

Phase 1 – Problem Statement & Use Case Document

Project Title: SmartCare CRM – Salesforce-Powered Healthcare Management & Patient Engagement Suite

Industry:

Healthcare / Hospital Management

Project Type:

Salesforce CRM Implementation (Admin + Developer + LWC + Integration)

Problem Statement

Hospitals often struggle with managing patient appointments, medical histories, and follow-ups in an efficient manner. Common issues include:

- Patients missing appointments due to lack of reminders.
- Doctors having no easy view of patient history during consultations.
- Receptionists managing bookings manually, leading to delays and errors.
- Hospital management lacking visibility into appointment load, doctor utilization, missed appointments, or patient satisfaction metrics.

To address this, a unified Salesforce-based system is needed that can handle appointment scheduling, automated reminders, tracking of medical histories and prescriptions, and dashboards for both doctors and hospital management.

Use Cases

- Patient Booking & Scheduling – Patients can schedule appointments via a portal or receptionist, with statuses (Requested → Confirmed → Completed → Cancelled).
- Doctor Assignment & Availability – Doctor profiles include specialization & availability, with auto-assignment or receptionist selection.
- Automated Reminders & Follow-ups – System sends reminders via SMS/email before appointments and auto-creates follow-up tasks.
- Patient Medical History & Prescription Tracking – Store and display past records & prescriptions for doctors during consultation.
- Cancellations, Rescheduling & No-Show Handling – Patients/receptionists can update appointment status; no-shows are tracked.
- Dashboards & Reports – Appointments by Doctor, Missed Appointments, Patient Volume; Dashboards for Doctors & Management.

Features & Modules

- Custom Objects: Patient, Doctor, Appointment, Prescription.
- User Roles & Profiles: Admin, Doctor, Receptionist.
- Automation: Validation rules, Flows, Process Builders.
- Developer Components: Apex Triggers, Batch jobs for cleanup.
- UI / LWC: Appointment booking form, Patient history view, Doctor dashboard.

Tech Stack

- Salesforce Developer Edition (or Sandbox)
- Salesforce Objects / Schema
- Lightning Web Components (LWC)
- Apex (Triggers, Batch, Async)
- Flow / Process Builder / Validation Rules
- Git & GitHub for version control