#### 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:**

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

- 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/Kokalta)
- 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** 

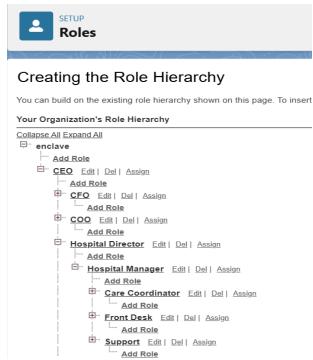
Clinic (Account) → Public Read/Write

# **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

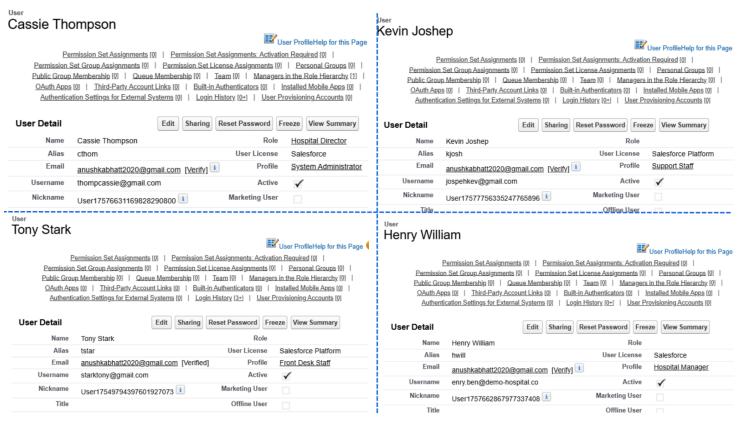
# **Login Access Policies:**

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



**ROLE HIERARCHY Screenshot** 

# **Project Screenshots:**



<sup>User</sup> 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 Sh	aring	set Password	Freeze	View Summary	
Name	Sarah Roger			R	ole		
Alias	sroge			User Lice	nse S	alesforce Platform	
Email	anushkabhatt2020@gm	nail.com [\	/erify]	Pro	file <u>C</u>	are Team	
Username	rogesara@gmail.com			Act	tive	<b>/</b>	
Nickname	User175777533753046	642708 🚺		Marketing U			
Title				Offline U	ser		