# Project Proposal Document

**Name:- Harsh Raj Mishra**

**Project Title:** "HealthConnect 360 – A Unified Patient Relationship & Clinic Management System"

**Industry:** Healthcare

**Project Type:** B2C Salesforce CRM Implementation

**Target Users:**

- Clinic Administrators / Receptionists
- Doctors & Nurses
- Lab Technicians
- Patients (as external users via a portal)

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## Problem Statement

Mid-sized medical clinics often operate with disconnected systems and manual processes for managing patient care and administrative tasks. This fragmentation leads to significant operational challenges, including:

- **Inefficient Appointment Scheduling:** Manual scheduling using phone calls and paper calendars often results in double bookings, long patient wait times, and a high rate of no-shows.
- **Fragmented Patient Information:** Patient records are scattered across paper files and separate software, preventing a single, 360-degree view of a patient's medical history.
- **Poor Communication:** A lack of automated reminders and follow-ups leads to missed appointments and poor patient engagement in their own care plans.
- **Lack of Actionable Insights:** Management has no easy way to track key performance indicators like patient wait times, doctor utilization, or peak appointment hours to improve clinic operations.

To overcome these issues, the clinic wants to implement a Salesforce Health Cloud CRM to:

- Automate and streamline the entire patient appointment lifecycle.
- Centralize all patient data into a single, secure platform.
- Improve patient communication and reduce no-show rates.
- Provide real-time dashboards for data-driven decision-making.

## Use Cases

### Patient Relationship Management

- **360-Degree Patient View:** A centralized database for patient demographic information, medical history, allergies, and past visit summaries.
- **Patient Onboarding:** A streamlined process for registering new patients and capturing initial health information.
- **Care Plans:** Track and manage ongoing patient care plans and treatment protocols.

### Appointment & Schedule Management

- **Smart Scheduling:** A system for booking, rescheduling, and canceling appointments with visibility into doctors' availability.
- **Automated Reminders:** Send automated SMS and email reminders to patients 24-48 hours before their scheduled appointment to reduce no-shows.
- **Status Tracking:** Monitor appointment status (e.g., Scheduled, Confirmed, Checked-in, Completed, No-Show).

### Clinical Operations Management

- **Doctor & Staff Schedules:** Manage daily, weekly, and monthly schedules for all clinical staff.
- **Digital Visit Notes:** Enable doctors and nurses to capture and store clinical notes digitally against the patient's record for each visit.
- **Prescription Management:** Log prescriptions issued to patients, including dosage and refill dates.

### Reporting & Dashboards

- **Administrator Dashboard:** Key metrics on daily appointments, patient no-show rates, average wait times, and revenue tracking.
- **Doctor's Dashboard:** A personalized view of the doctor's daily schedule, list of patients to see, and pending tasks (e.g., review lab results).
- **Performance Reports:** Reports on patient demographics, most common diagnoses, and clinic utilization rates to help plan for staffing and resources.