Release:
Project: EdTech
Version: Version 1.0

Wizearly Product Requirement Document (PRD) 2024

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Project: Wizearly EdTech Platform

Revision History

Version	Name	Reason for Changes	Date
Version 1			

Approved by:

Name	Status	Department	Date
Version 1.0			

Duration: June 2024 - October 2024

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Wizearly Overview

Wizearly: <mark>Transforming School Attendance and Student Engagement</mark>

Overview

Wizearly Inc. is an intelligent EdTech platform designed to boost student attendance, enhance data analysis, and support effective interventions. By integrating intelligent scientific data into its predictive training and leveraging advanced technology—including artificial intelligence, machine learning, and predictive analytics—Wizearly aims to forecast chronic absenteeism before it occurs. Combining diverse data sources like attendance, demographic, and behavioral information with sophisticated algorithms, the platform supports a range of educational stakeholders. The WizPulse app engages parents through gamification and personalized incentives, while ensuring data privacy and compliance. Wizearly's goal is to achieve a 99% predictability ratio in identifying and addressing chronic absenteeism issues, creating a more supportive and engaging educational environment.

Key Features

- **Attendance Tracking**: Monitor and analyze student attendance with comprehensive views of weekly, monthly, and yearly trends, providing insights into patterns and anomalies.
- **Data Analysis**: Gain deep insights into student performance and absenteeism through integration with Student Information Systems (SIS). Evaluate time-saving metrics, track revenue from Average Daily Attendance (ADA), and identify trends in chronic absenteeism to inform strategic interventions.

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- **Intervention Management**: Automated and manual tracking with AI-powered recommendations, tailored interventions on the basis of trained , predictive and evolving data sets.
- **Communication Tools**: Messaging system(In-app and push notifications, emails, SMS, Notes), community features
- **Virtual agent(Wiz-E)**: Users can send prompt requests regarding chronic absenteeism to the AI(Wiz-E) and get the response. Read more here: [Wiz-E(Wizearly's Artificial Intelligence)](#)
- **Wizpulse Gamification**: Points, rewards, and challenges to motivate students and parents.
- **User Interface**: User-specific dashboards, navigation.
- **Integration**: Seamless integration with SIS, Stripe, and additional technologies through robust API connections, ensuring smooth data synchronization and expanded functionality.: The Wizearly landing page will have the following components: Hero SectionHeadline: "Transform Attendance, Empower Students"
- Subheadline: "Wizearly: Where data meets compassion to boost student success"
- CTA: "See Wizearly in Action"
- The Wizearly Difference"Attendance isn't just about numbers. It's about understanding each student's story."
- Brief overview of how Wizearly combines AI, data analysis, and human insight
- For Schools & Districts"Spot trends before they become problems"
- "Turn data into actionable insights"
- "Streamline communication across your entire community"
- For Families"Stay connected to your child's educational journey"
- "Engage in fun challenges that boost attendance"
- "Open clear lines of communication with schools"
- Our ImpactReal stories from schools using Wizearly
- Key statistics on improved attendance rates
- Quote from a school administrator or teacher
- How It WorksSimple step-by-step breakdown of implementing Wizearly
- Emphasize ease of integration with existing systems
- Features SpotlightHighlight 3-4 key features with engaging icons or illustrations
- Focus on benefits rather than technical details
- Partners & IntegrationsLogos of key integration partners
- Brief statement on seamless data flow
- Get StartedCTA: "Book a Personalized Demo"
- Brief form to capture essential info
- FAQAddress common concerns about data privacy, ease of use, and implementation
- FooterQuick links, social media, contact info
- "Join the movement to make every school day count"

[Landing page](#)

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User Benefits

- **Administrators**: Make informed decisions with advanced data analysis and reporting tools. Save time and money by streamlining data collection and gaining insights into attendance trends and ADA revenue. Optimize interventions and resource allocation to improve student attendance and reduce financial losses.
- **Parents**: Track children's attendance, participate in challenges, and engage with the school and community.
- **Students**: Stay motivated with gamification elements and track their own attendance.
- **Community Managers**: Oversee community engagement and support interventions.
- **Partners**: Collaborate with schools and provide additional resources to support student attendance and intervention progress.

Why Wizearly?

Wizearly's integration of AI-driven analytics, user-friendly design, and supportive community features offer a comprehensive solution to a pressing problem in education. The focus on predictive insights and actionable recommendations could make a significant difference in managing attendance and enhancing overall school effectiveness.

- **Innovative Technology**: AI-powered analytics and predictive recommendations.
- **User-Friendly Design**: Intuitive interface and user-specific features.
- **Engaging Community**: Foster a supportive and interactive educational environment.
- **Proven Impact**: Improve attendance rates and overall school performance.

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Objectives

- **Improve Attendance Tracking**: Provide accurate attendance data.
- **Enhance Data Analysis**: Offer insights into attendance trends and their impact on school performance.
- **Streamline Communication**: Facilitate effective communication between users in schools, school districts, community based organizations, parents, students.
- **Support Interventions**: Enable timely and effective interventions to address attendance issues.
- **Engage Users**: Use gamification and community features to increase user engagement.

Competitive Analysis

- **Powerschool**: Comprehensive data analytics and reporting, wide range of integrations, but expensive and complex.
- **School Status**: Strong focus on communication and data analytics, user-friendly interface, but lacks gamification and AI features.
- **Attendance Works**: Focuses on raising awareness and providing general strategies for improving attendance rather than using real-time predictive analytics. Their emphasis is on advocacy and community engagement.
  Source: Attendance Works
- **EveryDay Labs**: Utilizes data analytics for retrospective analysis and family engagement, focusing on nudges and communications to families rather than real-time predictive modeling.
  Source: EveryDay Labs
- **EdFi Alliance**: Concentrates on data interoperability and integrating educational data systems. Their core mission is standardizing data rather than predictive absenteeism analytics or intervention strategies.
  Source: EdFi Alliance
- **PowerSchool**: Offers comprehensive student information system functionalities, including attendance tracking. However, their platform is primarily for data management and administrative tasks, lacking advanced predictive analytics capabilities.
  Source: PowerSchool
- **BrightBytes**: Uses data analytics to provide periodic insights into student engagement, including attendance. Their approach is typically retrospective, lacking real-time, predictive, and adaptive intervention features.
  Source: BrightBytes

Wizearly sets itself apart by providing AI-driven, real-time predictive analytics and personalized intervention strategies, addressing the limitations in predictive capabilities found in these competitors.

