Practitioner Portal WebApplication Help Manual

IASIS Official Platform

Index

1. Practitioner Login Screen

To start the login process, follow these steps:

Step 1: Open Your Web Browser. Launch the preferred web browser (e.g. Chrome, Firefox, Safari) on your device.

Step 2: Enter the Practitioner's Website URL. In the address bar, type the URL of the Practitioner's website: https://iti.iasistech.com/

Logging In:

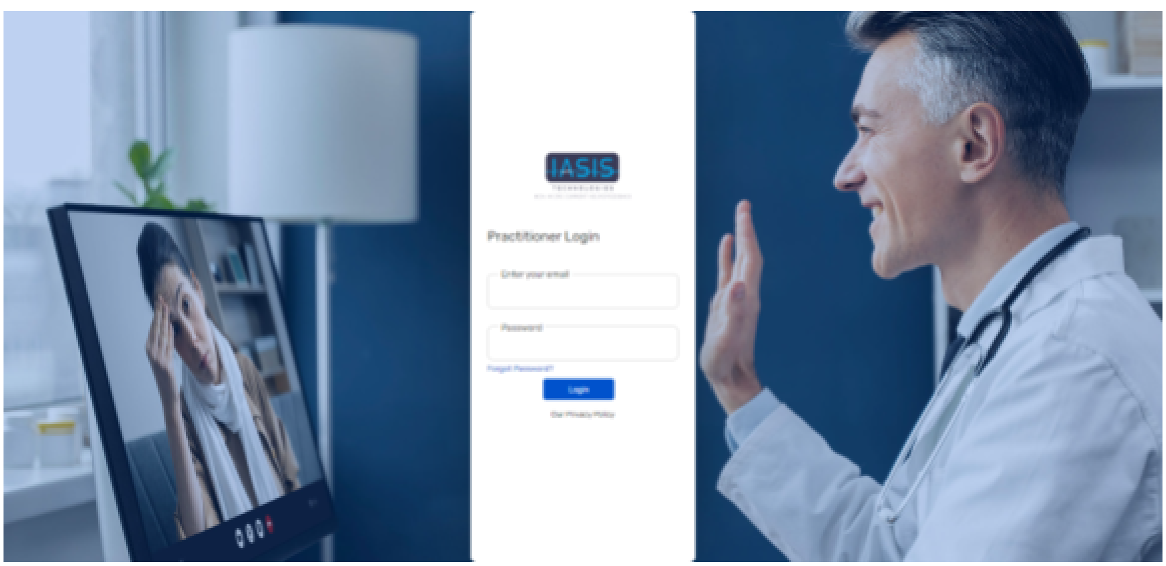
Now, let's log in to your Practitioner account:

Step 1: On the login page, find the "Email" field. Enter the email address associated with your Practitioner account into this field.

Step 2: Locate the "Password" field on the same page. Type your password into this field.

Step 3: Once your email and password are correctly entered, click the "Login" button.

Step 4: Upon successful login, you will be directed to the "Manage Clients" page.

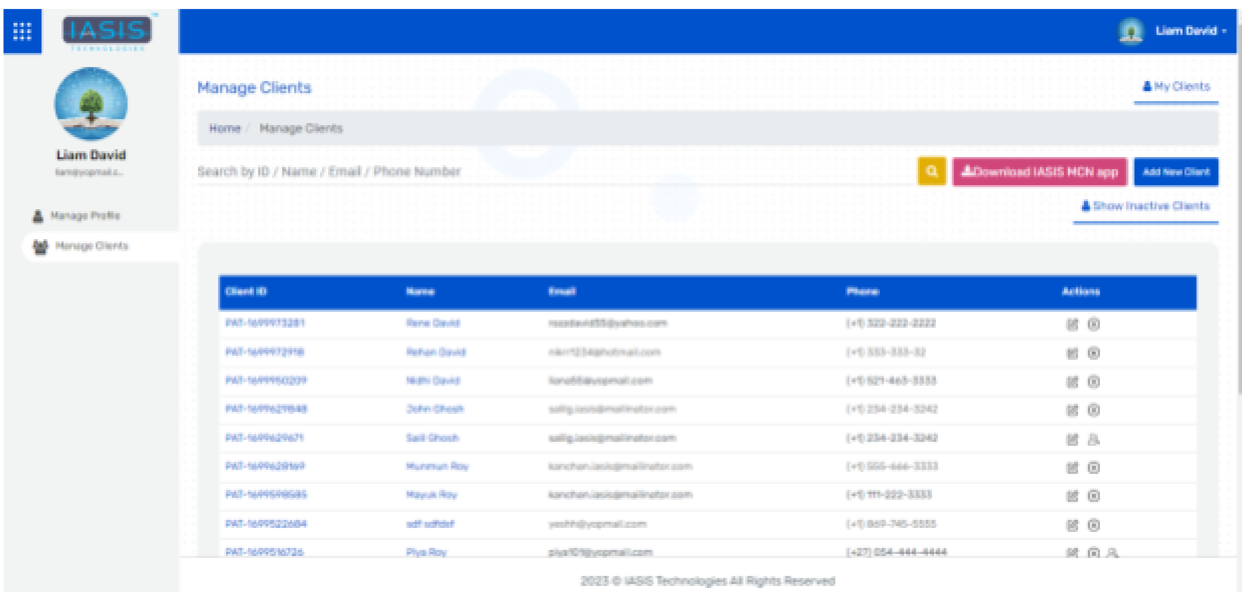


2. Manage Clients

After successfully logging in, you will be directed to the "Manage Clients" page. This page provides you with a client management interface, and it includes various options for managing your clients. Here's a breakdown of each option:

