

P26 – T1 – Automation of Digital Intake with MS 365 – Carelink of  
Georgia

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## 1.0 Project Overview / Abstract

### 1.1 Background

CareLink of Georgia is a nonprofit healthcare organization that helps connect patients to treatment and resources, especially those dealing with opioid use disorder and people who may not have consistent access to healthcare. Right now, their patient intake process is still mostly paper-based. Patients fill out forms by hand, and staff then scan, email, and upload those forms manually.

This process takes a lot of time, creates extra work for staff, and makes it harder to stay organized. Our project focuses on changing this paper process into a secure digital workflow using Microsoft 365 and Adobe Sign so intake becomes faster, cleaner, and easier to manage.

### 1.2 Objectives

- Create a digital intake process that patients can complete and sign electronically
- Automatically store completed and signed intake forms in SharePoint
- Use Adobe Sign for secure digital signatures
- Build an automated workflow using Power Automate
- Develop a simple process for digitizing other paper forms in the future
- Provide training materials so staff can use the system with little confusion

### 1.3 Scope

In Scope:

- Digitize one full intake form for CareLink
- Build a working intake workflow for:
  - Email-based form signing
  - In-office tablet/kiosk signing
- Store all submitted forms securely in SharePoint
- Track form metadata such as patient name, staff name, and submission date
- Test the system using sample data (no real patient data)
- Create documentation and training materials for staff
- Plan a method for future legacy form digitization

Out of Scope:

- Direct integration with Methasoft
- Billing, insurance, or clinical charting systems
- Use of real patient data
- Mobile app development

## 2.0 Project Website

URL: <https://cs4850-26.github.io/carelink/>

This website is used to share project updates, documentation, and final deliverables. It is public and does not require a login. It serves as a central location for all project-related materials for the class, as well as the advisor/sponsor.

## 3.0 Deliverables

### 3.1 Project Plan

The Project Plan itself is a vital document for the project. It highlights and goes over the overall goals, scope, team roles, schedule, milestones, and communication plan for the project. It helps everyone stay organized and shows CareLink staff and our advisor what to expect.

### 3.2 Requirements Document (SRS)

SRS (Software Requirements Specification) defines what the digital intake system must do, including:

- Security
- Form Submission
- Signatures
- Storage
- Notifications

### 3.3 Software Design Document (SDD)

SDD (Software Design Document) explains how the system is designed, including:

- Intake workflow
- Adobe Sign integration
- Power Automate flows
- SharePoint storage structure

### 3.4 Code and Development Document

Describes the actual technical setup and implementation of:

- Microsoft Forms
- Adobe Sign
- Power Automate
- SharePoint libraries
- Automation flow logic

### 3.5 Workflow and Storage Setup (Prototype Presentation)

An in-class presentation and demo showing:

- The Form Selection Tool
- The signing process
- Automated file storage
- Email notifications

### 3.6 Test Plan and Report (STP & STR)

Describes how we tested the form and workflow. It lists the test scenarios, results, and any changes we made based on testing to make sure everything works correctly.

### 3.7 Training & User Guide

Step-by-step guide for CareLink staff on:

- Sending forms
- Tracking signatures
- Accessing completed forms
- Managing SharePoint storage

### 3.8 Final Report Package

This includes the complete project documentation:

- Final Documentation
- Final Presentation
- Demo Video
- Links to the Website and GitHub Repository
- Source Files
- All Completed Deliverables

## 4.0 Meeting Schedule

### 4.1 Weekly Meetings

The project team will hold weekly meetings every Friday at 5:00 PM via Microsoft Teams.

These meetings will serve to review progress, assign upcoming tasks, and discuss any challenges. Each member will provide an update on their assigned deliverables. The team leader will track agenda items and ensure notes are shared with the sponsor and advisor.

### 4.2 Check-Ins

To maintain progress between weekly meetings, midweek check-ins (Wednesdays) will be conducted through group chat on Microsoft Teams. These short check-ins will confirm task

completion, identify roadblocks, and provide opportunities for quick clarifications. Urgent updates may also be handled through phone calls or text messages.

