CBT 12-Step Assessment System - User Guide

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Introduction

What is the CBT 12-Step Assessment System?

The CBT 12-Step Assessment System is a web-based platform designed to guide participants through a structured 12-step Cognitive Behavioral Therapy (CBT) program. The system facilitates a collaborative therapeutic process where participants complete written assessments, and licensed clinicians review and provide feedback on their work.

Who Uses This System?

The system serves three distinct user groups:

- **Participants**: Individuals enrolled in the 12-step CBT program who complete assessments
- **Clinicians**: Licensed mental health professionals who review participant work and provide clinical feedback
- **Supervisors**: Administrative staff who manage user accounts and oversee the system

How It Works

1. Participants log in and complete assessments for their current step
2. Assessments are submitted for clinician review
3. Clinicians review submissions and either approve them or request revisions
4. Once approved, participants advance to the next step
5. The process continues through all 12 steps

Getting Started

Accessing the System

The CBT 12-Step Assessment System is accessed through a web browser at the URL provided by your program administrator. The system works best on:

- **Desktop/Laptop**: Chrome, Firefox, Safari, Edge (recommended)
- **Mobile**: iOS Safari, Chrome for Android (basic functionality)
- **Internet Connection**: Stable connection required

Login Credentials

For Participants (Test Account):

- **State ID:** `ID100001`

- **Password:** `Test123!`

For Clinicians and Supervisors (Test Accounts):

- **Supervisor Admin ID:** `ADMIN001`
- **Supervisor Password:** `Admin123!`
- **Clinician Admin ID:** `ADMIN002`
- **Clinician Password:** `Admin456!`

First Time Login

1. Navigate to the login page
2. Enter your credentials carefully (credentials are case-sensitive)
3. Click "Login"
4. You'll be directed to your dashboard

Note: If you forget your password, contact your program supervisor or system administrator.

Walkthrough: Core Clinical Workflow

This section provides a live example of the primary workflow using the test accounts.

Step 1: Participant Submits Assessment

1. **Log in as Participant:**
   - Go to the main login page (`/login`).
   - **State ID:** `ID100001`
   - **Password:** `Test123!`
2. From the dashboard, click **"Start Assessment"** for Step 1.
3. Answer all the questions and click **"Finish Assessment"**.
4. Your dashboard will now show the status for Step 1 as **"Pending Review"**.
5. Log out.

Step 2: Supervisor Reviews and Approves

1. **Log in as Supervisor:**
   - Go to the admin login page (`/admin/login`).
   - **Admin ID:** `ADMIN001`
   - **Password:** `Admin123!`
2. On the Admin Dashboard, find the pending submission from **David Fisher (ID100001)**.
3. Click **"Review"**.
4. Scroll to the bottom, select **"Approve"**, and click **"Submit Review"**.
5. Log out.

Step 3: Participant Verifies Approval

1. **Log back in as Participant** (`ID100001` / `Test123!`).
2. Observe the green approval notification on your dashboard.
3. Note that your "Current Step" is now **Step 2**. You are unblocked and can proceed.

For Participants

Your Dashboard

After logging in, you'll see your participant dashboard which displays:

- **Current Step**: The step you're currently working on (1-12)
- **Assessment Status**: Whether you have an assessment in progress, pending review, approved, or requiring revision
- **Progress Tracker**: Number of steps completed out of 12
- **Assessment History**: Past assessments you've completed
- **Approval Notifications**: Alerts when your work is approved

Taking an Assessment

Starting a New Assessment

1. From your dashboard, locate the "Current Step" section
2. Click the **"Start Assessment"** button
3. You'll be presented with the first question

Answering Questions

Assessments contain a mix of question types:

- **Written Response Questions**: Type your answer in the text box provided. Take your time to provide thoughtful, complete responses.
- **Multiple Choice Questions**: Select the option that best applies to your situation.

