

*CalDoc .*

(Product Name)



# Product Design Task

By

Amit Behura

amitbehura.ab@gmail.com

## Problem Statement

As a Product Designer, Build an Appointment Management App to enable doctors/Physicians to manage calendar as per availability and manage appointment request from external sources for multiple locations

## Vision

To build a simple appointment management app to let the user manage appointment schedules efficiently with minimal customization

## Goal

As per the Pain Points of Doctors/Physicians, the App would only include required features focused on user's basic requirements

## Market Scenario

- Major competitors are Calendly, Google Calendar, HubSpot meetings, Acuity etc.
- Existing features
  - Calendar Sync
  - Payment Integration
  - Custom Booking link
  - Third Party Integration (External Lead like Practo / Video conference platform like Zoom)
  - Event Customization
  - Auto Scheduler
  - CRM Integration
  - Team/Admin Management

Compared to competitors, This App would be simple, light weight, Easy to on-board and setup

## User Persona

### Julia Gilbert

Age: 47

Work: Psychologist/Therapist

Location: Dublin

Family: Mother of Two



#### Bio:

Julia works at St. Patrick's University Hospital at Dublin. She also work with Patients at her home clinic and through online sessions. Taking care of two kids at home, She only works with few patients outside Hospital due to availability issue.

#### Motivation:

- Convenience of use
- Spending time at home

#### Wants:

- To be able to help more patients with therapy
- To have flexible scheduling system to manage any unavailability

#### Frustrations:

- Too much time spend on calls while setting appointments
- Needs a flexible Scheduling automated to her needs

### Ajay Patel

Age: 35

Work: Dentist

Location: Bangalore

Family: Single



#### Bio:

Ajay works at City Hospital at Bangalore. During Weekends he goes to a clinic at Doddaballapura . In his free time, He involves in a debating club near his house. He also likes to learn new skills outside of his work.

#### Motivation:

- Accessibility
- Efficient use of time

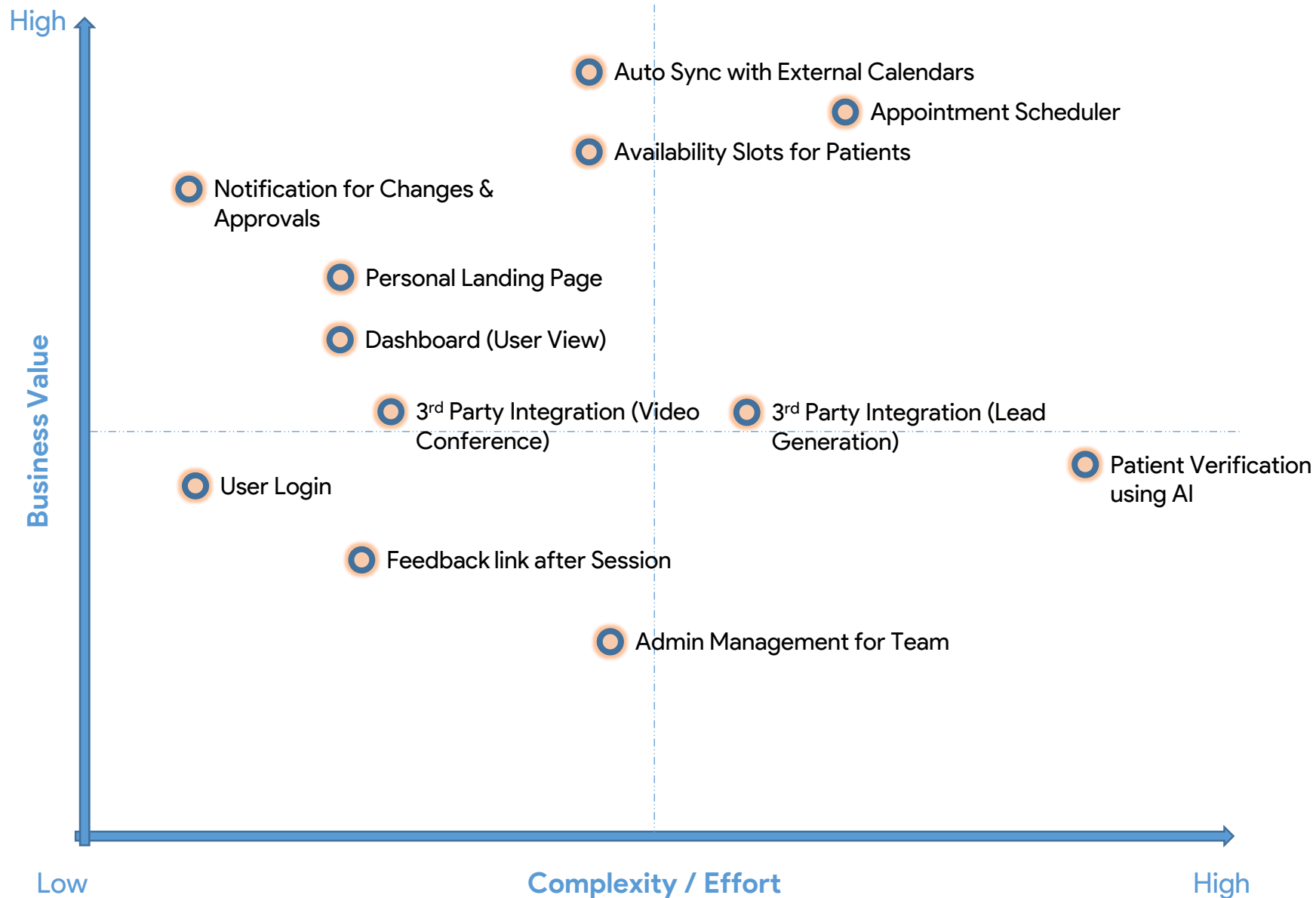
#### Wants:

