



SCOPE DOCUMENT

1. **Project Title and Overview:**

- title of project
- overview of the project, its purpose and significance

2. **Project Objectives:**

- goals and objectives of the project.

3. **Scope Statement:**

- Define the project's scope, including what is in scope (what the project will include) and what is out of scope (what it won't include).

4. **Project Deliverables:**

- List all the specific deliverables that will result from the project. This can include documents, software, hardware, or any other tangible outputs.

5. **Stakeholders:**

- all stakeholders involved in the project, both internal and external.

6. **Request Creation and Completion:**

- How a request is created and completed in Direct Docs.

7. **Workflow:**

- How the task is completed in Direct Docs.

8. **Instances:**

- Contains major screens and their functionalities.

9. **Risks:**

- Potential risks that could affect the project.

10. **Project Schedule:**

- Provide a timeline of previous, current and potential sprints with the time durations and goal of sprints..

11. Resource Requirements:

- Outline the resources (human, financial, equipment, etc.) required for the project.

12. Quality Standards:

- Specify any quality standards or benchmarks that must be met during the project.

13. Technical Requirements:

14. Development Methodology:

1. Project Title and Overview:

1.1 Project Title:

“Direct Docs” refers to the name of the project.

1.2. Overview of the project.

The core objectives of the Direct Docs project are as follows:

1. **Centralized Document Repository:** Implements a centralized repository for all types of documents, ensuring a single source of truth for organizational data.
2. **Efficient Document Retrieval:** Enables quick and intuitive document retrieval, reducing time spent searching for critical information.
3. **Enhanced Security:** Implements advanced security measures to protect sensitive documents and ensure compliance with data privacy regulations.
4. **Streamlined Collaboration:** Facilitates seamless collaboration among teams, allowing for real-time document editing and version control.
5. **Automation and Workflow:** Integrates automation to streamline document creation, approval, and distribution processes, reducing manual intervention.
6. **User-Friendly Interface:** Develops an intuitive and user-friendly interface, ensuring that employees can easily adopt and navigate the system.

Key Features:

Direct Docs includes the following key features to achieve its objectives:

- **Document Categorization:** Documents are categorized based on type, department, and other relevant criteria, simplifying organization and retrieval.
- **Access Control:** Role-based access control are implemented to restrict access to sensitive documents and ensure data security.
- **Version History:** A comprehensive version history is maintained, allowing users to track changes and revert to previous versions when necessary.
- **Search Functionality:** Advanced search capabilities, including keyword search, filters, and tags, are facilitated quick and accurate document retrieval.
- **Automated Workflows:** Customizable workflows are automated document creation, review, and approval processes, improving efficiency.
- **Integration:** Seamless integration with existing tools and systems, such as email and cloud storage, is ensured for a smooth transition.

Benefits:

The successful implementation of the Direct Docs project will yield several significant benefits:

- **Time Savings:** Reduced time spent searching for documents and managing paperwork, leading to increased productivity.
- **Improved Compliance:** Enhanced security and version control aid in meeting regulatory requirements.
- **Streamlined Collaboration:** Law firms and employees collaborate more effectively, leading to better decision-making and project outcomes.
- **Cost Reduction:** Reduced paper usage and improved efficiency results in cost savings over time.

2. Project Objectives:

The primary objective of this project is to establish and operate a comprehensive records retrieval service with a nationwide reach. The services will cater to attorneys, insurance companies, and various other firms, enabling them to quickly, securely, and affordably obtain records from diverse sources across the United States.

3. Scope Statement:

The project scope encompasses the following key components:

3.1. Geographic Coverage:

Services will be offered nationwide, with a focus on efficient records retrieval from all regions of the United States.

3.2. Record Types:

To locate and provide a wide range of records, which may include medical, legal, and administrative documents, as requested by our clients.

3.3. Online Portal:

To streamline the retrieval process, we will develop and maintain an online portal. This portal will serve as the primary interface for clients to submit retrieval requests.

3.4. Communication:

Team will handle all communication with hospitals, healthcare providers, local authorities, businesses, and other relevant entities to facilitate the timely retrieval of records.

3.5. Security:

The project will prioritize the secure handling and transfer of sensitive records, adhering to industry best practices and data protection standards.

3.6. Efficiency:

Our goal is to ensure an efficient and responsive records retrieval process, delivering requested files promptly to clients.

4. Project Deliverables:

4.1. User Interface (UI) and User Experience (UX) Improvements:

- Redesigned and user-friendly interface for the Direct Docs Direct Docs.
- Enhanced user experience for seamless navigation and interaction.

4.2. Company and User Management:

- Implementation of company and user management features, including user roles (admin, regular users), and permissions.
- User profile customization options.

4.3. Billing and Payment Integration:

- Integration of billing and payment functionalities, including tracking payments and generating invoices.

4.4. Document Request System:

- "Create New Request" feature to initiate and manage document retrieval requests.
- Dashboard for users to monitor the status of their requests.

4.5. Provider Integration:

- Integration with legal entities (providers) to receive legal documents and records.

4.6. Request Types and Mapping:

- Customizable options for specifying document types and mapping document sources.

4.7. Reporting and Analytics:

- Reporting tools to analyze request data, user experiences, and request processing times.

4.8. Security Enhancements:

- Implementation of robust security measures to protect sensitive legal information and user data.

4.9. Documentation:

- Comprehensive user manuals and documentation for system usage and administration.

4.10. Training and Support:

- User training sessions for both administrators and regular users.
- Ongoing customer support and troubleshooting.

4.11. Testing and Quality Assurance:

- Rigorous testing of all system features to ensure functionality and reliability.

4.12. Deployment and Rollout:

- Successful deployment of the upgraded Direct Docs system for all users.

4.13. User Feedback Mechanism:

- Establish a mechanism for users to provide feedback and suggest improvements.

4.14. Compliance and Data Privacy:

- Ensure compliance with legal regulations related to data privacy and document handling.

4.15. Scalability and Future Enhancements:

- Framework for future scalability and enhancements to accommodate the growing user base and evolving requirements.

4.16. Project Documentation:

- Compilation of project documentation, including project plan, design specifications, and implementation details.

4.17. Project Management:

- Regular project status updates, meetings, and coordination.

5.Stakeholders:

Direct Docs involves three primary stakeholders based on their interests and roles:

5.1. Direct Docs Clients:

- These individuals or organizations are the lifeblood of DirectDocs's business.
- DirectDocs's main objective is to provide legal documents and records promptly in response to client requests.
- Clients approach Direct Docs when they require specific documents or records for their business purposes.

5.2. Direct Docs Law Firms:

- Law firms registered on the Direct Docs Direct Docs play a significant role in the ecosystem.
- They act as intermediaries between clients and Direct Docs, bringing clients to the Direct Docs.
- Law firms guide clients through legal proceedings, understand their document requirements, and then initiate requests for documents or records through Direct Docs.

5.3. Direct Docs Employees:

- DirectDocs's dedicated team members are essential for meeting clients' needs.
- These employees are hired by Direct Docs to efficiently and accurately provide the necessary set of documents and records requested by clients.
- They ensure the seamless fulfillment of client demands.

In summary, Direct Docs's success relies on a collaborative relationship among its clients, law firms, and dedicated employees. Clients seek specific documents for their business needs, law firms facilitate the process, and Direct Docs employees ensure the timely delivery of the required documents, forming a cohesive stakeholder ecosystem.

6. Request Creation and fulfillment:

In this section, the process of creation of new requests is explained in a stepwise manner.

