1. Admin User

Must:

- **Referral Intake & Validation**: Capture all client data, including psychometric assessments (e.g., WHO-5, baseline questionnaires) and cultural/language preferences.
- **Psychometric & Cultural Matching Engine**: Implement algorithm to match referrals with counsellors based on:
    - Language proficiency
    - Cultural background / familiarity
    - Psychometric profile (wellbeing score, needs assessment, risk level)
- **Manual Override & Audit**: Admin can override algorithmic matches when necessary.
- **Allocation Notifications**: Notify counsellor of matched client automatically.
- **Dashboard – Match Quality**: Display match metrics and flagged mismatches for oversight.
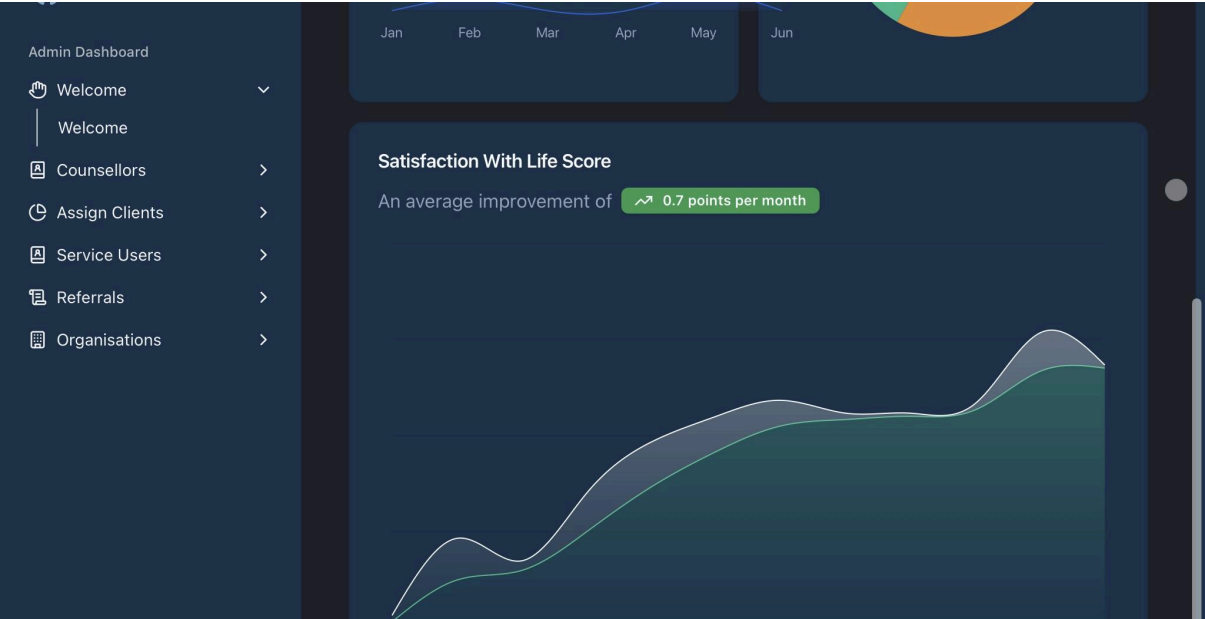
Should:

