

SHRS Wellness Pavilion Information System

User Manual

Part 1

Contents

Account Creation.....	4
Account Approval.....	5
Client Creation.....	6
Program Forms.....	7
Make appointment.....	8
Events.....	9
Create event.....	8
Edit event.....	8
Add Clients to event.....	10
Take event attendance.....	10

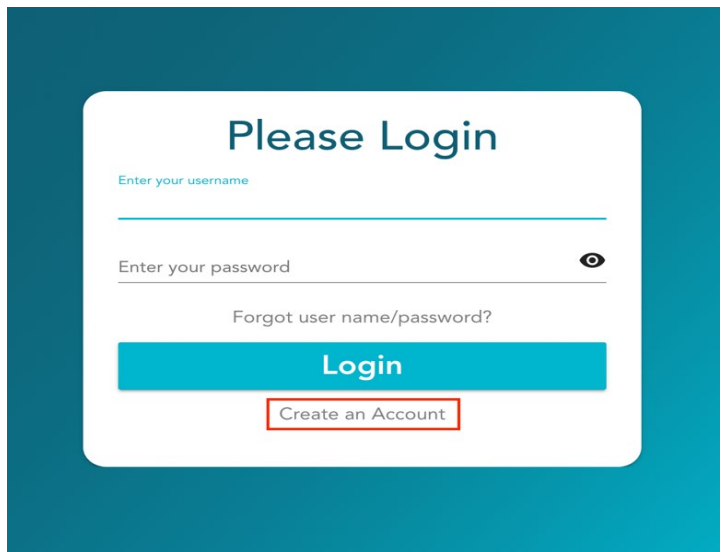
Roles

Front Desk (The account has already been created in the system)	The front desk can access functions such as "client list," "Events," and "Appointments." Front desk can add new clients.
System Admin (The account has already been created in the system)	Functions specific to the system admin include "overview," "screening," "outcome," and "programs." This allows the system admin to see statistics and information from every from across all programs.
School Admin (The account has already been created in the system)	School admin can access functions such as "client list," "Events," and "Appointments." The school admin can access all the program forms.
Program Admin (Accounts have already been created in the system)	The functions specific to the program admin are creating program availability and approving/rejecting clinician accounts. Program admin also create Events. They do not create clients or specific appointments.
Clinician (Faculty and Students. Accounts need to be created)	The clinician account can access functions such as "client list," "Events," and "Appointments." Clinicians can view and modify details for clients and create appointments.

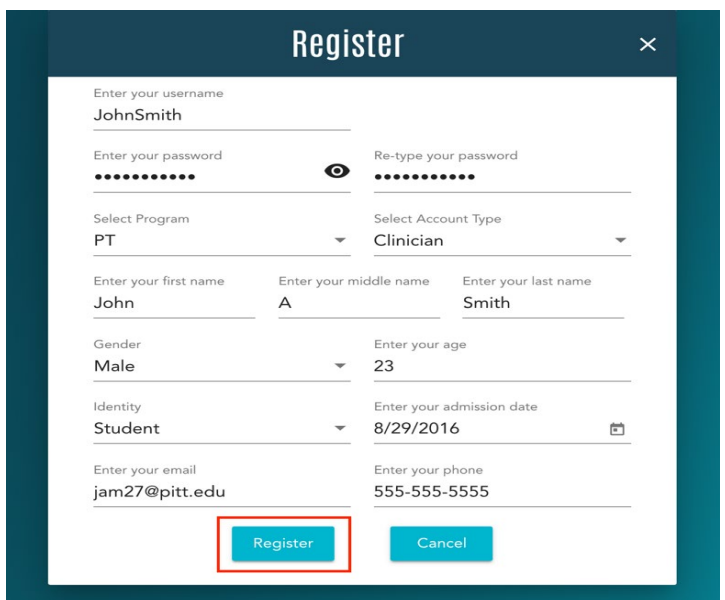
Account Creation - Clinician

Steps:

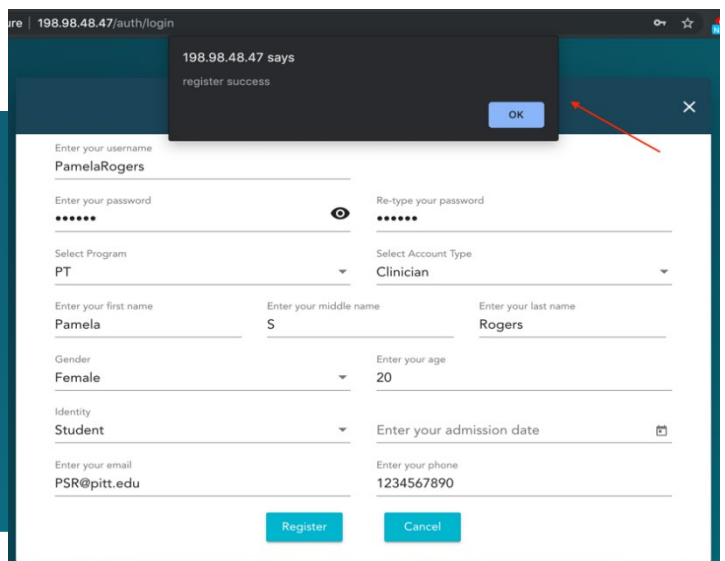
1. Go to the Wellness Pavilion site.
2. Click on **"Create an Account"** below the login button.
3. Fill out all information accurately.
4. Once all information is completed the **Register** button in the bottom left corner will turn blue.
5. Click on button.
6. If registration successful, a popup will appear confirming.
7. Your account is not accessible until a program administrator approves.
8. Once approved, you can type in your created username and password to login.



The image shows a 'Please Login' form on a teal background. It has two input fields: 'Enter your username' and 'Enter your password' with a toggle icon. Below the password field is a link 'Forgot user name/password?'. At the bottom are two buttons: a large teal 'Login' button and a smaller white 'Create an Account' button with a red border.



The image shows a 'Register' form with a dark teal header. It contains several input fields: 'Enter your username' (JohnSmith), 'Enter your password' (masked), 'Re-type your password' (masked), 'Select Program' (PT), 'Select Account Type' (Clinician), 'Enter your first name' (John), 'Enter your middle name' (A), 'Enter your last name' (Smith), 'Gender' (Male), 'Enter your age' (23), 'Identity' (Student), 'Enter your admission date' (8/29/2016), 'Enter your email' (jam27@pitt.edu), and 'Enter your phone' (555-555-5555). At the bottom are 'Register' and 'Cancel' buttons. The 'Register' button is highlighted with a red border.



The image shows the same 'Register' form as above, but with a dark grey popup overlay. The popup contains the text '198.98.48.47 says register success' and an 'OK' button. A red arrow points to the 'OK' button. The 'Register' button on the form is still highlighted with a red border.

Account Approval – Program Admin

1. Log in using your credentials for program admin

2. Either search for the name needing approval by first or last name or find the name by scrolling through account list

3. To approve the account, click the **blue check mark** to the left of the individual's name.

4. To reject click the **red x**

The approval will be marked in the "status" column.