6.1 Request Creation:

Step 1.

Goto “Company’s List”

Step 2.

Fill in the form provided:

Create New Request

Who is the main contact for this request?

WADIC TEST

Records Request Start Date

09/02/2023

Records Request End Date

09/16/2023

Should We Rush This Order (\$7 Extra Per Provider)

Yes Please

Need Updated Records

Choose The Client This Request is Being Made For

Client, Empty

Date Of Birth: 01/14/2020

SSN: 123-12-1234

Custom Code: 1

Address: 1 1, 1, 1 1

Edit Client

Add Client

- Main contact : is the law firm.
- Client is the person who requested certain records.
- Start date and End date provides, Range for which documents are required.
- Rush requests state the urgency of the task. Extra amount is applicable for this.
- Providers are the hospital which provides records and what requests,
- After selecting the provider click on “ Submit Request”.

09/02/2023

Should We Rush This (Provider)

Yes Please

Need Updated Reco

1 Choose The Provi

Add Provider

Provider

Submit Request

Choose Your Provider

Provider Name

2

Provider Starts With

0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Provider Name

100% Chiropractic - Broomfield

100% Chiropractic - Castle Rock

100% Chiropractic - Downtown Colorado Springs

100% Chiropractic - East Colorado Springs

3

4

Select

Select

Select

Select

5

After submitting the required number of requests, Open dashboard to view status.

6.2 Request Assignment:

Step 1.

Open Dashboard:

DIRECT DOCS

Dashboard Invoices Billings Company List Provider List Request Types Edit Mappings Log Out

Direct Docs Dashboard

Show Tables

Open Requests

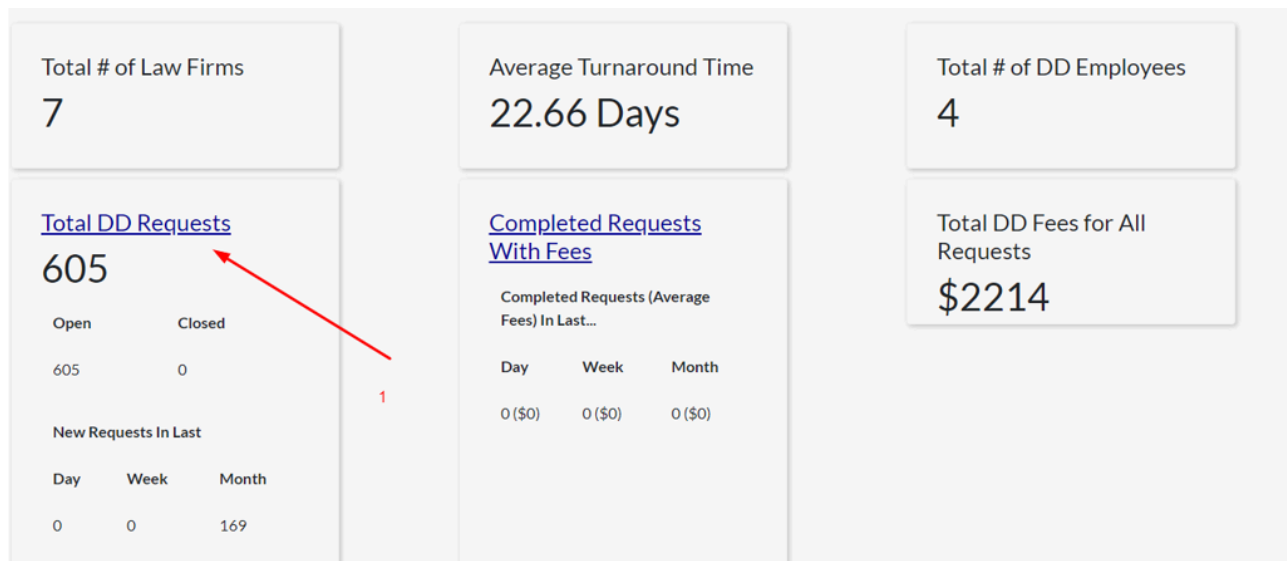
✓ Loaded

2 Closed Requests

Load Closed Requests

Click on “Load Closed Requests”, to update data.

Step 2.



New window will open. Showing all the assigned and unassigned tasks.

Showing 0 - 100 results. (605 total)

CHANGE THIS TO DESCENDING TO VIEW LATEST REQUESTS.

Working	Internal #	View	Law Firm	Client	Provider	Request Types	Paralegal	Requestor	Status	Rush?	Created At Date (Descending)	Next Reminder Date
Assign	21436	View	The Law Offices of Ross Ziev, P.C.	James Villegas	UC Health Grandview Medical Center	ER Physician Billing, Radiology Reading Physician Billing	Herb Ziev	Glacy Soliva	Requested By Lawyer		09/12/2023	09/09/2023
Assign	21435	View	The Law Offices of Ross Ziev, P.C.	James Villegas	UC Health Grandview Medical Center	Medical Records and Itemized Billing Statements and HICFs	Herb Ziev	Glacy Soliva	Requested By Lawyer		09/12/2023	09/09/2023

Step 3.

Request For: James Villegas at UC Health Grandview Medical Center

Who do you want to assign this to?

2. select DirectDocs employee

[Save](#)

3

1

Working	Internal #	View	Law Firm	Client	Provider	Request Types	Paralegal	Requestor	Status	Rush?	Created At Date (Descending)	Next Reminder Date
Assign	21435	View	The Law Offices of Ross Ziev, P.C.	James Villegas	UC Health Grandview Medical Center	Medical Records and Itemized Billing Statements and HICFs	Herb Ziev	Glacy Soliva	Requested By Lawyer		09/12/2023	09/09/2023

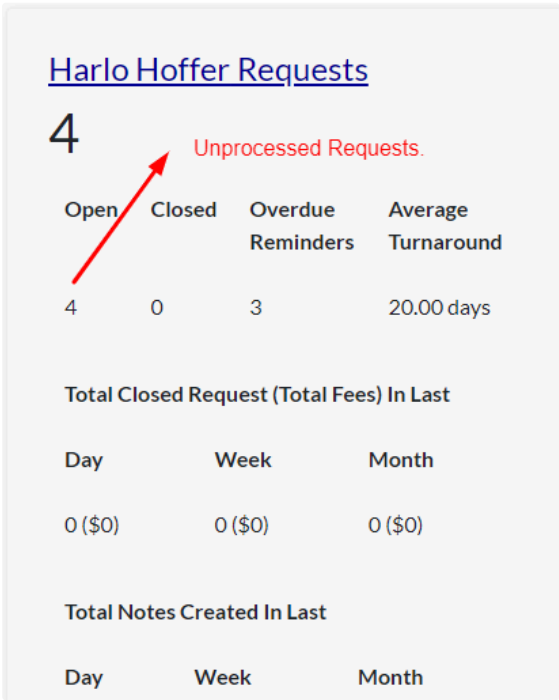
Click on "Assign" to assign the request to one of the DirectDocs employee, from the drop down list. Click on "Save" to complete.

Request Fulfillment:

In order to fulfill the request, go to the “employees” section on Dashboard.

Check the employee to whom the request was assigned. In this case, the request is assigned to Harlo Hoffer so goto “Harlo Hoffer”.