- Track client journey: session completion, check-ins, discharge.
- Generate reports on allocation efficiency, client outcomes vs matches.
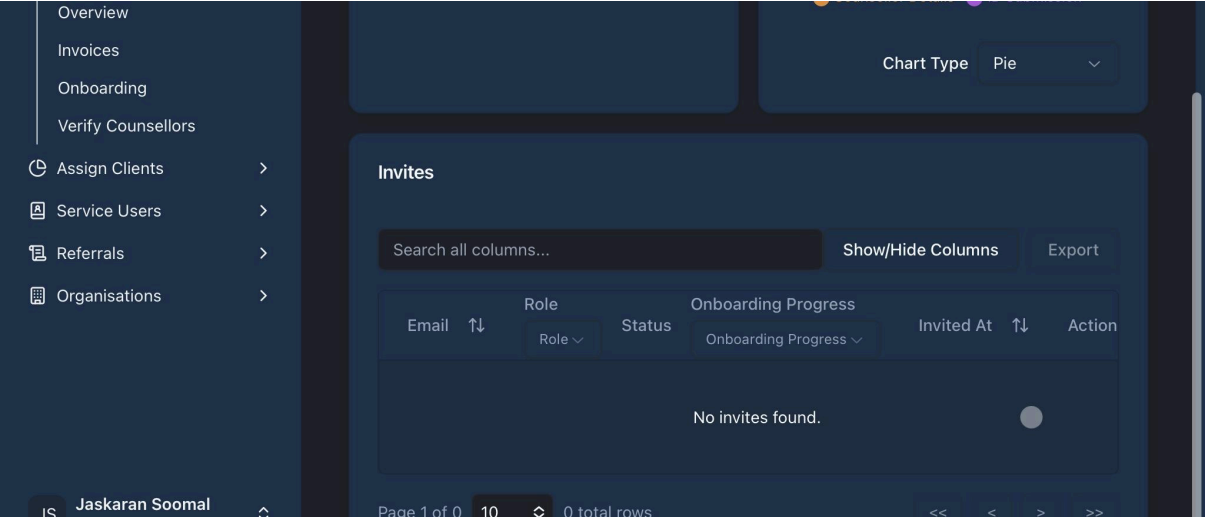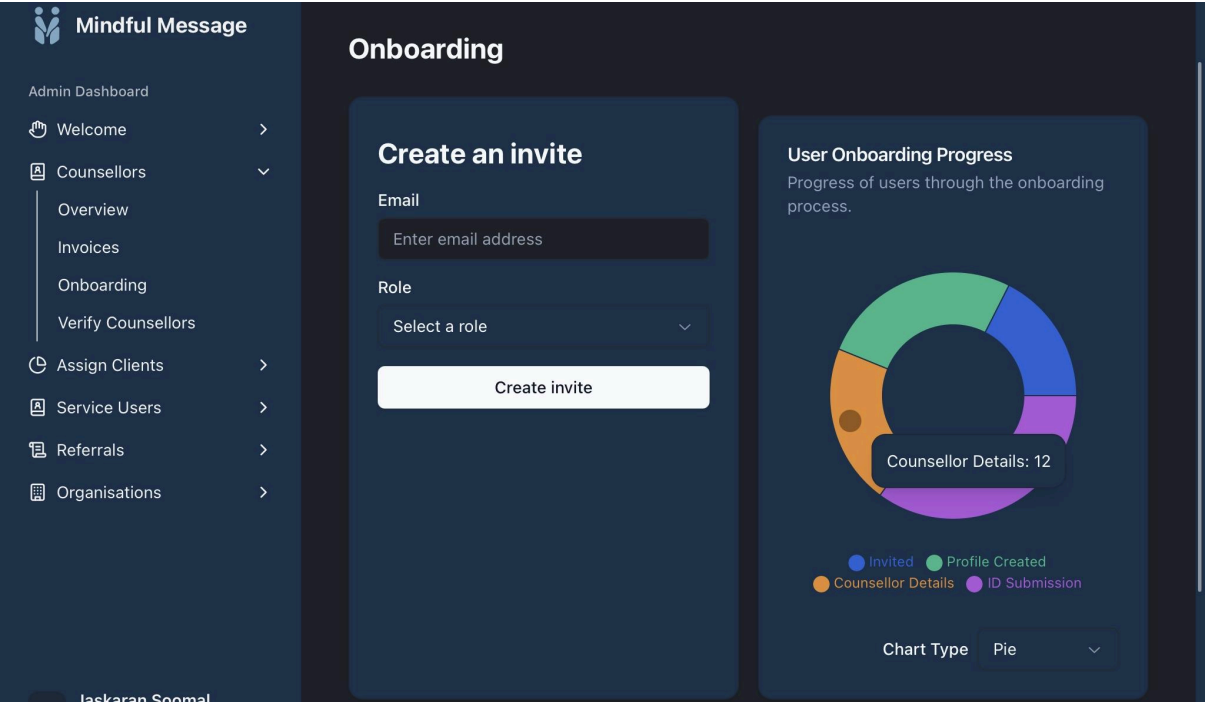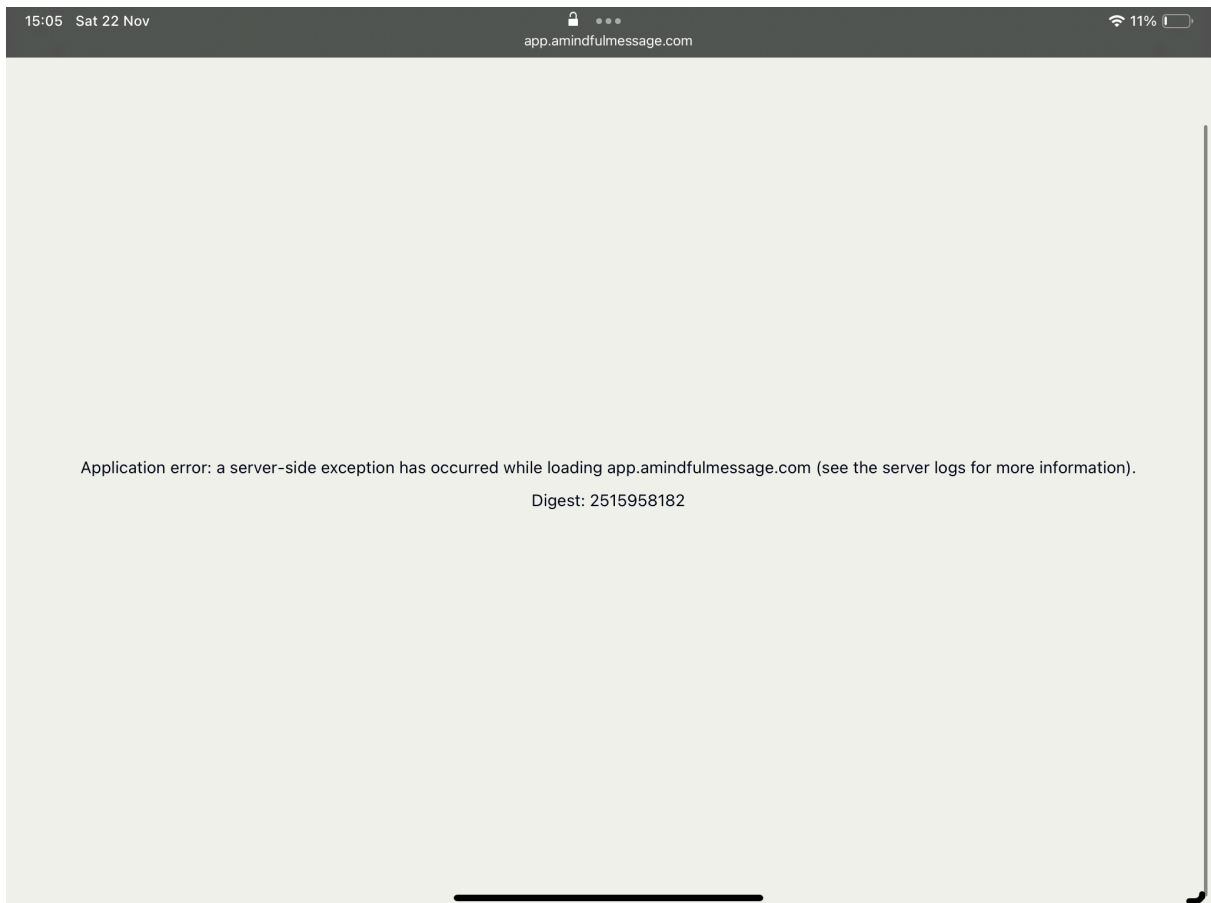