Patient Explorer App - Project Status Brief

Date: December 3, 2025 **Project:** Patient Explorer (Practice Transition Support) **Status:** ACTIVE DEVELOPMENT - Beta Phase **Deadline:** December 31, 2025 (28 days remaining)

Executive Summary

Patient Explorer is a HIPAA-compliant desktop application supporting Dr. Robert Green's practice transition from Southview Medical Group to Home Team Medical Services. The application manages patient consent tracking, APCM program transitions, and SMS outreach campaigns.

Current Status: Beta application deployed and functional. Primary features complete. Focus shifting to Microsoft OAuth integration, consent form setup, and SMS campaign launch.

Risk Level: 🟡 MODERATE

- Timeline is aggressive but achievable
- Core features operational
- Integration dependencies (Microsoft OAuth, Forms) in progress

Key Metrics:

- **Days to Deadline:** 28 days (Dec 31, 2025)
- **Features Complete:** 70% (14 of 20 planned features)
- **Patient Records:** 1,384 patients imported
- **Spruce Matches:** ~1,100+ patients matched (estimated)
- **Consent Campaign:** Not yet launched (pending S7 completion)

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1. Timeline & Milestones

1.1 Critical Path

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December 2025 Timeline (28 days remaining)

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│ Week 1 (Dec 2-8)  │ Week 2 (Dec 9-15) │ Week 3 (Dec 16-22)   │
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│ ✅ App deployed   │ OneNote setup     │ Bug fixes            │
│ 🔄 S5: MS OAuth   │ S8: SMS campaign  │ Staff training       │
│ 🔄 S7: Forms      │ End-to-end tests  │ 50-patient pilot     │
│ Test connections  │ Alpha on Jenny PC │ Response monitoring  │
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│ Week 4 (Dec 23-31): Full Rollout & Support          │
│ • All 1,384 patients contacted                │
│ • Monitor consent response rates              │
│ • Daily phone follow-ups for non-responders         │
│ • December 31: Practice transition effective date      │
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1.2 Key Milestones

Milestone	Target Date	Status	Progress
Beta App Deployment	Dec 2	✅ Complete	100%
Microsoft OAuth Integration	Dec 6	🔄 In Progress	40%
Consent Form Setup	Dec 6	🔄 In Progress	30%
SMS Campaign Launch	Dec 9	📅 Scheduled	0%
OneNote Integration	Dec 13	📅 Planned	0%
Alpha Deployment (Jenny's PC)	Dec 10	📅 Planned	0%
50-Patient Pilot	Dec 16	📅 Planned	0%
Full Rollout (1,384 patients)	Dec 20	📅 Planned	0%
Practice Transition Effective	Dec 31	📅 Fixed	-

1.3 Days Remaining Breakdown

Activity	Days Allocated	Status
OAuth & Forms Setup	4 days	In progress
SMS Campaign Execution	12 days	Not started
Response Processing	10 days	Not started
Phone Follow-ups	7 days	Not started
Buffer/Contingency	5 days	Available
Total	**28 days**	On track

2. Progress Summary

2.1 What's Built (70% Complete)

Core Infrastructure (100%):

- ✅ Streamlit application framework (15 pages)
- ✅ SQLite database with SQLAlchemy ORM
- ✅ Authentication system (local users)

- ✅ BitLocker encryption verification
- ✅ Audit logging (HIPAA compliant)

Data Management (95%):

- ✅ Excel patient import (1,384 patients loaded)
- ✅ APCM enrollment data parsing
- ✅ Spruce contact matching (~1,100 matched)
- ✅ Consent token generation
- ✅ AI-powered reconciliation agent (Smart Data Ingest)
- 🔄 Consent response import (90% - needs testing)

API Integrations (60%):

- ✅ Spruce Health API (SMS sending, contact management)
- ✅ Azure Claude AI (HIPAA-compliant AI features)
- ✅ Azure Document Intelligence (OCR)
- 🔄 Microsoft Graph API (40% - OAuth in progress)
- ⏳ Microsoft Forms integration (30% - form created, import pending)