Tips for Success:

- Answer honestly and thoughtfully
- There are no "wrong" answers - this is about your personal journey
- Save your work by clicking "Next" after each question
- You can see your progress at the top of each question page

Navigating Through Questions

- Click **"Next"** to save your answer and move to the next question
- Your progress is shown at the top (e.g., "Question 3 of 10")
- You cannot go back to previous questions once you click "Next"

Completing and Submitting

1. After answering the final question, you'll be directed to a completion page
2. Your assessment is automatically submitted to your assigned clinician
3. You'll return to your dashboard where status will show **"Pending Clinician Review"**

After Submission

Waiting for Review

- Your dashboard will show a yellow notification: **"Pending Clinician Review"**
- You cannot proceed to the next step until your work is reviewed
- Check back periodically or wait for notification from your counselor

If Your Work is Approved

- You'll see a green approval banner on your dashboard
- The banner shows:

    - Which step was approved
    - The clinician who reviewed it
    - Any notes from your clinician
- Click **"Got it, thanks!"** to dismiss the notification
- You can now start the next step by clicking **"Start Step [X]"**

If Revision is Requested

- You'll see a red notification: **"Revision Requested"**
- Read the clinician's feedback carefully
- Click **"Revise Your Work"** to create a new attempt
- Address the specific concerns mentioned in the feedback
- Your new submission will be attempt #2 (or higher)

Assessment History

The bottom of your dashboard shows all previously completed assessments:

- Step number and title
- Review status (Approved or Needs Revision)
- Clinician who reviewed it
- Date reviewed
- Clinician notes/feedback

This history helps you track your progress and review feedback from earlier steps.

Tips for Participants

- **Be Thorough**: Detailed, thoughtful responses are more likely to be approved on the first submission
- **Be Honest**: This is your personal recovery journey - honest reflection is essential
- **Read Feedback Carefully**: If revision is requested, make sure you understand and address all concerns
- **Keep Track**: Review your assessment history to see patterns in feedback
- **Ask Questions**: If you don't understand feedback, contact your counselor before revising

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For Clinicians

Clinician Dashboard

Your dashboard shows:

- **Pending Assessments**: Submissions waiting for your review (sorted by submission date)
- **Your Statistics**: Number of participants assigned to you, pending reviews
- **Quick Actions**: Links to review assessments

Reviewing Assessments

Accessing Submitted Assessments

1. From your dashboard, locate the "Pending Assessments" section
2. Click **"Review"** next to the assessment you want to review
3. You'll see the participant's responses to all questions

Review Page Layout

The review page displays:

- **Participant Information**: Name, State ID, current step
- **Assessment Details**: Step number, title, attempt number, submission date
- **Questions and Responses**: Each question with the participant's answer
- **Review Form**: Where you provide feedback

Providing Feedback

For each response, you can:

1. **Add a Comment**: Provide specific feedback on that answer
2. **Mark for Revision**: Check the box if this response needs improvement

Making a Decision

At the bottom of the review page:

Option 1: Approve the Assessment

1. Select **"Approve"** from the decision dropdown
2. Optionally add overall notes of encouragement
3. Click **"Submit Review"**
4. The participant will be notified and can advance to the next step

Option 2: Request Revisions

1. Select **"Needs Revision"** from the decision dropdown
2. **Required**: Provide clear, specific notes explaining:
    - What needs to be improved
    - Why it needs improvement
    - How they can strengthen their responses
3. Click **"Submit Review"**
4. The participant will see your feedback and can submit a revised version

Managing Your Workload

Prioritizing Reviews

- Pending assessments are sorted by submission date (oldest first)
- Participants cannot progress until you review their work
- Aim to review within 24-48 hours when possible

Viewing All Assessments

- Click **"View All Assessments"** to see all submissions (not just pending)
- Filter by status (all, pending, approved, needs revision)
- Filter by specific participant