Wellness Pavilion

Welcome, Program Admin Logout

Account List Program Availability

Account List

☐ Student ☐ Professor ☒ All ☐ Only Unapproved

Search Clinician Name Alice

Status First Last Name Sex Age Program Category Class + Email Phone

Name

pending ☒ ☐ Alice Suarez male 18 student 2018-09-25 ronem@gail.co (513) 784-1959 m

Wellness Pavilion

Welcome, Program Admin Logout

Account List Program Availability

Account List

☐ Student ☐ Professor ☒ All ☐ Only Unapproved

Search Clinician Name Alice

Status First Last Name Sex Age Program Category Class + Email Phone

Name

pending ☒ ☐ Alice Suarez male 18 student 2018-09-25 ronem@gail.co (513) 784-1959 m

Wellness Pavilion

Welcome, Program Admin Logout

Account List Program Availability

Account List

☐ Student ☐ Professor ☒ All ☐ Only Unapproved

Search Clinician Name Alice

Status First Last Name Sex Age Program Category Class + Email Phone

Name

approved ☐ ☒ Alice Suarez male 18 student 2018-09-25 ronem@gail.co (513) 784-1959 m

Account Creation - Clinician

1. **Login**
2. On the "Client List" section of the Wellness Pavilion click on **"Create Client"**. **Search and check whether the client is already in the system. If not, go to the next step.**
3. Fill out the demographics form for the new client
 - a. Note: First and last name is the minimum information needed to create a new client
4. Once all the information is in, click the blue **"Upload"** button on the bottom right corner
5. To view your newly added client, click on **"View"** button or the icon to the left of the client's name
6. To create an encounter, click **"Clinical Information"**
 - a. Note: an encounter is needed before adding any information or **INFORMATION WILL NOT BE SAVED**
7. Fill out the encounter form and **"Submit"**
If successful, a pop up will appear confirming

The screenshot shows the 'Client List' section of the Wellness Pavilion. At the top, there are tabs for 'Client List', 'Events', and 'Appointments'. Below the tabs is a search bar with 'Own' and 'Search Client Name'. A table of client records is displayed with columns: First Name, Last Name, Middle Name, Date of Birth, Gender, and Encounter. The table contains three rows: Yemima Tabuni (1987-01-04, Female, 2019-10-09), Simon Magai (2007-05-19, Female, 2019-10-09), and Maria Magai (2002-09-03, Male, 2019-10-09). A 'Create Client' button is highlighted with a red box at the bottom left of the table.

The screenshot shows the client demographics form. It includes fields for Address 2, City, State (dropdown), and Zipcode. There are radio button options for Living arrangement (Alone, With Spouse or unrelated partner, With children, With parents or guardian, With relatives other than spouse, children or parents, With nonrelatives) and Resident Condition (a. One story(no stairs), b. Stairs to home entrance with ramp, c. Stairs to home entrance without ramp, d. Stairs in home with stair lift, e. Stairs in home without stair lift, f. Apartment with elevator, g. Apartment without elevator). Below these are dropdowns for Marry Status and Employment Status, and a text field for Other Comments. At the bottom, there are 'Cancel' and 'Upload' buttons, with the 'Upload' button highlighted by a red box.

The screenshot shows the 'Client List' section after a new client has been added. The table now includes a fourth row: Jane Doe (2019-11-17). The 'View' button for Jane Doe is highlighted with a red box. The 'Create Client' button is still visible at the bottom left.

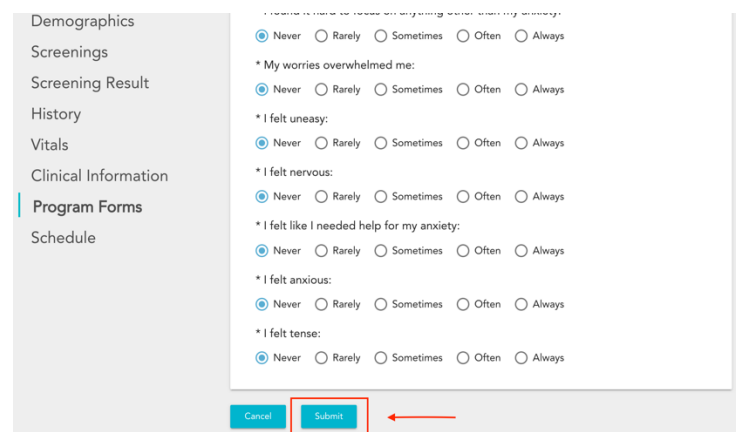
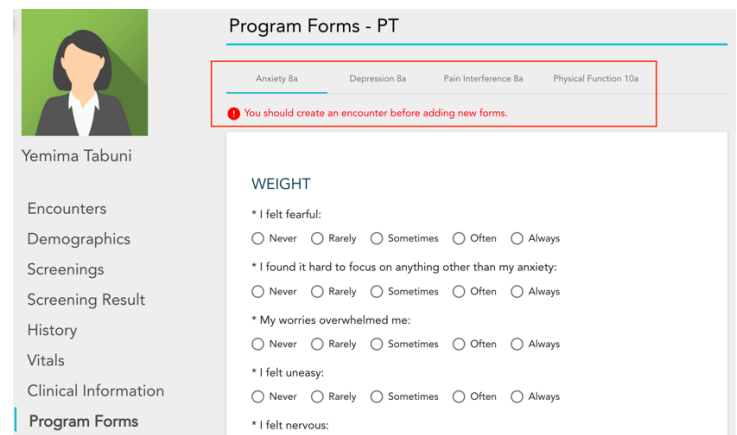
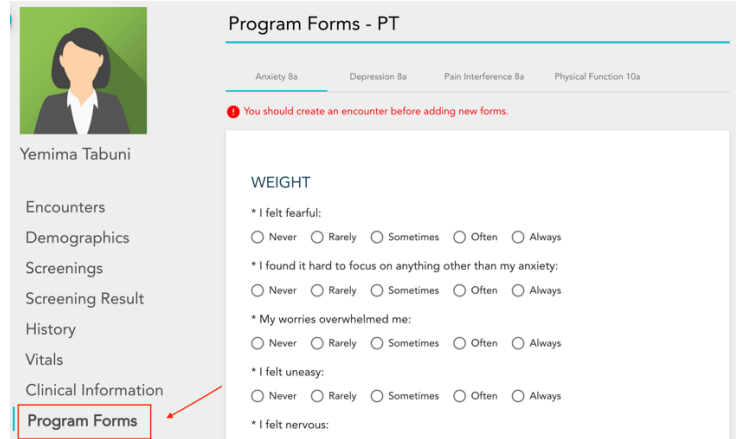
The screenshot shows the 'Encounter List' for Jane Doe. It displays a list of encounters with columns for Date, Time, and Status. The 'Clinical Information' tab is highlighted with a red box. The 'Encounter List' section shows 'No Data Available'.

Program Forms – School Admin and Clinician

1. To access the program forms, select a client.
2. Click on “**Program Form**” on the left hand side

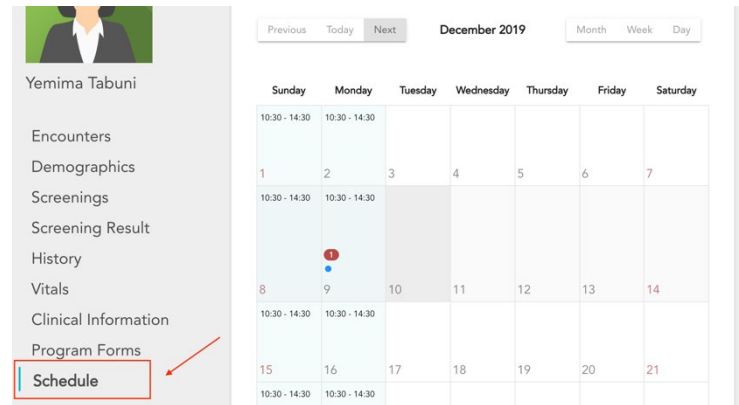
3. Before beginning a program form, ensure that an encounter has been created for the client.
4. Then select which program form is desired from the list at the top of the page.