User Personas

School District Admin(Web)

- Name: Alex Johnson
- Age: 45
- Role: District Superintendent

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- Goals: Improve attendance rates, reduce absenteeism rate, enhance school performance, increase revenue.
- Challenges: Managing multiple schools, analyzing large data sets, implementing district-wide initiatives.
- Tech Savvy: Moderate
- Tools Used: SIS systems, email, spreadsheets (not limited to)
- Preferred Communication: Email, in-app messages
- Access link to bottom page

School Admin(Web)

- Name: Sarah Lee
- Age: 38
- Role: School Principal
- Goals: Monitor student attendance, support at-risk students, improve school performance.
- Challenges: Identifying at-risk students, managing intervention programs, coordinating with community school managers and intervention team members.
- Tech Savvy: Moderate
- Tools Used: SIS systems, email, spreadsheets
- Access link to bottom page

Community Partner(Web)

- Name: Emma Thompson
- Age: 50
- Role: Community Organization Director
- Goals: Support local schools, improve community engagement, track the impact of contributions.
- Challenges: Ensuring funds are used effectively, engaging with the community, measuring impact, conducting interventions, and tracking intervention's progress.
- Tech Savvy: Moderate
- Tools Used: Email, spreadsheets, social media
- Preferred Communication: Email, in-app messages
- Access link to bottom page

Parent(Mobile App, Wizpulse)

- Name: Maria Gonzalez
- Age: 34
- Role: Parent of two high school students
- Goals: Stay engaged with their children's education, track daily attendance, earn rewards.
- Challenges: Balancing work and family responsibilities, keeping up with school communications.
- Tech Savvy: High
- Tools Used: Smartphone, social media, messaging apps
- Preferred Communication: In-app messages, notifications
- [Access link to bottom page](#)

High School Student(Mobile)

- Name: Jake Martinez
- Age: 16
- Role: High School Junior
- Goals: Improve attendance, participate in daily challenges, earn rewards.
- Challenges: Staying motivated, balancing school and extracurricular activities.
- Tech Savvy: High
- Tools Used: Smartphone, social media, gaming apps
- Preferred Communication: In-app messages, notifications
- [Access link to bottom page](#)

User Journey

Wizearly Super Admin(Web)

1. **Onboarding**
   - Receive access credentials.
   - Set up a super admin profile.
2. **Dashboard and Navigation**
   - Access super admin dashboard.
   - View system-wide metrics and performance.
3. **User Management**
   - Create, update, and delete user roles.

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○ Manage permissions and access control.
    4. Notifications
        ○ Receive system notifications and alerts.
        ○ Monitor critical events and updates.

School District Admin Journey(Web)

1. **Sign Up and Onboarding**
    ○ Signup from the landing page, do not make payment unlike the schools and community based organizations.
    ○ Receives an invitation email from the account manager after signup.
2. **Dashboard Usage**
    ○ Logs into the dashboard.
    ○ Views district overview metrics.
    ○ Uses filters to view specific school data.
    ○ Generates and downloads reports.
3. **Engagement and Community**
    ○ Participates in forums.
    ○ Sends and receives messages within the district.
    ○ View training materials.
4. **Account Management**
    ○ Manages user accounts and permissions.
    ○ Configures settings and integrations.

School Admin Journey(Web)

1. **Sign Up and Onboarding**
    ○ Signup from landing page/ Receives an invitation email.
    ○ Make payment during signup and onboarding when they signup from the landing page
    ○ Click on the invitation link and set up a password.
    ○ Completes onboarding questions.

2. **Dashboard Usage**
    ○ Logs into the dashboard.
    ○ Views school overview metrics.
    ○ Identifies and addresses hotspots and bright spots.
    ○ Manages student intervention logs.

3. **Engagement and Community**

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- Participates in forums.
- Sends and receives messages within the school.

4. **Account Management**
   - Manages user accounts and permissions.
   - Configures settings and integrations.

Community Partner Journey(Web)

1. **Sign Up and Onboarding**
   - Signup from the landing page
   - Make payment during signup and onboarding when they signup from the landing page
   - Completes onboarding questions and preferences.

2. **Dashboard Usage**
   - Logs into the dashboard.
   - Views organization's engagement metrics and impact reports.
   - Participates in forums and discussions.
   - Manages donations and sponsorships.

3. **Engagement and Community**
   - Engages with the community through forums and discussions.
   - Receives notifications about community activities and impacts.

4. **Account Management**
   - Manages account settings and preferences.
   - Updates sponsorship details and donation preferences.

High School Student Journey(Mobile)

1. **Sign Up and Onboarding**
   - Receives an invitation email or download link.
   - Signs up and sets up a password.

2. **Dashboard Usage**
   - Opens the app and logs in with email and password.
   - Views badges, points, streaks, leaderboard position, challenges, and winner's ticker.
   - Views personal dashboard displaying:
     i. Badges: Earned for achievements.
     ii. Points: Accumulated for various activities.
     iii. Streaks: Consecutive days of attendance or activity.
     iv. Leaderboard Position: Ranking among peers.
     v. Challenges: Ongoing and upcoming challenges.
     vi. Winner's Ticker: Recent challenge winners.
   - Check daily attendance records.
     i. Joins school or class challenges to earn more points and badges.