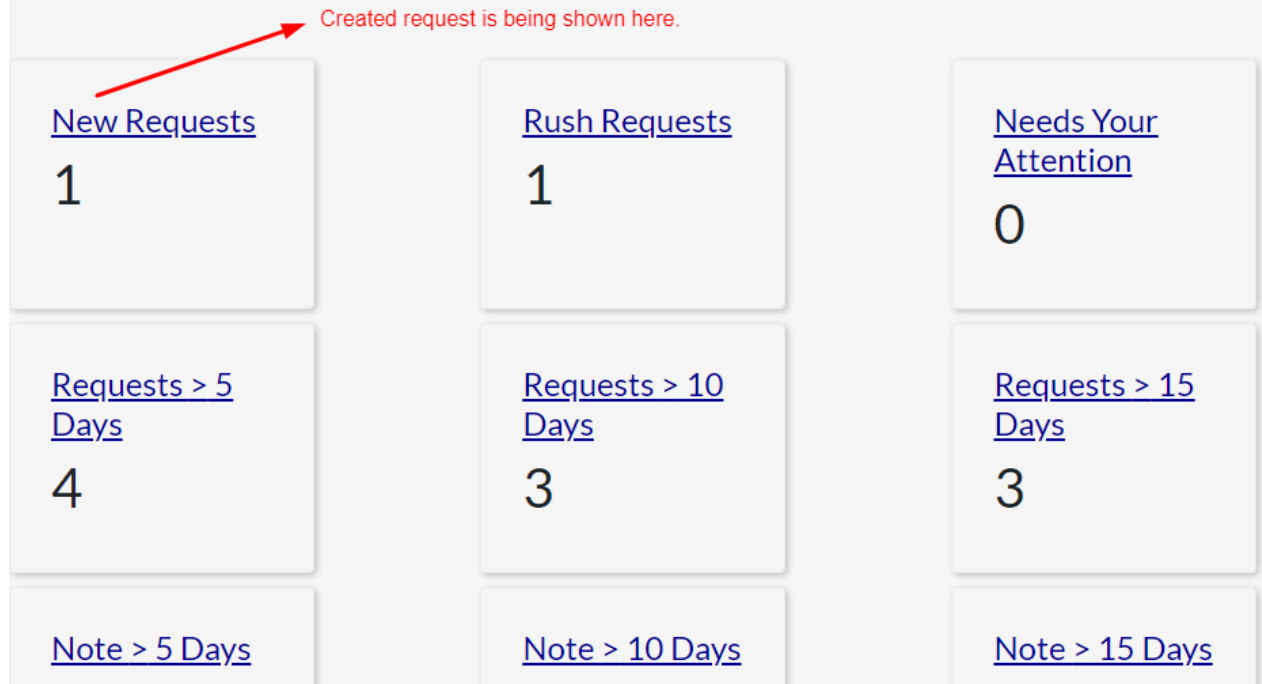
Login from “Harlo Hoffer’s” account.



Step 4.

Click on Harlo Hoffer it will open the following window.

Requests



This window against the employee account will be opened. Click on “view” to view the request.

Send The Medical Request

To Email: na

Subject: Medical Records Request For Injury Claim

Message:

To Whom It May Concern,

We are representing a law firm in an injury claim for one of your previous patients, James Villegas.

We've attached all the pertinent forms to this email. Let us know how we can help expedite the process. Thank you!

And if you need anything, contact me with the information below.

Name: Harlo Hoffer

Email: harlo-cancel@directdocs.com

Phone: 720-446-5201

Request Details: #21436

Client Name: James Villegas Birthday: 04/08/1992 SS#: [REDACTED]

[Patient Info](#)

Provider Name: [UC Health Grandview Medical Center](#)

Main Contact: Herb Ziev

Request Types: ER Physician Billing, Radiology Reading Physician Billing

Request Start Date: 06/22/2022 Request End Date: 09/11/2023

Request Rush?: No

Request Special Instructions:

[I've sent the email](#) [Cancel The Request](#) [Edit Request](#) [Delete Request](#)
[Split Request](#)

Confirm.

Are you sure? ×

←

1436

irthday: 04/08/1992 SS#:

Patient Info

Provider Name: UC Health Grandview Medical Center

Main Contact: Herb Ziev

Request Types: ER Physician Billing, Radiology Reading Physician Billing

Request Start Date: 06/22/2022 **Request End Date:** 09/11/2023

Request Rush?: No

Request Special Instructions:

The following screen will appear in which employee will add the requested documents and the service fee.

<p>Request Details Center: #21436</p> <p><input type="button" value="Split Request"/> <input type="button" value="Edit Request"/> <input type="button" value="Patient Info"/></p> <p><input type="button" value="Patient Request"/> <input type="button" value="Provider Request"/></p> <p><input type="button" value="Law Firm Release"/></p>	<p>Archived Status: Active</p> <p>Requisition Id: <input type="text" value="133e"/> <input type="button" value="Save"/></p> <p>Provider Fee: <input type="text" value="10"/></p>	<p>Law Firm: The Law Offices of Ross Ziev, P.C.</p> <p>Main Contact: Herb Ziev</p> <p>Request Status: Medical Records Request Sent</p> <p>Follow Up Date:</p>
<p>Client Name: James Villegas Birthday: 04/08/1992 SS#:</p> <p>Provider Name: UC Health Grandview Medical Center</p> <p>Request Types: ER Physician Billing, Radiology Reading Physician Billing</p> <p>Request Start Date: 06/22/2022 Request End Date: 09/11/2023 Rush: No</p> <p>Request Special Instructions:</p> <p>Additional Documents</p> <p><input type="button" value="Choose Files"/> No file chosen → If any additional document.</p>		<p>Add Documents</p> <p><input type="button" value="Send Request To Lawyer"/></p> <p><input type="button" value="Choose Files"/> No file chosen → Attach required documents here</p>

Scroll down to update the status of task and click to save.

Additional Documents

Choose Files No file chosen

Add Note

Remind Me To Follow Up On

Note

Text

Save

New Status Of Request

- In Contact With Provider
- Documents en Route
- Need Assistance
- Completed - Documents Arrived**
- Completed - No Documents Available
- Closed - Documents Arrived
- Closed - No Documents Available
- Closed - Cancelled Request
- Closed - Originally no document found/now document arrived.

All Notes

Name	Notes	Date
Harlo Hoffer	Sent the Initial Medical Records Request	09/18/2023

Delete Request

Select from any 6 of these to complete.

Are you sure?

Cancel Save

Request has been completed.

7. Workflow:

As already mentioned, the primary objective of this project is to establish and operate a comprehensive records retrieval service with a nationwide reach. Enabling various firms and clients to quickly, securely, and affordably obtain records from diverse sources across the United States. Here is the workflow of Website.

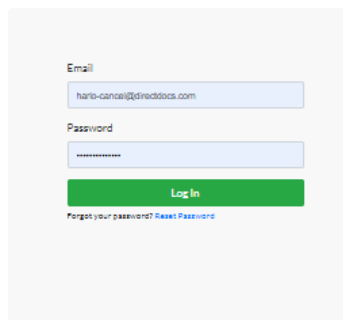
- External clients in need of legal documents or records contact law firms registered on Direct Docs.
- The law firm accepts the client's request and posts it on Direct Docs' open application Direct Docs.

- An assigned employee, chosen by the law firm, begins the process of retrieving the requested data.
- If a client requires expedited service, a extra fee is charged.
- The Direct Docs employee fulfills the request and delivers the document to the law firm.
- The law firm generates an invoice for the client.
- Direct Docs ensures payment has been received.
- The required documents are handed over to the client.

8. Instances:

1. Login

When you visit the URL [Direct Docs](#) , you'll encounter a login screen. Users, whether they belong to a law firm or are employees, can access the Direct Docs by entering their provided credentials. To log in, users must input their email aDirect address and password.



