

Western Behavioral Health Information System

User Manual

Part 1

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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 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 Western Behavioral Health 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.

The image shows a "Please Login" screen. It has fields for "Enter your username" and "Enter your password". 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 "Create an Account" button, which is highlighted with a red border.

The image shows a "Register" form. It includes fields for "Enter your username" (JohnSmith), "Enter your password", "Re-type your password", "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), "Enter your phone" (555-555-5555), and "Enter your last name" (Smith). The "Register" button at the bottom left is highlighted with a red box.

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 browser window with a success message: "198.98.48.47 says register success" in a black bar. Below it is the same "Register" form as the previous image, with the "Register" button highlighted with a red box. A red arrow points from the success message to the "OK" button in the top right corner of the message bar.

Account Approval – Program Admin

1. Log in using your credentials for program admin

The screenshot shows the 'Wellness Pavilion' account list interface. At the top, there are filter options: 'Student', 'Professor', 'All' (selected), and 'Only Unapproved'. A search bar contains the name 'Alice'. The main table has columns: Status, First Name, Last Name, Sex, Age, Program, Category, Class, Email, and Phone. A single row is visible for Alice Suarez, who is marked as 'pending'. The status column shows a blue checkmark icon and a red 'X' icon.

| Status | First Name | Last Name | Sex | Age | Program | Category | Class | Email | Phone |
|---------|------------|-----------|------|-----|---------|----------|------------|----------------|----------------|
| pending | Alice | Suarez | male | 18 | student | | 2018-09-25 | ronen@gmail.co | (513) 784-1959 |

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

This screenshot is identical to the one above, showing the account list for Alice Suarez with the 'pending' status. The status column is highlighted with a red box.

| Status | First Name | Last Name | Sex | Age | Program | Category | Class | Email | Phone |
|---------|------------|-----------|------|-----|---------|----------|------------|----------------|----------------|
| pending | Alice | Suarez | male | 18 | student | | 2018-09-25 | ronen@gmail.co | (513) 784-1959 |

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.

This screenshot shows the same account list after approval. The 'Status' column for Alice Suarez now displays 'approved' with a blue checkmark icon, and the red 'X' icon is no longer present. The rest of the account details remain the same.

| Status | First Name | Last Name | Sex | Age | Program | Category | Class | Email | Phone |
|----------|------------|-----------|------|-----|---------|----------|------------|----------------|----------------|
| approved | Alice | Suarez | male | 18 | student | | 2018-09-25 | ronen@gmail.co | (513) 784-1959 |

Account Creation - Clinician

1. **Login**
2. On the “Client List” section of the Western Behavioral Health 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

Client Records

| First Name | Last Name | Middle Name | Date of Birth | Gender | Last Encounter |
|------------|-----------|-------------|---------------|--------|----------------|
| Yemima | Tabuni | | 1987-01-04 | Female | 2019-10-09 |
| Simon | Magai | | 2007-05-19 | Female | 2019-10-09 |
| Maria | Magai | | 2002-09-03 | Male | 2019-10-09 |

Create Client

Address 2: _____

City: _____ State: Select

Zipcode: _____

Living arrangement:

Alone With Spouse or unrelated partner With children With parents or guardian
 With relatives other than spouse, children or parents With nonrelatives

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

ADDITIONAL INFORMATION

Marry Status: Select Employment Status: Select

Other Comments: _____

Cancel **Upload**

Client Records

| First Name | Last Name | Middle Name | Date of Birth | Gender | Last Encounter |
|------------|-----------|-------------|---------------|--------|----------------|
| Yemima | Tabuni | | 1987-01-04 | Female | 2019-10-09 |
| Simon | Magai | | 2007-05-19 | Female | 2019-10-09 |
| Maria | Magai | | 2002-09-03 | Male | 2019-10-09 |
| Jane | Doe | | | | 2019-11-17 |

Create Client

Encounter List

No Data Available

Jane Doe

Encounters

Clinical Information

Demographics

Screenings

Screening Result

History

Vitals

Program Forms

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

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



Yemima Tabuni

Encounters

Demographics

Screenings

Screening Result

History

Vitals

Clinical Information

Program Forms

Program Forms - PT

Anxiety 8a Depression 8a Pain Interference 8a Physical Function 10a

1 You should create an encounter before adding new forms.

WEIGHT

* I felt fearful:

Never Rarely Sometimes Often Always

* I found it hard to focus on anything other than my anxiety:

Never Rarely Sometimes Often Always

* My worries overwhelmed me:

Never Rarely Sometimes Often Always

* I felt uneasy:

Never Rarely Sometimes Often Always

* I felt nervous:



Yemima Tabuni

Encounters

Demographics

Screenings

Screening Result

History

Vitals

Clinical Information

Program Forms

Program Forms - PT

Anxiety 8a Depression 8a Pain Interference 8a Physical Function 10a

1 You should create an encounter before adding new forms.

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* I found it hard to focus on anything other than my anxiety:

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* My worries overwhelmed me:

Never Rarely Sometimes Often Always

* I felt uneasy:

Never Rarely Sometimes Often Always

* I felt nervous:

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

I found it hard to focus on anything other than my anxiety:

Never Rarely Sometimes Often Always

* My worries overwhelmed me:

Never Rarely Sometimes Often Always

* I felt uneasy:

Never Rarely Sometimes Often Always

* I felt nervous:

Never Rarely Sometimes Often Always

* I felt like I needed help for my anxiety:

Never Rarely Sometimes Often Always

* I felt anxious:

Never Rarely Sometimes Often Always

* I felt tense:

Never Rarely Sometimes Often Always

Cancel **Submit**

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

The screenshot shows a sidebar with a user profile picture and a list of client details: Encounters, Demographics, Screenings, Screening Result, History, Vitals, Clinical Information, Program Forms, and Schedule. The 'Schedule' button is highlighted with a red box and an arrow pointing to it. The main area is a calendar for December 2019, showing days from Sunday to Saturday. A red dot is placed on December 1st at 10:30 - 14:30.

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

The screenshot shows a 'Schedule' section with a 'Add a schedule' button. Below it is a form for adding a new appointment: Program: PT, Start at: 13:00, End at: 13:45. The 'Submit' button is highlighted with a red box. In the background, there's a calendar for December 2019 with days from Sunday to Saturday. A red dot is placed on December 1st at 13:00 - 13:45.

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

The screenshot shows a calendar for December 2019 with days from Sunday to Saturday. A red dot is placed on December 1st at 13:00 - 13:45, indicating a successful appointment submission.

Track appointments

7. Click on the “appointments” tab to view all upcoming appointments

The screenshot shows the 'Wellness Pavilion' interface with a 'Welcome, Clinician' message and a 'Logout' button. The 'Appointments' tab is selected. Below it is a table titled 'Upcoming Appointment' with columns: First Name, Last Name, Age, Gender, Contact, Program, Start Time, End Time, and Status. Two entries are listed: Maria Magei (17, male) and Yemima Tabuni (32, female), both with a status of 'confirmed'. Each entry has 'submit' and 'reschedule' buttons. At the bottom, there are pagination controls: 'Items per page: 10', '1 - 2 of 2', and navigation arrows.

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

The screenshot shows the 'Events' tab selected in the top navigation bar. Below it is a table titled 'Event List' with columns: Name, Location, Start Time, End Time, Capacity, and Attendance. Two events are listed: 'Open Session' and 'Seminar'. At the bottom of the table is a blue 'Create Event' button, which is highlighted with a red box and has a red arrow pointing to it.

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

The screenshot shows a modal window titled 'Add New Event' with a dark header. Inside, there's a form for creating an event with fields for Name, Location, Start Time, End Time, Capacity, and Attendance. At the bottom right of the form is a blue 'Submit' button, which is highlighted with a red box and has a red arrow pointing to it.

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

The screenshot shows the 'Events' tab again. The 'Event List' table now includes a third row for 'health eating'. The 'Open Session' row has a red box around its pencil icon. A red arrow points from the text in step 6 to this pencil icon.

9. To delete an event, click on the “**x**” symbol next to the pencil icon

The screenshot shows the 'Events' tab once more. The 'Event List' table now only shows two rows: 'Seminar' and 'health eating'. The 'Open Session' row has a red box around its 'x' icon. A red arrow points from the text in step 9 to this 'x' 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

| Name | Location | Start Time | End Time | Capacity | Attendance | |
|-------------------|----------|------------------|------------------|----------|------------|--|
| Forbes Tower Room | | | | | | |
| Open Session | 404 | 2019-10-16 13:00 | 2019-10-16 14:00 | 20 | 0 | |
| Seminar | 502 | 2019-11-07 09:00 | 2019-11-07 11:30 | 15 | 10 | |
| health eating | Lobby | 2019-12-09 13:00 | 2019-12-09 14:00 | 100 | | |

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 List

Sign up an event

Search Client Name: Jane

| First Name | Last Name | Middle Name | Last Encounter |
|------------|-----------|-------------|----------------|
| Jane | Doe | | 2019-11-17 |

Event Attendance

1. Go to the Events tab
2. In the event's row, click on **person with check symbol** to the far right

| Name | Location | Start Time | End Time | Capacity | Attendance | |
|-------------------|----------|------------------|------------------|----------|------------|--|
| Forbes Tower Room | | | | | | |
| Open Session | 404 | 2019-10-16 13:00 | 2019-10-16 14:00 | 20 | 0 | |
| Seminar | 502 | 2019-11-07 09:00 | 2019-11-07 11:30 | 15 | 10 | |
| health eating | Lobby | 2019-12-09 13:00 | 2019-12-09 14:00 | 100 | | |