5. Complete form
6. Click “**Submit**” to save the form

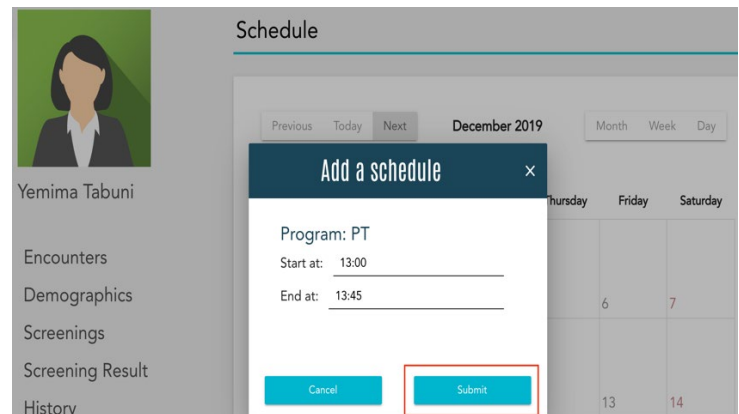


Creating Appointments – Clinician

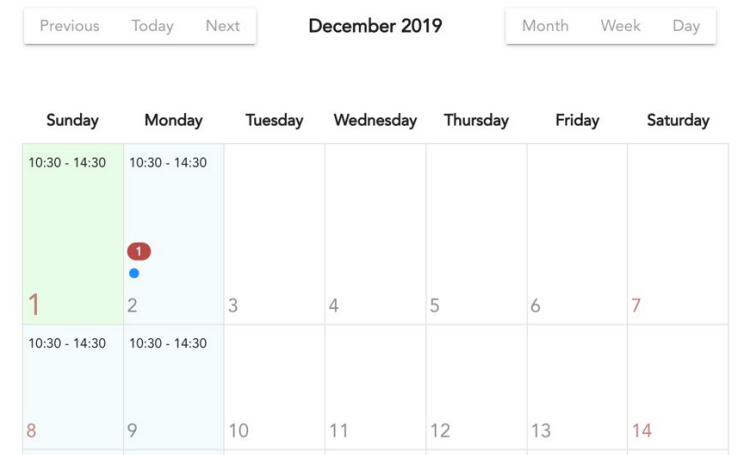
1. Select the client you would like to make an appointment for then click on **"Schedule"**
2. A calendar will appear
3. Click on the date desired to make the appointment



4. A pop-up will appear asking for the start and end appointment time
 - a. Note that the time is in military time
5. Once desired time is chosen, click the blue **"Submit"** button

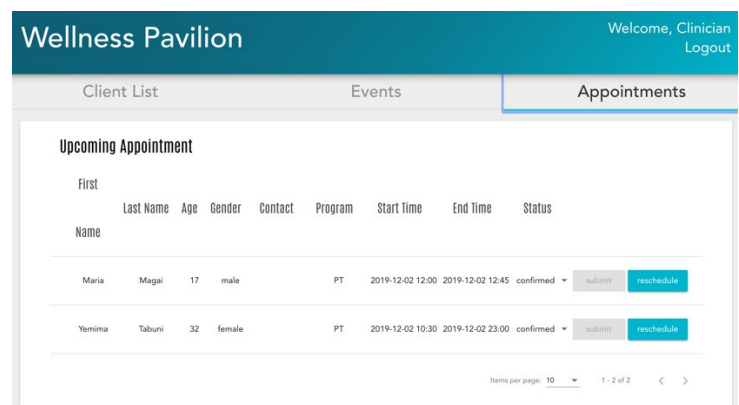


6. A red indicator will appear on the calendar for the date chosen to confirm the successful appointment submission



Track appointments

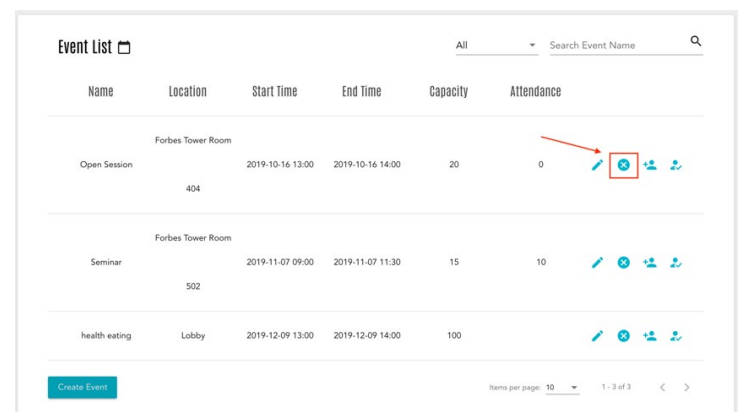
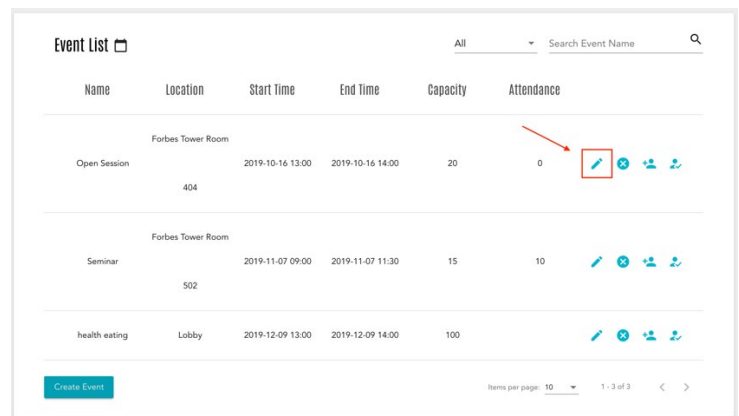
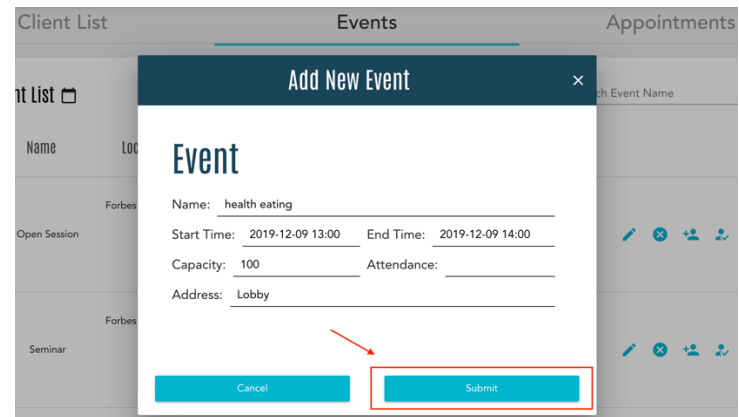
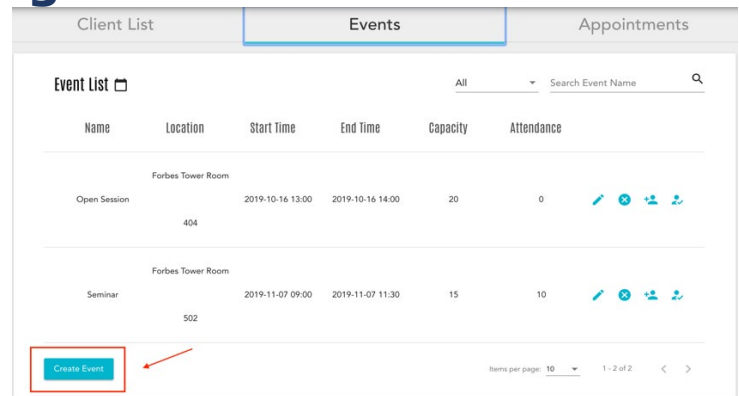
7. Click on the "appointments" tab to view all upcoming appointments