2. Dashboard

There are two Dashboards in ET, one is employee dashboard while the other is Law firm dashboard. The dashboard serves as a central hub providing a comprehensive summary of activities across the entire website. It offers a detailed insight into various aspects, including information pertaining to registered law firms, their associated employees, ongoing applications, and the status of requests being processed. This centralized view allows users to efficiently monitor and manage the operations, ensuring a seamless and organized workflow within the Direct Docs.

Following are the key aspects of Dashboard:

a. Open Requests: These are requests that have not yet been assigned to any specific employee. They are awaiting action or assignment within the system.

b. Closed Requests: These requests have been successfully processed by an employee and marked as completed. They represent tasks that have been fulfilled.

c. Total Number of Law Firms: This figure reflects the total count of law firms that have registered on Direct Docs, providing an overview of the Direct Docs's user base.

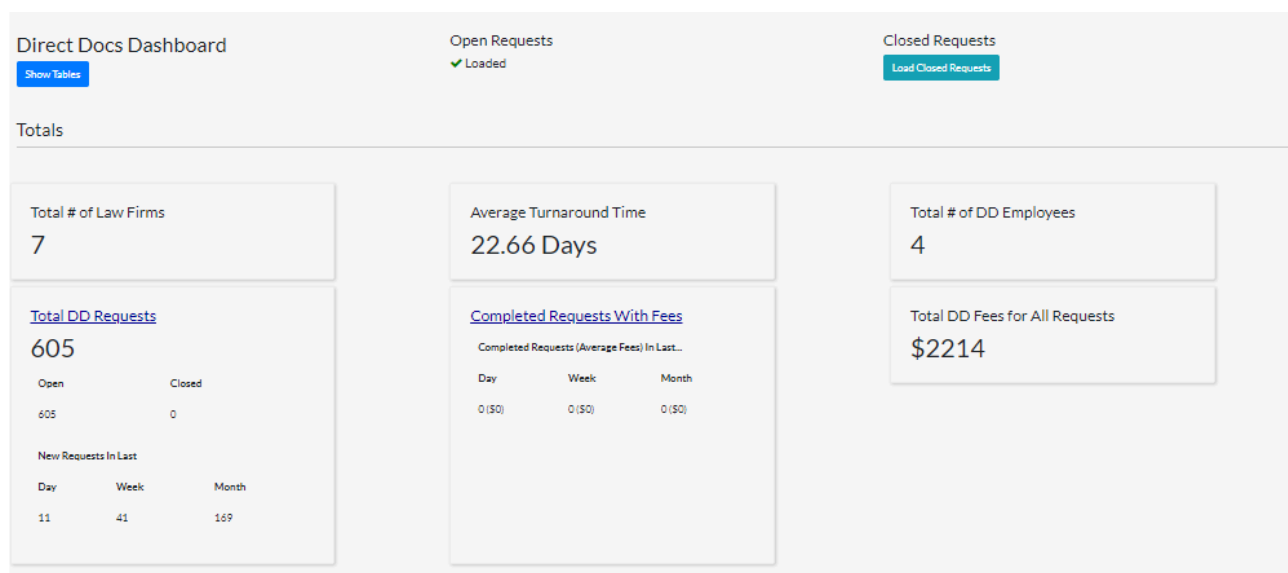
d. Average Turnaround Time: This metric measures the average duration between the submission of an application and its successful completion. It helps gauge the efficiency of the processing workflow.

e. Total Direct Docs Employees: This number represents the total count of employees who are registered with Direct Docs and actively participating in its operations.

f. Total Direct Docs Requests: This figure signifies the overall volume of requests received by Direct Docs. It indicates the demand for the Direct Docs's services.

g. Completed Requests with Fees: These are the requests that have been processed, billed to the client, and subsequently handed over. They represent completed transactions with associated fees.

h. Total Direct Docs Fees: This amount represents the total fees collected by Direct Docs for providing its services. It's important to note that law firms may also charge additional fees beyond the Direct Docs Direct Docs, and this metric reflects Direct Docs' revenue specifically.



Employees:

The "Employees" tab provides a detailed breakdown for each individual employee, including a dedicated section for unassigned requests. Within each employee's section, you'll find the following information:

a. Total Number of Requests: This figure shows the overall count of requests currently assigned and being handled by each specific employee.

b. Open Requests: These are requests that are currently in progress and have not yet been completed or marked as closed.

c. Closed Requests: These are requests that the employee has successfully processed and marked as completed.

d. Overdue Requests: This section highlights any requests that have exceeded their expected completion time, indicating potential delays or issues that need attention.

e. Average Turnaround: This metric represents the average amount of time it takes for an employee to complete a request, calculated from submission to closure.

f. Total Fee Charged: This amount reflects the total fees billed by each employee for their services. It includes breakdowns based on daily, weekly, and monthly timeframes, providing a clear overview of their billing activity over different periods.

This detailed breakdown within the "Employees" tab allows for effective monitoring and assessment of each employee's performance, workload, and contribution to the Direct Docs's operations.

Employees			
Ashley Webb Requests			
218			
Open	Closed	Overdue Reminders	Average Turnaround
218	0	13	15.61 days
Total Closed Request (Total Fees) In Last			
Day	Week	Month	
0 (\$0)	0 (\$0)	0 (\$0)	
Total Notes Created In Last			
Day	Week	Month	
175	40	491	
Alvina Cabrera Requests			
174			
Open	Closed	Overdue Reminders	Average Turnaround
174	0	39	31.58 days
Total Closed Request (Total Fees) In Last			
Day	Week	Month	
0 (\$0)	0 (\$0)	0 (\$0)	
Total Notes Created In Last			
Day	Week	Month	
46	29	325	
Yvette Mendoza Requests			
179			
Open	Closed	Overdue Reminders	Average Turnaround
179	0	18	20.05 days
Total Closed Request (Total Fees) In Last			
Day	Week	Month	
0 (\$0)	0 (\$0)	0 (\$0)	
Total Notes Created In Last			
Day	Week	Month	
63	63	474	
Harlo Hoffer Requests			
3			
Open	Closed	Overdue Reminders	Average Turnaround
3	0	0	20.00 days
Total Closed Request (Total Fees) In Last			
Day	Week	Month	
0 (\$0)	0 (\$0)	0 (\$0)	
Unassigned Requests			
31			
Open	Closed	Overdue Reminders	Average Turnaround
31	0	23	2.71 days
Total Closed Request (Total Fees) In Last			
Day	Week	Month	
0 (\$0)	0 (\$0)	0 (\$0)	

Law firms:

Law firms are the registered companies on Direct Docs (Direct Docs) and play a crucial role in bringing business to the Direct Docs. Clients typically engage with Direct Docs through these law firms. Similar to the employee sections, the law firm sections on the Direct Docs provide the following details:

a. Total Number of Requests: This indicates the overall count of requests that are currently being handled by each specific law firm.

b. Open Requests: These are requests that are currently in progress and have not yet been completed or marked as closed by the law firm.

c. Closed Requests: These are requests that the law firm has successfully processed and marked as completed.

d. Overdue Requests: This section highlights any requests that have exceeded their expected completion time, alerting the law firm to potential delays or issues.

e. Average Turnaround: This metric represents the average amount of time it takes for a law firm to complete a request, calculated from submission to closure.

f. Total Fee Generated: This figure reflects the total revenue generated by each law firm for the services provided on the Direct Docs Direct Docs. It quantifies the financial contribution of each law firm to the Direct Docs' operations.