User Features (75%):

- ✅ Patient list view with search/filter
- ✅ Consent tracking dashboard
- ✅ APCM patient management
- ✅ SMS template system
- ✅ Daily summary dashboard
- ✅ Patient notes timeline
- 🔄 Outreach campaign page (90% - needs OAuth)
- 🔄 Follow-up queue (80% - needs testing)
- ⏳ OneNote browser (0% - pending S6)

2.2 What's In Progress (20%)

Active Work Items:

Feature	Story	Progress	Blocker
Microsoft OAuth	S5	40%	Azure app registration needed
Consent Form	S7	30%	Form created, token pre-fill pending
SMS Campaign	S8	10%	Depends on S7 completion
OneNote Integration	S6	5%	Depends on S5 (OAuth)

2.3 What's Not Started (10%)

Pending Features:

- ⏳ Microsoft OAuth callback handling
- ⏳ OneNote notebook browsing
- ⏳ OneNote page content extraction
- ⏳ Automated Forms response import (Graph API)
- ⏳ Multi-user SharePoint sync (future)

3. Current Sprint (S5-S8)

3.1 Story Status

S5: Microsoft OAuth Integration (8 points)

Priority: HIGH | **Status:** 🔄 IN PROGRESS (40%)

Goal: Enable Microsoft account login for OneNote access and user authentication

Progress:

- ✅ Azure app registration process documented
- ✅ MSAL library added to requirements
- 🔄 MicrosoftAuth class implementation (60%)
- ⏳ Streamlit callback handler (0%)
- ⏳ Session token management (0%)
- ⏳ Testing on both machines (0%)

Acceptance Criteria:

- ☐ User clicks "Sign in with Microsoft" button
- ☐ Redirected to Microsoft login page
- ☐ Can authenticate with southviewteam.com credentials
- ☐ Session persists across page navigation
- ☐ Logout works correctly
- ☐ Tokens refresh automatically

Blockers:

- Azure app registration needs admin access (Dr. Green)
- Redirect URI configuration for localhost
- Testing requires both machines available

ETA: December 6, 2025

S7: Consent Form Setup (5 points)

Priority: CRITICAL | **Status:** 🔄 IN PROGRESS (30%)

Goal: Create Microsoft Forms consent form with token parameter

Progress:

- ✅ Form content drafted
- ✅ APCM election questions defined
- 🔄 Form creation in Microsoft Forms (50%)
- 🔄 Token parameter configuration (30%)
- ⏳ SMS template updates (0%)
- ⏳ End-to-end testing (0%)

Acceptance Criteria:

- ☐ Microsoft Form created with consent questions
- ☐ APCM election questions included

- ☐ Form accepts token parameter in URL
- ☐ Form is mobile-friendly
- ☐ Token captured in responses
- ☐ SMS template updated with form URL

Blockers:

- Microsoft Forms token pre-fill testing needed
- Form URL not yet documented in .env

ETA: December 6, 2025

S8: SMS Outreach Campaign Launch (8 points)

Priority: CRITICAL | **Status:** 📅 PLANNED (10%)

Goal: Send consent SMS messages to all matched patients

Progress:

- ✅ SMS templates created (initial, reminders)
- ✅ Spruce API integration complete
- ✅ Rate limiting implemented
- ⏳ Campaign page UI (80% - needs testing)
- ⏳ Batch sending logic (90% - needs testing)
- ⏳ Follow-up scheduling (70% - needs testing)
- ⏳ End-to-end campaign test (0%)

Acceptance Criteria:

- ☐ Can send SMS in batches (50 at a time)
- ☐ Progress indicator shows sending status
- ☐ Errors logged and displayed
- ☐ Patient record updated with outreach date
- ☐ Consent status changed to "invitation_sent"
- ☐ Follow-up reminders scheduled (Day 3, 7, 14)

Dependencies:

- Depends on S7 (consent form URL must be available)
- Depends on S5 (if OAuth required for app access)

ETA: December 9, 2025

S6: OneNote Integration (13 points)

Priority: HIGH | **Status:** 📅 PLANNED (5%)

Goal: Access Green Clinic Team Notebook for patient worksheets

Progress:

- ✅ Research complete (Graph API endpoints documented)
- ✅ OneNoteClient class designed
- ⏳ Implementation (0%)

- ⌛ UI page creation (0%)
- ⌛ Content parser (0%)
- ⌛ Testing with real notebook (0%)

Acceptance Criteria:

- ☐ App finds "Green Clinic Team Notebook"
- ☐ Lists all sections in the notebook
- ☐ Can view page content in app
- ☐ Can extract text for AI processing
- ☐ Can link pages to patient records

Dependencies:

- Depends on S5 (Microsoft OAuth required for delegated access)

ETA: December 13, 2025

3.2 Sprint Velocity

Metric	Value
Total Points Planned	34 points (S5-S8)
Points Complete	10 points (~30%)
Points In Progress	13 points (~38%)
Points Not Started	11 points (~32%)
Estimated Completion	December 13, 2025

Velocity Assessment: 🟡 MODERATE RISK

- Current pace: ~3 points/day
- Required pace: ~3.5 points/day
- Recommendation: Focus on S5 and S7 (critical path)

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4. Technical Architecture Status

4.1 Application Components

Component	Status	Health	Notes
Streamlit UI	✅ Deployed	🟢 Healthy	15 pages operational
SQLite Database	✅ Deployed	🟢 Healthy	1,384 patients imported
Authentication	🔄 Partial	🟡 Limited	Local auth works, OAuth pending
Spruce API	✅ Deployed	🟢 Healthy	Tested, rate limits respected
Azure Claude	✅ Deployed	🟢 Healthy	Smart Data Ingest working
MS Graph API	🔄 Partial	🟡 Limited	OAuth in progress

Audit Logging	✅ Deployed	🟢 Healthy	All PHI access logged

4.2 Data Status

Dataset	Count	Completeness	Quality
Patients	1,384	100%	🟢 High
Spruce Matches	~1,100	~80%	🟢 High
APCM Enrolled	~200	100%	🟢 High
Consent Tokens	1,384	100%	🟢 High
Consent Responses	0	0%	🟣 N/A (not launched)

4.3 Integration Health

Service	Status	BAA	Last Tested	Issues
Spruce Health	✅ Connected	✅ Yes	Dec 2	None
Azure OpenAI	✅ Connected	✅ Yes	Dec 2	None
Azure Doc Intel	✅ Connected	✅ Yes	Dec 2	None
MS Graph (OAuth)	🔄 In Progress	✅ Yes	-	Needs app registration
MS Forms	🔄 Partial	✅ Yes	-	Token pre-fill pending
SharePoint	⌛ Future	✅ Yes	-	Not implemented

4.4 Security & Compliance

Requirement	Status	Evidence
BitLocker Encryption	✅ Enforced	Startup check implemented
Localhost Binding	✅ Enforced	Streamlit config verified
BAA Coverage	✅ Complete	Spruce, Microsoft, Azure
Audit Logging	✅ Active	All PHI access logged
Password Hashing	✅ Implemented	bcrypt with salt
TLS for APIs	✅ Enforced	All external calls use HTTPS

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5. Risks & Blockers

5.1 Critical Risks (🔴 High Priority)

Risk	Impact	Likelihood	Mitigation	Owner

Microsoft OAuth delays	High - Blocks OneNote & Forms	Medium	Proceed with local auth for consent campaign	Dr. Green
Consent form token pre-fill issues	Critical - Campaign can't launch	Medium	Test thoroughly, have manual backup	Dev Team
Patient response rate <50%	High - Insufficient consents	Medium	Multi-channel outreach (SMS + phone + mail)	Dr. Green
Spruce API rate limits hit	Medium - Campaign delays	Low	Batch with delays, monitor rate limit headers	Dev Team

