**SOFTWARE REQUIREMENTS SPECIFICATION**

**FRONT DESK SOLUTION**

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# Revision History

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# 

# 1. Project Scope:

## 1.1 Goals/Objectives

* Reduce Redundant Data Entry/Capture
* Manage Client Information
* Manage/Tally Payments
* Emulate Office Workflow
* Reduce Paper Trail
* Enable Patient Profiles

## 1.2 Development Environment

The application will be developed via modern web technologies that will enable functional features, professional design and enhanced user experience. As a web-based application, it can be accessed via any device that can browse the web and will be responsively designed to be usable via different (mobile/desktop) screen sizes.

## 1.3 Timeframe - Two (2) months

|  |  |
| --- | --- |
| Project Scope Definition & UI Design | 1 Week |
| Development | 5 Weeks |
| Revisions | 2 Weeks |

1.4 Deliverables

* Client Records
* Booking/Appointment System
* Test Records
* Packages
  + General
  + Company/Clinic Specific
* Ordering
  + Payment
  + Balance
* User Management
  + Roles
  + Permissions
  + Views
* Reports
  + Daily
  + Weekly
  + Monthly

# 2. Assumptions and Dependencies:

We assume that report results are generated and printed outside the system. Our system will be capable of documenting results but it is assumed that the results that are handed over to the client are generated by another Laboratory Information System (LIS).

# 3. System Features:

### 3.1 Appointments

There would be an appointment system in the format of a calendar and bookable slots. A client would be able to select from an available slot in advance or walk-in. This calendar/ agenda listing can be filtered by date, time, company/clinic, test type, etc.

### 3.2 Order Creation

An order consists of a client’s data, date, medical, the selected packages and/or tests. A price is derived based on packages or individually selected tests..

### 3.3 Test Data Capture

Test selection will be based on form input. The client and/or front desk personnel will go through a form to aid in the package selection for the order.

#### 3.3.1 Individual Patient

If it is an individual client (without a company/clinic) they can select from the existing predefined packages. These packages will include a list of tests and a price. Individuals can also select their own list of tests and the price will be a sum of the cost of each test.

3.3.2 Company/Clinic Patient

If a patient is associated with a company/clinic, their company/clinic and occupation will need to be selected. The company/clinic information will be tagged in the order and the Company/Clinic Occupation test list will be selected.

### 3.4 Order Billing

After the tests and packages are confirmed, the price is calculated. For individual orders, each payment will be recorded and the amount, date and payment method will be documented.

Company/Clinic order invoices can be grouped into a larger invoice, where they can make payments for a collective set of orders (rather than individually). Once an invoice is paid, it’s payment status would reflect as such and be added to the accountant’s paid invoice list.

### 3.5 Reports

Based on data collected, a variety of reports will be derived. These reports can be adjusted to view different start and end dates. Daily reports will be a breakdown of the tasks achieved on any given day, such as orders made, appointments booked, appointments fulfilled and payments made.

Even further, each employee can have their own sets of daily reports along with information that is scheduled for the following day. A predefined list of reports can be set to generate on a weekly and monthly basis.

### 3.6 Patient Profiles

Each time client information is recorded a profile is made. As long as they have access to the email address attached to the profile, they can log in. Once they are logged in they can book new appointments, view invoices and test results.

### 3.7 Company/Clinic Profiles

Companies/Clinics will have their own profile where they can request job specific packages (test list and pricing), register employees (as patients), book appointments for employees and view a report on their current invoice balances.

*N.B. Clarification on if patients linked to companies/clinics can sign-in.*

### 3.8 Users

There would be different types of users that can log in. Each with tailored functions. Some of the user roles will be:

* Admin
* Front Desk Staff
* Patient
* Lab Staff
* Accounting Staff
* Company/Clinic

# 4. General Functionality:

## 4.1 Test Listing

An internal listing of test details and pricing will be added to the system for Order/Billing purposes but can also be used for internal reference.

## 4.2 Medical Questionnaire Forms

Data capture forms will be designed to collect all data points already being captured by physical forms but reducing redundancy and allowing for auto-fill of certain fields.

## 4.3 Multi-Criteria Search

Users can search the system’s database for multiple data points e.g. patient name, doctor, employer, lab technician, outstanding balances, etc.

## 4.4 PDF Generation

PDFs can be generated for any report or key data points e.g. Daily reports on tests done, cash collected, company/clinic credit balances etc.

## 4.5 Email Notifications

* Automatic emails can be sent to Lab or Front Desk staff upon creation or edits made to patient/ order records.
* Users can opt to send emails to individual patients or companies/clinics
* Automatic reminder emails can be scheduled and sent out to allow for appointment confirmation

## 4.6 Invoices with Local Taxes

Invoices will be formatted to local account standards, including VAT calculations

# 5. User Interface (UI):

Users will interface with a different dashboard according to their user roles. Dashboard options, links and menus will reflect different user’s roles and responsibilities within OHS.

The UI will be modern, mobile responsive and user friendly. Mockup options for UI design will be prepared within the first week of commencement.