



Case Study



Icreon

IMPORTANT:

Due to a governing confidentiality agreement, we've refrained from disclosing actual client and solution names. These have been changed appropriately, to more generic sounding terms and nomenclatures.

Appointment Management System

Our client, offering debt management counseling to people, wanted to upgrade their manual system of scheduling counselor appointments to an automated one. A centralized system to ease the process of scheduling appointments and notifying users about the fixed appointments was required. The system was required to automatically determine the availability of a counselor on the basis of the counselor's work-load, and schedule to the client's preferences. Based on these requirements Icreon designed and developed a web based appointment management system that provides the client with a mechanism to manage the appointment schedules of multiple counselors with ease.

Customer Profile

Our client is a non-profit organization that provides information and debt management counseling on issues pertaining to money management, budgeting, credit and personal finance, to people in financial difficulties.

Business Requirements

Our client was using a spreadsheet based system to fix and manage the appointment schedules of their counselors. The process of determining the availability of a counselor was a manual and time consuming process. They wanted to automate the process of scheduling appointments and notifying concerned counselors about their schedules so as to do away with problems that arose with the manual process. A solution was required to automatically determine the availability of a counselor for an appointment. The availability was to be based on a combination of factors such as customer preferences, a counselor's schedule, work-load etc. A mechanism to track the status of an appointment and the performances of counselors were required to be built into the solution.

A web based system to automate the process of scheduling appointments

Icreon provided the client with a web based appointment management system built on the .net framework. AJAX has been used extensively to provide an enhanced browsing experience.

Through the system, the client can create and manage the profiles of multiple counselors. (A counselor's profile details his/her area of expertise (i.e. types of appointments handled), languages and time-zones that the counselor is comfortable with. The profile also includes the work-shifts and the scheduled breaks (paid leave, lunch and other breaks) for the counselor).

The system provides authorized users with a means to schedule appointments between counselors and clients. They can enter the client's preferences in the system to identify a counselor available for the appointment. The system makes use of client preferences (such as appointment type, time-zone, language, counselor gender etc) to generate a list of counselors whose profiles match the preferences. The system then filters the list according to the counselor's current appointment schedule, work-load, work-shifts, lunch and other breaks (the details can be managed by the administrator/supervisor) to identify a specific counselor as being available for the appointment.

Once an appointment has been set, the system sends an e-mail notifying the counselor about the upcoming appointment. The appointment will also be available to the counselor on his/her schedule. Counselors can access the system to view their schedules and can update the status of the appointments.

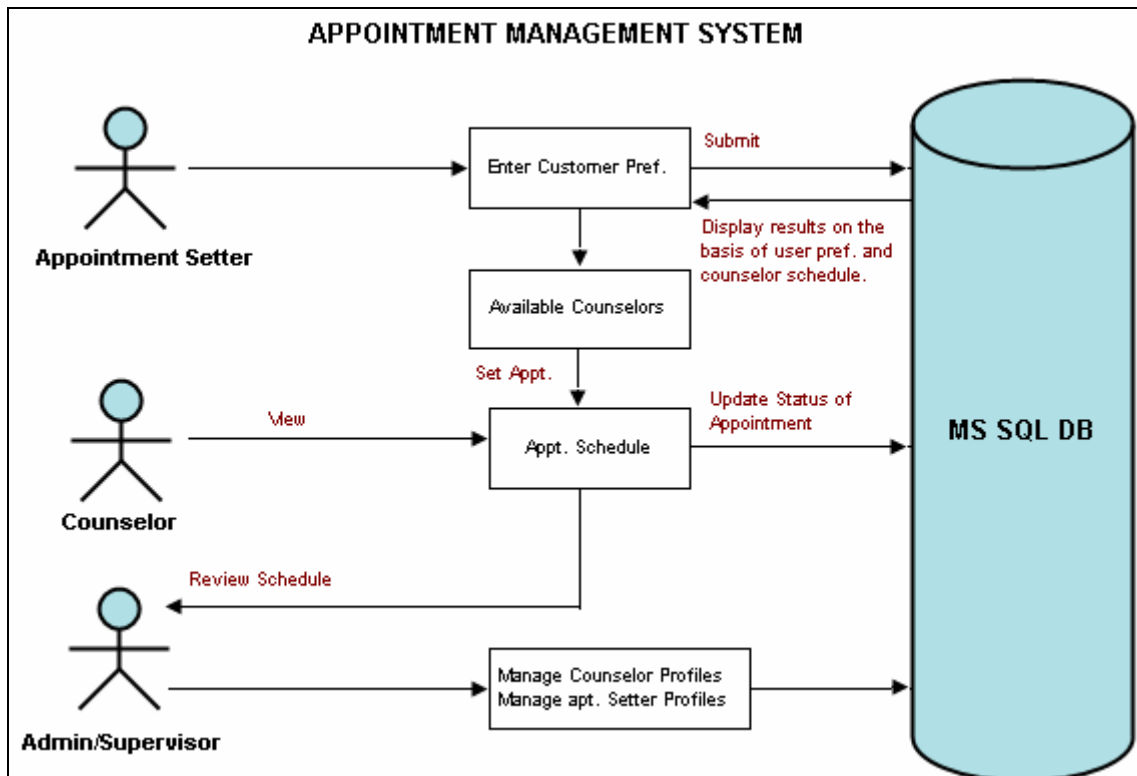
Provisions for appointments to be re-scheduled or cancelled have also been provided. A cancelled appointment can either be rescheduled to another date or can be re-assigned to another available counselor.

The appointment management system can be accessed by three types of users:

- **Administrators/Supervisors:** The users having complete control over the entire system. They can perform a variety of tasks to manage the system such as defining and managing the work shifts, appointment types, and end-users.

Supervisors can also run reports to monitor the performance of their counselors. The reports detail the number of assigned, completed, pending and rescheduled assignments for a counselor. The supervisors can run reports for individual counselors or for all counselors collectively thereby enabling a comparative analysis of their performances.

- **Appointment Setters:** The users responsible for setting up appointments. They can also create and manage a client database.
- **Counselors:** The users with whom the appointments are fixed. Counselors can access the system to view their schedules and process the status of the appointments.



System Architecture

Technologies used in developing this application are:



Summary

The appointment management system designed and developed by Icreon has provided the client with a means to streamline and automate their process of scheduling appointments thereby increasing efficiency. The simple web based interfaces enable users to easily schedule and manage appointments for multiple counselors. Designed in a manner so as to automatically identify an available counselor, the solution helps the client in saving time and effort required to manually check and determine the counselor availability. Detailed reports can be generated to monitor and analyze the performance of the counselors.