

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/Einstein 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 is free to use and practice, if the product would have been in the real world, it would 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/Kolkata)
- Currency Locale: USD (As I have learned that Salesforce only changes the Symbol, it does 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 staff
Sarah Roger	Salesforce Platform	Care Coordinator Profile
Kevin Joshep	Salesforce Platform	Support Team
Cassie Thompson	Salesforce	System Administrator
Henry William	Salesforce	Hospital Manager

Roles: Role Hierarchy created as:

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

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

OWD

Patient (Contact) → **Private**

Appointment → **Private**

Treatment → **Controlled by Parent (Appointment)**

Feedback → **Controlled by Parent (Appointment)**

Doctor → **Public Read Only**


Clinic (Account) → **Public Read/Write**

Object Access Matrix

User/Objects	Clinic (Account)	Patient (Contact)	Doctor	Appointment	Treatment	Feedback
Cassie Thompson(Sys Admin , Hos Director)	R/W/E	R/W/E	R/W/E	R/W/E	R/W/E	R/W/E
Tony Stark (Front Desk Staff)	Read Only	R/W/E(no delete)	Read Only	R/W/E(no delete)	No access	Read Only
Sarah Roger (Care Team)	Read only	R/W/E(no delete)	Read Only	R/W/E(no delete)	R/W/E(no delete)	Read Only
Kevin Joshep (Support)	Read Only	Read Only	Read Only	Read Only	Read Only	R/W
Henry William (hospital manager)	R/W/E	R/W/E	R/W/E	R/W/E	R/W/E	R/W/E

Login Access Policies:

Configured to allow **Admins to log in as users** for troubleshooting.



SETUP
Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert

Your Organization's Role Hierarchy

Collapse All

Expand All

enclave

Add Role

CEO Edit | Del | Assign

Add Role

CFO Edit | Del | Assign

Add Role

COO Edit | Del | Assign

Add Role

Hospital Director Edit | Del | Assign

Add Role

Hospital Manager Edit | Del | Assign

Add Role

Care Coordinator Edit | Del | Assign

Add Role

Front Desk Edit | Del | Assign

Add Role

Support Edit | Del | Assign

ROLE HIERARCHY Screenshot

Project Screenshots:

User
Cassie Thompson

User ProfileHelp for this Page

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(1\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-in Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Cassie Thompson	Role	Hospital Director
Alias	cthom	User License	Salesforce
Email	anushkabhatter2020@gmail.com	Profile	System Administrator
Username	thompccassie@gmail.com	Active	✓
Nickname	User17576631169828290800	Marketing User	<input type="checkbox"/>

User
Tony Stark

User ProfileHelp for this Page

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-in Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(3+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Tony Stark	Role	
Alias	tstar	User License	Salesforce Platform
Email	anushkabhatter2020@gmail.com	Profile	Front Desk Staff
Username	starktony@gmail.com	Active	✓
Nickname	User17549794397601927073	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>

User
Sarah Roger

User ProfileHelp for this Page

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-in Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Sarah Roger	Role	
Alias	sroge	User License	Salesforce Platform
Email	anushkabhatter2020@gmail.com	Profile	Care Team
Username	rogesara@gmail.com	Active	✓
Nickname	User17577753375304642708	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>

User
Kevin Joshep

User ProfileHelp for this Page

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User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Kevin Joshep	Role	
Alias	kjosh	User License	Salesforce Platform
Email	anushkabhatter2020@gmail.com	Profile	Support Staff
Username	josephkev@gmail.com	Active	✓
Nickname	User17577756335247765896	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>

User
Henry William

User ProfileHelp for this Page

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-in Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Henry William	Role	
Alias	hwill	User License	Salesforce
Email	anushkabhatter2020@gmail.com	Profile	Hospital Manager
Username	enry.ben@demo-hospital.co	Active	✓
Nickname	User1757662867977337408	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>