3. An "Attendance" pop-up will appear
4. Type in the client's name in the search bar at the top
5. Click "**Attended**"

Event List

Attendance

Search Client Name: Jane

| First Name | Last Name | Middle Name | Last Encounter |
|------------|-----------|-------------|----------------|
| Jane | Doe | | 2019-11-17 |

Screenings

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

WELLNESS Platform

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

Western Behavioral Health Information System

User Manual

Part2

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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

The screenshot shows the 'Wellness Pavilion' software interface. At the top, there's a navigation bar with 'Welcome, Admin-MHC' and 'Logout'. Below it is a sub-navigation bar with 'Account List' and 'Program Availability' (which is circled in red). A dropdown menu 'MHC Program Availability' is open, showing 'MHC' (also circled in red). The main area is a calendar for 'October 2020'. The days are color-coded: grey for Sunday, light blue for Monday, light green for Tuesday, light orange for Wednesday, light purple for Thursday, light pink for Friday, and light yellow for Saturday. Specific dates like October 14th are highlighted in green. At the bottom left of the calendar is a blue button labeled 'Add Availability'.

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

This screenshot shows a modal dialog box titled 'Add New Availability' over the Wellness Pavilion interface. The dialog contains the following fields:

- Program: MHC
- Frequency: No repeat
- Start at: Yearly (selected)
- End at: 1
- End date: October 28

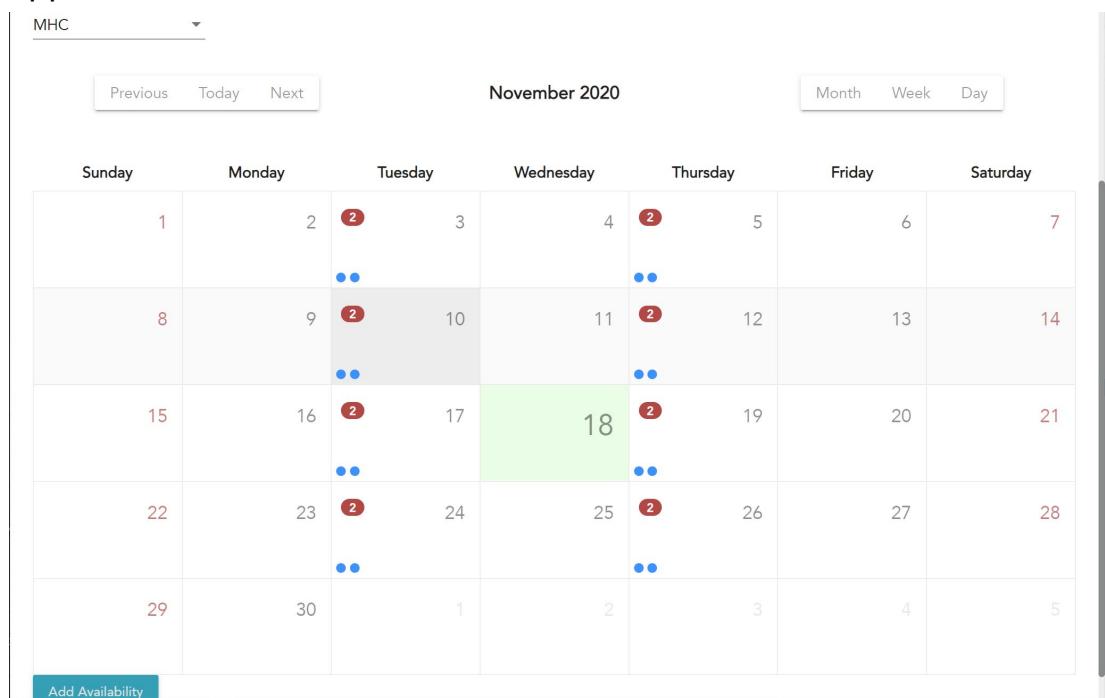
At the bottom of the dialog are two buttons: 'Cancel' (in white) and 'Save' (in blue).

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.

