

SLP Requirements Document

Innisfree Village

Nonprofit overview: Lifesharing at Innisfree means that residents and their volunteer caregivers live as families in the community's 15 houses. In this close-knit environment, people develop profound relationships based on mutual needs, respect, and love.

Contact: Monika Kohler, monika@innisfreevillage.org, 434 823-5400

Website: www.innisfreevillage.org

System summary: A system to manage the scheduling of the resident's appointments in the community, as well as manage the signing out of vehicles.

Development notes: One of the volunteers has programming experience, and this information is forthcoming; that may limit the platform choice. This should be known in a few days.

Confidentiality notes: The names of the residents is slightly confidential. The medical evaluations that are in the system are highly confidential. One option is to keep only the necessary information in the system, and the full diagnoses somewhere else. Even so, one can infer medical information from the appointments that are in the system. An NDA will likely be necessary

Description

From the customer:

Innisfree has about 40 residents and 40 volunteers/staff. We have a lot of overlapping schedules from medical appointments to scheduled activities to car sign-outs, meetings, and staff availability. It would be nice to have a system of organization for these things which would mean the ability to input a standing appointment for a specific resident at a specific location through out the year. It would be helpful if reminders of these appointments were emailed to our medical coordinator as well as the volunteer responsible for transportation to put everyone on the same page. It would be helpful to have reminders for irregular appointments that need to be made. Also seeing appointments while making an appointment at the doctors office to be able to coordinate appointments so that we would need to make less trips to town. Reports for each resident and the activities they had through out the year. Since each house at Innisfree has a different combination of coworkers and volunteers, having a profile for each house and

their specific needs could mean that if a new person wanted to get a feel for the flow of the house, they could see all this information in one profile as opposed to many many pages of dense reading.

Innisfree Village is a residential community for individuals with intellectual disabilities; those individuals are called “residents” or “co-workers”.

Innisfree has about 10 residential buildings (houses), and about 40 residents. Volunteers stay in one house for one year, and are tasked with caring for their 4 co-workers / residents. There are around 20 volunteers, 2 per house. In addition, there are about 5 staff, and about 6 workstation heads. A workstation is where the residents go for their daily activities, such as the bakery, woodshop, etc. Some staff live on the property, but not all; all volunteers live on the property, and none of the workstation heads live on the property.

The residents have various appointments (medical, legal, etc.) in the community, and the volunteers will transport them as needed. Currently, they schedule appointments on a paper calendar, and sign out cars with a sign-out sheet. Each volunteer has a set of physicians to go to, which are the set of physicians that their set of residents need. A staff member is the one in charge of making appointments in the community, and s/he writes the appointment info on paper and hands it to the volunteers.

The system is to create a scheduling system that will manage the scheduling of appointments and, following that, car reservations.

Features

- Standard web portal features: ability to log in, have accounts created, reset password, update profile
 - The only users will be the staff (about 15) and volunteers (about 20)
- There will be a set of (configurable) houses, and each house will have a number of volunteers assigned to them (currently average of 2 per house)
- Likewise, the residents will have profiles in the system, and will be assigned to a given houses (currently 4 per house)
 - Note that medical information will not be directly kept in the database, but one can easily infer such from the set of appointments that are stored in the DB
- All volunteers and staff can see all information, although they will most often only see their specific house/etc.
- Scheduling is somewhat similar to Google calendar where each house (and thus pair of volunteers) would have one “color” on the calendar. The staff scheduler would enter

appointments into the system, and the volunteers could then view it.

- The framework chosen will likely come with a pre-built calendaring system that should be used
- Each calendar entry would be tagged with the resident who went, the physician that was gone to (and thus the physician type)
- This implies that physicians and physician categories can also be entered, and then easily searched for when creating an appointment
- There will be a notes field that the volunteer will enter text into; this will be read, at a minimum, by the other volunteer in the house
- One option is diagnostic “codes” (dental:cleaning, dental:cavity, dental:root_canal, etc.). Codes can be matched to the specific physician, and thus entered. They may or may not use this feature, so this will be determined by the customer as the project progresses.
- Appointments are typically made by the staff scheduler, but the volunteers can make them as well (especially follow-up appointments).
- There are usually no more than 4 or so appointments on a given day; they try for Tuesday appointments, but that doesn't always work out
- Follow-up appointments
 - Volunteers can make them directly, and many will do so – via their smartphone – from the physician's office
 - This implies that there will need to be a viable mobile interface (but the mobile interface need not have all the features – just some features, such as making these types of appointments
 - Volunteers can also enter reminders to make a certain type of appointment in a certain amount of time. Each resident would have maybe 10 reminders in a given year. Times 40 residents is 400 reminders total, or about 8 per week. A reminder will be shown to the relevant volunteer(s) and the staff scheduler within a certain time period prior to it's due date (that time period should be configurable).
 - To find the volunteer, first find the resident that the reminder is for, find the house that s/he is in, and then find the volunteers for that house. This is necessary because, for 6-month or 12-month follow-up appointments, the volunteers might rotate, as the volunteers come and go (about 1 year each)

- About half of the volunteers have smart phones, so an easy web-based data entry form is desired. Some have tablets as well.
- Data generation
 - Data export to csv for system backup
 - Reports
 - For each resident, which categories of physicians they went to in a given time period (a year, for example)
 - Others as determined by the customer
 - A volunteer's view should default to his/her appointments (specifically, the appointments for the residents of his/her house), allowing for easy access to said data. The volunteer should be able to view all appointments (or appointments of other houses, etc.)
- Car sign-out
 - 8 or so vehicles (configurable), and any of the staff or volunteers can sign them out for a given period. They are used for transporting co-workers to appointments, attending private events, volunteer use on days off, etc.
 - While important, this feature is secondary to the other scheduling

Requirements: Minimum

- Basic web portal features
- Basic scheduling of appointments, notifications to volunteers
- Basic report generation, graph generation, etc.

Requirements: Desired

- Mobile interface
- All the scheduling and web portal features described above
- The car sign-out functionality

Requirements: Optional

- House coverages (volunteer swap-in when a volunteer goes on vacation): a means to help schedule who will cover (sometimes the people covering will only do shifts). This may be more work than it's worth.

Notes

...