

# **Functionalities for Kids ABA Services Schedule**

## **1. Structure**

### **Phase 1 - Beta:**

The primary focus of the beta phase will be on establishing the core functionality. This includes the ability to match the approved hours of patients with the availability of doctors and automate the scheduling process. The goal is to streamline the basic scheduling needs.

### **Phase 2 - Website Portal Development:**

In this phase, a web portal will be developed where both patients and team members can log in. Patients will be able to input their approved hours, while doctors can update their availability. This phase will focus on creating a user-friendly interface for managing and updating scheduling data.

### **Phase 3 - Schedule Management and Cancellations:**

The web portal will be expanded to display individual schedules for both patients and doctors. Patients will have the ability to cancel appointments, and doctors can update their availability as needed. If they cancel within x amount of days/hours before the appointment, can we have it give an update to whatever therapist or to the general that there was a "schedule update". Also it needs to show a reason for the cancellation so we know if it is considered excused/unexcused, so like a drop down tool with like the basic ideas of why a client would cancel. (ex: sick, doctor's appointment)

### **Phase 4 and Beyond:**

Any additional features, functions, modules, or portals will be introduced in future phases. This could include advanced reporting, integration with external systems, or specialized features tailored to the evolving needs of the clinic.

## **2. Functionality**

1. The user needs to have an option to add or delete a patient or a doctor in the schedule.
2. One of the criteria needs to be where we can set approved hours for a therapist. While also being able to set pre approved hours for patients.
3. Have an option where the user can cancel a patient's appointment, and the appointed doctor can be appointed to a different patient.
  - a. The user will have an option where the user can cancel a patient's appointment, and the appointed doctor can be appointed to a different patient.
4. Randomizing patients and doctors match up.
  - a. Specific doctors need to be matched with patients they are able to work with.

5. Maximizing the availability of the client and the hours of the doctor
6. Cancellation for the client can be distributed randomly between the doctors
  - a. If a client cancels, we need to have a way to where we allocate those hours either to training or provide them with hours to another session, having that option of training or allocating hours is what is needed.
7. Make a requirement that each session should be greater than 1 hour when randomizing the patient and client schedule
  - a. Set a limit to the maximum each session can be, and the minimum a session can be.
8. Also put a location next to the slots in the schedule.
  - a. Give a drive time to the location if needed to go to a different city or school or home.
9. Have a criteria for the doctors who are going to schools vs staying in clinics.
10. \*Create an external portal for the training schedule of new hires: if needed to give specific hours, provide a drop down to select the type of training they will get and it adjusts accordingly in the external portals.
11. Have a final total of how many hours the doctors have worked for and the total amount of hours for the clients.

### **3. Spreadsheet View**

- Grid Structure: Patients as columns, time slots (from 8:00 am to 5:30 pm) as rows, and doctor names in the cells.
- Time Slot Calculation: Create 15-minute time slots and distribute these slots based on patient-approved hours and doctor availability.

### **4. Result**

The final result of the software will be a comprehensive scheduling system with an online portal where each patient and doctor has a unique login. Through this portal, they can view their schedules, while the scheduling itself is automatically generated based on the criteria provided by both doctors and patients. This will streamline the scheduling process, save time, and reduce manual effort.

**Client:** KIDS ABA Servicers

By: \_\_\_\_\_

Name: \_\_\_\_\_

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Title: \_\_\_\_\_

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Date: \_\_\_\_\_

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**Developer:** SAK GLOBAL LLC (dba Emergitech Solutions)

By: \_\_\_\_\_

Name: \_\_\_\_\_

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Title: \_\_\_\_\_

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Date: \_\_\_\_\_