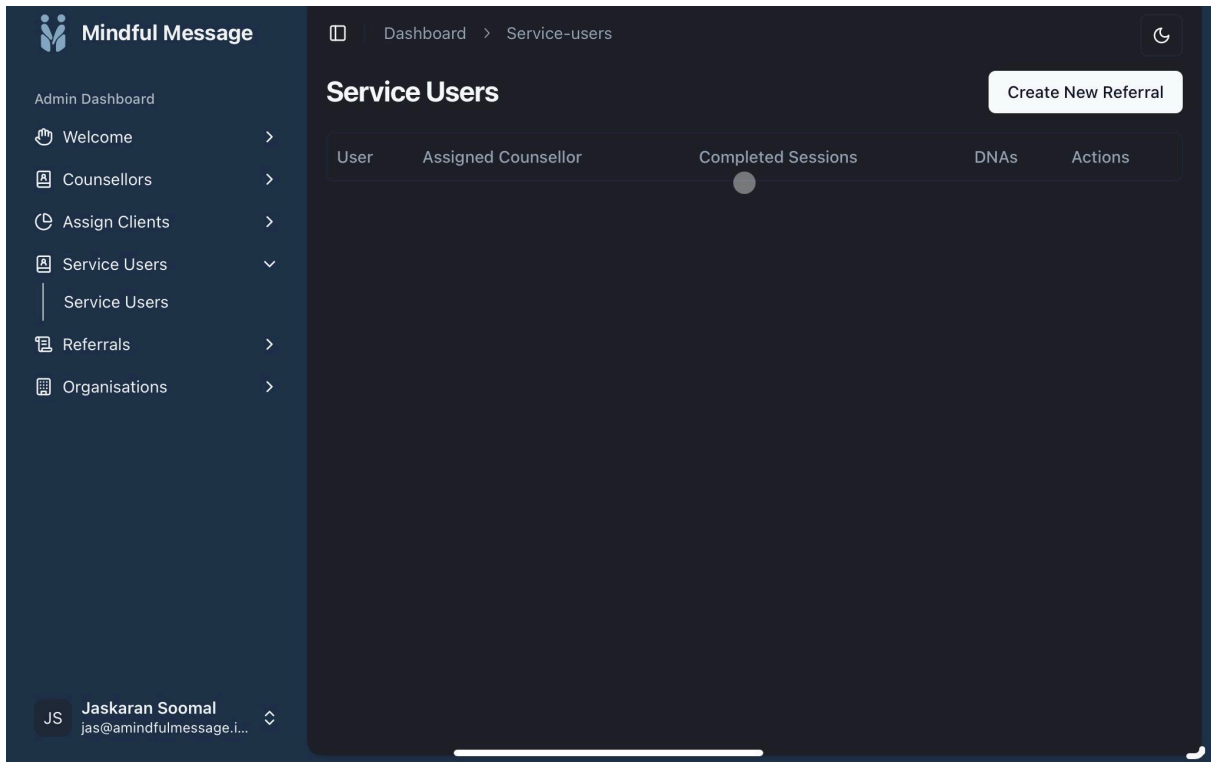- Support automated reminders for follow-ups and assessments.