3. **Engagement and Notifications**
   - Sends and receives messages with school admins and intervention teams for support or queries..
   - Receives push notifications for:
     i. New messages.
     ii. Updates on challenges.
     iii. Encouragement and motivational messages.

4. **Rewards**
   - Claim Rewards:
     i. Views available rewards on the dashboard.
     ii. Claims rewards based on accumulated points or achievements.

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Parent Journey(Mobile)

1. **Sign Up and Onboarding**
   - Download the app from Play Store or App Store.
   - Open the app and click on "Sign Up."
   - Enters personal information and creates a password.
   - Completes initial onboarding questions (e.g., relation to child, contact information).
   - Add children to the account by entering their details.
   - Optionally adds additional parents or guardians.

2. **Home Screen and Navigation**
   - Logs into the app with email and password.
   - Dashboard Overview:
     i. Views home screen displaying:
     ii. Badges: Earned by their children.
     iii. Points: Accumulated by their children.
     iv. Streaks: Their children's consecutive days of attendance.
     v. Leaderboard Position: Their children's ranking among peers.
     vi. Challenges: Ongoing and upcoming challenges their children can join.
     vii. Winner's Ticker: Recent challenge winners among students.
   - Child(ren) Cards:
     i. Swipes through cards for each child to see detailed attendance breakdowns and other relevant information.

3. **Engagement and Community**
   - Joins and participates in challenges.
   - Sends and receives messages with schools and intervention teams.

4. **Rewards and Notifications**
   - Views and claims rewards:
     i. Sees available rewards their children can claim.
     ii. Helps their children claim rewards based on their points or achievements.
   - Receives notifications about:
     i. Encouragement messages for their children.
     ii. Updates on their children's attendance and performance.

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Wizearly Success Metrics

- **User Adoption**: Number of active users (administrators, parents, students, community managers, partners).
- **Engagement**: Frequency of feature usage (attendance tracking, messaging, challenges).
- **Retention**: Percentage of users who continue to use the platform over time.
- **Impact**: Improvement in attendance rates and reduction in chronic absenteeism.
- **Feedback**: User satisfaction ratings and feedback.

MVP Features(Web):

Intervention types for MVP: Approved by client ▾ DONE
- Phone call
- Email
- SMS (prevention communication to start with)
- Home Visit
- Meetings with the parent e.g:
  - SAT: SAT (Student Assistance Team) is a school-based cadre whose function is to identify, intervene with and refer to students who are not making satisfactory academic progress. Cadres provide teachers, parents, and students with a prevention intervention process.
  - SST: Student Study Team, SST meetings are for the purpose of planning interventions for general education students that are not making satisfactory progress. The purpose of the SST is to provide teachers with additional strategies and support to use both inside of the classroom (such as the use of graphic
  - organizers for note taking) and outside of the classroom (such as strategies used in individual tutoring).
- Referrals e.g. attendance court, community partner, government resource, mental health professional
- Other _____

1. School district: Approved by client ▾
   a. Signup and onboarding: The school district would get a link to claim their account once the account manager that handled their onboarding activates it from the Wizearly super admin portal and they are taken to the dashboard.
      i. There is a virtual account manager named Billie on the signup page for a more conversational prompt—DONE

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ii. Account setup: design
b. Dashboard overview: Dashboard design
   i. The district admin can see the overview showing the chronic absence, attendance and truancy percentages, on a tab - DONE
   ii. The district admin can see arrows on these tabs depicting negative or positive metrics for the previous month: for Chronic absence and truancy: arrow going down is green, showing positive metric, arrow going up is red showing negative metric while for attendance, arrow going up is green showing positive metric, arrow going down is red showing negative metric - DONE
   iii. The district admin can see a school filter to filter the view by school, clicking on a particular school changes the view of the school district to that of the school.- DONE
   iv. A header showing the name of the district, this changes to that of the school if the user selects a school - DONE
   v. Attendance trend comparing the current year and previous year in a line graph, they can filter by year, month, week(this is dependent on the last time they updated their data), there will be a status icon on the dashboard to show when the attendance data was last updated. - DONE but updated needed: Scale needs to be at 100%
   vi. Overall score: This shows the accumulation of points the user has gotten from daily check-ins on the platform, completing assigned tasks, completing interventions. - NOT SCOPED FOR .
   vii. Hotspot: these are schools that are have severe, moderate and at-risk absenteeism, this is determined by the risk factors, the schools on the hotspots is determined by the number of students with high risk factors: - is based on attendance rate not risk factors - DONE

   91% threshhold for districts - possibly dynamic to set it at a district level.- change already made to attendance. Just tweak % to 91%

   1. Red (High Risk)
      ■ Threshold Range: 70 - 100
      ■ Description: Indicates a high likelihood of chronic absenteeism. Pupils/Students in this range are at significant risk and require immediate and intensive intervention.
      ■ Action Required: Immediate intervention plans, parental engagement, and support services.
   ○ Orange (Moderate Risk)
      ■ Threshold Range: 40 - 69
      ■ Description: Indicates a moderate likelihood of chronic absenteeism. Students in this range are at moderate

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risk and should be closely monitored with proactive interventions.