Program: MHC
Frequency: Weekly
Start at: 1:00 PM
End at: 2:00 PM
Range November 18, 2020 to April 30, 2021
 Sunday Monday
 Tuesday Wednesday
 Thursday Friday
 Saturday

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



Add appointments (clinician)

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

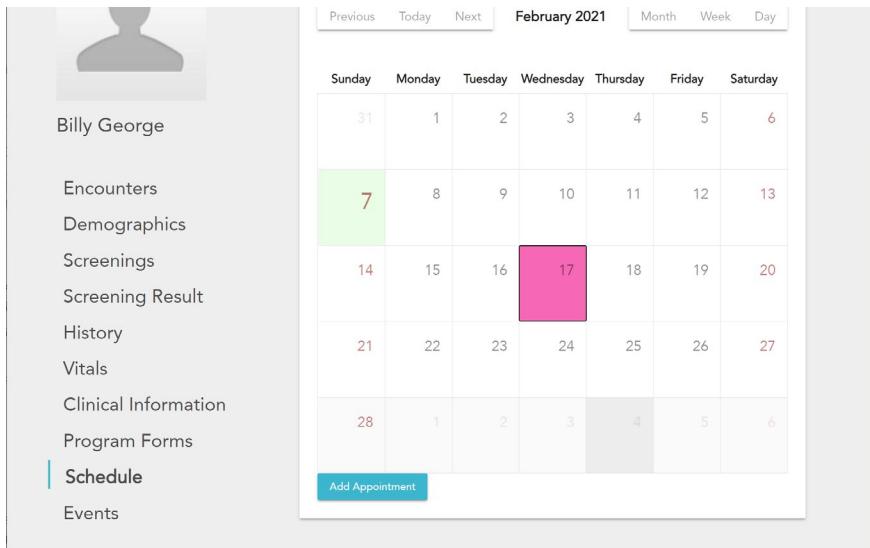
The screenshot shows the 'Wellness Pavilion' software interface. At the top, there's a teal header bar with the text 'Welcome, Clinician-MHC' and a 'Logout' link. Below the header, there are three tabs: 'Client List' (which is active and underlined), 'Events', and 'Appointments'. The main content area is titled 'Client Records' and contains a table with columns: First Name, Last Name, Middle Name, Date of Birth, Gender, and Encounter. There are four rows of data. The first row, for 'Billy George', has its profile picture circled in red. To the right of each row is a blue 'View' button. The table also includes a search bar at the top right labeled 'Search Client Name' with a magnifying glass icon.

| 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 |
| mhcпп1 | mhcпп1 | | | | 2020-09-01 |

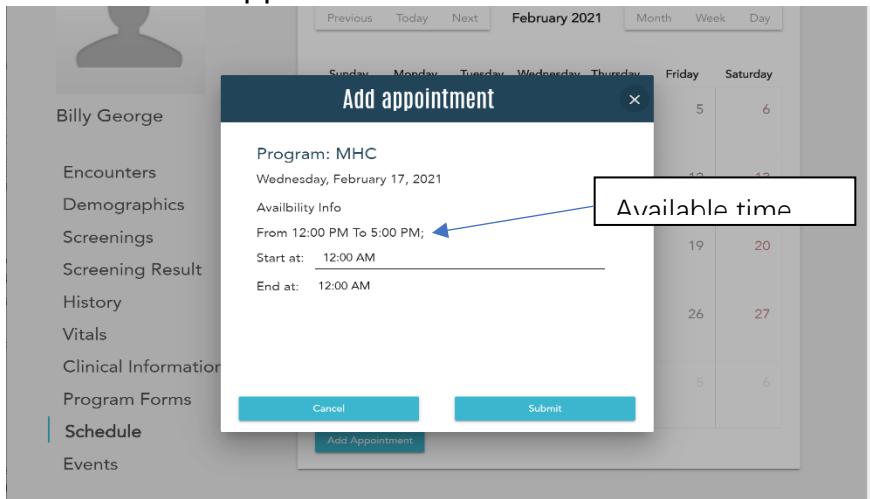
3. Click Schedule from the list (clinicians can see the available time after program admin set availability)

The screenshot shows the 'Schedule' section for 'Billy George'. On the left, there's a sidebar with links: Encounters, Demographics, Screenings, Screening Result, History, Vitals, Clinical Information, Program Forms, and Schedule. The 'Schedule' link is highlighted with a teal border. The main area is a calendar titled 'MHC Program Appointment' for February 2021. The calendar shows days from Sunday to Saturday. A red arrow points to the date '16' in the middle of the week, which is highlighted with a blue background. Other dates are shown in various colors (green, red, grey) to indicate different appointment types or statuses. At the bottom left of the calendar, there's a button labeled 'Add Appointment'.