Could:

- Suggest alternative matches if counsellor capacity is exceeded.
- Predict match success using historical outcome data.

Won't:

- Send therapeutic messages directly to clients.

Satisfaction With Life Score

An average improvement of   [📈 0.7 points per month]

Mindful Message

Welcome to A Mindful Message

Contract Expiry	🕐 17 weeks ago	Sessions Remaining 🕐	DNAs This Month 👤✕
24/07/2025		**318**	**6**

Attendance Chart
Showing total attended and DNAs

Client Feedback
This month

41
Feedback Forms

Jan   Feb   Mar   Apr   May   Jun

Mindful Message

✋ Welcome ›

📇 Counsellors ⌄

    Overview

    Invoices

    Onboarding

    Verify Counsellors

🕐 Assign Clients ›

📇 Service Users ›

📇 Referrals ›

🏢 Organisations ›

Onboarding

Create an invite

Email

Enter email address

Role

Select a role ⌄

Create invite

User Onboarding Progress

Progress of users through the onboarding process.

Counsellor Details: 12

● Invited ● Profile Created
● Counsellor Details ● ID Submission

Chart Type   Pie ⌄

Jaskaran Soomal

    Overview

    Invoices

    Onboarding

    Verify Counsellors

🕐 Assign Clients ›

📇 Service Users ›

📇 Referrals ›

🏢 Organisations ›

Chart Type   Pie ⌄

Invites

Search all columns...   Show/Hide Columns   Export

Email ⇅	Role	Status	Onboarding Progress	Invited At ⇅	Action
	Role ⌄		Onboarding Progress ⌄		
		No invites found.		●	

Page 1 of 0   10 ⇕   0 total rows   << < > >>

JS Jaskaran Soomal ⌃

Mindful Message

Admin Dashboard

- ✋ Welcome
- 🖼 Counsellors
- 🕓 Assign Clients
- 🖼 Service Users
  - Service Users
- 🖼 Referrals
- 🏢 Organisations

JS **Jaskaran Soomal**
jas@amindfulmessage.i...

Service Users

Create New Referral

User	Assigned Counsellor	Completed Sessions	DNAs	Actions

15:05 Sat 22 Nov

🔒 •••
app.amindfulmessage.com

📶 11% 🔋

Application error: a server-side exception has occurred while loading app.amindfulmessage.com (see the server logs for more information).

Digest: 2515958182

Application error: a server-side exception has occurred while loading app.amindfulmessage.com (see the server logs for more information).

Digest: 2630874328

Referrals

Filter by email...

Columns ⌄

	Status	Initials ↑↓	Email ↑↓	Sessions	Date	
☐	Rejected	OS	Click to show	12	17/07/2025	⋯
☐	Approved	OS	Click to show	12	17/07/2025	⋯
☐	Pending	TT	Click to show	12	18/11/2025	⋯

0 of 3 row(s) selected.

Previous   Next

Pending Referrals

Referral from

Urgency: 3

Status: PENDING
Session Funding: 12
Created At: 18/11/2025
Reasons:
- Anxiety
- Depression
- PTSD