- ■ Action Required: Regular monitoring, early intervention strategies, and counseling.
  - ○ Yellow (Low Risk)
    - ■ Threshold Range: 0 - 39
    - ■ Description: Indicates a low likelihood of chronic absenteeism. Students in this range are at low risk but should still be monitored to ensure they remain on track.
    - ■ Action Required: Ongoing support and regular attendance checks.

viii. Bright Spots: these are schools that were on the hotspot, but have improved significantly and are no longer at risk of severe absenteeism - Clarity Needed: Should this be solely left to AI predictions or should the district have control or flexibility on the thresholds? Currently powered by WizE.

ix. Time saved on Wizearly: this is displaying the time they have saved on Wizearly showing that they are spending less time to get their tasks done by using Wizearly than they would normally do. - DONE but NEEDS CLARITY: currently set to saving 7 hours but need to **clarify** the "time" to make sure its accurate.

x. Money earned from ADA: The formula would be the amount the district gets for each student present for the year, divided by the number of school days in that district, which also varies. There are only seven ADA schools in the US: California, Texas, Idaho, Illinois, Missouri, Kentucky and Mississippi. - This was redefined in December as communicated to the team.Currently, it is cumulative now as redefined in December - DONE

c. Navigation bar:
  i. Calendar: The calendar shows the tasks assigned to the individuals, so for each user in the school district, they can see the tasks assigned to them. The School district admin can also set the school year calendar by uploading the .ics version of their school year calendar - DONE. Update Requested: deadline for an intervention should be also added on the calendar - Already implemented by the team.
     1. Design: Calendar
  ii. Messages: The district users can send one-to-one(direct messages), one-to-many(group messages) to users in their district, this is inclusive of users in the schools in their district, they can also see their message history with timestamps. - NOT SCOPED FOR: Critical to current project. - Have conversation.

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1. Design: [Messages](#)

iii. Training: The school district see the training materials uploaded by Wizearly superadmin, they can also get badges for completing training videos uploaded by the Wizearly superadmin - NOT SCOPED FOR

    1. Design: [Training](#)

iv. Archives: Users can view reports that have been generated for their district. - NOT SCOPED FOR

    1. Design: [Archive](#)

v. Community: this is like a facebook/reddit community, there should be forums, the Wizearly super admin can upload information in the community for all users to see, so this can be any user in any district or organization being on the community and being able to send messages as long as they are users on Wizearly. Users can be blocked by superadmin from a community if they go against the rules.

    1. Design: [Community](#) - NOT SCOPED FOR

vi. Notebook: The district users can see notes they've added for all students in this feature, they can add new notes for the students here. Wiz-E will pick up the content of the notes by the tag that was added when creating the note.

    a. Design: [Notebook](#) —-DONE

vii. Ask Wiz-E: This takes them to the page for the AI, they should be able to see prompts(examples we'd give them) and also create new prompts to make a search or request from Wiz-E. Wiz-E would have access to everything except their messages on the platform.

    1. Design: [Ask Wiz-E](#)—-DONE

d. Top menu bar:

i. User profile: user can see the following once they click on the user's profile: [User profile design](#)—DONE

    1. User details: all the information pertaining to the user—-DONE

    2. Logout: they can log out of the account —DONE

    3. Invite your team: they can invite more team members—-DONE

    4. Product updates: they can see new product updates about Wizearly here—DONE

    5. Pricing and features: they have to reach out to their account manager— DONE

    6. Settings: user can see the following once they click on the settings icon [Settings design](#) —-DONE

    7. Account setup: user can do:

        a. Account default: user can see the organization's details here—DONE

        b. User and teams: They can make setting about the added team members and access controls here—-DONE

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c. Integrations: Users can do data import here using CSV(they would need to update this weekly if they choose the manual route which is CSV) or SIS integrations: options for SIS integrations are: Powerschool, Infinite campus, Skyward and Aeries.----DONE, only Aeries provided an API

d. Privacy and consent: user can see the privacy and consent agreement they agreed to when they signed up here—DONE

e. Security: user can see login history, when last the other team members logged in to the platform—DONE

8. General settings: user can edit profile picture, can see the first name, last name, and every other information we got at onboarding here—DONE

9. Schools: Users click on this and can see a list of schools in their district they have uploaded to Wizearly—DONE

   a. Design: Schools

ii. Notifications: they get notifications for scheduled interventions and comments on a note—DONE

2. School: Approved by client ▾

   a. Signup and onboarding: The school can signup and onboard to the platform using a work email.---DONE

      i. There is a virtual account manager named Billie on the signup page for a more conversational prompt—DONE

   b. Dashboard overview:

      i. The school admin can see the overview showing the chronic absence, attendance and truancy percentages, on a tab—-DONE

      ii. The school admin can see arrows on these tabs depicting negative or positive metrics: for Chronic absence and truancy: arrow going down is green, showing positive metric, arrow going up is red showing negative metric while for attendance, arrow going up is green showing positive metric, arrow going down is red showing negative metric for the previous month—DONE

      iii. A header showing the name of the school Dashboard design—DONE, changed this to a floating header

      iv. Attendance trend comparing the current year and previous year in a line graph, they can filter by year, month, week(this is dependent on the last time they updated their data), there will be a status icon on the dashboard to show when the attendance data was last updated.---DONE

      v. Overall score: This shows the accumulation of points the user has gotten from daily check-ins on the platform, completing assigned tasks, completing interventions.---NOT SCOPED FOR

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vi. Hotspot: these are students that have severe, moderate and at-risk absenteeism, this is determined by the risk factors—DONE

    1. User can click on student's name on the hotspot to view the details about the student; Student dashboard—DONE

        a. Contact info: this is the student's contact info, that is the information about the student, house address, phone number, parent's phone number, etc.----DONE

        b. Attendance trend for the student, this can also be filtered by the year, monthly, weekly view—DONE

        c. The risk factor score for the students

            i. Clicking on this would show the risk factors for the student, only allowed users can see the risk factors—DONE

            ii. Calculating Risk Scores for Chronic Absenteeism— DONE

            iii. The risk score for chronic absenteeism to be calculated based on several factors that contribute to a pupil/student's likelihood of being chronically absent. These factors may include:

- Attendance History: The student's past attendance records over a specific period (talking about baselining the 7 years of SIS data)
- Home factors:
  - Homeless
  - Transportation/Distance from school
  - Food insecurity
  - Domestic abuse
  - Parent health
  - Sibling health
  - Moved multiple times
  - Death in the family
  - Parents' divorce
- School factors:
  - IEP/504 Special Education
  - Poor grades
  - Bullying or being bullied
  - Suspensions
- Personal factors:
  - Fight with partner
  - Mental health issues
  - Breakup with partner

