

Phase 10: Final Presentation & Demo Day

1. Pitch Presentation

Project Name & Introduction

Patient Records & Treatment Tracking System

Developed in Salesforce Lightning Experience

Purpose:

Provide a secure, cloud-based platform for hospitals or clinics to efficiently manage patient details, treatment plans, and visits while giving real-time insights through reports and dashboards.

Problem Statement

- Manual patient record-keeping is **error-prone and time-consuming**.
 - Tracking treatment progress and scheduled visits is difficult without automation.
 - Lack of timely notifications leads to missed follow-ups and inefficient care coordination.
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Project Goals

- Centralize patient information and treatment history.
 - Automate appointment and follow-up reminders.
 - Provide dynamic reports and dashboards for monitoring patient health and treatment stages.
 - Enforce robust security for sensitive medical data.
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Key Features

- **Record-Triggered Flows:** Auto-update treatment status (Planned, Active, Completed) and send follow-up reminders.
 - **Scheduled Apex/Flows:** Daily check for upcoming visits and overdue treatments.
 - **Appointment Automation:** Email alerts to doctors, patients, and coordinators.
 - **Reports & Dashboards:** Visualize patient distribution by treatment status, gender, and appointment dates.
 - **Security & Access Control:** Sharing rules, Field-Level Security, session settings, and **login IP ranges for the Doctor profile** to protect patient data.
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Impact / Benefits

- **Improved Care Coordination:** Doctors and staff have instant access to accurate records.

- **Reduced Manual Errors:** Automated updates and reminders cut human mistakes.
 - **Time Efficiency:** Faster scheduling and tracking of treatments and visits.
 - **Data-Driven Insights:** Real-time dashboards help management make informed decisions.
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Technology Used

- **Salesforce Lightning Platform**
- **Flows & Process Automation:** Record-Triggered Flows, Scheduled Flows
- **Apex Classes** for advanced automation (e.g., visit scheduler, treatment reminders)
- **Email Alerts & Notifications**
- **Reports & Dashboards** for analytics and monitoring
- **Data Import Wizard / Data Loader** for bulk patient and treatment data management