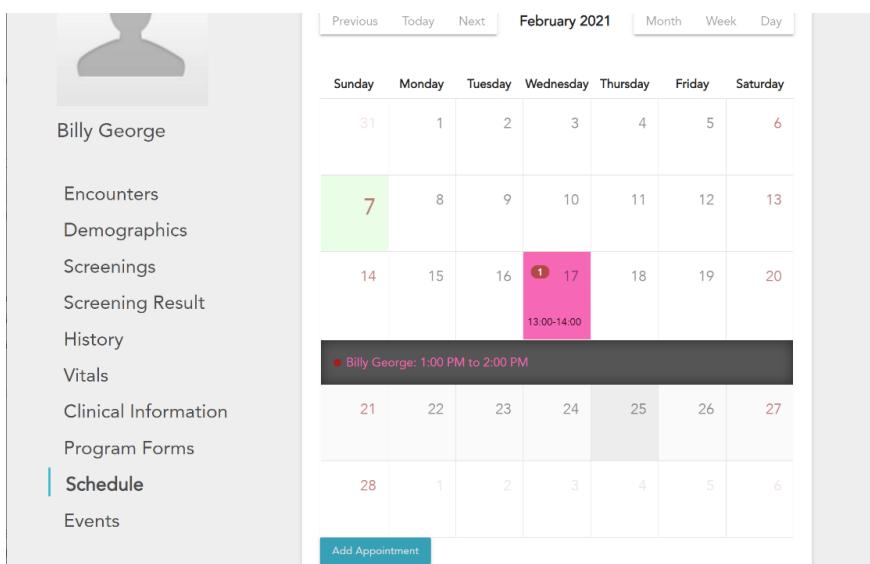
4. Select the day for which you want to make an appointment and click the blue "Add Appointment" button in the bottom left corner.



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



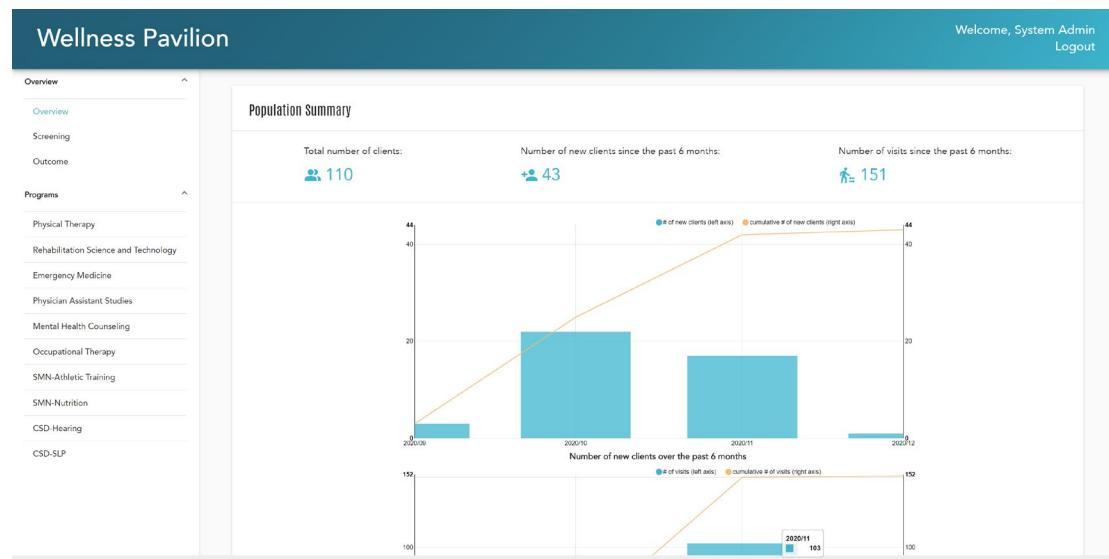
6. After submitting, the information will be displayed on the calendar with a red circle on the selected day.



