

Overview:

This scheduling software streamlines appointment management by matching patient availability with therapist schedules, reducing manual work and optimizing clinic resources. It automates therapist-patient assignments based on approved hours, accounts for travel time between locations, and allows for location-specific scheduling. The end product is a user-friendly online portal where staff can log in to view and manage their schedules, enhancing efficiency, accessibility, and care quality.

Functionalities:

☐ **User Management:**

- ☐ **Add/Delete Patients and Doctors:** The system allows users to add or remove patients and doctors from the scheduling system, maintaining flexibility in managing the clinic's workforce and patient intake.
- ☐ With this, there needs to be additional requirements for each patient and doctor. (see google sheets of client and staff)

☐ **Approved Hours:**

- ☐ **Therapist Hours:** Therapists will have approved working hours that define their availability for scheduling.
- ☐ **Patient Pre-Approved Hours:** Patients will have predefined available hours during which they can attend sessions.

☐ **Appointment Cancellation & Reassignment:**

- ☐ **Reassign Doctors:** Upon patient cancellation, doctors will be reassigned either automatically or manually to another available patient.
- ☐ **Cancellation Allocation:** Users can allocate canceled hours to training or reassign them to another session, with dropdown options for flexible reallocation.

☐ **Randomized Patient-Doctor Matching:**

- ☐ **Specific Doctor Matching:** The system allows random matches between patients and doctors but also facilitates matching based on compatibility or specific criteria.

- ☐ **Maximizing Availability:** Both the doctor's working hours and patient availability are maximized for efficient scheduling.
 - ☐ **Session Constraints:**
 - ☐ **Minimum Session Length:** Sessions must be greater than 1 hour, with adjustable minimum and maximum lengths.
 - ☐ **Location-Based Scheduling:**
 - ☐ **Display Locations:** Each time slot will show the location of the session (clinic, school, home, etc.), providing clarity in the schedule.
 - ☐ **Drive Time:** Travel time will be calculated for doctors moving between different locations, ensuring feasible scheduling for back-to-back appointments.
 - ☐ **Doctor Assignment Based on Location:**
 - ☐ **Schools vs Clinics:** Doctors can be designated for schools or clinics, and the system will assign them accordingly.
 - ☐ **Hours Tracking:**
 - ☐ **Total Hours for Doctors & Clients:** A final tally of hours worked by doctors and clients is provided, helping track productivity and service delivery.
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Development Phases:

Phase 1: Beta

- **Core Scheduling System:** Focus on matching patient-approved hours with doctor availability to automate the scheduling process, forming the product's foundation.

Phase 2: Website Portal Development

- **User Access:** Develop a web portal where patients and doctors can log in to input hours and manage schedules.