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- ■ Participation in extracurricular activities
  - ○ The calculation typically would be done using this weighted formula that would consider the relative importance of each factor.
- Risk Score=(W1×Attendance History)+(W2×Demographic Factors)+(W3×Academic Performance)+(W4×Behavioral Indicators)+(W5×External Factors)
- Where W1,W2,W3,W4, and W5 are the weights assigned to each factor based on their impact on absenteeism risk.
- Red (High Risk)
  - ○ Threshold Range: 70 - 100
  - ○ Description: Indicates a high likelihood of chronic absenteeism. Pupils/Students in this range are at significant risk and require immediate and intensive intervention.
  - ○ Action Required: Immediate intervention plans, parental engagement, and support services.
- Orange (Moderate Risk)
  - ○ Threshold Range: 40 - 69
  - ○ Description: Indicates a moderate likelihood of chronic absenteeism. Students in this range are at moderate risk and should be closely monitored with proactive interventions.
  - ○ Action Required: Regular monitoring, early intervention strategies, and counseling.
- Yellow (Low Risk)
  - ○ Threshold Range: 0 - 39
  - ○ Description: Indicates a low likelihood of chronic absenteeism. Students in this range are at low risk but should still be monitored to ensure they remain on track.
  - ○ Action Required: Ongoing support and regular attendance checks.

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- NEW REQUIREMENT: Percentages assigned to each factor and this is used to calculate the risk factor score—DONE
    d. Student's intervention log; this shows the intervention logs added when the intervention of a student is scheduled for the intervention team members by community school manager for the student—-DONE
    e. Student's care/intervention team: this shows the list of the intervention team members for the student, this is specific to each student
        i. NEW REQUIREMENT: one intervention team member can be assigned to multiple students—-DONE
    f. Care note log: this shows the care note logs for this student that has been added by various members of the student's intervention team—-DONE
    g. Add care note: user can add a care note for the student here—-DONE
    h. See full care note history: user can see in details the care notes for the students(this can be locked for just selected members in the organization to see)----DONE
  vii. Bright Spots: these are students that were on the hotspot, but have improved significantly and are no longer at risk of severe absenteeism—--DONE
  viii. Time saved on Wizearly: this is displaying the time they have saved on Wizearly showing that they are spending less time to get their tasks done by using Wizearly than they would normally do.----DONE but NEEDS CLARITY: currently set to saving 7 hours but need to **clarify** the "time" to make sure its accurate.
  c. Navigation bar:
    i. Calendar: The calendar shows the tasks assigned to the individuals, so for each user in the school, they can see the tasks assigned to them. The School admin can also set the school year calendar by uploading the .csv version of their school year calendar.
        1. Design: calendar—-DONE
    ii. Messages: The school users can send one-to-one(direct messages), one-to-many(group messages) to users in their district, this is inclusive of users in the schools in their district, they can also see their message history with timestamps.
        1. Design: messages—-NOT SCOPED FOR
    iii. Training: The school can see the training materials uploaded by Wizearly superadmin, they can also get badges for completing training videos uploaded by the Wizearly superadmin

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1. Design: training—-NOT SCOPED FOR

iv. Archives: Users can view reports that have been generated for their school.

1. Design: Archives—-NOT SCOPED FOR

v. Community: this is like a facebook/reddit community, there should be forums, the Wizearly super admin can upload information in the community for all users to see, so this can be any user in any organization being on the community and being able to send messages

1. Design: community—-NOT SCOPED FOR

vi. Notebook: The school users can see notes they've added for all students in this feature and create new notes for students. Wiz-E will pick up the content of the notes by the tag that was added when creating the note.

1. Design: notebook—-DONE

vii. Ask Wiz-E: This takes them to the page for the AI, they should be able to see prompts(examples we'd give them) and also create new prompts to make a search or request from Wiz-E. Wiz-E would have access to everything except their messages.----DONE

d. Top menu bar:

i. User profile: user can see the following once they click on the user's profile:-----DONE

1. User details: all the information pertaining to the user
2. Logout: they can log out of the account
3. Account and billing; this is where they can see their current plan and subscription details here
4. Invite your team: they can invite more team members
5. Product updates: they can see new product updates about Wizearly here
6. Pricing and features: they can see available plans for Wizearly here—BLOCKED—NO PRICING PLAN

ii. Settings: user can see the following once they click on the settings icon—DONE

1. Account setup: user can do:

a. Account default: user can see the organization's details here—DONE

b. User and teams: They can make setting about the added team members and access controls here—DONE

c. Integrations: Users can do data import here using CSV(they would need to update this weekly if they choose the manual route which is CSV) or SIS integrations: options for SIS integrations are:

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Powerschool, Infinite campus, Skyward and Aeries.----DONE, Aeries, which is the only option we got, doesn't give an allowance for schools to use them

  d. Privacy and consent: user can see the privacy and consent agreement they agreed to when they signed up here–DONE

  e. Security: user can see login history, when last the other team members logged in to the platform—DONE

 2. General settings: user can edit profile picture, can see the first name, last name, and every other information we got at onboarding here—DONE

 iii. Notifications: tNotifications: they get notifications for scheduled interventions and comments on a note—DONE

