Sunday - (8:00 AM - 4:00 PM)
Holidays: National Holidays and any Hospital-specific holidays

Used for **escalations, Service Level Agreement(SLA), and appointment reminders.**

Fiscal Year Settings

Standard Fiscal Year (April – March, aligned with Indian financial year). Enables reporting on yearly patient engagement and revenue trends.

User Setup & Licenses

User	Licenses	Profiles
Tony Stark	Standard Salesforce User	Front desk Executive
Alex Connor	Salesforce Platform	Care Coordinator Profile
Sarah Roger	Salesforce Platform	Support Team
Cassie Thompson	**Salesforce**	System Administrator

Roles

Role Hierarchy created as:

- **Hospital Director** (top)
  - **Admin / Managers**
    - **Front Desk Staff**
    - **Care Coordinators / Support**

Ensures **data rolls up** to management for visibility.

Object Access Matrix

User/Objects	Clinic	Patient	Doctor	Appointment	Treatment	Feedback
Cassie Thompson(Sys Admin)	R/W/E	R/W/E	R/W/E	R/W/E	R/W/E	R/W/E
Tony Stark(FDE)	Read Only	R/W/E(no delete)	Read Only	R/W/E(no delete)	No access	Read Only
Alex Connor(Care Team)	Read only	R/W/E(no delete)	Read Only	R/W/E(no delete)	R/W/E(no delete)	Read Only
Sarah Roger(Support)	Read Only	Read Only	Read Only	Read Only	Read Only	R/W

Login Access Policies:

Configured to allow **Admins to login as users** for troubleshooting.