Reject   Accept

Mindful Message

Admin Dashboard

- Welcome
- Counsellors
- Assign Clients
- Service Users
  - Service Users
- Referrals
  - Process Referrals
  - Submit Referral
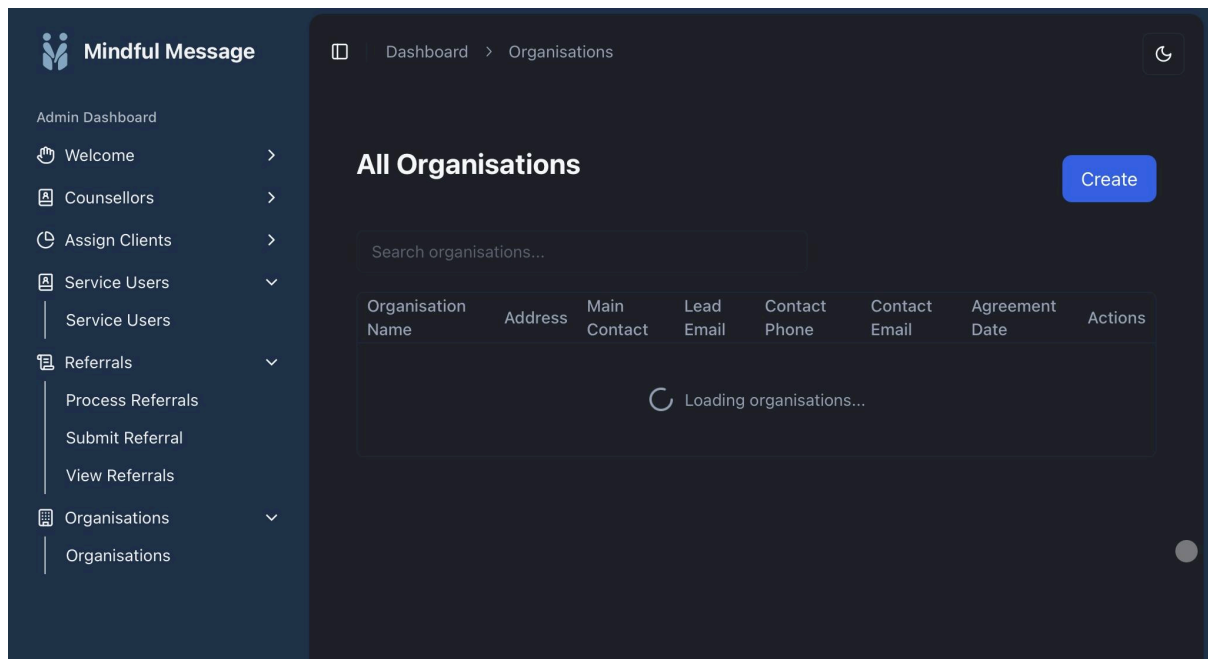 - View Referrals
- Organisations
  - Organisations

All Organisations

Create

Search organisations...

Organisation Name	Address	Main Contact	Lead Email	Contact Phone	Contact Email	Agreement Date	Actions

Loading organisations...

2. Counsellor User

Must:

- View clients assigned through psychometric & cultural/language algorithm.
- Access client psychometric profile, language preferences, and cultural notes.
- Receive alerts if client's wellbeing indicates high risk.
- Log session notes and update psychometric scores after each session.

Should:

- Adjust availability and preferences to optimize future matches.
- Access suggested conversation guides or resources tailored to client's psychometric and cultural profile.

Could:

- Provide feedback to improve matching algorithm (e.g., "this match is optimal" / "match needs review").
- Receive AI-driven suggestions for culturally or linguistically sensitive approaches.

Won't:

- Modify admin-controlled allocation rules.

3. Organisation User

Must:

- Submit referrals with full psychometric data and cultural/language info.
- Track allocation status and matched counsellor details.
- Access outcome reports post-session (anonymized if needed).

Should:

- Receive suggestions on how to complete psychometric assessments properly.
- Provide feedback on match success for continuous algorithm improvement.

Could:

- Schedule automated reminders for clients to complete assessments.
- Use dashboard analytics to see match outcomes across referred clients.

Won't:

- Directly assign counsellors themselves.

Technical Priorities for Development

1. **Matching Algorithm (Core Feature)**
   - Weighting: psychometrics (wellbeing scores, risk levels), cultural background, language.
   - Must be modular, transparent, and auditable.
   - Include scoring or confidence metric for each match.
2. **Data Capture & Integrity**
   - Ensure psychometric data is validated at submission.
   - Capture cultural and language info in structured fields.
3. **Security & Privacy**
   - Sensitive data encrypted in transit and at rest.
   - Strict role-based access control.
4. **Dashboards & Reporting**
   - Admin dashboard shows match quality, allocation efficiency, outcomes by match type.
   - Counsellor dashboard emphasizes assigned clients and alerts.
5. **Continuous Improvement**
   - Algorithm should accept feedback loops from counsellors and admins.
   - Optionally, integrate AI analytics to refine match predictions over time.