Events – Clinicians and Program Admin

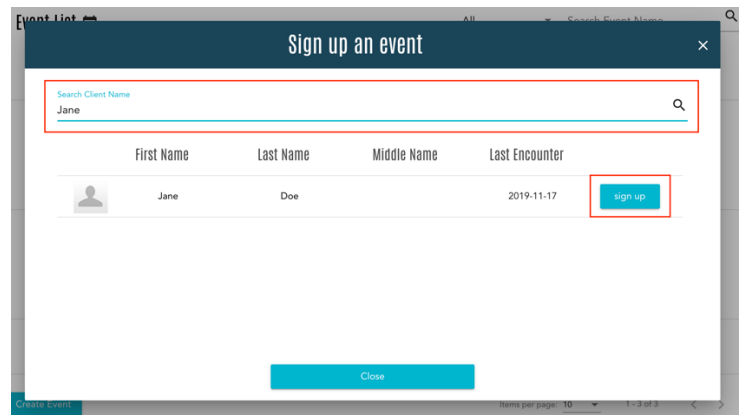
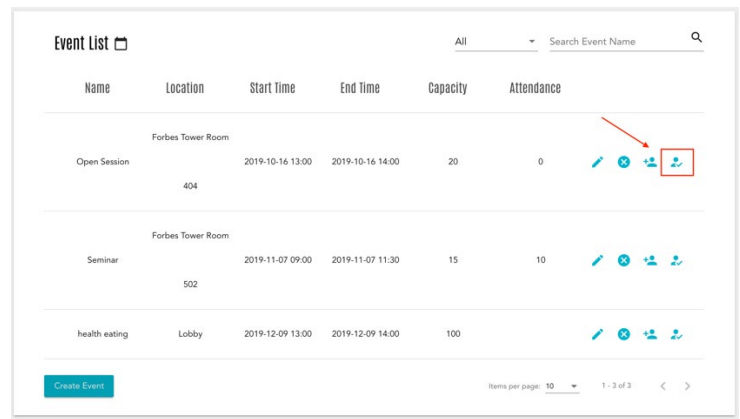
Event Creation and edits

1. Click on the “**Events**” tab at the top of the page
2. Then click on the blue “**Create Event**” button at the bottom left corner
3. An “Add New Event” pop up will appear
4. Fill out event information and click the blue “**Submit**” button
5. The event should now appear under the event list
6. To edit an event’s information, click on the **pencil icon** to the right of the event
7. The “Add New Event” pop up will appear allowing you to edit the previous information
8. Click “**Submit**” to save your edits
9. To delete an event, click on the “**x**” symbol next to the pencil icon



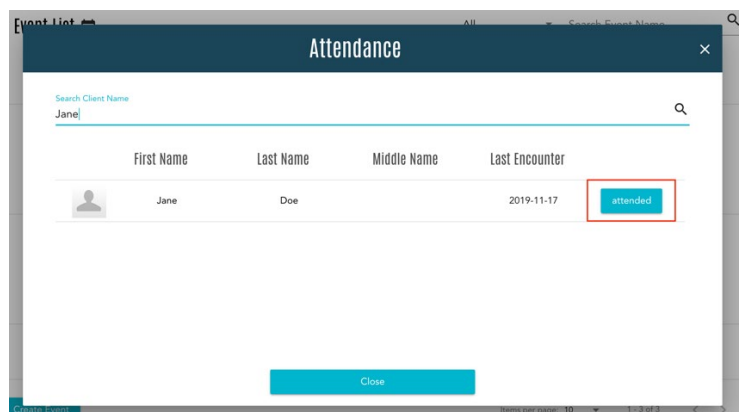
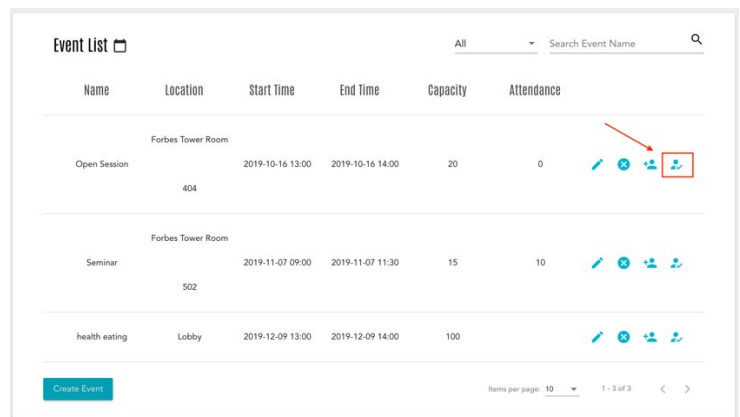
Add client to event

1. The Events tab allows a user to add clients to an event
2. In that event's row, click on the **person with a plus sign** to the far right
3. A "Sign up an Event" pop-up will appear
4. Type the client's name you wish to add in the search bar
5. Click on the blue **"Sign Up"** button



Event Attendance

1. Go to the Events tab
2. In the event's row, click on **person with check symbol** to the far right
3. An "Attendance" pop-up will appear
4. Type in the client's name in the search bar at the top
5. Click **"Attended"**




Screenings

Note: All questions in screenings should have a response, otherwise it will not be scored

Wellness Pavilion

Logout

←



Jane Doe

Encounters

Demographics

Screenings

Screening Result

History

Vitals

Clinical Information

Program Forms

Schedule

Screenings

Screenings for Adults

Screenings for Children

PROMIS GLOBAL HEALTH

* In general, would you say your health is

☐ Poor

☐ Fair

☐ Good

☐ Very good

☐ Excellent

* In general, would you say your quality of life is

☐ Poor

☐ Fair

☐ Good

☐ Very good

☐ Excellent

* In general, how would you rate your physical health

☐ Poor

☐ Fair

☐ Good

☐ Very good

☐ Excellent

* In general, how would you rate your mental health, including your mood and your ability to think

☐ Poor

☐ Fair

☐ Good

☐ Very good

☐ Excellent

* In general, how would you rate your satisfaction with your social activities and relationships

☐ Poor

☐ Fair

☐ Good

☐ Very good

☐ Excellent

* In general, please rate how well you carry out your usual social activities and roles. (This includes

☐ Poor

☐ Fair

☐ Good

☐ Very good

☐ Excellent

11

SHRS Wellness Pavilion Information System

User Manual

Part2

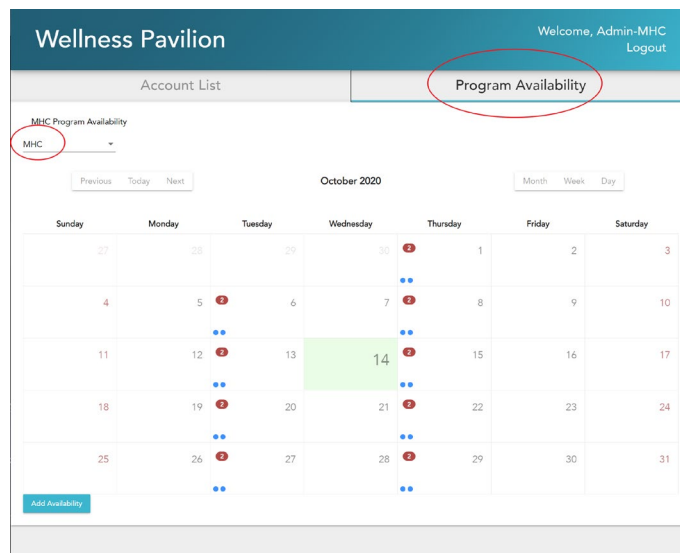
Contents

Appointments	3
Create appointment availability (program admin only)	3
Add appointments (clinician)	5
System Admin Functions	7
Overview	7
Screening	7
Outcome	8
Programs	8
Front Desk Account	9
Client View Pages	10
Encounters	11
Demographics	11
Screenings	12
Screening Results	12
History	13
Vitals	13
Clinical Information	14
Program Forms	14
Schedule	15
The schedule tab allows a clinician or admin to schedule an appointment for the client.	15
Events	15