- To have all the schedules at one place
- To have direct feedback from patients to reduce multiple visits to Hospital/Clinic

#### Frustrations:

- Different Calendars for different work locations
- No single solution for Managing all his schedules effectively while getting direct feedbacks

## Feature Priority Matrix

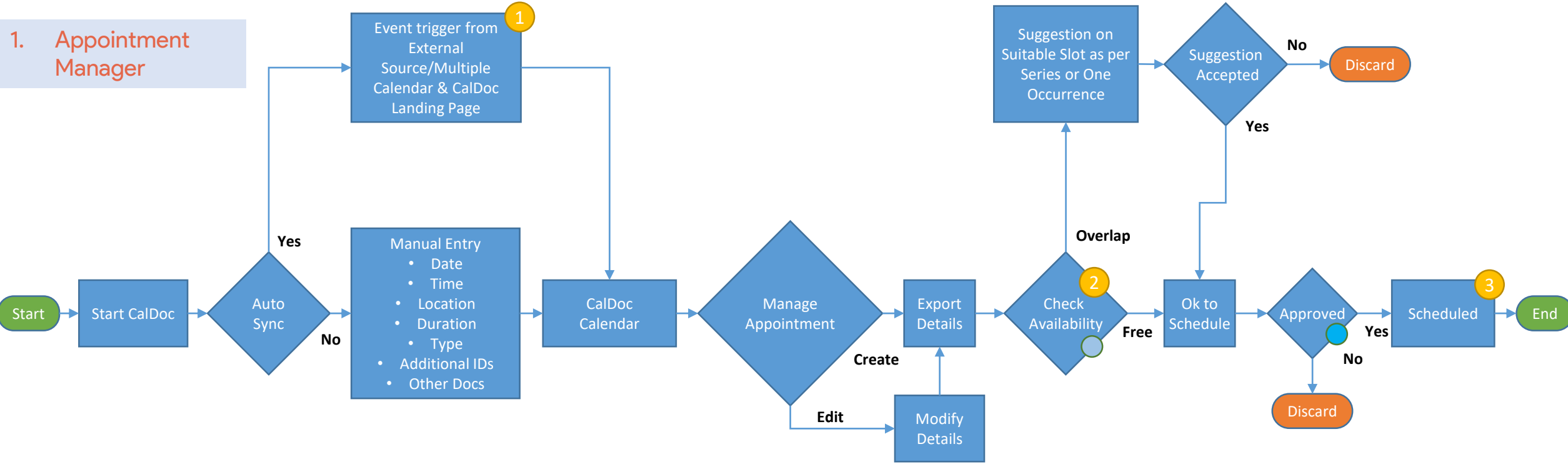


## Feature Roadmap

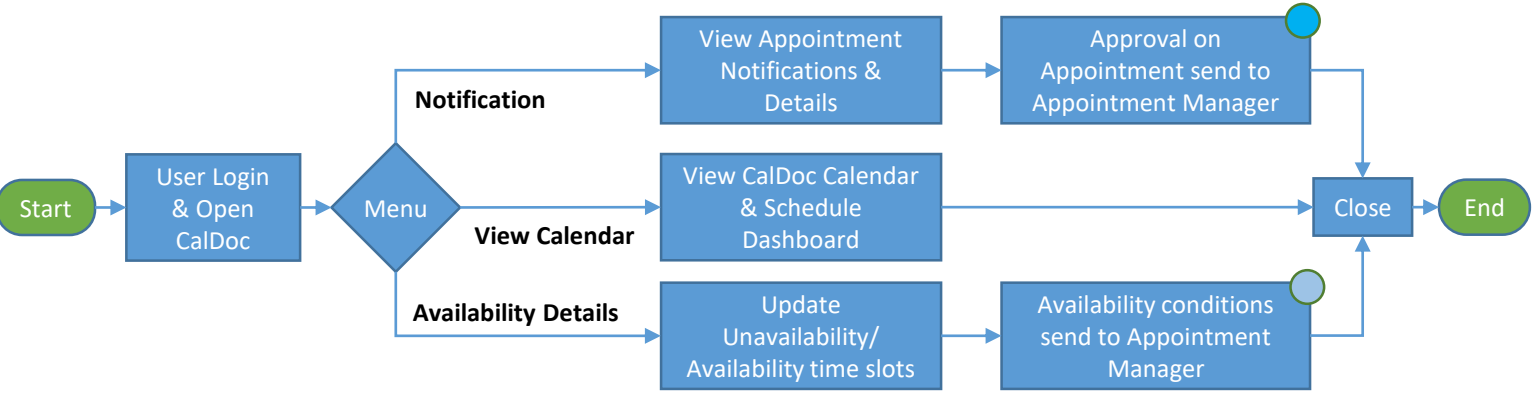
- 1
  - User Login
  - Auto Sync from External Calendar
  - Availability Slots for Patients
  - Appointment Scheduler
  - Notification for Changes & Approvals
- 2
  - Personal Landing Page
  - 3rd Party Integration (video conference)
- 3
  - Dashboard (user view)
  - 3rd Party Integration (for lead)
  - Admin Management
  - Feedback link after Session (to user mail)
- 4
  - Patients verification using AI

# User Workflow

## 1. Appointment Manager



## 2. Dashboard



- Notes:**
- External Source includes following:
    - Third Party Sites like Practo, Lybrate etc.
    - Event Sync from Multiple Personal mail Ids or different work mail Ids (From Both Google & Teams Calendar)
    - Leads from CalDoc Landing Page
  - Availability Check: As per the Availability Hours & Conditions given by User, Conditions checked against Appointment details
  - In Scheduled Phase, CalDoc can create Video conference link as per the Main email ID or User Preference settings

## User Interface

### Landing Page for Appointment Booking

The mobile app landing page for appointment booking features the CalDoc logo at the top. Below it is a circular profile picture of a doctor, Ajay Patel, with his name and title 'Dentist, City Hospital, Bangalore' displayed. A toggle switch allows users to switch