The inclusion of revenue generation details, an important financial perspective, allowing Direct Docs to assess the economic impact and profitability of each law firm's engagement with the Direct Docs. This information is crucial for tracking the financial health and performance of the law firms registered on Direct Docs.

Zaner Harden Law Requests 345 (\$1152) <table> <tr> <th>Open</th> <th>Closed</th> <th>Average Turnaround</th> </tr> <tr> <td>345</td> <td>0</td> <td>29.73 days</td> </tr> </table> Completed Requests (Average Fees) In Last <table> <tr> <th>Day</th> <th>Week</th> <th>Month</th> </tr> <tr> <td>0 (\$0)</td> <td>0 (\$0)</td> <td>0 (\$0)</td> </tr> </table> New Requests In Last <table> <tr> <th>Day</th> <th>Week</th> <th>Month</th> </tr> <tr> <td>7</td> <td>20</td> <td>114</td> </tr> </table>	Open	Closed	Average Turnaround	345	0	29.73 days	Day	Week	Month	0 (\$0)	0 (\$0)	0 (\$0)	Day	Week	Month	7	20	114	Kidneigh & Kaufman, P.C. Requests 134 (\$582) <table> <tr> <th>Open</th> <th>Closed</th> <th>Average Turnaround</th> </tr> <tr> <td>134</td> <td>0</td> <td>17.16 days</td> </tr> </table> Completed Requests (Average Fees) In Last <table> <tr> <th>Day</th> <th>Week</th> <th>Month</th> </tr> <tr> <td>0 (\$0)</td> <td>0 (\$0)</td> <td>0 (\$0)</td> </tr> </table> New Requests In Last <table> <tr> <th>Day</th> <th>Week</th> <th>Month</th> </tr> <tr> <td>0</td> <td>9</td> <td>20</td> </tr> </table>	Open	Closed	Average Turnaround	134	0	17.16 days	Day	Week	Month	0 (\$0)	0 (\$0)	0 (\$0)	Day	Week	Month	0	9	20	The Law Offices of Ross Ziev, P.C. Requests 64 (\$276) <table> <tr> <th>Open</th> <th>Closed</th> <th>Average Turnaround</th> </tr> <tr> <td>64</td> <td>0</td> <td>27.74 days</td> </tr> </table> Completed Requests (Average Fees) In Last <table> <tr> <th>Day</th> <th>Week</th> <th>Month</th> </tr> <tr> <td>0 (\$0)</td> <td>0 (\$0)</td> <td>0 (\$0)</td> </tr> </table> New Requests In Last <table> <tr> <th>Day</th> <th>Week</th> <th>Month</th> </tr> <tr> <td>4</td> <td>9</td> <td>17</td> </tr> </table>	Open	Closed	Average Turnaround	64	0	27.74 days	Day	Week	Month	0 (\$0)	0 (\$0)	0 (\$0)	Day	Week	Month	4	9	17
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Requests:

The "Requests" section of the Direct Docs handles applications for the acquisition of specific records and documents. Within this section, users can access the following categories:

a. New Requests:

These are recently submitted applications that require attention and processing. They represent fresh requests for records and documents.

b. Rush Requests:

These are urgent requests that need to be expedited and completed quickly due to their time-sensitive nature.

c. Unassigned Requests:

These are requests that have not yet been assigned to a specific employee or entity for processing. They are awaiting allocation.

d. Requests Requiring Attention:

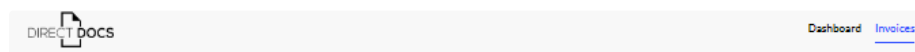
This category highlights requests that have encountered issues or require special attention for various reasons, such as missing information or complications.

In addition to categorizing requests, the section also provides information about the timeframes in which these requests were placed, including slots like "within 15 days," "within 30 days," and "within 45 days." This timeframe data helps users understand the urgency and expected processing timelines associated with each request category, allowing for effective prioritization and management of tasks.

Requests			
New Requests 22	Rush Requests 173	Unassigned Requests (Open) 31	Needs Your Attention 1
Requests > 15 Days 360	Requests > 30 Days 195	Requests > 45 Days 167	
Note > 15 Days 4	Note > 30 Days 0	Note > 45 Days 0	
Today's Reminders 79	Old Reminders 14	Requests Without Reminders 1	
Requests Made Within Last 24 Hours 11	Requests Made Within Last Week 41	Requests Made Within Last Month 169	

3. Invoicing

Adjacent to the dashboard is the Invoicing tab.



Upon first accessing the Invoicing tab, the window displays requests categorized as "normal" and "rush" for each individual law firm. Additionally, there is a convenient filter option at the top, allowing users to search and locate requests within specific timeframes. This feature streamlines the process of finding and managing requests based on their submission and processing dates, ensuring efficient and organized invoicing for each law firm.

Company	Normal Requests	Rush Requests
Test Company	25	8
Lounsberry Law Office PC	0	0
Domnick, Cunningham, & Whalen	5	0
Law One	24	0
The Babcock Law Firm, LLC	0	0
WADIC	0	0
Zaner Harden Law	7209	5038
Arnold Law Firm	0	1
Jordan, Herington & Rowley	0	0

When you access an individual law firm within the Direct Docs, you will find a comprehensive set of information displayed, including:

I. Time Filter: This filter allows you to specify a timeframe for viewing and managing requests associated with the selected law firm.

II. Fee Charged: The amount of fees billed by the law firm for its services within the chosen timeframe.

III. Individual and Cumulative Invoicing: Information about invoicing, both on a per-request basis and a cumulative total for all requests, respectively.

IV. Total Requests: The overall count of requests associated with the selected law firm.

V. Normal Requests: The number of requests categorized as "normal" within the selected law firm.

VI. Rush Requests: The number of urgent requests categorized as "rush" within the selected law firm.

VII. Request Fee: The fee associated with each individual request.

VIII. Provider Fee: The fee paid to the provider of the requested documents.

IX. Organization Fee: Any additional fees charged by the law firm or organization.

X. Total Fee: The cumulative total fee for all requests handled by the law firm.

XI. Client Information: Details about the client making the request, including the requestor's name, request type, and request status.

Additionally, there are six different completion scenarios for requests, each accompanied by the respective number of requests falling into that category:

I. Completed - Documents Arrived: Requests that have been successfully processed, and the requested documents have been received.

II. Completed - No Documents Available: Requests that have been successfully processed, but no documents were available.

III. Closed - Documents Arrived: Requests that have been closed, and the requested documents have been received.

IV. Closed - No Documents Available: Requests that have been closed, but no documents were available.

V. Closed - Originally No Document Found/Now Document Arrived: Requests initially closed due to a lack of available documents but have since had documents become available.

This detailed information provides a comprehensive overview of the law firm's activity and performance within the Direct Docs, facilitating effective management and analysis of their invoicing and request completion metrics.