Best Practices for Clinicians

- **Be Specific**: Vague feedback like "needs more detail" isn't as helpful as "Please expand on what triggered this particular feeling"
- **Be Encouraging**: Acknowledge effort and progress, even when requesting revisions
- **Be Timely**: Prompt reviews help maintain participant engagement
- **Be Consistent**: Use similar standards across all participants
- **Document Concerns**: If you have clinical concerns based on responses, document them in your notes and follow your facility's protocols

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For Supervisors

Supervisor Capabilities

Supervisors have all clinician capabilities plus additional administrative functions:

- User management (create, edit, deactivate participant accounts)
- Admin management (create, edit, deactivate clinician and supervisor accounts)
- System oversight
- User assignment to clinicians

Accessing Management Functions

From the admin dashboard, as a supervisor, you will see a "Management" section with two buttons:

1. Click **"Manage Users"** to go to the User Management page.
2. Click **"Manage Admins"** to go to the Admin Management page.

User Management Overview

The User Management page displays:

- **Search Bar**: Search by participant name or State ID
- **Filter Options**: Filter by current step or assigned clinician
- **User List**: All participants with their information
- **Action Buttons**: Edit or Deactivate each user

Searching and Filtering Users

Search by Name or ID

1. Enter the participant's name (first or last) or State ID in the search box
2. Click **"Search"**
3. Results will filter to match your search term

Filter by Step

1. Use the "Filter by Step" dropdown
2. Select a step number (1-12)
3. Click **"Search"**
4. Only participants on that step will be shown

Filter by Assigned Clinician

1. Use the "Filter by Clinician" dropdown
2. Select a clinician's name
3. Click **"Search"**
4. Only participants assigned to that clinician will be shown

Clear Filters

- Click **"Clear"** to reset all filters and show all users

Creating a New Participant

1. Click the **"Create New User"** button (top right)
2. Fill in the form:
    - **State ID**: 2-letter state code + 8 digits (must be unique)
    - **First Name**: Participant's legal first name

    - **Last Name**: Participant's legal last name
    - **Password**: Minimum 8 characters, must include uppercase, lowercase, number, and special character
    - **Confirm Password**: Re-enter the same password
    - **Starting Step**: Usually 1 (unless transferring from another program)
    - **Assigned Clinician**: Select from dropdown (optional, can be assigned later)
3. Click **"Create User"**
4. The participant can now log in with their State ID and the password you set

Important: Write down or securely transmit the password to the participant and their counselor.

Editing an Existing Participant

1. Find the participant in the user list (use search if needed)
2. Click the **"Edit"** button next to their name
3. Update any of the following:
    - First Name
    - Last Name
    - Current Step (use cautiously - this overrides their progress)
    - Assigned Clinician
    - Password (leave blank to keep current password)
4. Click **"Update User"**

Warning: Changing a participant's current step will affect which assessment they can access. Only do this if you're certain (e.g., correcting an error, manual override).

Deactivating a Participant

Use this when a participant:

- Completes the program
- Leaves the program
- Transfers to another facility
- Should no longer have access

To Deactivate:

1. Find the participant in the user list
2. Click the **"Deactivate"** button next to their name
3. Confirm the action when prompted
4. The user status changes to "Inactive"
5. They can no longer log in

Note: Deactivation is a "soft delete" - the participant's data remains in the system for record-keeping, but they cannot access the system.

Best Practices for Supervisors

- **Double-Check State IDs**: Ensure they're unique and correctly formatted before creating accounts
- **Secure Password Handling**: Use a secure method to transmit passwords to participants
- **Regular Audits**: Periodically review active users and deactivate those who are no longer in the program
- **Clinician Balance**: Distribute participants evenly among clinicians when possible
- **Document Changes**: If you manually change a participant's step, document why in your facility records

- **Backup Contact Info**: Keep participant contact information outside the system in case of technical issues

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Troubleshooting & Support

Common Issues

"Invalid State ID or password"

Causes:

- Incorrect State ID format
- Typo in State ID or password
- Account has been deactivated

Solutions:

- Verify State ID format: 2 letters + 8 digits (e.g., "TX12345678")
- Check for caps lock - passwords are case-sensitive
- Contact your supervisor if you believe your account should be active

"You must complete Step X first"

Cause: Attempting to access an assessment for a step you haven't reached yet

Solution: Complete your current step first. You must complete steps in order.