between 'Slot' and 'Calendar' views. A date picker shows '2 July', '3 July', and '4 July'. Below the date picker, there are two columns of appointment slots: '10:00 AM City Hospital', '10:30 AM City Hospital', '4:30 PM Clinic X', and '5:00 PM Clinic X'. A large blue button labeled 'Enter Appointment Details' is positioned below the slots. At the bottom, there is a 'Submit' button. Numbered callouts I through VII are placed around the interface to identify key elements.

- I Physician Details
- II Slot/Calendar view
- III Date with Side Scroll
- IV Slot details with Location
- V Appointment Details Form
- VI Details entered (Green)
- VII Submit to Schedule

The web browser landing page for appointment booking displays the CalDoc logo and the doctor's profile information. It includes a 'Slot' and 'Calendar' toggle, a date selector for '2 July', '3 July', and '4 July', and a list of appointment slots. A green dot indicates that details have been entered. A 'Submit' button is located at the bottom right. The browser address bar shows 'caldoc.com/ajay-patel'.

### User View (Doctor / Physicians)

The mobile app user view for doctors/physicians shows the CalDoc logo and a profile picture. A notification badge with the number '6' is present. A toggle switch for 'Slot' and 'Calendar' views is shown. A date picker highlights '2 July', '3 July', and '4 July'. Below the date picker, appointment slots are listed. A form for patient details includes fields for Name, Age, Mobile No, and Email ID, followed by an 'Appointment Reason' section. A 'Documents' section shows a 'Report.pdf' file. At the bottom, there is an 'Approve to Schedule' button. Numbered callouts I through VIII are placed around the interface.