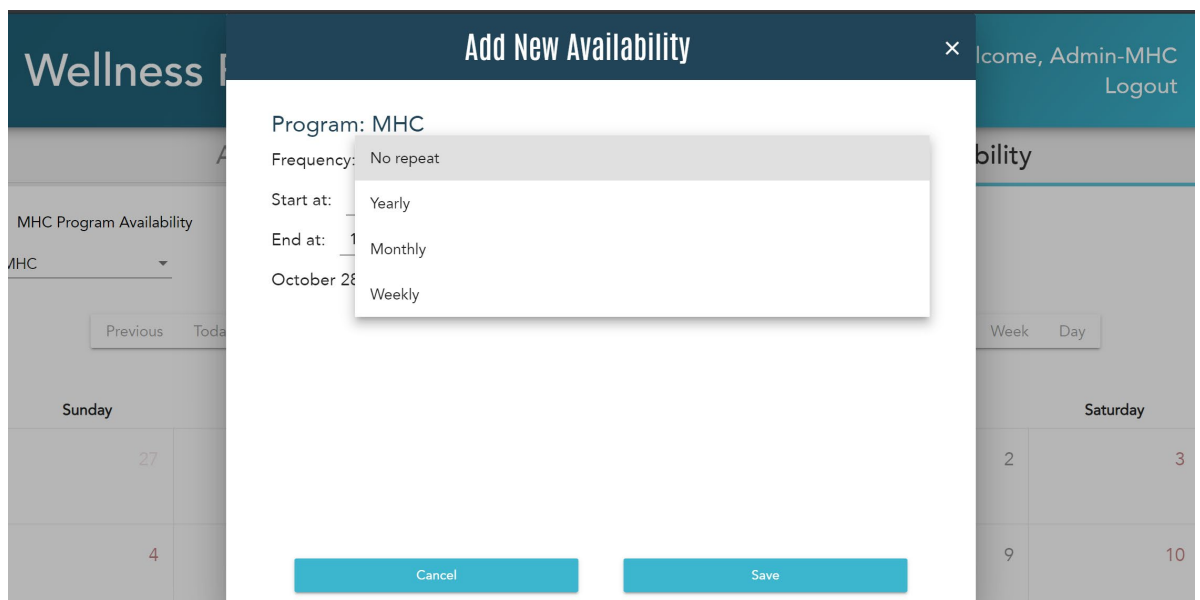
Appointments

Create program/appointment availability (program admin only)

1. Select the "Program Availability" tab in the upper right-hand corner
 - a) Note: Ensure sure that the correct option is selected in the drop down menu



2. Select a day from the calendar and select the blue "Add Availability" button in the bottom left corner.



3. For frequency, choose from the dropdown menu any repetitions of this availability (none, yearly, monthly, or weekly)
 - a) If "No repeat", omit this step and click the blue save button

- b) Note: If choosing Weekly, select the range of dates this applies to and select the available days in the week.

Add New Availability

Program: MHC

Frequency: Weekly

Start at: 1:00 PM

End at: 2:00 PM

Range: November 18, 2020 to April 30, 2021

☐ Sunday
 ☒ Tuesday
 ☐ Thursday
 ☐ Saturday
 ☐ Monday
 ☐ Wednesday
 ☐ Friday

Add Availability
 Cancel
 Save

- c) Note: Days with blue dots mean that clinicians can make appointments.

MHC

Previous Today Next

November 2020

Month Week Day

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Add Availability

Add appointments (clinician)





1. Login in as clinician.
2. Select the blue "View" button next to intended client

Wellness Pavilion

Welcome, Clinician-MHC Logout

Client List Events Appointments

Client Records MHC Search Client Name

First Name	Last Name	Middle Name	Date of Birth	Gender	Encounter	
Billy	George		Nov 6, 1981	Female	2019-01-22	
Van	Mezoist		Nov 10, 1984	Male	2018-09-13	
Marsha	Gomez		Jan 4, 1987	Female	2019-10-09	
mhcgp1	mhcgp1				2020-09-01	

3. Click Schedule from the list (clinicians can see the available time after program admin set availability)

MHC Program Appointment

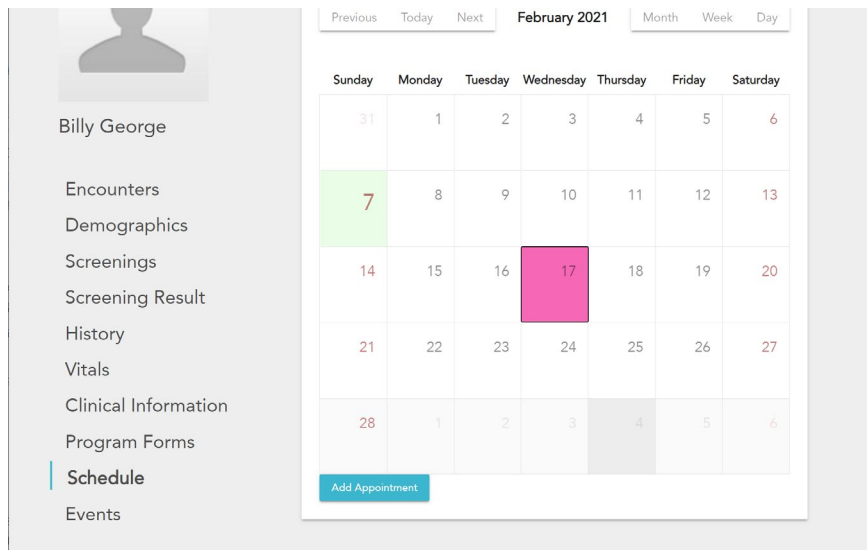
Previous Today Next February 2021

Sunday Monday Tuesday Wednesday Thursday

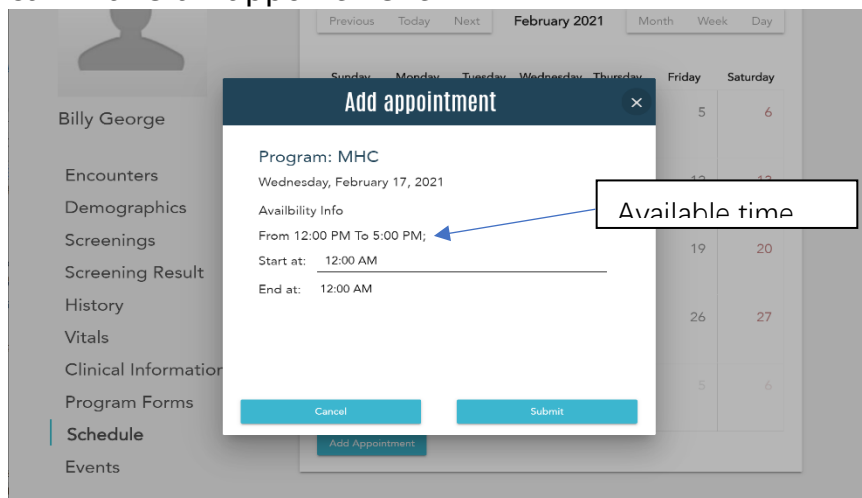
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Add Appointment

