

Meeting 1

Date: 5/24/2025

Current workflow as described by staff:

- Scheduling handled in a single Excel tab using grid layout. Each teacher has their column, and students are placed into 30-60 minutes time slots
- Invoices are generated within the Excel sheet using formulas, but sending invoices are done manually. Every 3-4 weeks one teacher will have to:
 - Screenshot every invoice of every student
 - Text the screenshot to the parent using their phone
- When parents pay, (amount paid, method, and date) are manually entered into the Record tab of the Excel sheet

Key frustrations:

- It takes almost half a day to get invoices sent out to everyone, sometimes even more if people have change times
- Double checking every screenshot
- Schedule changes a lot due to makeups or vacations, this is not always caught when creating the invoices. Even when these makeups are considered for

Priority number 1:

- Send invoices automatically every month

What to do?

- Use python scripts to extract invoice data, generate totals
- Use Twilio API to automate sending messages

Concerns:

- How much is the school willing to spend monthly to maintain these services? For now, Twilio does not look to be too expensive, but will need to clarify this at next meet

Meeting 2:

Date: 5/31/25

Key notes:

- Staff wants minimal change to their workflow, just automation on top
- Parents and staff are both of an older demographic, so minor changes with improvements to QOL is preferred rather than completely overhauling the current Excel system
 - No separate systems
- Students take days off by having parents message the school, then a staff member must check those messages and manually input the day off into invoices, subtracting the fees for that day in the process
 - Discussed the idea of creating a portal so that parents could get days off themselves without staff having to manually input it into invoices. This reduces a lot of confusion and manual labor
 - Not everyone is completely on board yet, since parents are older and this new system might be extremely confusing for them rather than a simple text message to the school.
- The school is willing to incur the costs of Twilio services. However, they are not entirely on board with maintaining an entire database just yet. Will bring this up in the future once priorities are completed.