3. Community partner: `Approved by client ▾`

 a. Signup and onboarding: The community partner can signup and onboard to the platform using a work email. [Signup](#)—-DONE

  i. There is a virtual account manager named Billie on the signup page for a more conversational prompt—-DONE

  ii. Their signup, onboarding and account setup is similar to the School district however, unlike the school district, they do not require an account manager for their payment—-DONE

 b. Dashboard overview: [Dashboard](#)

  i. The organization admin can see the overview showing the chronic absence, attendance and truancy percentages, on a tab—-DONE

  ii. The organization admin can see arrows on these tabs depicting negative or positive metrics: for Chronic absence and truancy: arrow going down is green, showing positive metric, arrow going up is red showing negative metric while for attendance, arrow going up is green showing positive metric, arrow going down is red showing negative metric for the previous month—-DONE

  iii. The organization admin can see a school filter to filter the view by school, clicking on a particular school changes the view of the organization to that of the school.---DONE

  iv. A header showing the name of the organization, this changes to that of the school if the user selects a school—DONE

  v. Attendance trend comparing the current year and previous year in a line graph, they can filter by year, month, week(this is dependent on the last time they updated their data), there will be a status icon on the dashboard to show when the attendance data was last updated.----DONE

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vi. Overall score: This shows the accumulation of points the user has gotten from daily check-ins on the platform, completing assigned tasks, completing interventions.---NOT SCOPED FOR

vii. Hotspot: these are schools that are have severe, moderate and at-risk absenteeism, this is determined by the risk factors, the schools on the hotspots is determined by the number of students with high risk factors:

    1. Red (High Risk)
        a. Threshold Range: 70 - 100
        b. Description: Indicates a high likelihood of chronic absenteeism. Pupils/Students in this range are at significant risk and require immediate and intensive intervention.
        c. Action Required: Immediate intervention plans, parental engagement, and support services.

    2. Orange (Moderate Risk)
        a. Threshold Range: 40 - 69
        b. Description: Indicates a moderate likelihood of chronic absenteeism. Students in this range are at moderate risk and should be closely monitored with proactive interventions.
        c. Action Required: Regular monitoring, early intervention strategies, and counseling.

    3. Yellow (Low Risk)
        a. Threshold Range: 0 - 39
        b. Description: Indicates a low likelihood of chronic absenteeism. Students in this range are at low risk but should still be monitored to ensure they remain on track.
        c. Action Required: Ongoing support and regular attendance checks.

    4. NEW REQUIREMENT: Percentages assigned to each factor and this is used to calculate the risk factor score—DONE

viii. Bright Spots: these are schools that were on the hotspot, but have improved significantly and are no longer at risk of severe absenteeism—DONE

ix. Time saved on Wizearly: this is displaying the time they have saved on Wizearly showing that they are spending less time to get their tasks done by using Wizearly than they would normally do.---DONE but NEEDS CLARITY: currently set to saving 7 hours but need to **clarify** the "time" to make sure its accurate.

c. Navigation bar:

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i. Calendar: The calendar shows the tasks assigned to the individuals, so for each user in the organization, they can see the tasks assigned to them. The organization's admin can also set the school year calendar by uploading the .csv version of their school year calendar
   1. Design: Calendar—DONE
ii. Messages: The organization users can send one-to-one(direct messages), one-to-many(group messages) to users in their organization, this is inclusive of users in the schools in their organization, they can also see their message history with timestamps.
   1. Design: messages—NOT SCOPED FOR
iii. Training: The organization can see the training materials uploaded by Wizearly superadmin, they can also get badges for completing training videos uploaded by the Wizearly superadmin—NOT SCOPED FOR
   1. Design: training
iv. Archives: Users can view reports that have been generated for their organization.
   1. Design: —NOT SCOPED FOR
v. Community: This is like a facebook/reddit community, there should be forums, the Wizearly super admin can upload information in the community for all users to see, so this can be any user in any organization on the community and being able to send messages
   1. Design: community—NOT SCOPED FOR
vi. Notebook: The organization users can see notes they've added for all students in this feature, user can also create a new note for a student here. Wiz-E will pick up the content of the notes by the tag that was added when creating the note.
   1. Design: notebook—DONE
vii. Ask Wiz-E: This takes them to the page for the AI, they should be able to see prompts(examples we'd give them) and also create new prompts to make a search or request from Wiz-E. Wiz-E would have access to everything except their messages.---DONE
d. Top menu bar:
   i. User profile: user can see the following once they click on the user's profile:
      1. User details: all the information pertaining to the user—-DONE
      2. Logout: they can log out of the account —-DONE
      3. Account and billing; this is where they can see their current plan and subscription details here—-DONE
      4. Invite your team: they can invite more team members—DONE
      5. Product updates: they can see new product updates about Wizearly here—DONE

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6. Pricing and features: they can see available plans for Wizearly here—BLOCKED—NO PRICING PLAN

ii. Settings: user can see the following once they click on the settings icon

1. Account setup: user can do:
   a. Account default: user can see the organization's details here—-DONE
   b. User and teams: They can make setting about the added team members and access controls here—DONE
   c. Integrations: Users can do data import here using CSV(they would need to update this weekly if they choose the manual route which is CSV) or SIS integrations and Aeries.---DONE,
   d. Privacy and consent: user can see the privacy and consent agreement they agreed to when they signed up here—-DONE
   e. Security: user can see login history, when last the other team members logged in to the platform—DONE

2. General settings: user can edit profile picture, can see the first name, last name, and every other information we got at onboarding here—DONE

3. Schools: Users click on this and can see a list of schools in their organization they have uploaded to Wizearly—DONE

iii. Notifications: they get notifications for scheduled interventions and comments on a note—DONE

4. Wizearly: superadmin Approved by client ▾
   a. Dashboard:
      i. System-wide Analytics:
         1. The super admin can see an overview showing key performance indicators (KPIs) such as user engagement, system usage statistics, and other relevant metrics.---DONE
         2. The super admin can see arrows on these tabs depicting negative or positive metrics: for negative metrics, the arrow will be red, and for positive metrics, the arrow will be green.----DONE
         3. The super admin can filter the view by region, school district, or school. Clicking on a particular school changes the view to show detailed metrics for that school.---DONE
         4. A header displays the name of the selected school or district.---DONE

