**FENIKS – BOOKING/ADMIN/HR SYSTEM**

We are looking for a system that

* will create a comprehensive database for our project (groups, workshops etc) and counselling clients
* Will combine booking the therapy sessions with the calendar and online and cash payments via a card reader, cash and paypal(?) or other payment system.
* Will distinguish the client-pathways for paid and donation based individual and couple counselling (Standard Track vs Fast Track) – described below
* Allow booking and allocation to the groups/projects, eg. Toddler Group as well.
* Would be easy to add new groups/projects/workshops to monitor attendance
* Allow on registration of the clients and data input from the registration forms;
* Allow on reporting – info from the registration forms as well as average amount of sessions etc.
* Would send reminders (txt, email?) to the users/clients
* Allow on the different access level for users;
* Allow on HR and volunteering monitoring (eg. worked hours);
* Be safe, secure, in accordance to GDPR
* Be easy to maintain for people who have no idea how to do it
* Be cheap to maintain

**Collected data**

We collect various data from the clients, which have different levels of sensitivity. At the moment we have 3 forms:

1. Registration form (address, contact details, GP Practice etc), option to choose the project (counselling, workshops)- sensitive - all clients, including groups and workshop attendants
2. Equalities Form (race, sex orientation, time abroad etc) - anonymous-not sensitive - all clients
3. Assessment Form (mental health assessment-diagnosis, symptoms, risk of suicide etc) - super sensitive - only counselling clients

Our clients can take part in the projects (eg. groups, workshops) and or/ counselling. Hence, the client database should give an option to allocate them appropriately.

Other information we would like to be able to collect and to access:

* which therapist is assigned to the client
* therapists' schedule and worked hours
* Group or project allocation
* Standard or the Fast-Track allocation
* collected payments and/or donations

**Standard and Fast Track**

Feniks provide counselling and therapy in two forms:

1. **Standard Track** is for people in difficult social and financial situation: homelles, victims of domestic abuse etc. who can't afford to pay for counselling. Those clients can come to us directly or can be referred from the GP practices, hospitals and other charities.
   * We offer them a set of 8 (with the extension to 16 or 24) sessions of free or donation-based counselling/therapy (suggested donation is £5-15). Our therapists work then on a voluntary basis. Feniks only covers their cost of their supervision.
   * The clients are then put on the **Waiting List** and wait to be allocated to the appropriate volunteer, depending on their and the therapist's availability, which we also register. At the moment the waiting list is about a year long. Spreadsheet [**Example**](https://docs.google.com/spreadsheets/d/1AvsQcwB4uGZf5oRVzOX4ZoycHMxqm9Kw7e51arGr41Y/edit?usp=sharing)
2. **Fast-Track –** is for the clients who can afford paid sessions. They can see a therapist a lot earlier and get an unlimited amount of sessions.

**The counselling client-pathways**

Each of the client will be be given an assessment session before starting the course of the counselling. There will be only one or two therapists allocated to do the assessments, so most likely there should be an assessment waiting lists for the Standard and Fast Track Assessment sessions.

1. Standard Track – assessment waiting list– assessment (donation) - evaluation and with the therapist suggestion - waiting list - booking – 8 sessions - with possible extension
2. Fast Track – assessment (payment) – evaluation and therapist allocation - booking – paid session - unlimited amount of further sessions

**Filtering and reporting**

* amount of sessions, per client, therapist, Standard, Fast-Track, year, months
* biometric data and info collected from the equalities forms
* where referred from

**USERS**

* **Therapists** to see information about the client, booking possible, view into the callendar to see working hours
* **Admin/reception volunteers** to book, take payments, possible data input from the forms, option to make reports-possible
* **Admin/ management staff/board members** - all of the above and possibility to make statistics and reports from the system (eg how many people for how long use the services, diagnosis, adress)
* **Clients** to be able to make booking online (?) and receive payment and/or booking confirmation and reminder (txt?)