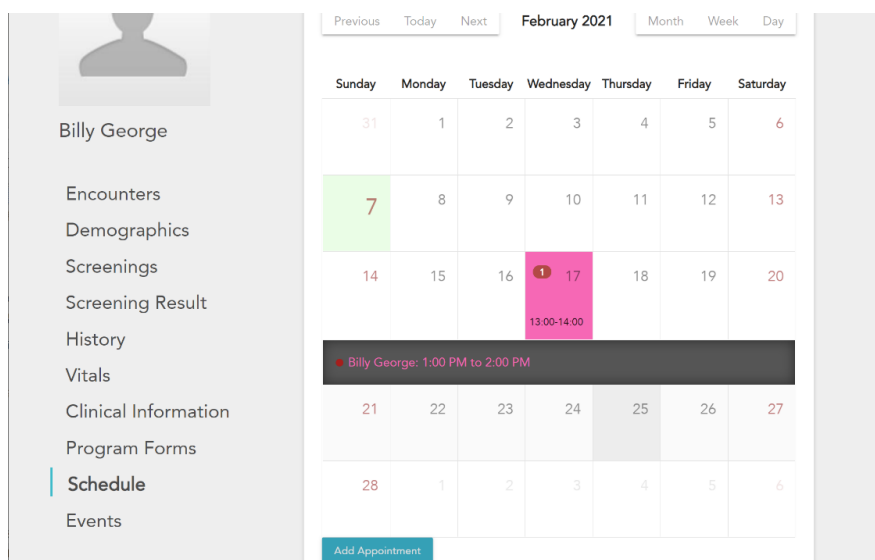
4. Select the day for which you want to make an appointment and click the blue "Add Appointment" button in the bottom left corner.



- The popup box shows the date and the available time that clients can make an appointment.



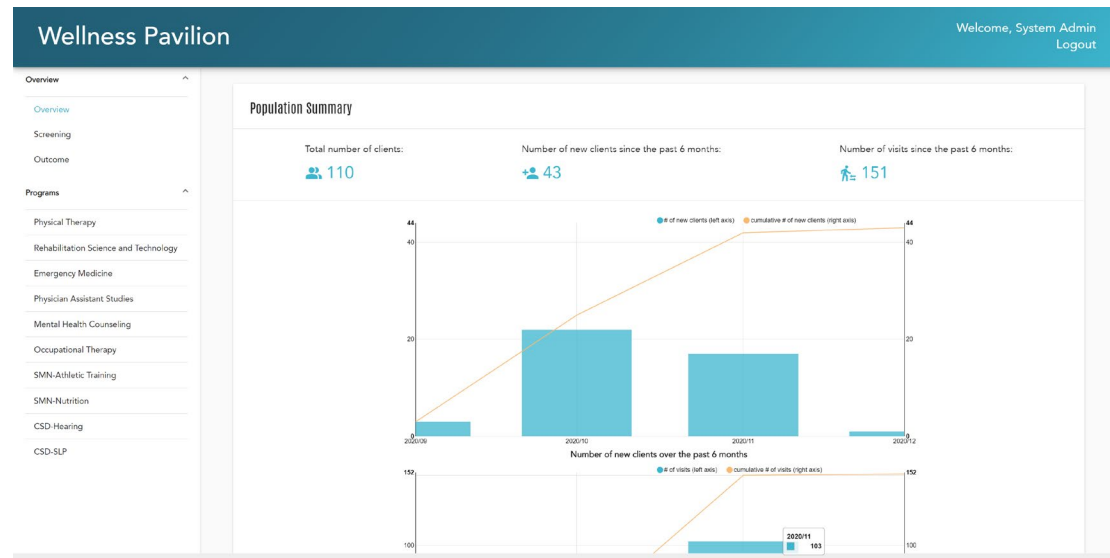
- After submitting, the information will be displayed on the calendar with a red circle on the selected day.



System Admin Functions

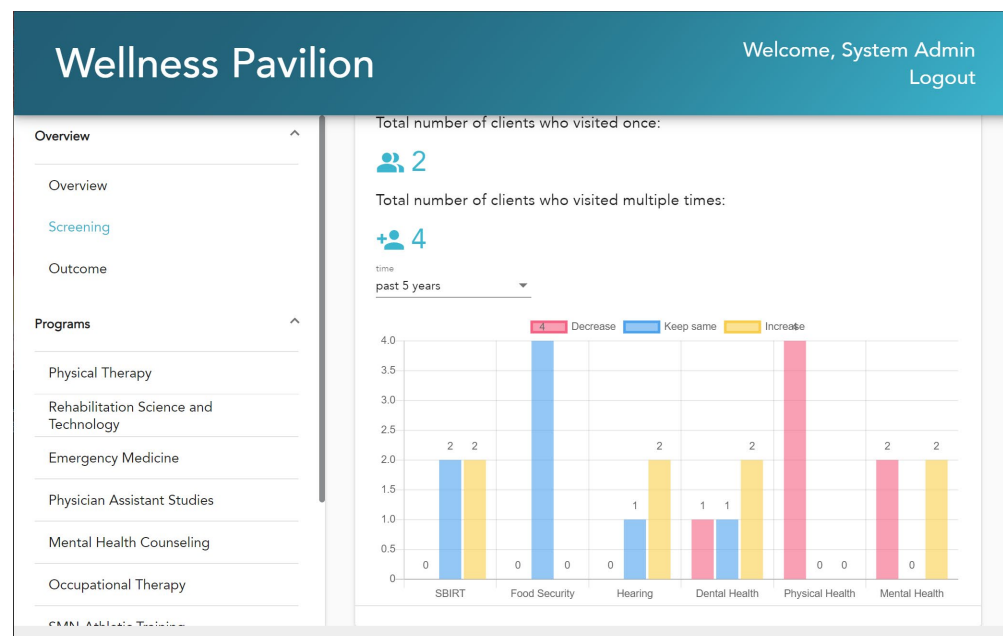
Overview

The overview tab displays the information from all clients across all programs.



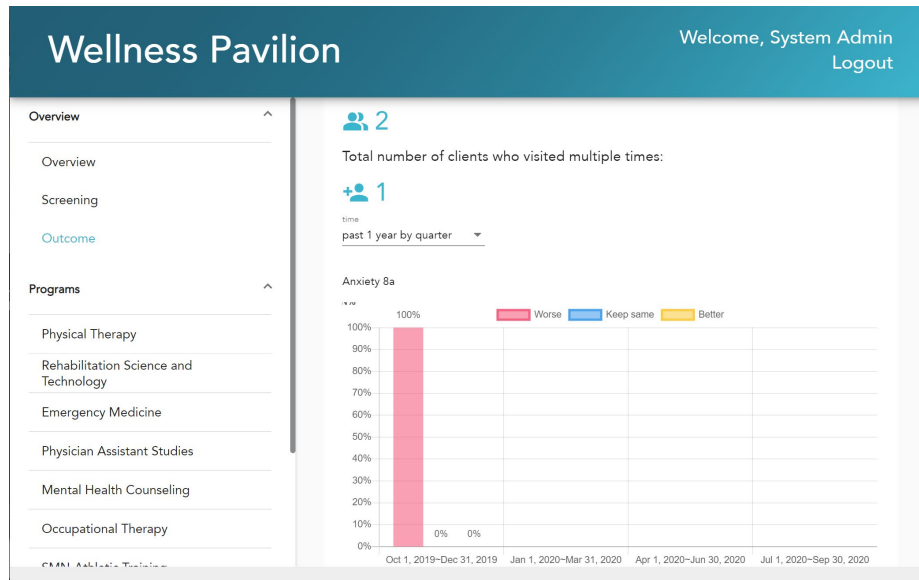
Screening

The screening tab shows statistics of wellness screening for all clients in all programs.



