HealthConnect 360 Project

Phase 10: Final Presentation & Demo Day

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Overview

Phase 10 focuses on showcasing the HealthConnect 360 system developed through previous phases. The goal is to clearly communicate the project's problem statement, the Salesforce-based solution, its benefits, and highlight future opportunities to key stakeholders through a structured pitch, demo, and documentation handoff.

1. Pitch Presentation

1.Problem Statement

Managing patient records, appointments, and health updates manually is cumbersome.

Clinics lack a unified system for patient interaction and clinical management.

Limited real-time data visibility for doctors, staff, and management.

2.Solution

Built HealthConnect 360 on Salesforce to unify patient data, scheduling, and event-driven updates.

Core features include:

• Patient Accounts with medical histories.

• Appointments and clinical workflows.

• Platform events for real-time updates and integration points.

• Automated workflows and triggers to reduce manual effort and errors.

• Custom reports and dashboards for actionable insights.

3.Benefits

• Staff access centralized, up-to-date patient and appointment data.

• Real-time event processing enhances operational responsiveness.

• Management gains rich analytics and oversight over clinical activities.

• Increased patient care efficiency, traceability, and satisfaction.

   4.Future Enhancements

• Deepen Change Data Capture and Salesforce Connect integrations.

• Implement AI for personalized patient recommendations.

• Mobile app extension for onsite staff.

• Advanced patient engagement tools (chatbots, alerts).

2. Demo Walkthrough

The demo is designed to clearly showcase HealthConnect 360's core functionalities in a realistic healthcare setting:

1. Accessing HealthConnect 360 App
Open Salesforce App Launcher.
Select the HealthConnect 360 application.
The navigation bar displays main objects: Accounts (Patients), Appointments, Platform Events, and Reports.

2. Patient Account Overview
Open a sample Patient Account record (e.g., Amit Sharma).
Patient details display in the Highlights Panel: Name, Phone, Medical History, Customer Priority, and SLA information.
Tabs include related Appointments, Activities, and Notes, allowing a full view of patient interaction.

3. Appointment Management
Create or open an Appointment record linked to the patient.
Fields shown: Appointment Date/Time, Status (Scheduled, Confirmed, Completed), and Patient lookup.
Demonstrate validation rules (e.g., Appointment Date cannot be in the past).
Show how edits trigger Platform Events for cross-system updates.

4. Real-time Updates with Platform Events
Display backend Apex triggers processing PatientUpdateEvent platform events on appointment and patient record changes.
Demonstrate by editing a patient's Medical History field and showing the event triggered and handled asynchronously.
Use debug logs or a custom dashboard widget to confirm event propagation.

5. Reporting & Dashboards
Open Patient Summary Report showing patient demographics and appointment counts.

Display Appointment Status Report by day and status for clinic management.
Highlight Dashboard visualizations for quick insights on patient load and staff performance.

6. Security & Access Controls
Show role-based sharing: Patient records accessible only to assigned doctors and staff.
Display field-level security hiding sensitive medical data from unauthorized users.
Review login history and audit trail demonstrating compliance with healthcare data privacy standards.

3. Feedback Collection

Gathered from end-users and stakeholders during demo session.

Focused on usability, feature completeness, and data accuracy.

Documented suggestions for UI improvements and workflow refinements to prioritize next sprints.

4. Handoff Documentation

Delivered comprehensive Phase 1–10 documents covering requirements, architecture, configurations, code snippets, and testing results.

Included setup guides and operational instructions for admins and developers.