5. Trends: Superadmin can view trends such as user activity and engagement over different periods (year, month, week) in line graphs.----DONE
6. Hotspot: Identifies users or schools with severe or moderate issues needing attention.----DONE
7. Superadmin can click on specific users or schools within the hotspot to view detailed information.---DONE

b. Navigation bar:
   i. User management:
      a. The super admin can create, update, and delete users.----DONE
      b. User role assignments allow the super admin to manage permissions and access levels.---DONE
      c. A search and filter function helps to find specific users quickly.----DONE
   ii. Account management:
      1. The super admin can manage school districts, schools, and community partners.----DONE
      2. The super admin can create, update school district accounts.---DONE
      3. Users can be assigned to different account types.----DONE
      4. Permissions and access levels can be set for each account type.---DONE
   iii. Community management:
      a. The super admin can upload information in the community, remove users from the community—-NOT SCOPED FOR
      2. Training Management:
         a. The admin can upload training materials for different account types, set questions the users can answer to get badges.---NOT SCOPED FOR
   iv. Challenges management:
      1. The super admin can manage the challenges shown on the Wizpulse, this is including the rewards system—DONE
   v. Verification for Wizpulse:
      1. The Wizearly admin can manage the parents' verification approval for Wizpulse, the admin will be able to see the information the parent submitted while signing up and download the consent form that was signed. The Wizearly Admin can delegate this to the ONGB team. The disapproved children, their parents will get a notification on Wizpulse and can re-add the child's information correctly.----DONE

c. Top menu bar:

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      i.   User Profile—DONE
           1. User details: the details of the user
           2. Invite your team: invite the other team members and assign roles to them
      ii.   Notifications: New signups on wizpulse, wizearly—DONE

Wiz-E(Wizearly's Artificial Intelligence)

Wiz-E should be able to identify students at risk of chronic absenteeism based on historical data and handle data for multiple students simultaneously, providing predictions on which students are likely to have chronic absenteeism. It should also offer daily or weekly updates on students needing support or intervention. It should be able to provide predictive analysis to help schools take preemptive actions rather than reactive ones. The AI will be able to generate detailed, easy-to-understand reports that offer clear insights into the data. Customization and flexibility are important, allowing the AI to meet the specific needs of different schools and districts, including focusing on students who need more attention to improve attendance rates.

Change Requests : 📄 **Wizearly Changes**

MVP Features(Wizpule) `Approved by client`

1. Parent: [Parent's design](#)
    a. Signup and onboarding: parents can sign up, login, reset password if forgotten on the platform once they download the application from playstore(Android) or app store(iOS), they also get to answer onboarding questions on the platform, add kids and two secondary parents and verification takes up to 4-5 business days before they can see their dashboard, they would be notified when the verification has been done via email or phone number or in-app and push notifications, so they can view their dashboard then.----DONE
    b. Homescreen: parents can see their badges,
        i.   Streak: A streak is defined as logging in for 20 consecutive days.
            1. Users do not get points for each day of the streak; instead, they receive a bonus of 20 points after completing a 20-day streak.----DONE
            2. If a user misses a day, the streak resets, and they must start over to achieve the 20-day streak bonus
        ii.   Points: Each student can earn up to 180 points for attending school every day out of a 180-day school year.----DONE
            1. If a student misses a day, they do not receive points for that day.---DONE

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2. Parents with multiple children will accumulate points for each child separately. For example, if a parent has three children, they can earn up to 540 points (180 points per child) if all children attend school every day—-DONE

3. High school students will earn their own points separately from their parents.

4. Parents may still receive engagement points for checking on their high school students, but the attendance points will be attributed to the students themselves—NOT DONE because the high school student flow is still being developed

   iii. Family number; a family number will be attached to each family for the lottery selection.---DONE

   iv. Challenges: can see upcoming and current challenges on the platform—DONE

   v. winner's ticker: a moving field, showing parent's initials and what they won, what school and location.---DONE

   vi. Their child(ren)'s cards: they can swipe to see each of their kid's card, they can click each child's card to see a full breakdown for the child, the cards are arranged in the order they added the kids—-DONE

c. Navigation bar:

   i. Child(ren): Users can see the details about their kids on this page, make absence report(this is the why data that would be displayed on the student's information), attendance report, invite high school students(OUT OF SCOPE) and add more kids—-DONE

   ii. Sponsors: parents can see the list of sponsors on this page and a call-to-action to join the sponsors, that is, donate to ONGB(Oakland Natives Give back) that is powering Wizpulse—-DONE

   iii. Messages: parents can send messages to and receive messages from their child(ren)'s schools, intervention team members.----DONE

   iv. Quizzes/survey: users can see their missed, in progress and completed quizzes and surveys here, users can see the points they have earned for completed surveys and quizzes and can continue the quizzes they have missed or didn't complete.----DONE

d. Top menu bar:

   i. User profile: parents can see their details here, upload their profile picture, manage their settings, edit contact information—-DONE

   ii. Rewards: users can see a list of rewards, claimed and unclaimed—-DONE

   iii. Notifications: users get notifications from the app, can be encouragement messages, a decline in their child's attendance, an improvement in their child's attendance, etc.----DONE

Secondary parent: `Approved by client`

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The secondary parent can be view only, they cannot participate in challenges, add kids or make absence reports or confirm attendance.----DONE