5.2 Medium Risks (🟡 Monitor)

Risk	Impact	Likelihood	Mitigation
Staff training insufficient	Medium	Medium	Create quick-start guide, schedule training session
Database corruption	High	Low	Daily backups to OneDrive, test restore process
Azure service outage	Medium	Low	AI features gracefully degrade, core features work
Patient phone numbers outdated	Medium	Medium	Encourage Spruce updates, use multi-channel

5.3 Current Blockers

Blocker	Blocking	Impact	Resolution	ETA
Azure app registration	S5 (OAuth)	S6 (OneNote) depends on S5	Dr. Green to complete registration	Dec 4
MS Forms token testing	S7 (Forms)	S8 (Campaign) depends on S7	Dev team to test token parameter	Dec 5
Jenny's PC setup	Alpha deployment	User testing delayed	Schedule setup session	Dec 10

6. Next Steps

6.1 Immediate (This Week - Dec 3-8)

Priority 1: Unblock S5 and S7 (Critical Path)

Task	Owner	ETA	Dependencies
Complete Azure app registration	Dr. Green	Dec 4	Admin access
Finish Microsoft OAuth implementation	Dev Team	Dec 6	Azure app ready

Create Microsoft Forms consent form	Dr. Green	Dec 5	Form content approved
Test Forms token pre-fill	Dev Team	Dec 5	Form created
Update SMS templates with form URL	Dev Team	Dec 6	Form URL available
End-to-end test: Import → SMS → Form → Response	Dev Team	Dec 6	All above complete

Priority 2: Prepare for Campaign Launch

Task	Owner	ETA
Validate all 1,384 patient phone numbers	Staff	Dec 8
Test SMS send with 5 test patients	Dev Team	Dec 7
Create campaign monitoring dashboard	Dev Team	Dec 8
Draft phone follow-up script	Dr. Green	Dec 8

6.2 Next Week (Dec 9-15)

Priority 1: Launch Consent Campaign

Task	ETA
Send initial SMS (Batch 1: 500 patients)	Dec 9
Send initial SMS (Batch 2: 500 patients)	Dec 10
Send initial SMS (Batch 3: 384 patients)	Dec 11
Monitor responses, import to app	Dec 9-11
Deploy alpha to Jenny's PC	Dec 10

Priority 2: OneNote Integration

Task	ETA
Implement OneNoteClient	Dec 11
Create OneNote browser UI	Dec 12
Test with Green Clinic Team Notebook	Dec 13

6.3 Week 3 (Dec 16-22)

Priority 1: Follow-Up Reminders

Task	ETA
Send Day 3 reminders (Batch 1)	Dec 12
Send Day 7 reminders (Batch 1)	Dec 16

| Send Day 14 final reminders (Batch 1) | Dec 23 |
| Phone follow-ups for non-responders | Dec 18-22 |

Priority 2: Pilot Testing & Bug Fixes

Task	ETA
50-patient pilot review	Dec 16
Bug fix sprint	Dec 17-19
Staff training session	Dec 19

6.4 Week 4 (Dec 23-31)

Priority 1: Full Rollout Support

Task	ETA
Monitor consent response rates daily	Dec 23-31
Phone outreach for remaining non-responders	Dec 26-30
Final status report	Dec 31

7. Decisions Needed

7.1 Immediate Decisions (This Week)

Decision	Options	Recommendation	Impact
OAuth timing: Now or later?	A) Complete OAuth this week B) Launch campaign with local auth, add OAuth later	**Option B** - Critical path is consent campaign, not OneNote	If B: OneNote delayed to Week 3
Forms import: Manual or API?	A) Manual CSV import initially B) Build Graph API import first	**Option A** - Faster to production, API can be added later	If A: Manual import overhead, but campaign launches sooner
SMS batch size	A) 50 messages/batch B) 100 messages/batch C) 200 messages/batch	**Option A** - Conservative, proven to work	If A: Campaign takes 3 days; If C: Risk of rate limits
Pilot cohort selection	A) First 50 patients alphabetically B) 50 APCM patients (highest risk) C) 50 Spruce-matched patients (easiest)	**Option B** - APCM patients are highest priority for transition	If B: Tests complex election logic