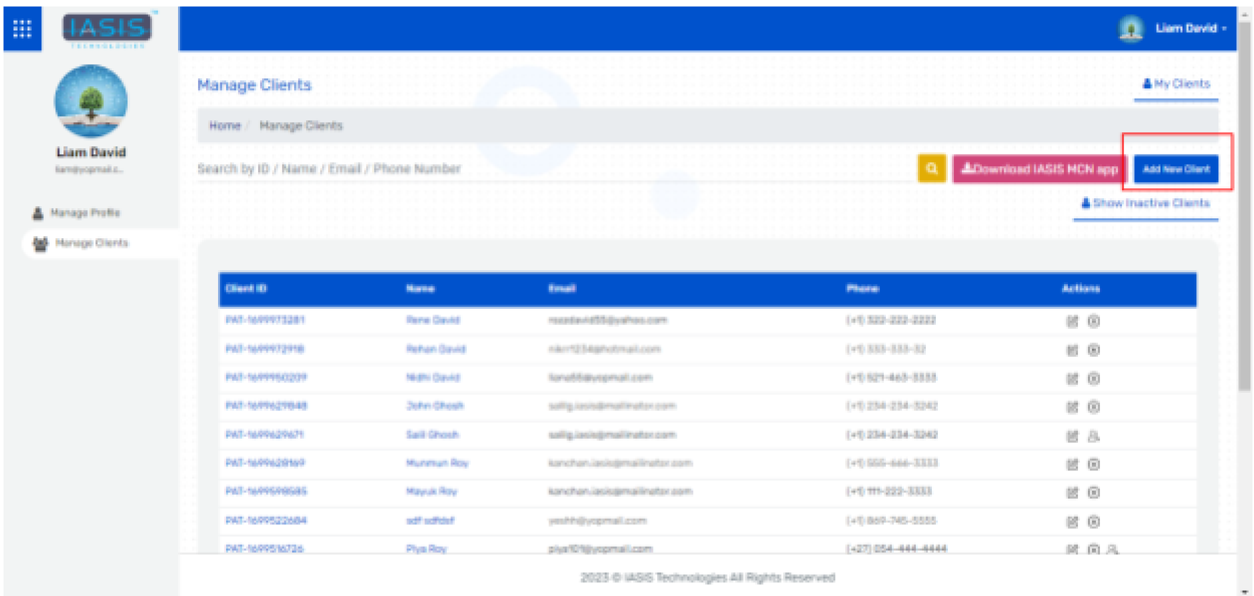
2.1 Manage Clients View

The Manage Clients page provides a comprehensive list of all your clients, enabling you to view a summarized overview of their information at a glance. This list typically includes key details about each client, such as their name, contact information, and any other pertinent information that helps you manage your clients effectively.



2.2 Add New Client Button

The "Add New Client" button is a feature that enables you to add a new client to your system. When you click on this button, you will be presented with a form where you can input the client's details. This function simplifies the process of onboarding new clients into your system.



2.3 Add Client Form

The "Add Client Form" includes the following fields to input all the necessary details for a new client:

1. **First Name:** Field for the client's first name.

2. **Last Name:** Field for the client's last name.

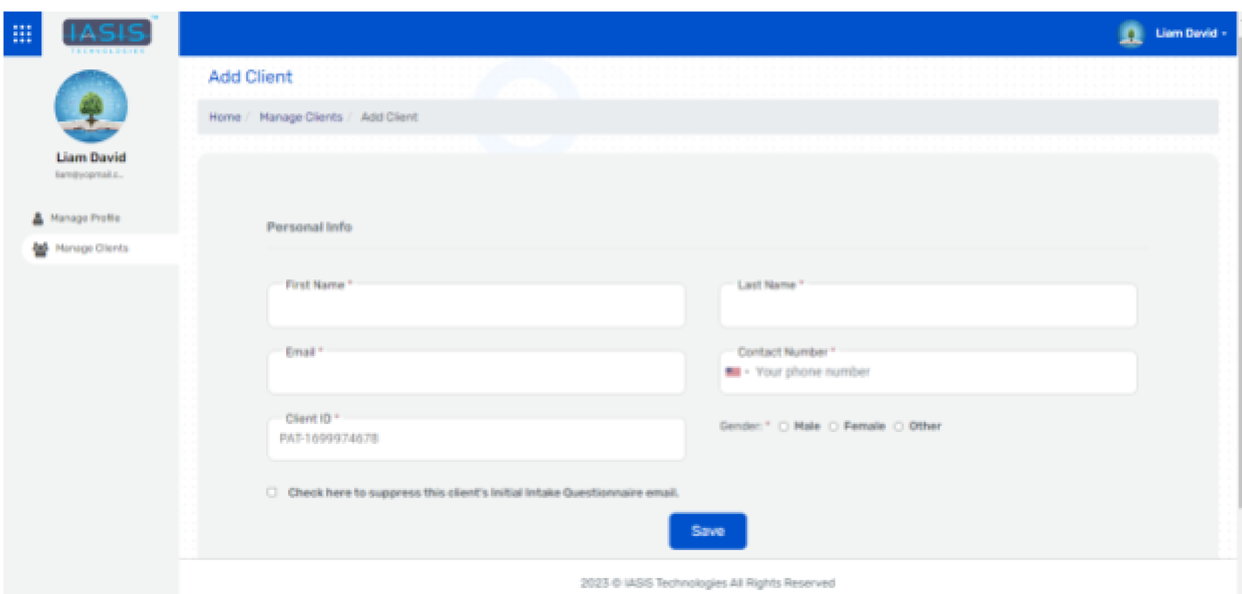
3. **Email:** Field to provide the client's email address.

4. **Contact Information:** Field for the client's phone number.

5. **Client ID (Auto-generated):** This field is automatically generated and assigned to the client.

6. **Gender:** Options to select the client's gender.

7. **Check here to suppress this client's Initial Intake Questionnaire email:** This checkbox allows you to control whether the client will receive the Initial Intake Questionnaire email. When checked, the client will not receive this email.



2.4 Save Button

Saving New Client Information:

When you click the "Save" button on the form, it does the following for you, the practitioner:

a. Double-Check Data:

The system reviews the information you entered to make sure it's correct. This helps avoid common mistakes, like using an incorrect email address or leaving out important details.

b. Securely Store Client Information:

Once everything looks good, the system safely stores the client's information.

c. Notify the Client about App Registration by Email:

Upon saving the client's details, the system sends an email to the client entitled **"Complete Your IASIS App Registration".** This email includes their login information and temporary password. It also provides instructions on how to login and change their password to something more secure.

Once the client has registered for the IASIS App, you as a practitioner will receive an email notification entitled **"Your New IASIS Client is Registered"** informing you of the registration.

d. Email Notification for Initial Intake:

After saving the client's information, the system also sends the client an email entitled "Your IASIS Initial Intake Questionnaire is Ready!". This email includes a link to their intake form.

Once the client completes and submits the Initial Intake form, you as a practitioner will receive an email notification entitled **"Your new IASIS client has completed their Initial Intake Questionnaire!"**, confirming the submission.