System Admin Functions

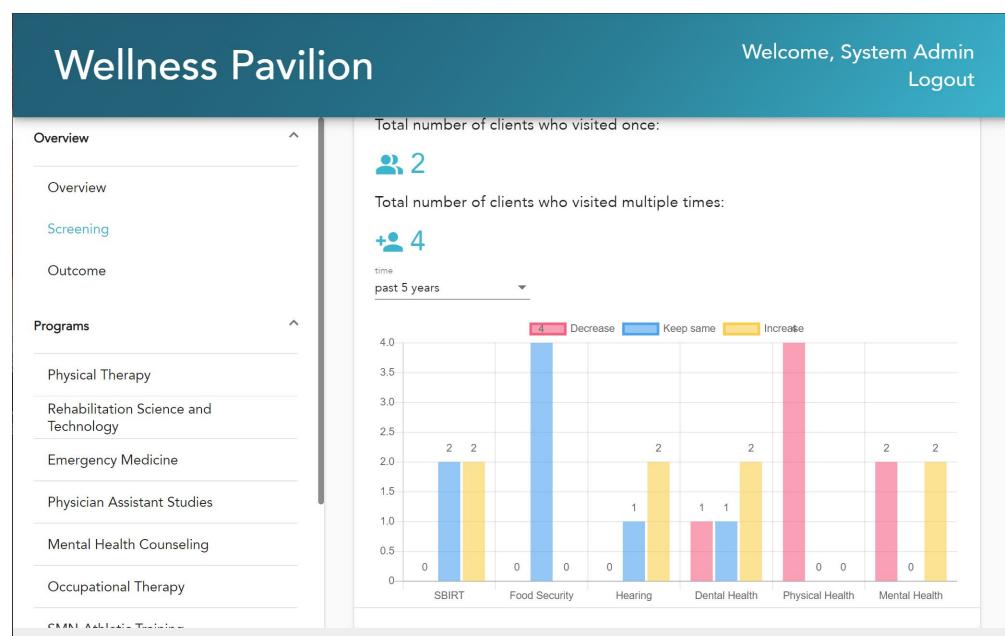
Overview

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



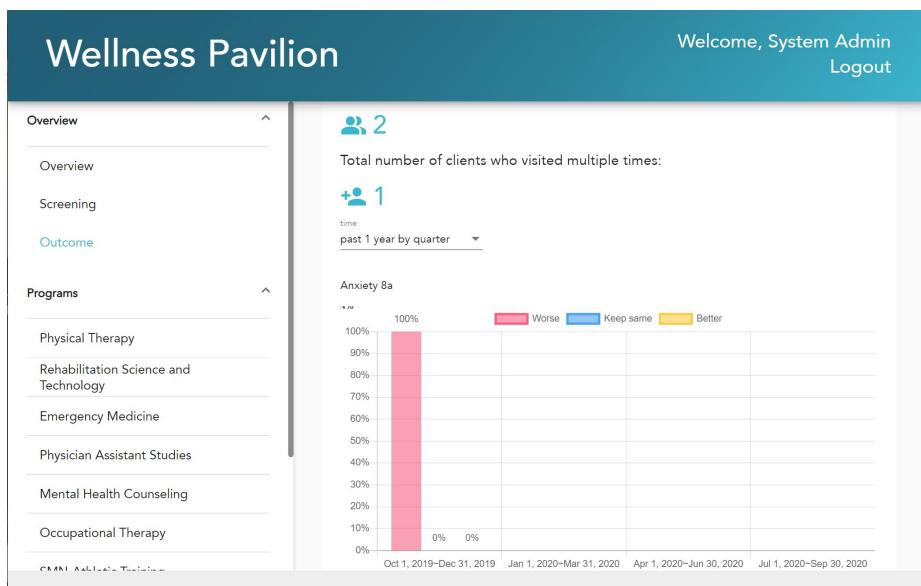
Screening

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



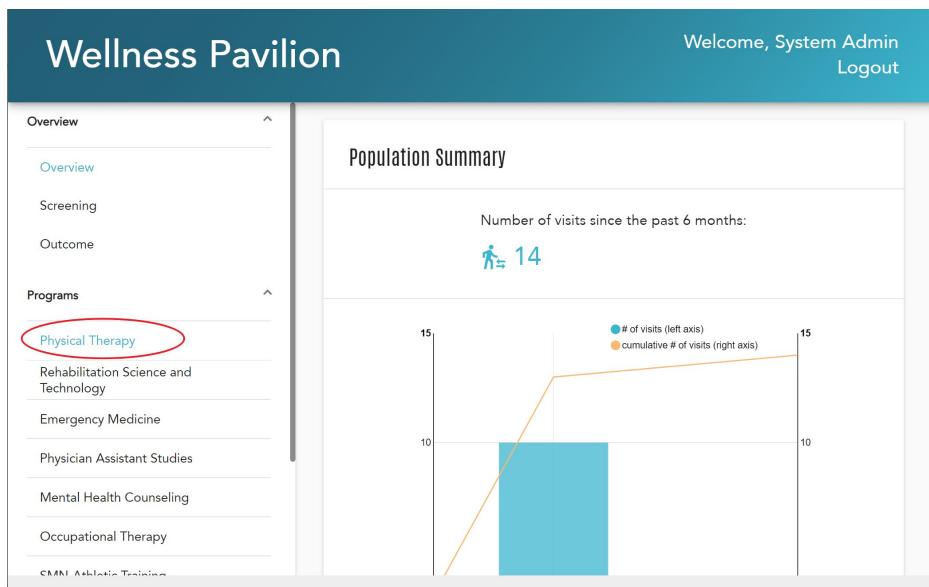
Outcome

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

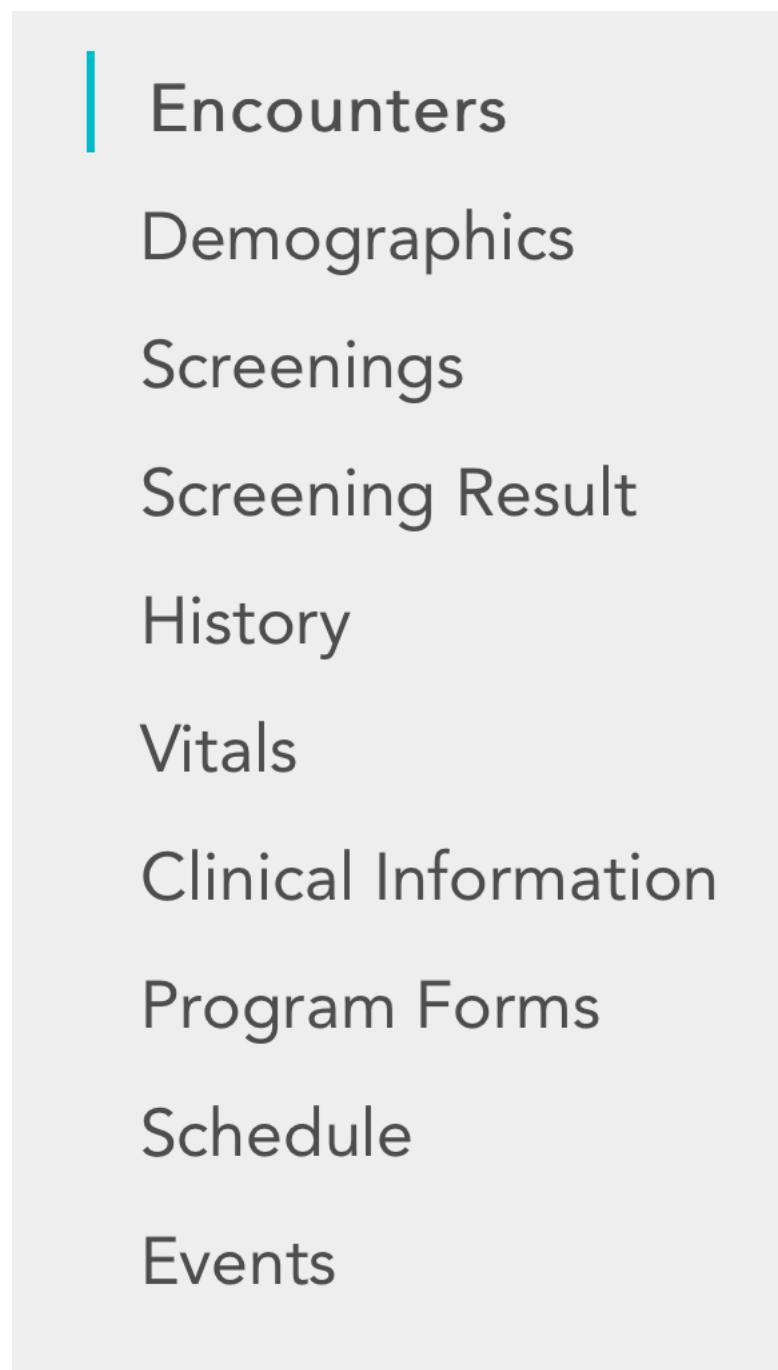
The front account has access to very limited functions including "Client List", "Events", and "Appointments" as shown in the photo below. Front Desk can add a new client to the system.

The screenshot shows the "Wellness Pavilion" application interface. At the top, there is a teal header bar with the text "Welcome, Front Desk" and a "Logout" link. Below the header, there are three main navigation tabs: "Client List", "Events", and "Appointments". The "Client List" tab is currently selected, indicated by a blue underline. The main content area is titled "Client Records" and displays a table of client information. The columns are labeled: First Name, Last Name, Middle Name, Date of Birth, Gender, and Last Encounter. There is also a dropdown menu set to "All" and a search bar labeled "Search Client Name" with a magnifying glass icon. The table contains four rows of data:

| 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

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

The screenshot shows the 'Wellness Pavilion' application interface. At the top, there's a header bar with 'Welcome, Clinician-OT' and a 'Logout' link. On the left, a sidebar displays a profile picture of 'Jane Doe' and a list of tabs: 'Encounters' (which is selected and highlighted in orange), 'Demographics', 'Screenings', 'Screening Result', 'History', 'Vitals', 'Clinical Information', and 'Program Forms'. The main content area is titled 'Encounter List' and contains a message 'No Data Available'.

Demographics

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

The screenshot shows the 'Wellness Pavilion' application interface. At the top, there's a header bar with 'Welcome, Clinician-OT' and a 'Logout' link. On the left, a sidebar displays a profile picture of 'Jane Doe' and a list of tabs: 'Encounters', 'Demographics' (which is selected and highlighted in orange), 'Screenings', 'Screening Result', 'History', 'Vitals', 'Clinical Information', and 'Program Forms'. The main content area is titled 'Demographics' and contains a section for 'BASIC INFORMATION' with fields for First Name, Last Name, Date of Birth, Email, Phone, Middle Name, Gender, Race, and Hispanic origin. Below this is a section for 'ADDRESS INFORMATION'.

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

Welcome, Clinician-OT Logout

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.