7.2 Strategic Decisions (Next Week)

Decision	Deadline	Rationale
OneNote priority	Dec 9	Decide if care plans needed before Dec 31 or can wait until January
Multi-user deployment	Dec 10	Decide if multiple staff need simultaneous access during campaign
SharePoint sync	Dec 13	Decide if real-time sync needed or periodic export sufficient

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8. Follow-Up Actions

8.1 For Dr. Green

Immediate (This Week):

- ☐ Complete Azure app registration for Microsoft OAuth (ETA: Dec 4)
- ☐ Review and approve Microsoft Forms consent form content (ETA: Dec 4)
- ☐ Provide Green Clinic Team Notebook access for testing (ETA: Dec 5)
- ☐ Draft phone follow-up script for non-responders (ETA: Dec 8)

Next Week:

- ☐ Review SMS campaign results (Dec 10)
- ☐ Test alpha deployment on Jenny's PC (Dec 10)
- ☐ Approve 50-patient pilot cohort (Dec 16)

8.2 For Development Team

Immediate (This Week):

- ☐ Complete Microsoft OAuth implementation (ETA: Dec 6)
- ☐ Test Microsoft Forms token parameter (ETA: Dec 5)
- ☐ Update SMS templates with form URL (ETA: Dec 6)
- ☐ End-to-end test: Import → SMS → Form → Response (ETA: Dec 6)
- ☐ Create campaign monitoring dashboard (ETA: Dec 8)

Next Week:

- ☐ Launch consent SMS campaign (Batches 1-3) (Dec 9-11)
- ☐ Implement OneNoteClient (Dec 11-13)
- ☐ Deploy alpha to Jenny's PC (Dec 10)
- ☐ Monitor and import consent responses (Dec 9-15)

8.3 For Clinical Staff (Jenny)

Immediate (This Week):

- ☐ Validate patient phone numbers in Spruce (ETA: Dec 8)
- ☐ Review SMS templates for accuracy (ETA: Dec 5)
- ☐ Prepare for alpha testing (ETA: Dec 10)

Next Week:

- ☐ Test alpha deployment on workstation (Dec 10)
- ☐ Provide feedback on UI/workflow (Dec 11)
- ☐ Begin monitoring consent responses (Dec 12)

8.4 For Cloud Agent / Background Tasks

Automated Monitoring:

- ☐ Set up daily backup of patients.db to OneDrive (automated script)
- ☐ Create alert for Spruce API rate limit approaching (monitoring script)
- ☐ Set up dashboard for consent response rate tracking (Streamlit page)

Documentation:

- ☐ Generate user quick-start guide from existing docs (automated)
- ☐ Create troubleshooting FAQ based on testing issues (iterative)

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9. Success Criteria

9.1 Technical Success Metrics

Metric	Target	Current	Status
App Uptime	>99%	100%	✅
SMS Send Success	>95%	Not launched	⌛
Form Response Import	<5 min manual	Not tested	⌛
Patient Import Time	<30 sec for 1,000	~15 sec	✅
Zero PHI in Logs	100%	100%	✅

9.2 Business Success Metrics

Metric	Target	Current	Status
Consent Response Rate (Day 7)	>30%	Not launched	⌛
Consent Response Rate (Day 14)	>50%	Not launched	⌛
Final Consent Rate (Dec 31)	>70%	Not launched	⌛
APCM Transfer Elections	>80% of APCM patients	Not launched	⌛
Staff Adoption	100% (3-4 staff)	100% (Dr. Green)	🟠

9.3 HIPAA Compliance Metrics

Requirement	Target	Current	Status
BAA Coverage	100% of PHI services	100%	✅
Audit Log Completeness	100% of PHI access	100%	✅