2. High school student**(On hold until Parent's app is completely developed):**
   Approved by client
   a. Signup and onboarding: students can sign up, login, reset password if forgotten on the platform once they accept the invite sent from their parents(primary parent only).
   b. Homescreen: students can see their
      i. Badges: students can see badges they have been awarded for activities on the app
      ii. Streak: A streak is defined as logging in for 20 consecutive days.
         1. Users do not get points for each day of the streak; instead, they receive a bonus of 20 points after completing a 20-day streak.
         2. If a user misses a day, the streak resets, and they must start over to achieve the 20-day streak bonus
      iii. Points: Each student can earn up to 180 points for attending school every day out of a 180-day school year.
         1. If a student misses a day, they do not receive points for that day.
         2. Parents with multiple children will accumulate points for each child separately. For example, if a parent has three children, they can earn up to 540 points (180 points per child) if all children attend school every day
         3. High school students will earn their own points separately from their parents.
         4. Parents may still receive engagement points for checking on their high school students, but the attendance points will be attributed to the students themselves
      iv. Family number; a family number will be attached to each family for the lottery selection.
      v. Challenges: can see upcoming and current challenges on the platform
      vi. winner's ticker: a moving field, showing parent's or student's initials and what they won, what school and location
      vii. their card: they can click on their card to see a full breakdown for themselves, can give feedback about their day, attendance, report absence(for right now, we add a disclaimer that they have to get notes from their parents to their teachers in school, the reason is so that they don't lose points on Wizpulse) etc.
   c. Navigation bar:
      i. Sponsors: high school students can see the list of sponsors on this page

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      ii.   Messages: students can send messages to and receive messages from their school, intervention team members

      iii.   Quizzes/survey: users can see their missed, in progress and completed quizzes and surveys here, users can see the points they have earned for completed surveys and quizzes and can continue the quizzes they have missed or didn't complete.

  d. Top menu bar:

      i.   User profile: high school students can see their details here, upload their profile picture, manage their settings, edit contact information, manage notification settings

      ii.   Rewards: users can see a list of rewards, claimed and unclaimed

      iii.   Notifications: users get notifications from the app, can be encouragement messages, a decline in their attendance, an improvement in attendance, etc.

Access control(Web, Wizearly):

Account type	User type	Access
School district	1. Admin	- Create the school district account, add other users(members of their team) and assign roles. - Can assign another admin, there can only be two admins at the same time - Can create or approve community partner/ school accounts - Can create a school account and assign an admin user to the school account - Can assign a

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		community manager for a school
	2. Superintendent	● Can manage users for the school district(add, remove users) ● Has full access to all features within the school district portal
	3. Finance/Billing	● Manage the subscription and payment module of the school district portal
	4. School supervisors	● Supervise the school and access to the school's performance reporting system
	5. IT Manager	● Access to upload school data only or integrate with SIS only
	6. Community manager	● Run the school's attendance community ● Can add and manage the assigned students' intervention teams ● Can add notes regarding a student ● Can add and manage a student's class schedule and CGPA
School	1. Admin	● Can create a school account and invite other team members ● Can assign another admin(the principal), we can only have two admins at the

		same time ● Can create/approve a community partner account ● Can assign a community school manager to a specific student group(individual or bulk assign) ● Can monitor the intervention progress/summary for the school ● Can create calendar plans for the school year ● Can add intervention team members(School counselors, social worker)
	2. Finance/Billing	● Manage the subscription and payment module of the school portal.
	3. IT Manager	● Access to upload school data only or integrate with SIS only
	4. Community school manager	● Run the school's attendance community ● Can add and manage the assigned students' intervention teams ● Can add notes regarding a student ● Can add and manage a student's class schedule and CGPA ● Can download a report for a particular

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		student or student group in the assigned student group
Community partner	1. Admin	● Can create and manage a community partner account ● Can assign and manage community school manager for a school ● Can use the Wizearly platform for note taking, communication, case management without onboarding schools on their rosters
	2. IT manager	● Access to upload school data only or integrate with SIS only
	3. Finance/Billing	● Manage subscription for the community partner account

	4. Community school manager	- Run the school's attendance community - Can add notes regarding the students - Can add and manage a student's class schedule and CGPA - Can create and manage intervention plans for the students

	5. Intervention team member	• Can only add see the details for the student they are the intervention team member for • Can add notes regarding the student • Can add and manage a student's class schedule and CGPA • Can download a report for a particular student • Can create and manage intervention plans for the student
Wizearly	1. Superadmin	• The super admin can create, manage, delete, verify, approve accounts on Wizearly Admin portal • Can assign admins/superintendents in cases where someone leaves and they need another person to take over the admin or superintendent role
	2. Admin	• can create, manage, assign accounts for Wizearly user types.
	3. NGO Partner	• Can manage the WizPulse mobile under the Wizearly super admin

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		● Can get access to student's attendance data
	4. Account manager	● Can create, update, and delete account types

Access control (Mobile, Wizpulse)

User	Access
Parent	● Can create and manage the parent account on WizPulse ● Can add their wards/kids information on the app ● Can invite their kids who are High school students to use the platform ● Can view and join challenges on the platform ● Can earn rewards and withdraw their rewards via Venmo from the challenges joined ● Can report kid's attendance ● Can view their child(ren)'s attendance(this connects with the attendance tracker on Wizearly) ● Can communicate directly with the school about their wards ● Can view each of their added kids' profiles ● Can only be the legal guardian(s) in the school's record ● Can add up to 2 other parents(making 3 parents in total for a child)
Student	● Can only be high school student ● Can accept invite sent from the parent to join the mobile app ● Can view their attendance ● Can communicate directly with school

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	● Can view and join challenges ● Can earn rewards and withdraw rewards via Venmo from the challenges joined ● Give feedback on daily school attendance(this is feeding the school's case notes)

PRD REVIEW MEETINGS

26th of August -
https://drive.google.com/file/d/1ah6NmuA7j8R84OSv9FclHvz7w0Wn9keu/view?usp=drivesdk

23rd of August -
https://drive.google.com/file/d/10eRwALj5jgnO8BK_V2TJ6ANxS4T_DLZl/view?usp=drivesdk

19th of August -
https://drive.google.com/file/d/1C4rxBWrF33CV3pyIAhTioObJcVZiYtR6/view?usp=drivesdk