Wellness Pavilion Welcome, Clinician-OT Logout

Jane Doe

Encounters

Demographics

Screenings

Screening Result

History

Vitals

Clinical Information

Program Forms

Welcome, Clinician-OT Logout

Screening Result - Sep 24, 2021

Screenings for Adults Screenings for Children

Normalized Outcomes

SBIRT 100
80
60
40
20
0

Hearing & Communication Dental Health Food Security Mental Health Physical Health

120
100
80

Normalized Outcomes

History

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

The screenshot shows the 'Wellness Pavilion' software interface. At the top, it says 'Welcome, Clinician-OT' and 'Logout'. On the left, there's a profile picture of a person and a sidebar with links: Encounters, Demographics, Screenings, Screening Result, History (which is highlighted with an orange border), Vitals, Clinical Information, and Program Forms. The main area is titled 'History' and contains a section titled 'GENERAL'. It lists 'Medical History:' with various options (a-t) for conditions like Varicose Veins, Hypertension, Diabetes, etc., each with a checkbox. Below this is a 'VITALS' section.

Vitals

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

The screenshot shows the 'Wellness Pavilion' software interface. At the top, it says 'Welcome, Clinician-OT' and 'Logout'. On the left, there's a profile picture of a person and a sidebar with links: Encounters, Demographics, Screenings, Screening Result, History, Vitals (which is highlighted with an orange border), Clinical Information, and Program Forms. The main area is titled 'Vitals' and has a table for tracking vital signs: Height, Weight (lbs), BMI, BP (mmHg), Heart Rate (BPM), Temperature (F), Oxygen Saturation, and Time. Below the table is a chart titled 'Height' showing a single data point at 50.50. There's also a 'Add New Row' button.

Clinical Information

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

The screenshot shows the 'Clinical Information' page. At the top right, it says 'Welcome, Clinician-OT' and 'Logout'. On the left, there's a sidebar with a user profile picture and the name 'Jane Doe'. Below the profile are links: Encounters, Demographics, Screenings, Screening Result, History, Vitals, Clinical Information (which is highlighted with a yellow border), and Program Forms. The main content area is titled 'Clinical Information'. It contains fields for 'Clinical Supervisor Name' and 'Student Name', both with input boxes. Below these are fields for 'Chief Complaint' and 'Reason for Encounter' (both with input boxes), 'Service Provided' (with an input box), and 'ICD-10-CM code for Service' (with a dropdown menu). Further down are dropdown menus for 'Follow up' and 'Referred elsewhere', and another for 'Encounter Category'. At the bottom, there are two large input boxes labeled 'SOAP NOTE' under 'Subjective:' and 'Objective:'.

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' page. At the top right, it says 'Welcome, Clinician-OT' and 'Logout'. On the left, there's a sidebar with a user profile picture and the name 'Jane Doe'. Below the profile are links: Encounters, Demographics, Screenings, Screening Result, History, Vitals, Clinical Information, and Program Forms (which is highlighted with a yellow border). The main content area has tabs at the top: Ability to Participate in Social Roles and Activities, AOTA Occupational Therapy Profile Form, Cognitive Function, and Em... (with a right arrow). A red warning message says 'You should create an encounter before adding new forms.' Below the tabs, there's a section titled 'PLEASE RESPOND TO EACH ITEM BY MARKING ONE BOX PER ROW'. It contains four items, each with a list of five options: 'Always', 'Usually', 'Sometimes', 'Rarely', and 'Never'. The first item is: '* I have trouble doing all of my regular leisure activities with others'. The second is: '* I have trouble doing all of the family activities that I want to do'. The third is: '* I have trouble doing all of my usual work (include work at home)'. The fourth is: '* 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 'Schedule' tab for a client named 'Jane Doe'. On the left, there's a sidebar with links for Encounters, Demographics, Screenings, Screening Result, History, Vitals, Clinical Information, Program Forms, and Events. The 'Schedule' link is highlighted with an orange border. The main area displays a monthly calendar for September 2021. The days of the week are labeled at the top: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday. The dates are numbered from 29 to 4. The date '26' is highlighted with a green background, and a button labeled 'Add Appointment' is located at the bottom left of the calendar area.

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 'Events' tab for the same client 'Jane Doe'. The sidebar on the left includes the same set of links as the Schedule tab. The 'Events' link is highlighted with an orange border. The main area is titled 'Event' and contains a sub-section titled 'Event List'. It features a table with columns for Name, Programs, Location, Start Time, End Time, and Capacity. There is one listed event: 'Sep 24, 2021, Sep 24, 2021, lkjlkj, CSD-H, 17:33, 17:33'. A 'Sign Up' button is visible next to the end time. At the bottom of the event list, there are buttons for 'Items per page: 10' and navigation arrows for '0 of 0 < >'.