BitLocker Enforcement	100% of deployments	100%	✅
Localhost Binding	100% of instances	100%	✅

10. Summary & Recommendations

10.1 Overall Assessment

Status: 🟡 ON TRACK WITH MODERATE RISK

Confidence Level: 75%

Rationale:

- Core infrastructure is solid (70% complete)
- Critical path items (OAuth, Forms) are in progress
- 28 days is sufficient if no major blockers
- Team has demonstrated ability to execute quickly

10.2 Key Recommendations

1. Focus on Critical Path (S5, S7, S8)

- Prioritize consent campaign launch over OneNote features
- OAuth can be completed after campaign if needed
- OneNote is "nice to have" for December, critical for January

2. Launch Campaign Early (Dec 9)

- Start campaign as soon as S7 complete
- Don't wait for OneNote integration
- 22 days for responses + follow-ups is adequate

3. Implement Fail-Safes

- Test Forms token parameter thoroughly (backup: manual token entry)
- Have phone follow-up plan ready (backup: if SMS fails)
- Daily backups of database (backup: if corruption)

4. Monitor Daily

- Check consent response rates daily
- Adjust follow-up strategy based on early results
- Be prepared to escalate phone outreach if needed

10.3 Go/No-Go Criteria for Campaign Launch (Dec 9)

Must Have (Go Criteria):

- ✅ Microsoft Forms consent form created and tested
- ✅ Token parameter working (or manual backup ready)
- ✅ SMS templates updated with form URL
- ✅ End-to-end test completed successfully (5 test patients)
- ✅ Patient phone numbers validated in Spruce
- ✅ Campaign monitoring dashboard ready

Nice to Have (Can launch without):

- ⬤ Microsoft OAuth (can use local auth initially)
- ⬤ OneNote integration (can add in January)
- ⬤ Graph API response import (can use manual CSV)
- ⬤ Alpha deployment on Jenny's PC (can deploy after launch)

10.4 Final Thoughts

The Patient Explorer project is well-positioned to meet the December 31 deadline. The development team has built a solid foundation with HIPAA-compliant architecture and functional core features. The primary risk is timeline compression, but with focused effort on the critical path (consent campaign), success is achievable.

Recommendation: Proceed with campaign launch on December 9, 2025, pending successful completion of S7 (Consent Form Setup) and basic testing. OneNote and advanced features can be deferred to January 2026 without impacting the primary goal of obtaining patient consent before the practice transition.

Appendices

A. Story Point Reference

Points	Complexity	Typical Duration
1-2	Trivial	<4 hours
3-5	Simple	1-2 days
8	Medium	2-3 days
13	Complex	4-5 days
20+	Very Complex	1+ week

B. Contact Information

Role	Name	Contact
Project Owner	Dr. Robert Green	robert@greenclinicteam.com
Clinical Lead	Nurse Jenny	jenny@greenclinicteam.com
Development Team	BMAD Team	-

C. Related Documents

Document	Location	Last Updated
Architecture Overview	`Project_Patient_Explorer_App/architecture/2025-12-03_App-Architecture-Overview.md`	Dec 3, 2025
Spruce API Research	`Project_Patient_Explorer_App/research/2025-12-03_Spruce-API-Research.md`	Dec 3, 2025
ADR-001	`docs/architecture/2025-12-02_ADR-001-Beta-App-Architecture.md`	Dec 2, 2025
Story S5	`docs/stories/S5-microsoft-oauth-integration.md`	Dec 2, 2025

Story S6	`docs/stories/S6-onenote-integration.md`	Dec 2, 2025
Story S7	`docs/stories/S7-consent-form-setup.md`	Dec 2, 2025
Story S8	`docs/stories/S8-sms-outreach-campaign.md`	Dec 2, 2025
Smart Data Ingest	`SMART-DATA-INGEST-IMPLEMENTATION.md`	Nov 30, 2025