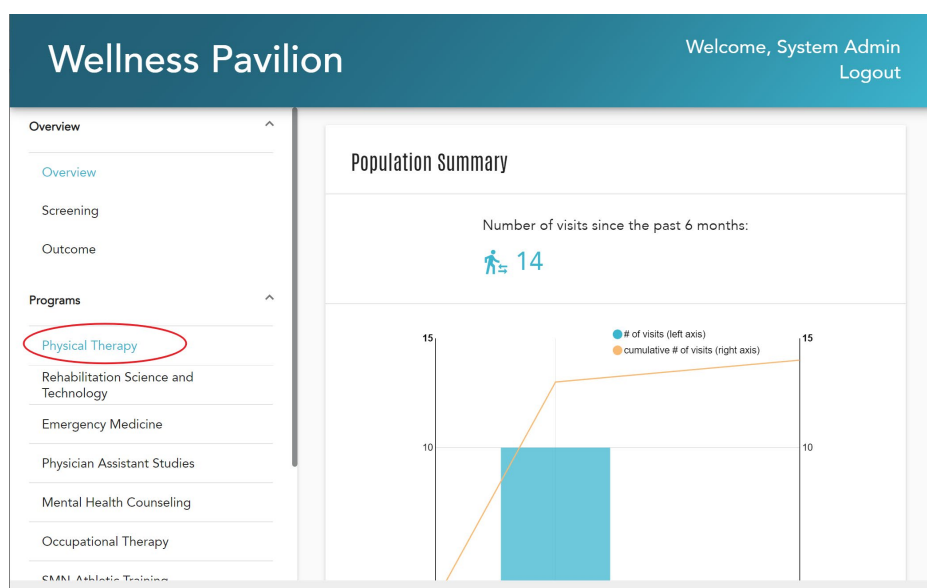
Outcome

The outcome tab displays the statistics for the data collected by every clinician from across all programs. The charts display the percentage of status change (better, same, or worse) for clients. (Note: the total number of clients who visited multiple times only includes the clients who have submitted the form more than twice. Additionally, the scores to be compared are the first and last scores within the period selected. Only valid scores are taken into statistics.)



Programs

The Programs tab shows statistics information (population, event, service, and outcome) of each program.



Front Desk Account

The front account has access to very limited functions including “Client List”, “Events”, and “Appointments” as shown in the photo below. Front Desk can add a new client to the system.

Wellness Pavilion

Welcome, Front Desk
Logout

Client List





Events

Appointments

Client Records

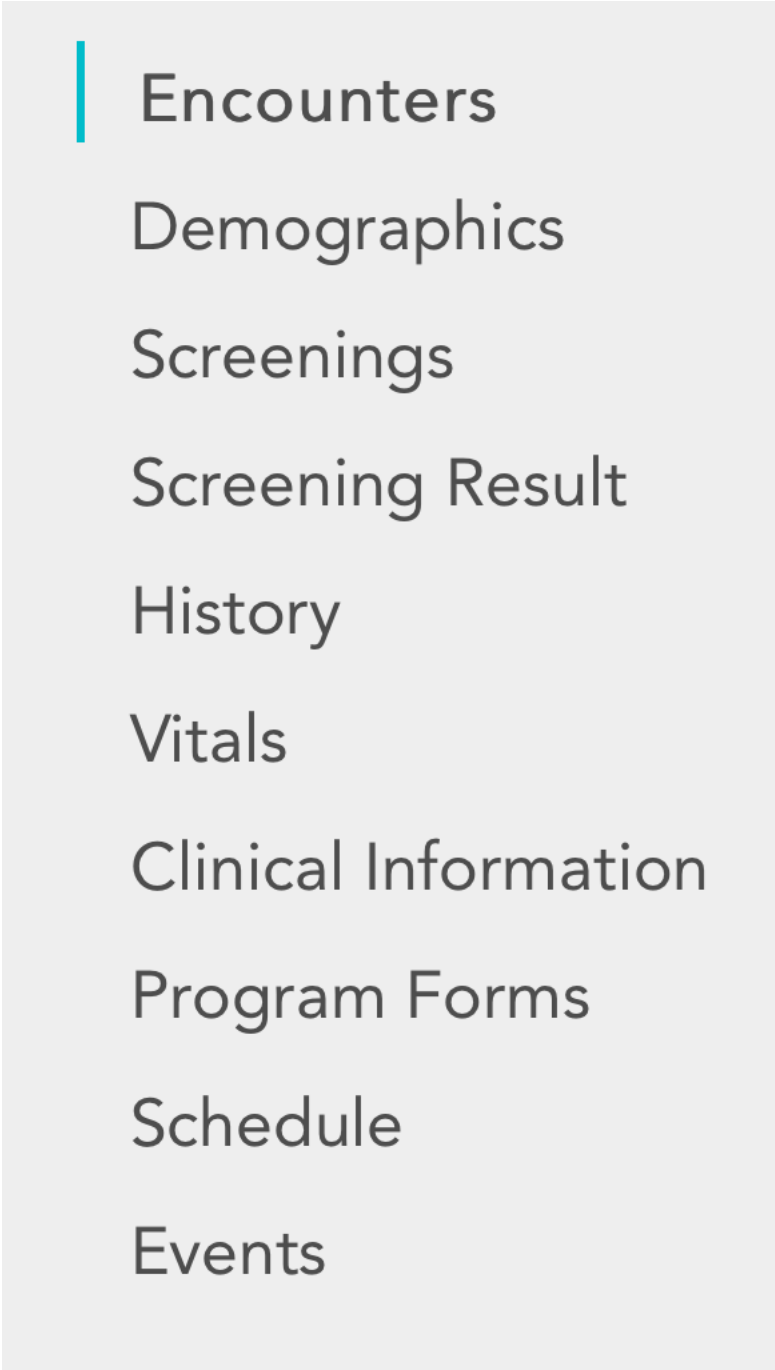
All

Search Client Name

First Name	Last Name	Middle Name	Date of Birth	Gender	Last Encounter
 Terrance	Woods	Kalepa	Sep 13, 1986	Female	Sep 13, 2018
 Roger	Curtis	Tyfiell	Sep 13, 1997	Male	Oct 9, 2019
 Erik	Singleton	Sujit	Sep 13, 1955	Female	Sep 13, 2018
 Glen	Guerrero	Neall	Sep 13, 1970	Female	Sep 13, 2018

Client View Pages

When a clinician or school admin selects a client, the following tabs appear on the left-hand side of the client screen. Clinicians will enter the data in these forms.

- 
- Encounters
 - Demographics
 - Screenings
 - Screening Result
 - History
 - Vitals
 - Clinical Information
 - Program Forms
 - Schedule
 - Events

Encounters

The encounters page keeps track of past encounters for a client.

The screenshot shows the 'Encounter List' page for Jane Doe. The header is 'Wellness Pavilion' with a user greeting 'Welcome, Clinician-OT' and a 'Logout' link. On the left, a sidebar lists navigation options: Encounters (highlighted), Demographics, Screenings, Screening Result, History, Vitals, Clinical Information, and Program Forms. The main content area is titled 'Encounter List' and includes a toggle switch for 'Hide other program's encounters'. Below this, a message states 'No Data Available'.