- I User Profile (Settings, Preference, Log Out)
- II Burger Menu (Dashboard, Availability, Notification)
- III Slot/Calendar View
- IV Date with Side Scroll
- V Slot Details with Location
- VI Appointment Details (Patient)
- VII Past/Relevant Medical Reports
- VIII Approve to Schedule button

The web browser user view for doctors/physicians displays the CalDoc logo, a dashboard navigation bar, and a notification badge. It includes a 'Slot' and 'Calendar' toggle, a date selector, appointment slots, and a patient details form. The 'Documents' section shows a 'Report.pdf' file. An 'Approve to Schedule' button is at the bottom. The browser address bar shows 'caldoc.com/login/ajay-patel/dashboard'.

## High-Level User Stories and Test Cases

### User Story 1

As a User, I want all my event Calendars & Third Party Appointment bookings in One Calendar so that I don't have to go through different calendars or Platforms to schedule my day.

### Acceptance Criteria 1

While Opening CalDoc Calendar, It has been updated with Latest changes from all the linked external sources

### Acceptance Criteria 2

Data export access is available for all external resources and Sync is actively fetching data

### Acceptance Criteria 3

Any Changes in Availability slots is correctly reflecting on 3<sup>rd</sup> Party Platform used for discovery and Appointment booking

### Test Case 1

#### Check Sync access, update & export features

**Precondition:** User has already created CalDoc account using One Mail ID

**Assumption:**

- Availability Slot has been created by User
- Sync access to External Calendar & Third Party websites are given

**Test Steps:**

1. User logged into CalDoc using Primary Mail ID
2. Linked 4 separate Google Calendar to CalDoc
3. Logged into Second Google Calendar, Create a event with family member overlapping existing appointment slot
4. Logged into third Calendar and Remove sync access directly from external Mail settings

**Expected Results:**

- CalDoc shows unified calendar with separate Tag for each external source
- For 3, CalDoc notifies User with existing appointment details to cancel and communicate to patient
- User Notified warning about Access removal and Show link as inactive

### Test Case 2

#### Check Booking export features from Third Party Platforms

**Precondition:** User has already created CalDoc account using One Mail ID

**Assumption:**

- Availability Slot has been created by User
- Sync access to External Calendar & Third Party websites are given

**Test Steps:**

1. Patient A booked appointment through Practo
2. While uploading Document, Patient uploaded an excel file. (Not supported in CalDoc)
3. User Logged into CalDoc
4. Updated an Appointment booking Manually by entering individual details
5. User Approved both the bookings

**Expected Results:**

- CalDoc Successfully updates Calendar as per Data received from Practo
- Unsupported Document shared notified to User (Doctor)
- Practo Timeslots updated as per Manual change in CalDoc & Reflecting correctly

## High-Level User Stories and Test Cases

### User Story 2

As a User, I want to check the appointment details and approve the schedule in a single click so that I don't spend my time creating new events & updating old ones on daily basis.

### Acceptance Criteria 1

All the Appointment details are exported correctly and available on Application to review

### Acceptance Criteria 2

Approve the schedule button is working & any changes communication will be received by Patient's Phone or Mail ID

### Acceptance Criteria 3

Documents including PDF, PNG, JPG, TIFF, ZIP, Drive links are uploaded successfully and accessible from user's end

### Test Case 1

#### Check Ideal/Happy User workflow

**Precondition:** User has already created CalDoc account using One Mail ID

**Assumption:**

- Availability Slot has been created by User
- Sync access to External Calendar & Third Party websites are given

**Test Steps:**

1. User Logged into CalDoc using Mail ID
2. Clicked on Slot view
3. Clicked on Specific Slots to Open Details tab
4. Review Appointment details
5. View Attached Document
6. Click schedule button to schedule the session

**Expected Results:**

- Appointment Details are filled and showing in details with attached document
- By Pressing Schedule Button, Session is confirmed and Communicated

### Test Case 2

#### Check if Appointment details breach the data constraints, User is getting the Appointment prompt or not

**Precondition:** Patient already has Landing Page link of the Doctor

**Assumption:**

- Availability Slot has been created by User (Doctor)
- Sync access to External Calendar & Third Party websites are given

**Test Steps:**

1. Patient opened the CalDoc Landing page
2. Clicked on Preferred time slot with location
3. Filled in details (Not filled Contact information)
4. Uploaded an Html document as Past report
5. Clicked on Submit button

**Expected Results:**

- Warning Remark showing Contact information is mandatory on top of page and about unsupported document
- Submit button should remain inactive
- No Appointment information to be created for User





Thank You .