2.5 Add Client's Family Member or Dependent

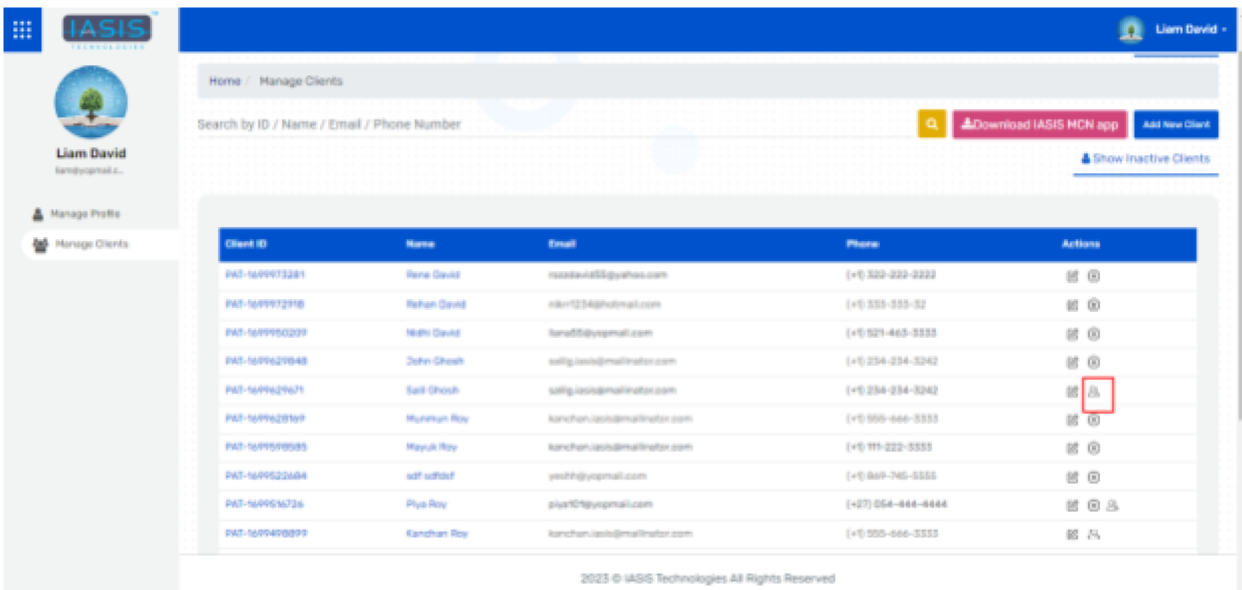
To add a family member to an existing client's account, follow these steps:

1. Client Verification:

First, ensure that the main client's status is verified. An account is verified when there's a person icon in the Actions column on the Manage Clients view.

2. Initiating the Process:

From the Manage Clients view, click the person icon under the Actions column. Hovering over this icon will reveal the label "Add Family Member." Click on this icon to begin the process.



3. Completing the Form:

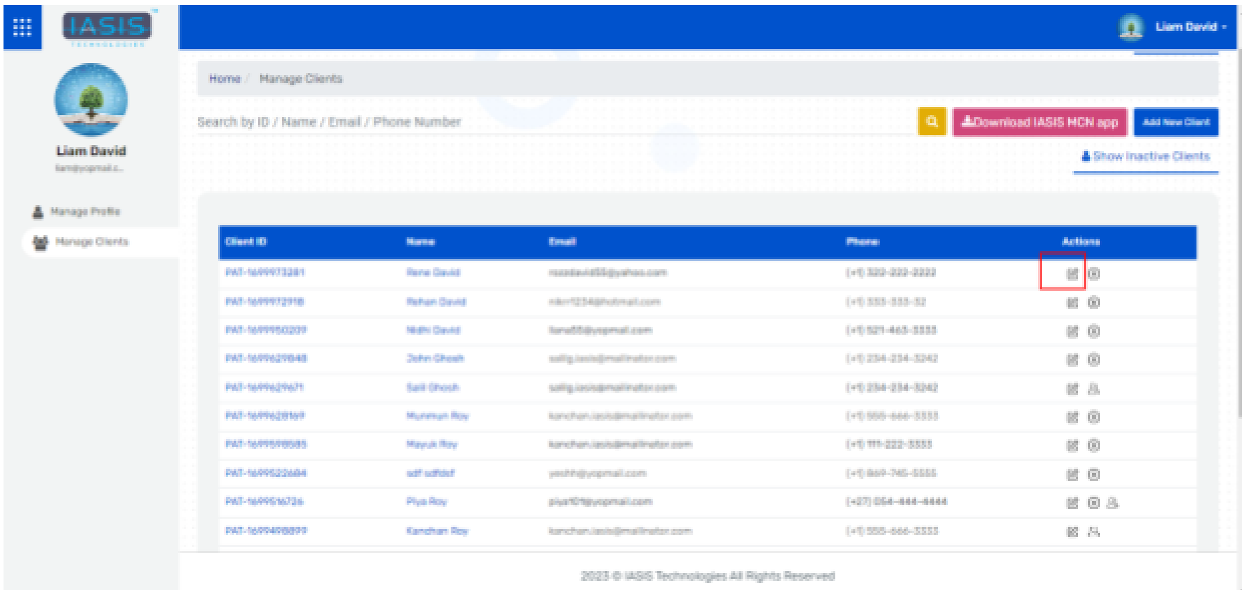
A form will appear wherein you can enter the information for the child/dependent client.

4. Email Confirmation:

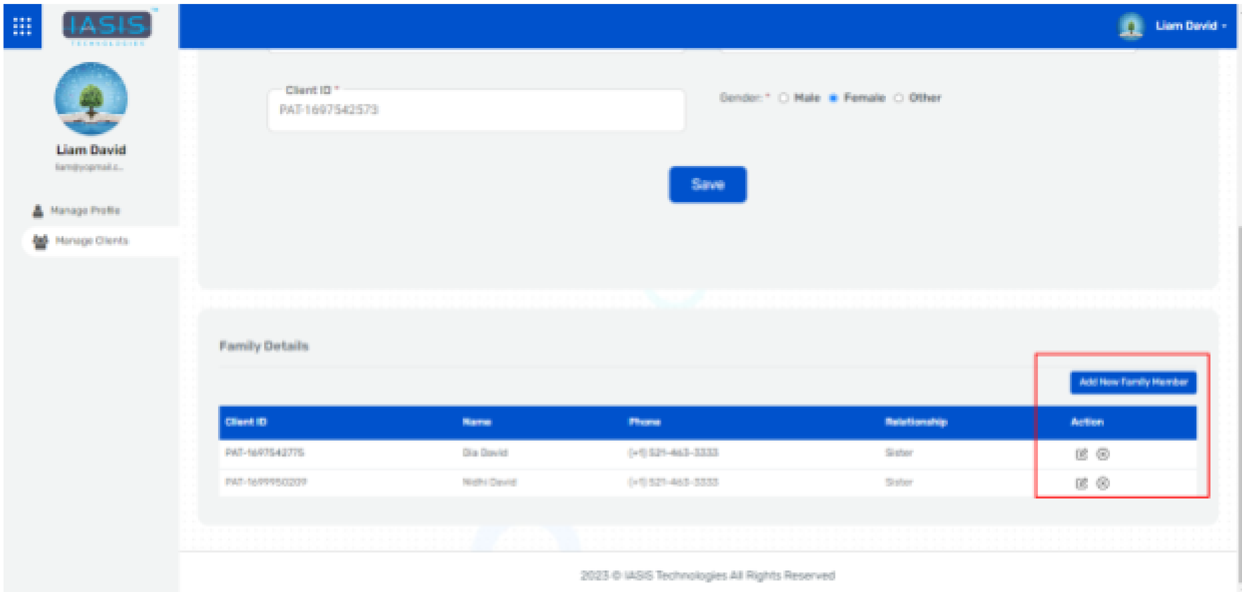
After adding a family member, the main client will receive an email with the subject "You've added a family member to the IASIS App!" They will also receive an email entitled "Your Family Member's IASIS Initial Intake Questionnaire is Ready!", which has a link to complete their Initial Intake form.