The Law Offices of Ross Ziev, P.C. Requests

[Ready To Print](#) [Create Billing](#)

From: To: Client: Provider: Status: Billing:

Fees

Completed - Documents Arrived: Completed - No Documents Available: Closed - Documents Arrived: Closed - No Documents Available: Closed - Cancelled Request: Rush:

Closed - Originally No Document Found/Now Document Arrived:

[Save](#) [Download Invoice Data](#)

	Total Requests	Requests	Rush Requests	Request Fees	Provider Fees	Organization Fees	Total
	14	11	3	\$525.00	\$488.35	\$0.00	\$1,013.35

ID	Billing Title	Requestor	Date	Client	Provider	Request Type	Rush	Request Status	Request Fee	Provider Fee	Organization Fee	Paid at	Payment Status	Save Changes
21036	-	Tana Todd	08/24/2023	Aleba Chalachow	Desert Radiology - Horizon Ridge	Radiology Records, Itemized Billing Statements and HICFs	Yes	Completed - Documents Arrived	42	<input type="text" value="6"/>	<input type="text" value="0"/>	-	Not Paid	Save
21027	-	Katie Lacey	08/24/2023	Phoebe Forbes	Denver Health Lowry Family Health Center	Medical Records	No	Closed - Documents Arrived	36	<input type="text" value="101.89"/>	<input type="text" value="0"/>	-	Not Paid	Save
20565	-	Katie Lacey	08/03/2023	Phoebe Forbes	Rocky Vista Health Center	Medical Records and Itemized Billing Statements	No	Closed - Documents Arrived	36	<input type="text" value="0"/>	<input type="text" value="0"/>	-	Not Paid	Save

4. Billings

At the right of Invoices is the billings tab.

Dashboard	Invoices	Billings	Company List	Provider List	Request Types	Edit Mappings	Log Out
---------------------------	--------------------------	--------------------------	------------------------------	-------------------------------	-------------------------------	-------------------------------	-------------------------

The billing tabs indicate whether a specific law firm has successfully received payment from its respective client. When payment has been received, it is displayed as "Paid" in green, and conversely, if payment is pending or not received, it is represented differently.

Ziev_1159	The Law Offices of Ross Ziev, P.C.	Not Paid	11/10/2022	-
K&K_1158	Kidneigh & Kaufman, P.C.	Not Paid	11/10/2022	-
1157	Zaner-Harden Law	Not Paid	11/10/2022	-
Conduit Law bill 1	Conduit Law	Paid	10/20/2022	10/20/2022
Lett Law, PLLC bill 1	Lett Law, PLLC	Paid	10/20/2022	10/20/2022
Zobel Legal Group, LLC bill 1	Zobel Legal Group, LLC	Paid	10/20/2022	10/20/2022
Mile High Legal Assist bill 1	Mile High Legal Assist	Paid	10/20/2022	10/20/2022
Kidneigh & Kaufman, P.C. bill 1	Kidneigh & Kaufman, P.C.	Paid	10/20/2022	10/20/2022

Within the billing section, there is a list of multiple companies. When you click on any of these company names, a window will open, offering a detailed overview of both past and current billing information. This includes data such as ID, Billing title, Requestor, Date, Client, Provider, Request type, Request status, Request fee, and Provider fee. Additionally, this window is

equipped with various filter tabs, making it easier to retrieve specific records within the billing section.

Zobel Legal Group, LLC Requests

From:

To:

Client:

Provider:

Status: All Closed

Billing: Zobel Legal Group, LLC bill 1

Fees

Completed - Documents Arrived

Completed - No Documents Available

Closed - Documents Arrived

Closed - No Documents Available

Closed - Cancelled Request

Rush

36

36

36

36

18

7

Closed - Originally No Document Found/Now Document Arrived

0

Save

Download Invoice Data

	Total Requests	Requests		Rush Requests	Request Fees	Provider Fees	Organization Fees	Total						
	109	72		37	\$3,829.00	\$3,585.67	\$0.00	\$7,414.67						
ID	Billing Title	Requestor	Date	Client	Provider	Request Type	Rush	Request Status	Request Fee	Provider Fee	Organization Fee	Paid at	Payment Status	Save Changes
10181	Zobel Legal Group, LLC bill 1	Harlo Hoffer	01/10/2022	Maria Gabriela Acosta-Garcia	Parker Adventist	Radiology Reading Physician Billing	Yes	Closed - No Documents Available	24.5	18.53	0	10/20/2022	Paid	Save
10180	Zobel Legal Group, LLC bill 1	Harlo Hoffer	01/10/2022	Maria Gabriela Acosta-Garcia	Parker Adventist	Radiology Imaging Films	Yes	Closed - No Documents Available	24.5	18.53	0	10/20/2022	Paid	Save
10181	Zobel Legal Group, LLC bill 1	Harlo Hoffer	01/10/2022	Maria Gabriela Acosta-Garcia	Parker Adventist	Radiology Records	Yes	Closed - No Documents Available	24.5	18.53	0	10/20/2022	Paid	Save

5. Company lists

Company lists represent law firms registered in Direct Docs .

Dashboard

Invoices

Billings

Company List

Provider List

Request Types

Edit Mappings

Log Out

In the company window, you'll find a display of law firms, each accompanied by options such as "Invite Users", "View Users Experience", "Manually Add Request", and "View Dashboard".

In the company window, you'll find a display of law firms, each with the following options:

Dashboard

Invoices

Billings

Company List

Provider List

Request Types

Edit Mappings

Log Out

a. Invite Users:

This option allows you to invite additional users to join the company or law firm's Direct Docs.

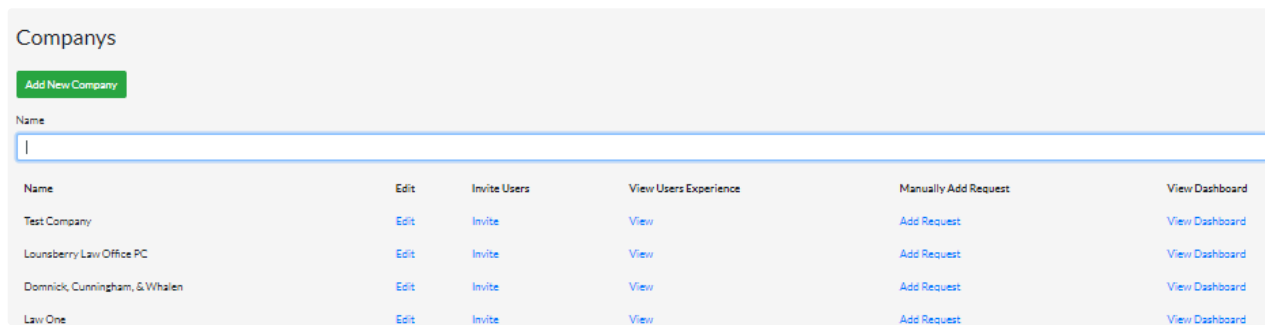
b. View Users Experience:

Here, you can access and review the experiences and interactions of users within the company.

c. Manually Add Request:

This feature enables you to manually input and create new requests or records within the system.

d. View Dashboard: By selecting this option, you can access a comprehensive dashboard that provides an overview of key metrics and data related to the company or law firm.



Companyys					
Add New Company					
Name					
<input type="text"/>					
Name	Edit	Invite Users	View Users Experience	Manually Add Request	View Dashboard
Test Company	Edit	Invite	View	Add Request	View Dashboard
Lounsberry Law Office PC	Edit	Invite	View	Add Request	View Dashboard
Dominick, Cunningham, & Whalen	Edit	Invite	View	Add Request	View Dashboard
Law One	Edit	Invite	View	Add Request	View Dashboard

The "Edit Company" option offers a range of editing capabilities, allowing you to modify company details such as:

- **Company Name:** Update the name of the company or law firm as needed.
- **Company Administrator Name:** Modify the name of the person designated as the administrator for the company.
- **Email:** Change the email address associated with the company for communication purposes.
- **Phone Number:** Edit the primary contact phone number for the company.
- **Fax Number:** Adjust the fax number for official correspondence.
- **Add address:** Make changes to the physical location or mailing address of the company.
- **City:** Modify the city where the company is located.
- **State:** Update the state or province in which the company is situated.
- **Zip Code:** Adjust the postal code of the company's location.
- **Request Price:** Modify the pricing information for requests or services provided by the company.