Demographics

The demographics tab is where all the basic information about is client is.

The screenshot shows the 'Demographics' page for Jane Doe. The header is 'Wellness Pavilion' with a user greeting 'Welcome, Clinician-OT' and a 'Logout' link. On the left, a sidebar lists navigation options: Encounters, Demographics (highlighted), Screenings, Screening Result, History, Vitals, Clinical Information, and Program Forms. The main content area is titled 'Demographics' and contains two sections: 'BASIC INFORMATION' and 'ADDRESS INFORMATION'. The 'BASIC INFORMATION' section includes fields for First Name (Jane), Last Name (Doe), Middle Name, Date of Birth (08/04/1999), Phone (9876533489), Email, Gender (Female), Race (White), and a dropdown for 'Do you consider yourself of Hispanic or Latino Origin?'. The 'ADDRESS INFORMATION' section is partially visible at the bottom.


Screenings

The screenings tab is a health form to be answered by clients every 6 months.

Wellness Pavilion

Welcome, Clinician-OT
Logout

←



Jane Doe

Encounters

Demographics

Screenings

Screening Result

History

Vitals

Clinical Information

Program Forms

Screenings

Screenings for Adults

Screenings for Children

PROMIS GLOBAL HEALTH

* In general, would you say your health is
☐ Poor ☐ Fair ☐ Good ☐ Very good ☐ Excellent

* In general, would you say your quality of life is
☐ Poor ☐ Fair ☐ Good ☐ Very good ☐ Excellent

* In general, how would you rate your physical health
☐ Poor ☐ Fair ☐ Good ☐ Very good ☐ Excellent

* In general, how would you rate your mental health, including your mood and your ability to think
☐ Poor ☐ Fair ☐ Good ☐ Very good ☐ Excellent

* In general, how would you rate your satisfaction with your social activities and relationships
☐ Poor ☐ Fair ☐ Good ☐ Very good ☐ Excellent

Screening Results

The screenings results tab reports the results for a client as reported in their screenings form.




History

The history tab is where the medical history for a client is filled.

Wellness Pavilion

Welcome, Clinician-OT
Logout

←



Jane Doe

Encounters

Demographics

Screenings

Screening Result

History

Vitals

Clinical Information

Program Forms

History

GENERAL

Medical History:

☐ a. Varicose Veins

☐ b. Hypertension

☐ c. Diabetes

☐ d. Sickle Cell

☐ e. Fibroids

☐ f. PID (Pelvic Inflammatory Disease)

☐ g. Severe Migraine

☐ h. Heart Disease

☐ i. Thrombosis/Stroke

☐ j. Hepatitis

☐ k. Gall Bladder Condition

☐ l. Breast Disease

☐ m. Depression

☐ n. Allergies

☐ o. Infertility

☐ p. Asthma

☐ q. Epilepsy

☐ r. Contact Lenses

☐ s. Contraceptive Complication (specify)

☐ t. Other (specify)

EXAM/TESTS


Vitals

The vitals tab is to keep track of the vitals taken for a client during each encounter,

Wellness Pavilion

Welcome, Clinician-OT
Logout

←



Jane Doe

Encounters

Demographics

Screenings

Screening Result

History

Vitals

Clinical Information

Program Forms

Vitals

Height	Weight (lbs)	BMI	BP (mmHg)	Heart Rate (BPM)	Temperature (F)	Oxygen Saturation	Time
5'4"	103	17.68	/			%	9/24/21, 5:59 PM

Add New Row

Height

51.5

51.0

50.5

50.0

50.5033

Clinical Information

The clinical information form is the be filled out by the clinician for each encounter,

The screenshot shows the 'Clinical Information' form within the 'Wellness Pavilion' application. The header bar is teal with 'Wellness Pavilion' on the left and 'Welcome, Clinician-OT Logout' on the right. A sidebar on the left lists navigation options: Jane Doe, Encounters, Demographics, Screenings, Screening Result, History, Vitals, Clinical Information (highlighted with a yellow border), and Program Forms. The main content area is titled 'Clinical Information' and contains several input fields: 'Clinical Supervisor Name:' and 'Student Name:' (text boxes), '* Chief Complaint:' and '* Reason for Encounter:' (text boxes with a small icon), '* Service Provided:' (text box with a small icon), 'ICD-10-CM code for Service:' (dropdown menu), '* Follow up:' (dropdown menu with 'Select' as the current value), 'Referred elsewhere:' (text box), and '* Encounter Category:' (dropdown menu with 'Select' as the current value). Below these fields is a section titled 'SOAP NOTE' with 'Subjective:' and 'Objective:' (text boxes with a small icon).

Program Forms

The program forms are to be filled out by the clinician. The clinician may select which form he/she needs at the top.

The screenshot shows the 'Program Forms - OT' form within the 'Wellness Pavilion' application. The header bar is teal with 'Wellness Pavilion' on the left and 'Welcome, Clinician-OT Logout' on the right. A sidebar on the left lists navigation options: Jane Doe, Encounters, Demographics, Screenings, Screening Result, History, Vitals, Clinical Information, and Program Forms (highlighted with a yellow border). The main content area is titled 'Program Forms - OT' and features a horizontal navigation bar with four tabs: 'Ability to Participate in Social Roles and Activities' (selected), 'AOTA Occupational Therapy Profile Form', 'Cognitive Function', and 'Em'. Below the tabs, a red error message states: 'You should create an encounter before adding new forms.' The main content area contains a section titled 'PLEASE RESPOND TO EACH ITEM BY MARKING ONE BOX PER ROW' with four items, each followed by five radio button options: 'Always', 'Usually', 'Sometimes', 'Rarely', and 'Never'. The items are: '* I have trouble doing all of my regular leisure activities with others', '* I have trouble doing all of the family activities that I want to do', '* I have trouble doing all of my usual work (include work at home)', and '* I have trouble doing all of the activities with friends that I want to do'.

Schedule

The schedule tab allows a clinician to schedule an appointment for the client.

The screenshot shows the 'OT Program Appointment' interface for Jane Doe. On the left is a sidebar with navigation links: Encounters, Demographics, Screenings, Screening Result, History, Vitals, Clinical Information, Program Forms, **Schedule** (highlighted), and Events. The main area displays a calendar for September 2021. The calendar has columns for Sunday through Saturday. Dates 29, 30, 31, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, and 27 are visible. The date 26 is highlighted in green. Below the calendar is an 'Add Appointment' button. At the top of the calendar area are tabs for 'Previous', 'Today', and 'Next', and a dropdown menu for 'Month', 'Week', and 'Day'.

Events

The events tab allows the clinician or school admin to create an event or add a client to an event.

The screenshot shows the 'Event List' interface for Jane Doe. On the left is a sidebar with navigation links: Encounters, Demographics, Screenings, Screening Result, History, Vitals, Clinical Information, Program Forms, Schedule, and **Events** (highlighted). The main area displays a table of events. The table has columns: Name, Programs, Location, Start Time, End Time, Capacity, and Attendance. The first row shows an event named 'CSD-H' with a capacity of 10 and 0 attendees. The event is scheduled for Sep 24, 2021, from 17:33 to 17:33. There is a 'Sign Up' button next to the event. At the top of the event list area are tabs for 'All' and a search bar for 'Search Event Name'. Below the table is a pagination bar showing 'Items per page: 10' and '0 of 0'.