2.6 Edit Client Information

In the Manage Clients view, you'll notice a edit icon under the Actions column. Hovering over this icon will reveal the label "Edit Client". Click on this button to initiate the process.



- The form fields are editable, allowing you to update the necessary details.
- Be sure to click the "Save" button after making any changes.
- Upon scrolling down, the practitioner can also access the "Family Details" option. Within this section, you will find a list that displays all the family members under the main client you are currently editing.



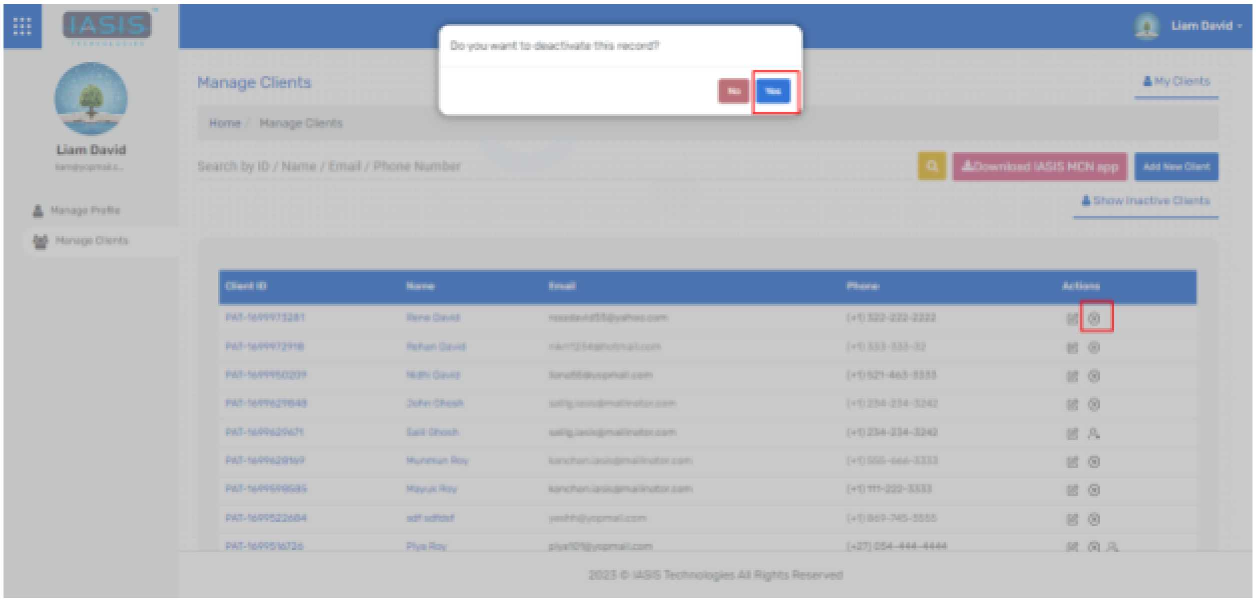
- In this list, there are options to edit or delete family member details.
- Additionally, you'll find a button at the top of the list that allows you to easily add a new family member to the client's account. This way, you can conveniently manage family member information as needed.

2.7 Deactivate a Client

In the Manage Clients view, you'll notice an X icon in the Actions column. Hovering over this icon will reveal the label "Deactivate Client". Click on this button to initiate the deactivation process.

Confirm this action by clicking "Yes" on the pop-up dialog. This helps prevent accidental delactivations.

***** Please note that to deactivate a main client with family members, you have to deactivate the family members first, then you will only get the deactivate option for the main client.***

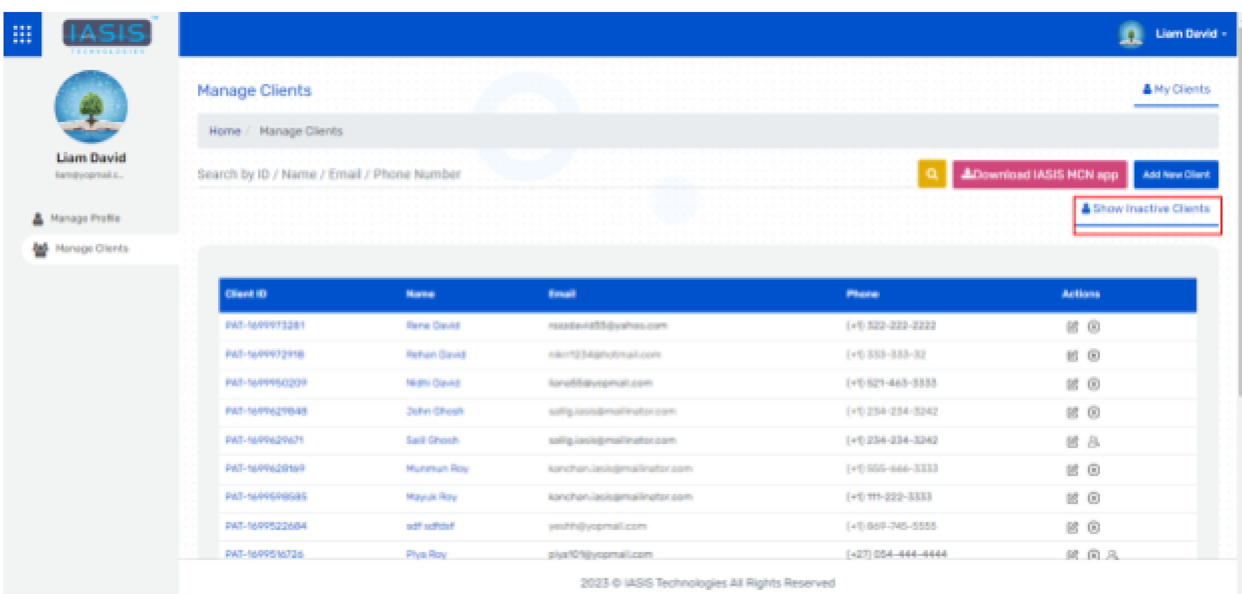


2.7.1. Show Inactive Client Button:

Clicking this button displays a list of clients that have been deactivated. From this list, the practitioner can restore the client.