Additionally, the option to Upload Files allows you to add or replace documents, ensuring that the most up-to-date information is available. This can include contracts, reports, or any other relevant files necessary for the company's operations.

Edit Company: Test Company

Company Name
Test Company

Company Administrators Name
Name

Company Administrator Email
admin@...

Company Administrator Phone Number
(303) 123-4567

Company Fax Number
(303) 123-4567

Company Main Number
(303) 123-4567

Address 1
123 Street

Address 2
Apt 102

City
City

State
State

Zip Code

Request Price
25

The "Company User List" feature presents a comprehensive list of users associated with a company or law firm. This list includes the following details for each user:

- **Name:** The full name of the user.
- **Email:** The email address associated with the user's account.
- **Phone Number:** The contact number of the user.
- **Admin Access:** Indicates whether the user has administrative privileges or access within the company or law firm's Direct Docs. This could be denoted as "Admin" or "User" to distinguish between administrators and regular users.

Company User List					
Type in your users or copy from excel. If you remove them from here and click invite, they will be removed.					
Invite Users/Save					
First Name	Last Name	Email	Phone Number	Admin Access (Write TRUE or leave blank)	Active (Write FALSE or leave blank)
The Best	Lawyer	dmiller89+1-cancel@gmail.com	2039189851		
Test	User	dmiller89+2-cancel@gmail.com			
Failure	Test	dmiller89+2-cancel@gmail.com			
One	More	jeremythiesen2+2-cancel@gmail.com			
WADIC	TEST	lt-cancel@wadic.net		TRUE	
Sardar	Ali	sardarali-cancel@wadic.dev			

Within the "View Users Experience" section, you can access user-specific information. Here's what you can find:

- **User Name:** The name of the user for whom you are viewing the experience.

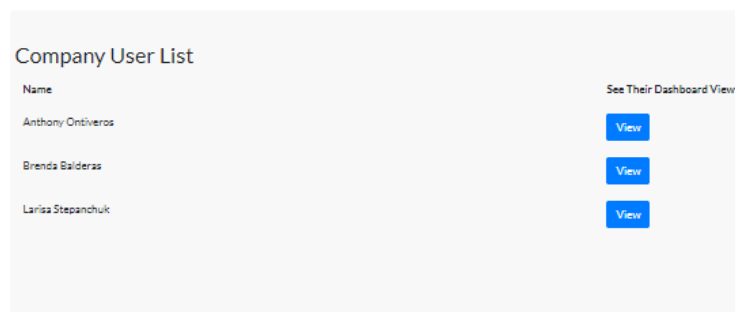
When you access their dashboard, you will be able to see the following details related to requests:

- **Request Date Range:** The time frame during which requests were initiated.
- **Request Made:** The date when a request was initially created.
- **Request Picked:** The date when the request was assigned or picked up for processing.
- **Request Processed:** The date when the request was fully processed or completed.
- **Documents Provided to the User:** The date when the requested documents or information were delivered to the user.

Additionally, the dashboard provides records related to the request, including:

- **Legal Personnel:** The legal professionals or staff involved in handling the request.
- **Client:** The client or entity for whom the request was made.
- **Provider:** The service provider or source of the requested information.
- **Request Type:** The category or type of the request (e.g., legal research, document retrieval).
- **Status:** The current status of the request (e.g., pending, completed).

This information allows for a detailed overview of a user's experience and the status of their requests within the system.



Company User List	
Name	See Their Dashboard View
Anthony Ontiveros	View
Brenda Balderas	View
Larisa Stepanchuk	View

The "Create New Request" feature provides a portal through which users can initiate a fresh request for document retrieval. A detailed explanation of this process can be found in the previous section, outlining the step-by-step procedure for requesting and managing document retrieval requests within the system.

Create New Request

Who is the main contact for this request?

Choose The Client This Request is Being Made For

Records Request Start Date

Records Request End Date

Add Client

Should We Rush This Order (\$7 Extra Per Provider)

No Thanks

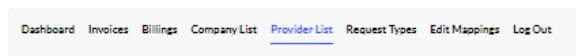
Choose The Provider(s) This Request is Being Made To

Add Provider

Provider	Provider Address	Request Types	Special Instructions
<div>Submit Request</div>			

6. Providers list

After the company's list , the next tab is providers list.

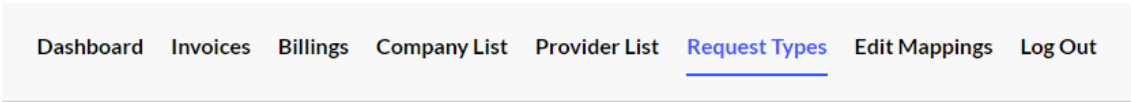


The "Providers List" is a compilation of hospitals and other legal entities that collaborate with Direct Docs by providing them with legal documents and records. This list helps to identify and manage the various sources from which legal documents are obtained or received.

Providers				
<div>Add New Provider</div> <div>Name</div> <div></div>				
Name	Has Email	Has Phone Number	Has Form	Edit
UCHealth Emergency Room - Commerce City	✓	✓	✗	<div>Edit</div>
(AMR) American Medical Response	✓	✓	✗	<div>Edit</div>
100% Chiropractic - Aurora	✓	✓	✓	<div>Edit</div>
100% Chiropractic - Broomfield	✓	✓	✓	<div>Edit</div>
100% Chiropractic - Castle Rock	✓	✓	✗	<div>Edit</div>
100% Chiropractic - Downtown Colorado Springs	✓	✓	✗	<div>Edit</div>
100% Chiropractic - East Colorado Springs	✓	✓	✗	<div>Edit</div>
100% Chiropractic - Ft. Collins	✓	✓	✗	<div>Edit</div>
100% Chiropractic - Highlands Ranch	✓	✓	✗	<div>Edit</div>
100% Chiropractic - Lakewood	✓	✓	✗	<div>Edit</div>
100% Chiropractic - Monument	✓	✗	✗	<div>Edit</div>
100% Chiropractic - North Central Colorado Springs	✓	✓	✗	<div>Edit</div>
100% Chiropractic - North Colorado Springs	✓	✓	✗	<div>Edit</div>

7. Request types:

Next tab is the Request Types.



The "Request Types" section displays the specific types of documents that can be requested. These document types may include ledger documents, affidavits, billing records, reports, statements, and more. It serves as a reference to categorize and specify the nature of the documents being sought or processed within the system.

Request Types

Add New Request Type

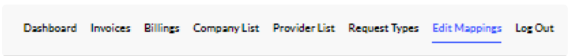
Name

Save

Name	Delete?
Pharmacy Ledger	Delete
Affidavit from Billing Custodian	Delete
Affidavit from Records Custodian	Delete
Ambulance Trip Report and Itemized Billing Statements	Delete
Anesthesia Billing	Delete

8. **Edit Mappings:**

The last tab before logout is the “Edit Mappings”.



The "Edit Mappings" feature empowers both users and law firms to customize the layout of "Company Forms" and "Provider Forms" for multiple law firms and companies within the Direct Docs. This capability allows for tailored adjustments and configurations of forms to suit the specific needs of each entity on the Direct Docs.

