Session Notes

Private Practice Made Simple

Application Design Document

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Revision History

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# **Introduction**

## High Level Requirements

SessionNotes is a client/patient management application geared towards psychotherapist and their small private practice requirements. There are other applications on the market that target medium to enterprise private practice business, but SessionNotes is targeting that single user that does not require all the big business features that other similar applications contain. The user (therapist) will be required to setup an account with credentials to help keep their client’s information secured. This application will offer features that allow the user to add new clients and manage client info, such as: name, address, phone number, fees, session information, ETC. Due to the nature of the client’s confidential information, this application must contain encryption and an automatic backup system to comply with HIPPA requirements.

* + 1. Profile Setup

The user must setup a profile with login credentials before first using the application. Basic login information will be required; user name, password, name, phone number, email and some security questions in case a password is forgotten.

* + 1. Authentication

Once a user profile is established, the user must provide login credentials to access the application. There will also be a mechanism in place that will log the user out if there isn’t activity for *X* amount of time. The exact amount of time will be determined after some research.

* + 1. Edit Profile

The user will be able to edit profile information and modify login credentials and security questions.

* + 1. Manage Session

The session manager will be the main screen of the application, displaying client/patient information. From here client/patient information can be viewed and edited. New sessions can be added per client/patient that will contain session information and notes. Any editing that takes place here will be logged and stored as to comply with HIPPA standards.

* + 1. Select Client

From the session manager area, the user will be able to select different clients from some list component populating the selected client’s information in the session manager.

* + 1. Reports

As what you would expect from a business application, the user will be able to run reports on client data. The format of the reports will be determined a later date.

* + 1. Forms

The user will be able to store forms and documents that their practice requires in the SessionNotes application. In a later phase, these forms will be able to be seen in the session manager and there will be notification icon/s that will be displayed if a client/passion has received, signed and returned the form.

# **SessionNotes Use Cases**

## 2.1 Use Cases

The following uses case are listed in order of priority. The top two use cases will be fully dressed in this document.

* Add New Client
* Add New Client Session
* Edit Client
* Edit Client Session
* Therapist Profile Setup
* Therapist Authentication
* Edit Therapist Profile
* Run Reports
* Edit Forms
* Check Fee Balances (system)
* Log Edits (system)
* Log Out (system or user)
* Back up data (system)
  + 1. Use Case Diagram

The followings shows the use case diagram with the therapist (user) and system as the actors.



# **Fully Dressed Use Case**

## **Add New Client Use Case**

**Primary Actor:** Therapist (User)

**Assumptions:**

* Therapist is already logged into the application and is viewing the Session Manager UI.

**Stakeholders:**

* The therapist wants to be able to add a client with ease.
* The therapist wants to be able to add a new client with minimal effort and wants the process to be relatively easy.

**Pre-conditions:**

* The therapist has an application profile and is logged into the system.

**Post-conditions:**

* A new client has been successfully added to the database.

**Flow of Events: (Basic flow with no exceptions)**

1. Therapist selects “Add New Client” in Session Manager UI.
2. Therapist enters primary Client/Patient info:
   1. Full name (required)
   2. Phone number (required)
   3. Street address
   4. Email address
   5. Hourly fee amount
   6. Any secondary patients names (family therapy, couple therapy)
   7. Insurance information
   8. Attach any forms or documents (not a priority as of yet)
   9. Id number (auto generated)
3. Therapist selects save.
4. A confirmation UI shows the new clients info before actually persisting info.
5. Therapist confirms the information is entered correctly and selects save once more.
6. A new client is added to the data base with a confirmation pop up.
   1. <FullName> has been successfully added!

**Extension (Alternative flow or exceptions)**

1. The therapist doesn’t enter one of the required fields when selecting save.
   1. A pop up is now visible on the screen stating:
      1. <FieldName> is required to save new client.
   2. A new client will not be able to be saved unless the required fields are entered.
2. The therapist notices an error on the confirmation screen.
   1. The edit button is selected.
   2. The new client screen is now visible and ready for editing.
   3. The therapist clicks save and is lead back to the confirmation screen.

## 3.2 **Add New Client Session Use Case**

**Primary Actor:** Therapist (user)

**Assumptions:**

* Therapist already is logged into the application and is viewing the Session Manager UI.

**Stakeholders:**

* The therapist wants an easy to use process to add information about a session he/she had with their client.
* If the client has had any previous sessions, the therapist wants the most recent session information populated into the new session fields when adding a new session.

**Pre-conditions:**

* The therapist has an application profile and is logged into the system.
* The therapist has a client selected on the session manager UI.

**Post-conditions:**

* A new client session has been successfully added to the database.

**Flow of Events: (Basic flow with no exceptions)**

1. The therapist selects “Add New Session”
2. New session window pops up with fields to populate:
   1. Date of session (required)
   2. Time of session (required)
   3. Fee amount (required)
   4. Fee paid (required)
   5. Payment type (required)
   6. Notes about session
   7. Client Info (auto import)
3. Therapist selects save.
4. A confirmation UI shows the new session information before actually persisting to database.
5. Therapist confirms the information is entered correctly and selects save once more.
6. A new sessions is added to client’s records and is persisted to the data base with a confirmation pop up.
   1. Session saved successfully!

**Extension (Alternative flow or exceptions)**

1. The therapist doesn’t enter one of the required fields when selecting save.
   1. A pop up is now visible on the screen stating:
      1. <FieldName> is required to save session.
      2. <OtherFieldName> is required to save session and so on.
   2. A new session will not be able to be saved unless the required fields are entered.
2. The therapist notices an error on the confirmation screen.
   1. The edit button is selected.
   2. The new session screen is now visible and ready for editing.
   3. The therapist clicks save and is lead back to the confirmation screen.
3. The client has a previous session.
   1. Populate the new session data fields with the previous sessions; date, time and fee amount.

# **Sequence Diagrams**

## **Add New Client Sequence Diagram**



## **Add New Session Sequence Diagram**