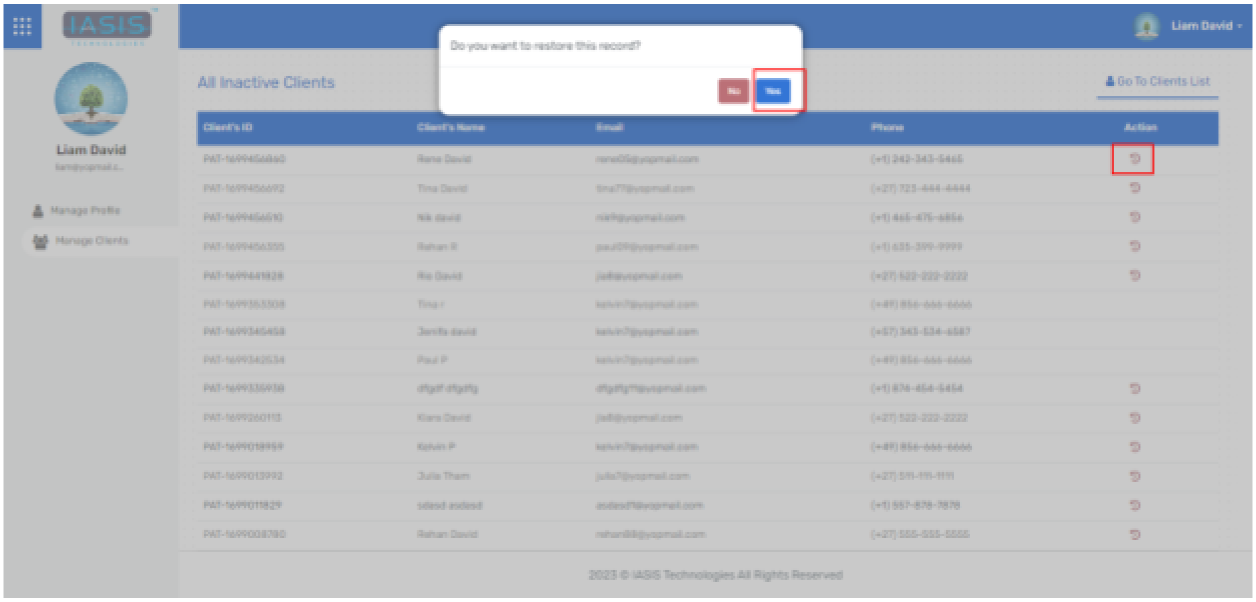
2.7.2 Accessing Inactive Clients:

When you select the "Show Inactive Clients" option, the system displays a list or view of clients who have been previously deactivated.



2.7.3 Restore Option

To restore a deactivated client, click the Restore icon in the Actions column. The system will prompt the user to confirm their intention to restore the client. This step helps prevent accidental restoration.



a. Restoring Child/Dependent Accounts: Please note if you have a deleted client who is the main and also a deleted family member of the same you have to restore the main client first in order to restore the family member.

b. Notification:

After restoring a client's account, the system will automatically send an email to the restored client. This email serves to inform them that their account has been reinstated; the email also includes a temporary password necessary to access their account.

*** Please note that notification will be sent only for restoring the main client not family members as they use the same credentials. For restoring a family member only the email notification is sent to inform about the restoration but no credentials is shared*

2.8 Search

The search option is vital for swiftly locating specific client records based on criteria such as first name, last name, email, and contact number. We can search from the Manage Clients view.

- **Search by First Name or Last Name:**

  Input the first name or last name of the client. Matching client records will be displayed.

- **Search by ID:**

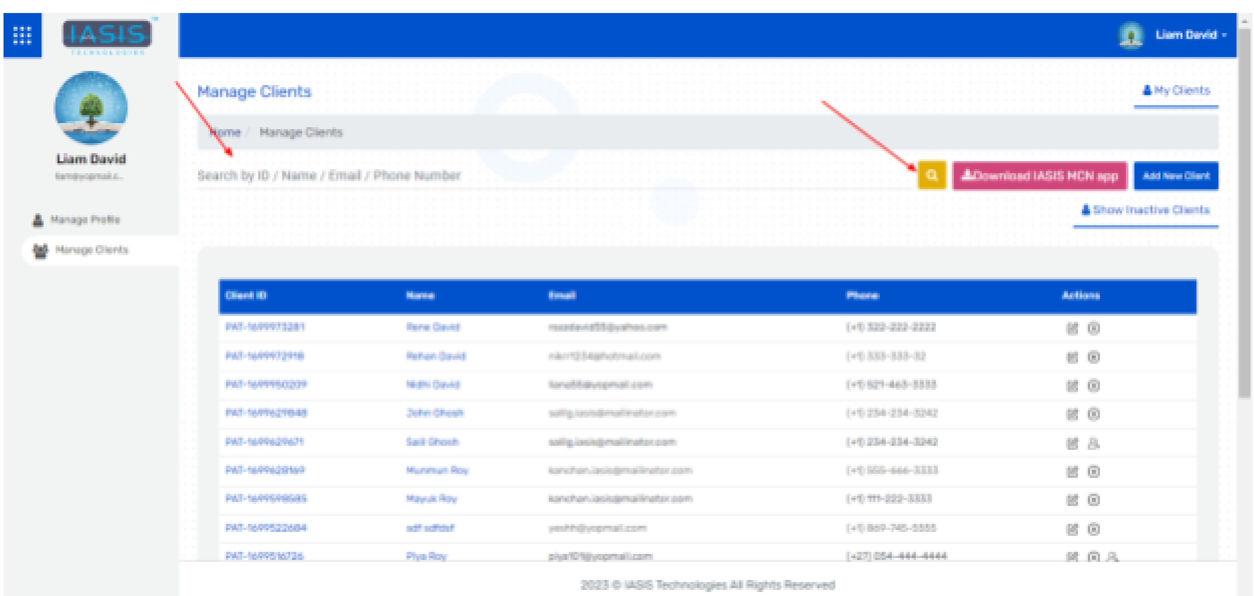
  Input the client's ID, or a portion thereof. Matching client records will be displayed.