PDFs

Name

Company Forms

Add New Company Form

Company	Name	Edit
Lounsberry Law Office PC	Lounsberry Provider Letter	Edit

Provider Forms

Add New Provider Form

Provider	Name	Edit
	Base Provider Form	Edit
Adams County Coroners Office	Base Provider Form	Edit

9. RISKS:

Here are some potential risks that should be considered.

1.Data Security Risks:

- Risk of unauthorized access to sensitive legal documents and confidential information.
- Data breaches and cyberattacks could compromise the privacy and integrity of the system.

2.Compliance and Legal Risks:

- Failure to comply with legal regulations and data privacy laws could result in legal actions and fines.
- Mismanagement of legal documents may lead to legal disputes.

3.User Adoption and Training:

- Users may struggle to adapt to the new system, leading to resistance and reduced productivity.
- Inadequate training could result in errors and inefficiencies.

4.Technical Challenges:

- Technical issues, such as system crashes or software bugs, may disrupt operations and cause downtime.
- Integrating with various providers and maintaining system stability could pose technical challenges.

5.Data Integrity and Accuracy:

- Inaccurate or incomplete data entry may lead to errors in document retrieval and processing.
- Maintaining data accuracy and consistency is crucial for legal operations.

6.Scope Creep:

- Expanding project scope beyond the initial requirements may lead to delays and budget overruns.
- Changes in project objectives without proper evaluation could impact project success.

7.Resource Constraints:

- Insufficient resources, including time, budget, and skilled personnel, may hinder project execution.
- Resource allocation should be carefully planned to avoid bottlenecks.

8.Third-Party Dependency:

- Relying on external providers for legal documents could result in delays or disruptions if these providers face issues.
- Contingency plans should be in place to mitigate such dependencies.

9.User Experience and Satisfaction:

- If the redesigned interface and user experience do not meet user expectations, it could lead to dissatisfaction and decreased productivity.

10. Regulatory Changes:

- Changes in legal or regulatory requirements may necessitate updates or modifications to the system.
- Staying compliant with evolving laws is crucial.

11. Data Backups and Recovery:

- Insufficient backup and recovery mechanisms could result in data loss in case of system failures or disasters.

12. Testing and Quality Assurance:

- Inadequate testing and quality assurance may lead to undetected issues and system instability.

13. Project Management Risks:

- Poor project management, including unclear roles, communication breakdowns, or scope changes, can impact project timelines and success.

14. Training and User Adoption:

- Users not fully understanding the system or resisting change can lead to inefficiencies and errors in document requests and handling.

15. Scalability and Future Expansion:

- Inadequate planning for scalability could hinder accommodating a growing user base and evolving requirements.

16. User Feedback and Iteration:

- Not collecting user feedback or failing to iterate on the system based on feedback may lead to a less effective solution.

17. Supplier or Provider Reliability:

- Dependence on external suppliers or providers for legal documents may expose the project to disruptions if these entities fail to deliver.

10. Project Schedule:

Up till now 10th sprints have been completed while the 11th sprint is in the planning phase.
Sprints are presented in their descending order

Sprint: DD Sprint 11

Sprint Schedule:

Sprint Start Time:

Sprint End Time:

Total Hours:

Front-End Hours:

Developers: Danish Khalid

QA:

Goal: The goal of this sprint is to Implement pagination and enhance speed of the platform

Sprint: DD Sprint 10

Sprint Schedule: Thursday 28-Sep-2023 to Thursday 12-Oct-2023

Sprint Start Time: Thursday 28-Sep-2023 (09:00 PM)

Sprint End Time: Thursday 12-Oct-2023 (06:00 AM)

Total Hours: 125

Developers: Danish Khalid , Waleed Sultan, Mirza Safeer Baig, Sami Ullah

QA: Shoaib

Goal: Implementation of Redis , code optimization of invoice and request fee issue of invoice

Sprint: DD Sprint 9

Sprint Schedule: Wednesday 5-April-2023 to Tuesday 18-April-2023

Sprint Start Time: Wednesday 5-April-2023 01:00 am

Sprint End Time: Tuesday 18-April-2023 01:00am

Total Hours: 6hrs

Front-End Hours: 6hrs

Developers: [@Mirza Safeer Baig - Frontend Developer](#) (6hrs)

QA: [@Ameer Majid/SQA Engineer](#)

Goal: created filter functionality to see the completed/closed request application and fixed the data synching between show table request and employee completed request on the main dashboard.

11. Resource Requirements:

Following are the resource requirement for the project:

a. Software Resources:

Database Management System: the database systems suitable for Direct Docs needs are MySQL, PostgreSQL, MongoDB.

Development Tools: For the backend Django is implemented while for the frontend Node Js is being used.

b. Development Resources:

• Development Team:

1.Front-End Developer:

Front-end developers are responsible for designing and implementing the user interface (UI) of the Direct Docs platform. They focus on creating an engaging and responsive user experience.

2.Back-End Developer:

Back-end developers focus on the server-side logic and infrastructure that power the Direct Docs platform. They handle data processing, business logic, and server maintenance.

3.Database Administrator (DBA):

Database administrators are responsible for the management, security, and performance of the database systems used by the Direct Docs platform.

4.DevOps Engineer:

DevOps engineers bridge the gap between development and operations, focusing on automation, deployment, and maintaining a stable and efficient development environment.

12. Quality Standards:

Quality standards are essential to ensure that the Direct Docs project meets its objectives and delivers high-quality Direct Docs.

1.Performance:

- The Direct Docs shall respond to user requests within 1 week under normal operating conditions.
- It should handle concurrent user requests without significant degradation in performance.
- Performance testing is conducted regularly to identify and resolve any bottlenecks.

2.Security:

- The Direct Docs adheres to industry best practices for security, including data encryption, secure user authentication, and authorization mechanisms.

3.Reliability:

- A robust backup and disaster recovery plan shall be in place to minimize data loss and downtime in case of failures.

4.Scalability:

- The Direct Docs is designed to scale horizontally and vertically to accommodate increased user loads without service interruptions.
- Scalability testing is performed to ensure that the system can handle future growth.

5.Usability:

- The Direct Docs's user interface is intuitive and user-friendly, requiring minimal training for users to navigate and perform tasks.
- Usability testing is conducted with representative users to identify and address usability issues.

6.Compliance:

- The Direct Docs complies with all relevant data protection and privacy regulations, such as GDPR or HIPAA, depending on the nature of the data being handled.
- Regular compliance audits and assessments are conducted to ensure ongoing adherence.

7.Documentation:

- Comprehensive documentation, including user manuals, API documentation, sprint sheets and scope document, are provided to facilitate system understanding and troubleshooting.
- Documentation is kept up-to-date as the Direct Docs evolve.

8.Change Management:

- A formal change management process is followed for implementing new features or updates to the Direct Docs.

9.Maintenance and Updates:

- Regular maintenance tasks, such as system updates and security patching, is performed with minimal disruption to users.

10. Accessibility:

- The Direct Docs shall adhere to accessibility standards (e.g., WCAG) to ensure that it is usable by individuals with disabilities. (not implemented yet)

13. Technical Requirements

Direct Docs will be developed as a web application based on a scalable, secure, and reliable architecture. The application will offer support for various devices, including desktops, laptops, tablets, and smartphones, while providing a responsive user interface.

14. Development Methodology

The development of the Direct Docs web app will follow an agile software development methodology, Backend is Django and frontend in Nodejs. The development team will work in sprints, with regular feedback and input from stakeholders. Extensive testing will be conducted to ensure the system meets both functional and non-functional requirements before its official launch.