

PHASE 1:

Objective: To lay the foundational groundwork for the Patient Appointment Management System by formalizing the project's purpose, identifying key players, and mapping the primary business workflow.

1. Project Charter

This document acts as the guiding star of the project, outlining its core purpose, scope, and intended outcomes.

- **Project Title:** Patient Appointment Management System
- **Industry:** Healthcare / Clinic Management
- **Problem Statement:**

The current appointment scheduling in many small clinics is handled manually through registers or spreadsheets. This results in several operational challenges:

 - Receptionists struggle to track doctors' availability, often leading to overlapping bookings.
 - Patients receive no reminders or confirmations, causing missed appointments.
 - Doctors have no organized view of their daily schedules.
 - Administrators lack real-time reports on appointment trends, cancellations, and resource usage.

These issues reduce clinic efficiency, increase patient wait times, and create overall dissatisfaction.
- **Proposed Solution:**

Develop a custom Salesforce-based application called **Patient Appointment Management System** that centralizes all patient, doctor, and appointment data. The system will automate scheduling, prevent overlapping appointments, send confirmation/reminder notifications, and provide real-time dashboards to improve decision-making and operational efficiency.
- **Key Use Cases:**
 - Receptionist creates a new Patient record and books an appointment with a Doctor.
 - The system validates doctor availability and prevents overlapping bookings.

- Patient automatically receives a confirmation email and a reminder 1 day before the appointment.
- Doctor views their appointment schedule and marks completed appointments.
- Admin views dashboards to analyze daily appointments, cancellations, and doctor workload.

2. Identified Stakeholders & Users

The following key users have been identified as the target audience for the application:

- **Receptionist:** Manages patient records, books appointments, and handles cancellations. Needs a fast and simple interface to manage schedules accurately.
- **Doctor:** Provides medical consultation and needs a clear view of upcoming appointments, patient details, and the ability to update appointment status.
- **Patient:** Receives confirmation and reminder communications and attends scheduled appointments.
- **System Administrator:** Configures and maintains the Salesforce system, manages security, profiles, permissions, and supports users.
- **Clinic Administrator:** Reviews reports and dashboards to track clinic performance, appointment trends, and resource allocation.

3. Core Business Process Map

The main workflow that the system will support is as follows:

1. **Patient Registration:** Receptionist registers a new Patient or selects an existing record.
2. **Appointment Booking:** Receptionist books an Appointment with a selected Doctor and time slot.
3. **Availability Validation:** The system checks for conflicts and prevents overlapping appointments for the same Doctor.
4. **Notification Trigger:** The system sends an appointment confirmation email immediately and a reminder email 1 day before the appointment.
5. **Consultation:** On the appointment date, the Doctor attends the patient and marks the Appointment as “Completed.”

6. **Performance Review:** The Administrator views dashboards to analyze the number of appointments, cancellations, and doctor workload trends.