#### 4.3 Sponsor/Advisor Meetings

Meetings with the project sponsor/advisor (Professor Sharon Perry) will take place bi-weekly on Tuesdays or upon request. These meetings will ensure alignment with Carelink's requirements, provide feedback on deliverables, and address risks or changes to scope. The advisor will also attend milestone presentations to evaluate progress and outcomes.

### 5.0 Collaboration and Communication

#### 5.1 Tools

To ensure smooth collaboration, the team will use the following tools:

- Microsoft Teams – For weekly virtual meetings, file sharing, and ongoing discussions.
- GitHub Pages – To host the public-facing project website and final deliverables.
- Microsoft SharePoint & Power Automate – For workflow design, secure storage, and automation.
- Microsoft Forms & Adobe Acrobat – To create digital intake forms and add digital signatures.
- Group Chat (SMS/Text) – For quick updates and urgent reminders.
- Email – For official communications with the advisor, sponsor, and external stakeholders.

#### 5.2 Communication Plan

The communication plan ensures information flows efficiently among team members and stakeholders:

- Internal Communication (Team Members):
  - Weekly meetings (Fridays) on Microsoft Teams for progress reports.
  - Midweek check-ins (Wednesdays) via Teams chat for task alignment.
  - Quick updates through group texts or calls when needed.
- External Communication (Advisor & Sponsor):
  - Bi-weekly sponsor meetings (Tuesdays) to share updates and get feedback.
  - Deliverables submitted through email and posted on the project website.
  - Final presentations and reports shared via both Microsoft Teams and GitHub Pages.
- Documentation & Record-Keeping:
  - Meeting notes will be taken by the documentation lead (Aashna Suthar) and uploaded to the Teams project folder.
  - All finalized deliverables will be stored in SharePoint with proper version control.

## 6.0 Project Schedule

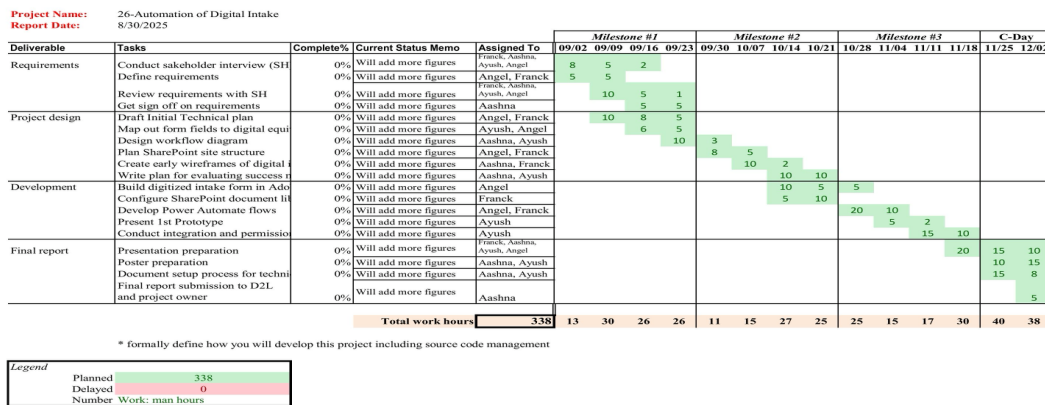
### 6.1 Milestones

- Milestone 1 – Requirements & Planning
  - Stakeholder discussions
  - User workflows
  - Intake form selection
  - Technical planning
- Milestone 2 – Development & Automation
  - Digital intake form created
  - Adobe Sign integration
  - Power Automate workflow built
  - SharePoint Libraries configured
  - Email notifications tested
  - End-to-end workflow completed
- Milestone 3 – Testing, Training, & Final Delivery
  - Software testing and test report
  - Training documentation
  - Legacy form digitization guide
  - Final presentation and demo video

### 6.2 Gantt Chart

Below is an image of what our Gantt Chart looks like:

(It is submitted as a separate file per class instructions.)



## 7.0 Version Control

We will be using GitHub for version control through a group organization which will contain the project repository that all team members will have access to. SharePoint is used for internal document storage and workflow files.