

Phase 0 Scope Freeze & Acceptance Checklist

AI Voice Agent, WhatsApp Bot & Reception Tracking Dashboard

Client Name: The Eye Center (Dr. Mahnaz Naveed Shah & Associates)

Document Reference: TECH-P0-FREEZE-2026-V2

Service Provider: Techionic Engineering

Freeze Date: 28th July, 2026

Project Scope: Phase 0 AI Intake System (Pre-EMR Deployment)

Integration Mandate: EMR-Ready API Bridge Built-In

Document Purpose: This document serves as the binding functional baseline for the Phase 0 deployment. It explicitly outlines all feature specifications, operational boundaries, guardrails, and acceptance criteria agreed upon by the Client and Techionic. Any capability not explicitly listed in this document is classified as Out-of-Scope for Phase 0.

1. Architectural Phasing & Integration Strategy

- **Standalone Launch (Phase 0):** The AI Voice Agent and WhatsApp Bot will deploy immediately alongside a **Comprehensive Lead Tracking Dashboard**. All leads, conversation summaries, full transcripts, and booking requests will populate on this dashboard in real-time.
- **Future-Proof EMR Bridge (Phase 1):** The underlying data structure is built with standardized REST APIs/Webhooks. When the custom on-premise EMR system goes live in Phase 1, the AI agents will seamlessly switch their backend destination from the Interim Dashboard directly into the EMR database without requiring any workflow changes from the patient's perspective.

CRITICAL OPERATIONAL GUARDRAIL (Appointment vs. Tentative Booking):

The AI Agents (Voice & WhatsApp) act strictly as Intake and Lead Capture Funnels. The AI system **DOES NOT confirm final appointment times or issue guaranteed medical consultation slots**. The AI records the patient's preferred doctor and requested date/time window, and marks the request as a *"Tentative Booking Request."* A human receptionist **MUST** call or message the patient to verify medical suitability and confirm the final time slot.

2. AI Voice Agent ("Sarah") - Functional Scope

The AI Voice Agent handles incoming phone calls, engaging patients naturally while strictly following conversational parameters.

Feature Component	Detailed Functional Description & Behavior	Scope
Multilingual Adaptation	Dynamically detects spoken language. If patient speaks Urdu, responds in fluent Urdu with a natural Pakistani accent. If patient speaks English, responds in professional English. Supports seamless code-switching (Urdish).	INCLUDED
Human-Like Tone & Voice	Configured with warm, empathetic speech synthesis (Urdu/English accents), low-latency audio response, and natural conversational pacing. Supports polite barge-in (interruption handling).	INCLUDED
Contact & Lead Capture	Politely requests and records: Full Name, Primary Callback Cell Phone Number, and General Purpose of Call.	INCLUDED
Doctor & Day Preference	If the patient knows which doctor they want, the AI asks for their preferred day based on that doctor's schedule and logs a <i>Tentative Booking Request</i> . Explicitly informs caller that reception will call back to confirm exact time.	INCLUDED
Strict Medical Guardrail	Zero Medical Advice: Programmed never to diagnose, prescribe, or provide medical opinions. For medical inquiries, the AI politely logs the question as a lead for human staff follow-up.	INCLUDED
Call Transcript & Summary	Generates a concise AI summary and full text transcript of every call, transmitting it immediately to the tracking dashboard for receptionist review.	INCLUDED
Out-of-Scope Functions	Calendar calendar-lock writing, automated payment collection, emergency triage diagnosis, or outbound cold calling.	EXCLUDED

3. AI WhatsApp Bot - Functional Scope

The WhatsApp Bot provides an interactive, rich messaging interface over Meta Cloud API, guiding patients visually through information and intake.

Feature Component	Detailed Functional Description & Behavior	Scope
Smart Conversational Intake	Welcomes patient, answers basic clinic FAQs (location, operating hours, general services), and collects basic contact info (Name, Mobile #).	INCLUDED
Interactive Doctor Directory	Presents an interactive menu/button list of available specialists. On selecting a doctor, displays their profile, sub-specialty, credentials, and available consultation days.	INCLUDED
Tentative Booking Request	Allows the patient to select a preferred doctor, day, and preferred morning/evening window. Explicitly notifies patient that reception will communicate final time slot confirmation.	INCLUDED
Non-Probing Guardrail	Collects intake preferences without asking intrusive medical questions or asking for medical reasons for booking. Bypasses medical diagnostic discussions completely.	INCLUDED
Human Handoff Option	Includes a "Speak to Receptionist" button option that flags the chat on the dashboard as an Urgent Callback Request for clinic staff.	INCLUDED
Out-of-Scope Functions	Direct PDF medical record generation, processing online credit card payments, sending unverified bulk promotional marketing blasts.	EXCLUDED

4. Comprehensive Lead Tracking Dashboard

A secure web-based portal provided to reception staff prior to the full EMR rollout to track, handle, and manage all inbound leads from both AI agents.

- **Unified Lead Handling:** Real-time tracking board to manage the entire lifecycle of a lead (e.g., New Inquiry → Pending Callback → Confirmed Booking → Closed).
- **Complete Conversation History:** Full, unedited scrolling chat logs for every WhatsApp interaction, allowing staff to read exactly what the bot and patient discussed before taking over the conversation.
- **Voice Transcripts & Call Audio:** Full text transcripts of the AI voice calls, alongside a playable audio recording of the actual conversation for quality assurance and context verification.
- **Lead Card Details:** Displays Patient Name, Phone #, Selected Doctor, Requested Date/Time Window, and Source Channel (Voice or WhatsApp).
- **Phase 1 EMR Integration Ready:** All tracked leads, transcripts, and chat histories captured in this dashboard will automatically migrate and sync into the patient's permanent record once the main EMR system is launched.

5. Technical Delivery & Operational Boundaries

Operational Area	Agreed Term & Liability Boundary
Third-Party Telephony / Meta SLA	Techionic configures and maintains the AI software logic. Techionic is not liable for upstream telecom carrier outages, Meta WhatsApp platform downtime, or local internet connectivity failures at the clinic.
Human Verification Mandate	The clinic administration accepts full responsibility for conducting human verification calls before finalizing any appointment in the clinic's master register.
Language Accuracy Scope	Speech recognition (STT) is optimized for standard Pakistani English and conversational Urdu. Non-standard regional dialects or heavy background noise during calls may trigger polite clarification prompts from the AI.

6. Client Sign-Off & Acceptance Commitment

By signing below, both parties confirm that the features, boundaries, and acceptance criteria outlined in this document represent the complete and frozen scope for the Phase 0 AI deployment. Any future modifications requested by the Client outside this checklist will be processed as formal Change Requests subject to separate timeline and cost evaluation.

For Techionic Engineering

Name: Muhammad Ali

Title: Founder & Technical Director

Signature & Date

For The Eye Center (Client)

Name: Dr. Mahnaz Naveed Shah / Authorized Rep

Title: Executive Management

Signature & Date