We have prepared the report for VICNA based on two documents - Staff Login and Clients Login. But still we need some clarification on some points.

I have answered to your queries in ‘red’ next to the query.

It will be better if we can have reply for the queries so that we can estimate the timeline for completion of the project.

**\*\*\* Clients Login Section:**

1. Client is going to have three navigation options – Profile, Bookings, and Accounts & Billing.
2. In profile section client can update their information very easily.

Also admins should be able to do it as well from their account.

1. Under Bookings there must be 4 options – Book a Nurse, Manage Bookings, Completed Shifts, Do Not Send
2. Under Book a Nurse we will be using the same Request a Nurse form but can you please clarify this statement please - We will use the same form ‘Clients>Request a Nurse>Shift Booking Form’ but prefilled with facility details and add Specialty to it. Also add Specialty to original form.

The form will be the same from “Shift Booking Form” which is under “Request a Nurse” in “Clients” section.

Prefilling means the details of Client/Facility like Facility Name, Phone Number and Email Address will be automatically filled. Specialty is just another thing which client needs to tell us for making a booking, for example they need Aged Care Nurse, Emergency Nurse, Surgical Nurse etc. We missed it in our Shift Booking Form under Request a Nurse as well, so was wondering if we can add that too in the form.

1. How the manage bookings data will come that are in tabular format. That means who will be responsible to save these data into database so that we can fetch and then provide the option for cancellation.

I am open for suggestions here, as you now I am no technical person. I was wondering maybe an Admin Account or Page can be created too, where the information can be uploaded by us in the same format for both Staff & Client pages. I will be happy to create a Layout and Feature document for Admin Account too.

1. Click here to make another online booking – What are the form fields that should be there.

Same as the “Additional Shift” feature on our Shift Booking Form under Request a Nurse in Clients section.

1. How the completed shifts data should come so that we can display in a tabular format. Also in provide a feedback – what should be the form fields and the feedback will be sent to which user?

Completed shifts will be the shifts/bookings which are completed by VICNA staff. Once shifts are completed they are removed from Manage Bookings and are transferred to Completed Shifts. Now the clients can provide a feedback about the VICNA staff, which admin should receive on its Admin Page.

1. What is purpose of Do Not Send and how these data will come?

Do Not Send feature is for our clients to stop any particular VICNA staff to work on their facility. This is kind of a feedback that client did not like that staff’s work and they don’t want that staff again. Data can be uploaded by the client by clicking add more under Do Not Send, or also it can be uploaded by admin account if a client requests on phone or email.

1. Please provide us the form fields for Click here to add more under Do Not Send.

Name of Staff:

Qualification:

Reason:

1. Under Accounts & Billing there should be 4 options to navigate – Billing Details, Invoices, Billing Enquiries and Payment Options.
2. The 4 digit authority Pin should be there somewhere under Setting Options so that to access Accounts & Billing every time Pin is mandatory.

Since a lot of people in a facility will know the clients login details, to maintain privacy & confidentiality with billing details we need to have an Authority Pin. We will provide this Pin via email for first time use to the Facility Manager (which will be different email to the one on Profile), and then they have to set their own Pin after first login before accessing the Accounts & Billing Section. From second time onwards they will continue to use the same pin they chose. However if they wish to change it, we can put a little option Reset Authority Pin, then once again a new random will be emailed to Facility Manager, and again they will be asked to change it upon login.

1. Billing details should be updated by Client himself.

Admin should also be able to do it, because not all clients can use computer so well, so we will update them from Admin Section.

1. Who will send the invoices to clients so that during creating invoices we can store into database and then we can fetch. Can we have the invoice design so that we can display in PDF format.

Ideally, an Accounts department at VICNA will do it, but that doesn’t exist at the moment, so it will be just me for the moment and later an Accounts Department Login can be created. However for now Admin should do be able to do it from Admin Account. Admin will be uploading a .pdf file for each payment cycle. Can this invoice design wait for the moment? I will provide you that down the line once we have physical address, landlines, emails etc working.