- **Search by Email ID:**

  Input the client's email address. Matching client records will be displayed.

- **Search by Contact Number (without spaces):**

  Input the client's contact number without spaces or special characters. Search Matching client records will be displayed.



2.9 Client Record

From the Manage Clients page, click on the Client ID or the client's Name. You will be directed to that client's Client Record page.

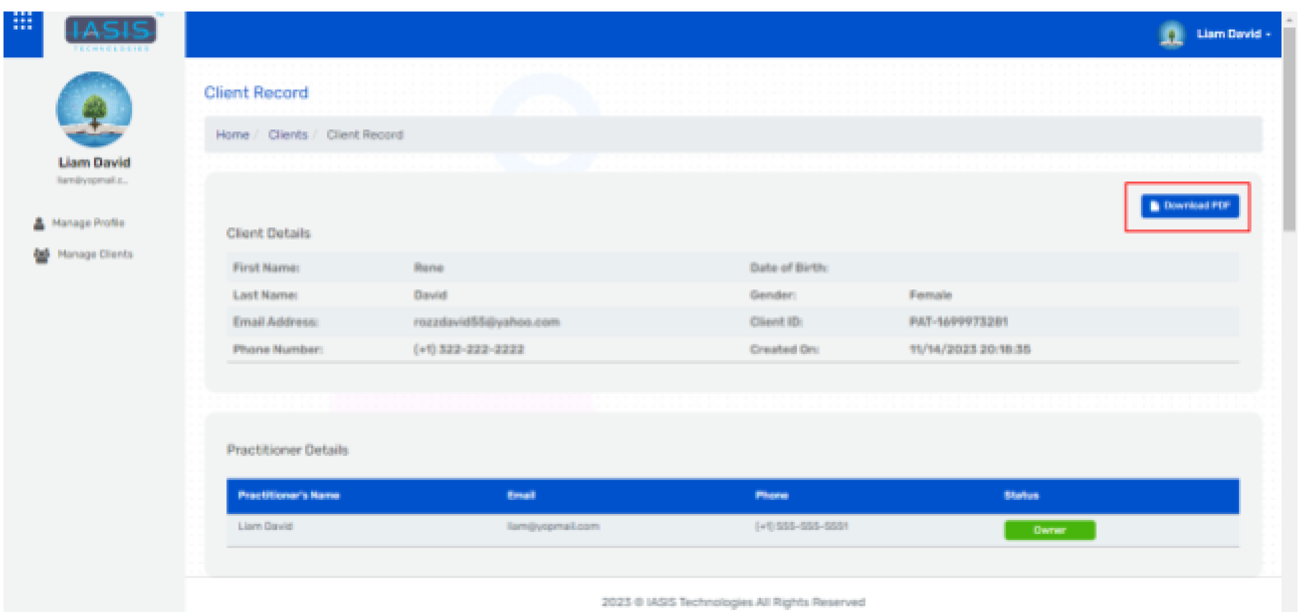
On this page, You will find the following information about the client:

- Client Details
- Practitioner Details
- Documents and Actions
- Client Issues
- Pre-Session MORs
- Procedures and Notes
- 24 Hour Observation

2.9.1 Client Details

- **Client Details Section:** In the "Client Details" section, you will find all information about the client, including their contact details, unique client ID, and other relevant personal data.

- **Download PDF Option:** Within the "Client Details" section, you will notice a "Download PDF" button. If you click on this button, the system will generate a PDF document containing all the client's details and information displayed in the section.



2.9.2 Practitioner Details

You can view a list of practitioners assigned to the client. This list is specific to the client, providing detailed information about the professionals collaborating in their care.

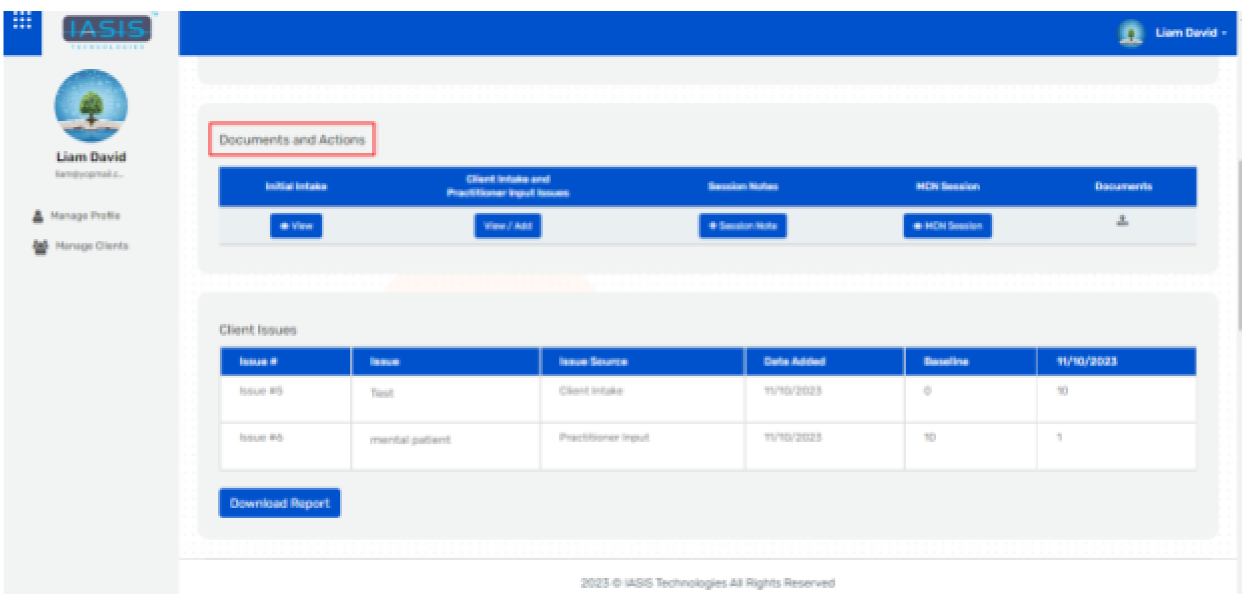
Practitioner Details

Practitioner's Name	Email	Phone	Status
Sophia David	sophia5@yopmail.com	(+1) 955-555-5555	Owner
Andrew DTS	andrew66@yopmail.com	(+57) 456-547-5685	Shared

2.9.3 Documents and Actions

Under this section following list will be displayed

- Initial Intake
- Client Intake and Practitioner Input Issues
- Session Notes
- Documents