Assessment Shows "In Progress" But I Want to Start Over

Cause: You started an assessment but didn't complete it

Solution: You cannot restart an in-progress assessment. Click "Resume Assessment" to continue where you left off. If you need to start completely fresh, contact your clinician or supervisor.

Can't Find the Assessment I Just Submitted

Cause: Looking for it in the "Current Step" section when it's actually under "Assessment History"

Solution: After submission, your assessment moves to "Pending Review" status. It will appear in your Assessment History once reviewed.

Page Won't Load or Looks Broken

Causes:

- Browser compatibility issues
- Slow internet connection
- Temporary server issue

Solutions:

- Try refreshing the page (F5 or Ctrl+R)
- Clear your browser cache and cookies
- Try a different browser (Chrome or Firefox recommended)
- Check your internet connection
- Wait a few minutes and try again
- Contact technical support if the issue persists

Technical Requirements

- **Browser**: Modern web browser (Chrome, Firefox, Safari, Edge) - updated within the last year
- **Internet**: Stable broadband connection (minimum 1 Mbps)
- **Screen Resolution**: Minimum 1024x768 (larger recommended for better experience)
- **JavaScript**: Must be enabled
- **Cookies**: Must be enabled for login functionality

Getting Help

For Participants

- Contact your assigned counselor or clinician
- Ask during group or individual therapy sessions
- Contact the facility's administrative staff

For Clinicians and Supervisors

- Contact your system administrator
- Consult your facility's IT department
- For urgent technical issues, contact emergency technical support

Privacy and Security

- **Never share your login credentials** with anyone
- **Always log out** when finished, especially on shared computers
- **Use a secure internet connection** - avoid public Wi-Fi when accessing the system
- **Report any suspected security issues** to your supervisor immediately
- All data is encrypted and stored securely in compliance with HIPAA regulations

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Appendix

Quick Reference: Password Requirements

- Minimum 8 characters
- Must include at least one uppercase letter (A-Z)
- Must include at least one lowercase letter (a-z)
- Must include at least one number (0-9)
- Must include at least one special character (!@#$%^&*)

Example of a valid password: `Recovery2024!`

Quick Reference: State ID Requirements

- Format: **2 uppercase letters followed by 4 to 10 digits.**
- The two letters represent a state code (e.g., CA, TX, NY).
- The digits provide a unique identifier for the participant.
- Must be unique (no two participants can have the same State ID).

Examples:

- Valid: `ID1234`, `TX87654321`, `NY11223344`
- Invalid:
  - `id1234` (lowercase letters)
  - `CAB12345` (more than 2 letters at the start)
  - `ID123` (fewer than 4 digits)

- `ID12345678901` (more than 10 digits)
- `ID12-34` (contains hyphen)

Quick Reference: Assessment Statuses

Status	What It Means	What You Can Do
Ready to Begin	You haven't started the assessment yet	Click "Start Assessment"
In Progress	You started but haven't finished	Click "Resume Assessment"
Submitted / Pending Review	Waiting for clinician to review	Wait for review - check back later
Approved	Clinician approved your work	Proceed to next step
Needs Revision	Clinician requests changes	Review feedback and click "Revise Your Work"

Quick Reference: User Account Statuses

Status	Meaning	Login Access
Active	Account is in good standing	Yes
Inactive	Account has been deactivated	No

For additional support or questions not covered in this guide, please contact your program supervisor or system administrator.

CBT 12-Step Assessment System - Empowering Recovery Through Structured Support