PROJECT SCOPE:

ABOUT THE COMPANY:
Wellness Center who has two main offices with 3-4 therapists per office. There are about 110 total clients. Looking to expand to Montreal and Edmonton.

Previously using Microsoft Access to manage and track data. Not easy to use.

DESCRIPTION OF PROJECT:
Looking for user-friendly patient data management system with the ability to track patient data including test data, scanned documents (?), patient sessions and potentially connect Quickbook's billing (make it easy to invoice).

THE SCOPE:
PERMISSIONS:
- Follows security standards
  - Requires login
    - Users (Executive, Floor Manager, Therapists)
      - Executive has access to:
        - All data, all configurations, all settings, Quickbooks
      - Floor Manager has access to:
        - Add/edit/access their office's client data
        - All user accounts under their office
        - Reset passwords for Therapists in their office
      - Therapist has access to:
        - Add/edit/access their office's client data
        - Reset ***only their*** password

PAGES:
DASHBOARD AND PAGES:
1. User Account Settings
2. User Management
3. Client Record and Data
4. Sessions
5. Therapists
6. Reports
7. Billing (Quickbooks) – please quote separately

1. USER ACCOUNT SETTINGS: (for all users)
- Display only that users account info
- Ability to change first name, last name, email, password, education

2. USER MANAGEMENT:

Permissions:

- Executive can view/edit ALL users
- Floor Manager can view/edit ALL THEIR OFFICE'S users
- Therapist have NO ACCESS

- **Fields for adding user:**
    - Username (email address)
    - Password
    - First Name / Last Name
    - Education (checkboxes)
        - Bachelor of Kinesiology
        - Certified Exercise Physiologist
        - Exercise Specialist
    - Date of Hire (popup calendar)
    - Office location (radio button) – WITH ABILITY TO ADD MORE LATER
        - Regina
        - Vancouver
    - Role (radio button)
        - Executive
        - Floor Manager
        - Therapist
    - About / Notes (large textbox)
    - Also, needs to note the timestamp the user was created

- **Fields for view users:**
    - Ability to filter users by ROLE and/or OFFICE
    - Ability to sort users alphabetically
    - Display in table:
        - First Name / Last Name
        - Office
        - Role
    - Ability to select users to *edit their records* or change their password

3. CLIENT RECORD AND DATA:

Permissions:

- Executive can add/view/edit ALL clients and data
- Floor Manager can add/view/edit ALL THEIR OFFICE clients and data
- Therapist can add/view/edit ALL THEIR OFFICE clients and data

- Fields for adding new client:
    - Client's First Name / Last Name
    - Office Location
        - Radio button: - with ability to add more:

        - Regina
        - Vancouver
    - Therapist seeing this client
        - Dropdown
            - Select from list of therapists
    - Phone Number
    - Email address
    - Mailing address
    - Gender (Male/Female)
    - Date of Birth
    - Provincial Health Number
    - Insurance Company
        - Group Number
        - Policy Number
    - Injury Date
    - Therapy start date
    - ASIA (drop down)
        - Letters: A, B, C, D, E or F
    - Injury (radio button):
        - Complete / Incomplete
    - Medication (large textbox)
    - Assessments
        - Upload files to client record
            - Add a description to this upload
            - Upload date
    - Notes

- Fields for viewing client data:
    - When a user is added, they are listed under clients, but we have to have the ability to edit this users data. Also, we need to be able to add client assessments and data.
    - Also, we need to be able to add SESSIONS, which is listed below. This can be a button saying "ADD A NEW SESSION TO THIS USER" which will redirect you to the ADD SESSESIONS page below.

4. SESSIONS

Permissions:

- Executive can add/view/edit ALL sessions to clients
- Floor Manager can add/view/edit sessions to clients under THEIR OFFICE
- Therapist can add/view sessions to clients under THEIR OFFICE and edit ONLY THEIR existing sessions

USER IS PROMPTED TO "ADD NEW SESSION" OR "VIEW OLD SESSIONS"

- Fields for adding new session:
  - Ability to upload session notes:
    - Description to go along with upload
    - Upload date
  - Other Session Notes (in textboxes):
    - Client (from dropdown of their clients; searchable from client list)
    - Date of session (calendar dropdown; default to today)
    - Textbox for therapist name and their total session time
      - Ability to add additional rows for other therapists
    - Workout that was done (large textbox)
    - Comments
      - Whoever writes a comment has their name associated with this comment. Most recent displayed first. *Cannot be edited or deleted.*
- Fields for viewing sessions:
    - User is prompted to select a client from a dropdown
    - AND/OR prompted to select a therapist from dropdown
    - Filter list of clients by office (for executives)
    - When a client is selected:
      - Display sessions by DATE; most recent first
    - When a session is selected:
      - Ability to edit information in the session fields above, or add a new comment

5. THERAPISTS

Permissions:

- Executives: can access all therapists
- Floor Manager: can access their office location therapists
- Therapists: NO ACCESS

- Prompted to select a Therapist from list
  - Sorted alphabetically by First Name
  - Filter list of clients by office (if executive)
- When a Therapist is selected:
  - Ability to view ALL that Therapist's recorded sessions; most recent first
- Button that says "ADD NEW THERAPIST" – takes you to user management

6. REPORTS

Permissions:

- Executives: can access ALL reports
- Floor Manager: can access ONLY THEIR OFFICE location reports
- Therapist: can access ONLY THEIR OFFICE location reports

- Ability to view sessions with following filters:
  - Date Range

- and/or Client Name (can be one client or multiple clients – checkbox)
- and/or Therapist Name:
- After filters are applied, display:
  - Total records added (with info)
  - Total hours recorded
  - Session list
    - Displayed in table
      - Client Name
      - Date of Session
      - Therapist's Name
      - Hours worked
      - Workout
      - Comments (display all)
    - Ability to click on session, going to session page
- Ability to print or export to PDF report; nicely formatted to A4

7. BILLING (QUICKBOOKS) – please bill seperately

Permissions:

- Only available to Executives

- Details:
  - When entered, prompt user for CLIENT
  - THEN prompt for DATE PERIOD (monthly) (ex. From Jan to Feb)
  - Ability to export billable amount ($80/hour * hours worked [from session data]) and session details from 'SESSION' to Quickbooks.
  - NO INVOICE MADE ON SYSTEM, THIS WILL BE DONE IN QUICKBOOKS

  - ~~Ability to bill/invoice clients for Sessions based on hours worked~~
    - ~~Amount billed is $80 per hour~~
  - ~~When an invoice is made, it will email the client the invoice:~~
    - ~~Client can then view invoice information~~
      - ~~This can be in the email (attached)~~
      - ~~OR it can be a link that goes to secure page~~
  - ~~Invoice should include:~~
    - ~~List of Session data and hours worked~~
  - ~~*NO NEED* FOR TAKING CREDIT CARD INFO AT THIS TIME!!~~
  - This AMOUNT should be EASILY exportable to Quickbooks