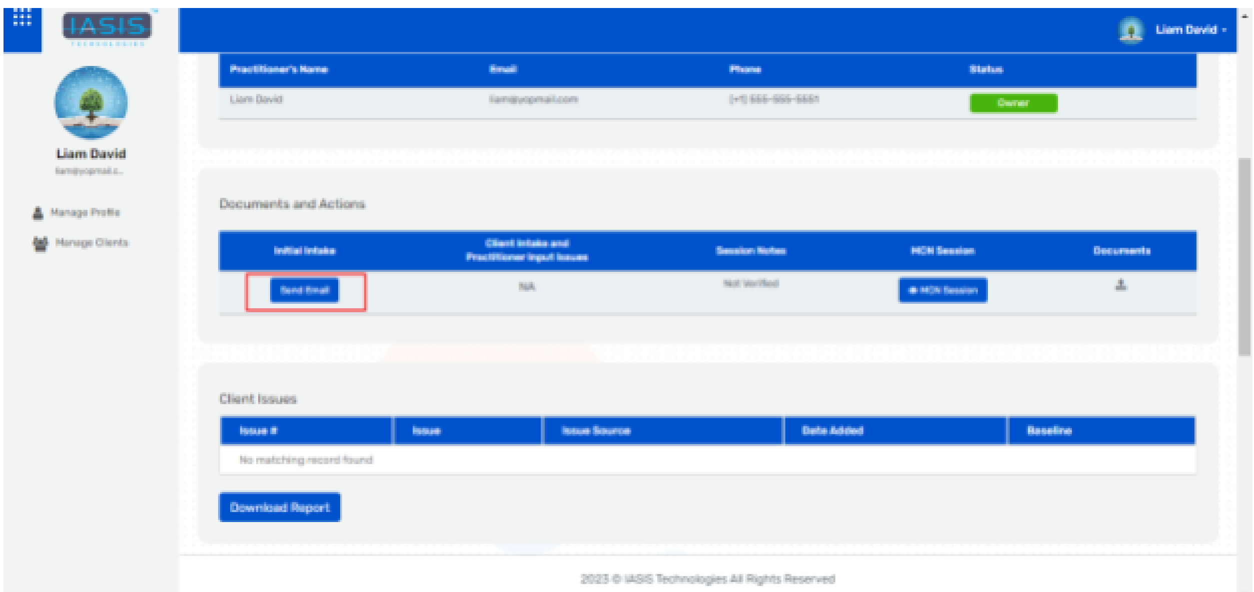


2.9.3.1 Initial Intake

This feature is related to the Initial Intake Questionnaire.

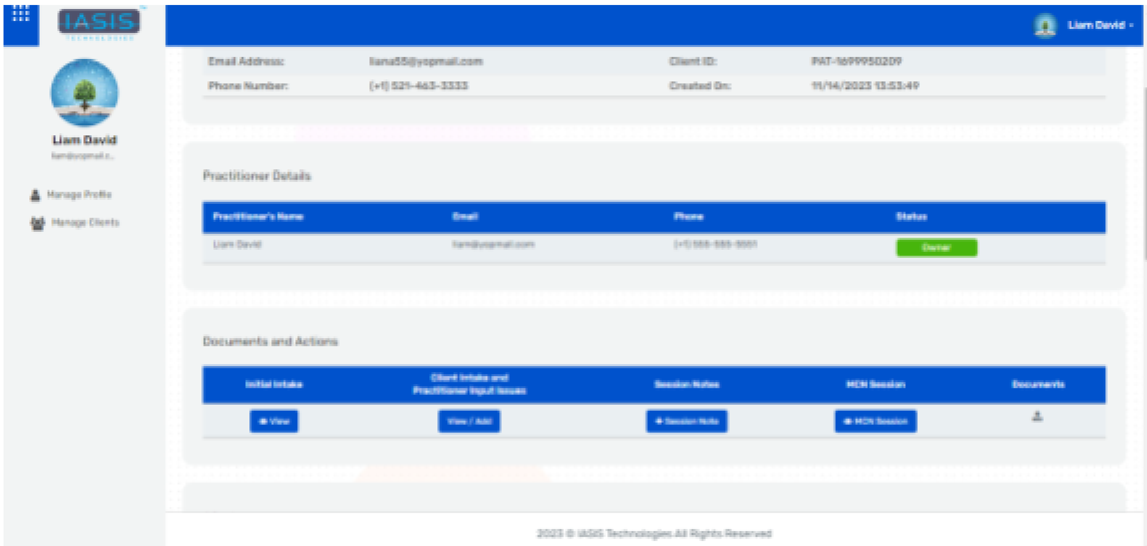
- Send Email

  If the practitioner opts to suppress the Initial Intake form upon registration, or if the client has not yet submitted the Initial Intake form, there will be an option to send an Initial Intake notification email to the client.



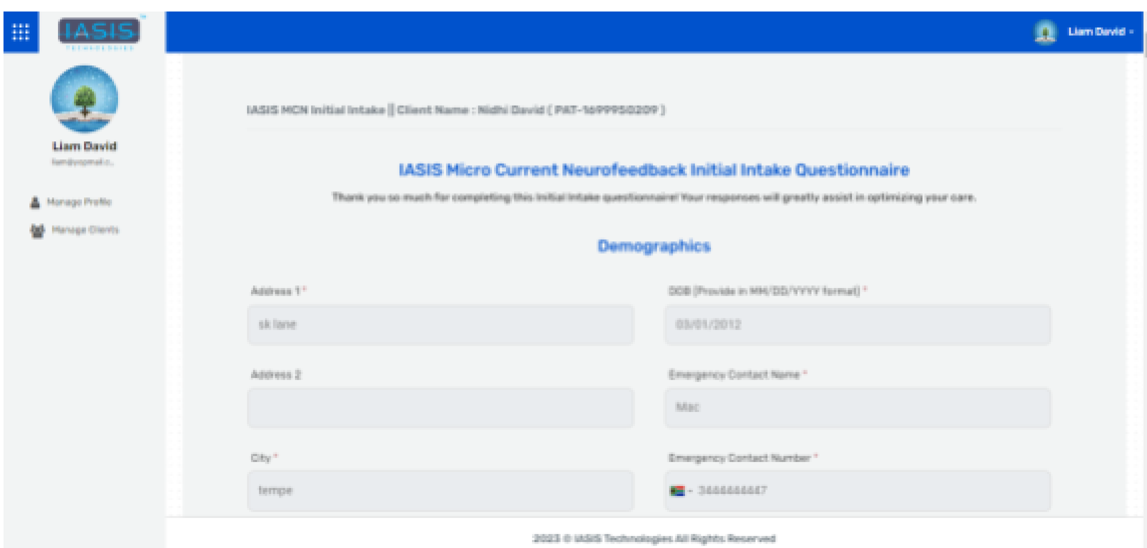
- View Initial Intake

If the client has completed and submitted the Initial Intake Questionnaire you will have the "View" button here and it will take you to the detailed view of the Initial Intake data.