1. Billing enquires will be send to which user.

Once again Admin should receive those; Later Accounts Department will be introduced.

1. Under payment options we just need to display that information nothing else. And this information must be updated by Admin.

Yes that’s correct.

**\*\*\* Staff Login Section:**

1. Staff is going to have 4 navigation options – My Profile, Allocations, Payroll and My Vicna Email.
2. Under My Profile Staff is going to update their profile pictures, personal information and scanned documents. And it will be stored in our database so that they can update this and download at any time.

Correct, once again Admin should be able to do it as well from Admin Account.

1. Under Allocations there should be 4 options – Available Shifts, My Availability, Allocated Shifts and My Preferences.
2. How the available shifts data will be populated and who will be responsible to send this over. What should be under More Info?

Available shifts data will be uploaded by Admin Account. More Info will be a text containing information like:

Address:

Parking:

Comments:

1. Under My Availability we will be using a Calendar where staff will select the date and then there will be three options AM, PM, ND and there should be notes.

Calendar look is fine but only for one week at a time. We want one week to be displayed at a time, where staff will select Yes, No or Maybe for multiple days and then save it. By default current week will be opened, but staff can click on next 3 weeks, and if they have to go absolutely a random date then they can put in the date and it should open the week which has that date. If they select Yes to make it their permanent availability then the same days every week should have same YES, NO or MAYBE, however they can change it any time, like going to one particular day and then changing it to anything manually.

1. How the allocated shifts data should be there and also under more info can you give us detailed overview. Also who will set the allocated shifts?

This data should be transferred from Available Shifts when a staff member accepts it, also a particular shift can be assigned by Admin Account, if a staff says yes over the phone and then the details will be transferred from Admin Account in the same way to Staff Account under allocated shifts. Once a shift is accepted by a staff, it gets disappeared from other staff member’s accounts.

1. My preferences should be updated by Staff very easily.

Also Admin should be able to do it for staff if they tell us over the phone. **Only implemented at user panel**

1. Under Payroll there should be 4 options – Payroll Details, Weekly PAYG Summaries, Group Certificates and Pay Enquiries.
2. Under Payroll details how the TFN and Superannuation Fund will be utilize over here and how these information will be updated.

TFN will be provided to us at the time of hiring, so Admin should upload that. If a staff wants to change it, they should contact payroll in person, these are just legal issues. It will only be changed if by mistake TFN is put in wrong.

Superannuation Details will also be provided to us at the time of hiring, so only Admin should upload it, however if the staff wants to change it they should contact payroll in person, once again legal issues. But this can be changed if staff wishes, but it just needs to be done in paper first, so only Admin should be able to change it.

Bank Accounts for Salary can be added by the Staff as well as the Admin.

1. How the PAYG Summaries tabular data will be populated over here.

It will be uploaded by the Admin Account at the moment, however in the future we will introduce Payroll/Accounts department to do all these jobs.

1. Who will send the group certificates to staff?

Admin should do it, until Payroll/Accounts department is introduced.

1. Pay Enquiries should be sent to Admin or any other user.

Yes to Admin at the moment, but once again to payroll/Accounts Department once they come in.

1. My VICNA Email should be utilizing something like that Staff can send message to Admin, can send message to client. And these messages should be saved to our database also these will be send to their vicna email account as well. And also admin should be also notified for every message.

Are you suggesting that staff can use it as Internal messaging system instead of a full-fledged email, where they can contact Admin, Payroll, Quality, and HR from VICNA etc as threads. And a copy of these messages will automatically go to their VICNA email. But from here they can’t send an email to a third party. Is that a correct understanding?

If we can have the clarification for the above mentioned violet color marked statement then we can start this task at the earliest.

Dedicated Time Line – For Both Staff and Client – 45 working Days. Further changes will increase the timeline.