Practitioners have the capability to access and view these saved intake forms at any time.

However, the system is designed so that practitioners can only view the forms and not edit them.



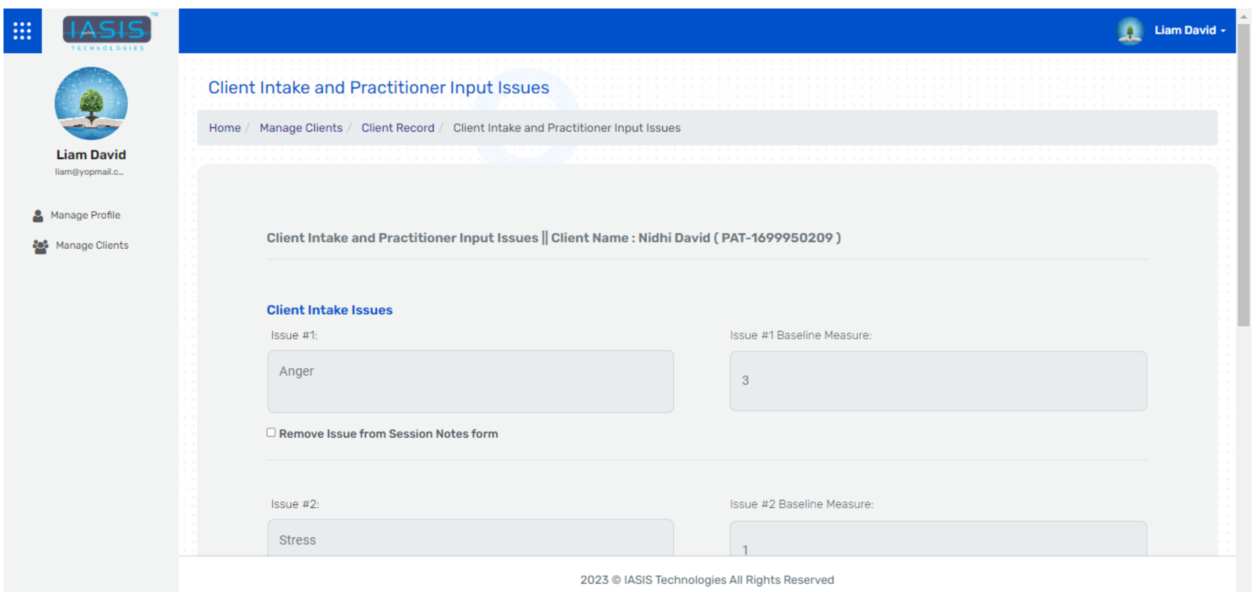
2.9.3.2 Client Intake and Practitioner Input Issues

After the client submits their intake, there's a 'View/Add' option available in the Client Intake and Practitioner Input Issues column.

Practitioners can view Issues submitted by client upon completing their Initial Intake. Practitioners can also add Issues.

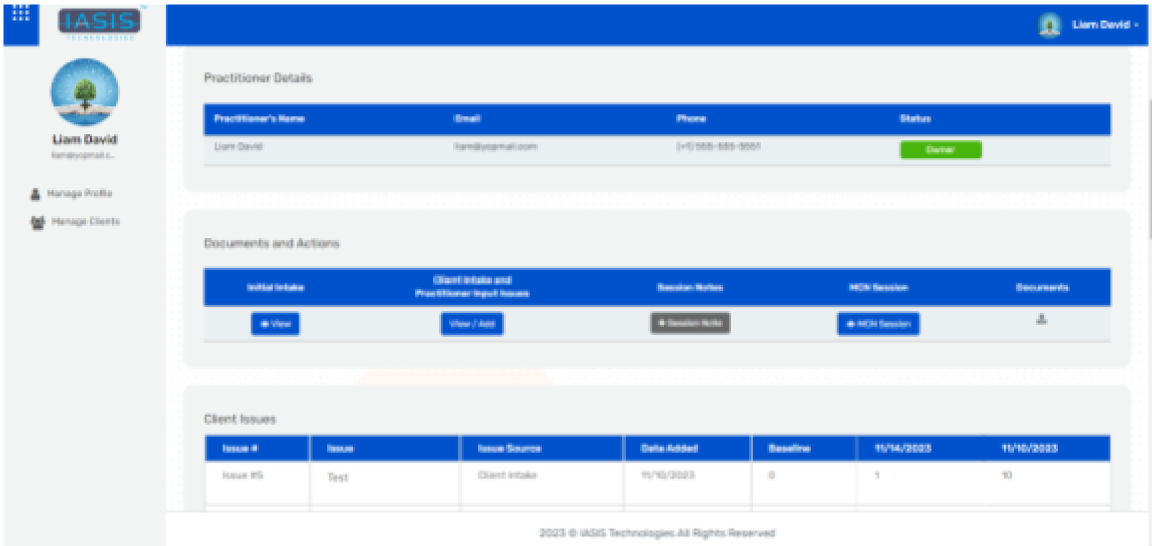
The Practitioner controls which Issues will be visible in the Session Notes form.

If the checkbox "Remove Issue from Session Notes form" associated with an Issue is checked, those Issues will **not** appear on the Session Notes form.



2.12.3 Session Note

This feature allows you to create Session Notes for clients. Click the "+ Session Notes" button in the Session Notes column to initiate a Session Note.



- **Practitioner Entered Fields**

  There are fields that the practitioner (therapist) can manually enter or update based on the client's progress and treatment plan. These fields include Session Identifier, Therapist, Treatment notes, and other relevant information

- **Auto-Fill from the Intake**

  Some fields, such as Client Issues and their baseline measures, may be automatically populated with data pre-existing in the system.

- **Save Button**

  After entering the necessary information, click the "Save" button to save the Session Note to the client's record.

- **Client Notification**

  Twenty three hours after the practitioner submits a Session Notes form the client will receive an email reminder to complete their 24 Hour Observation Questionnaire on the app.

- **The "+ Session Note" Button Is Disabled for 12 Hours**

  After the practitioner submits a Session Note, the "+ Session Note" button changes from blue to grey and is disabled for 12 hours.

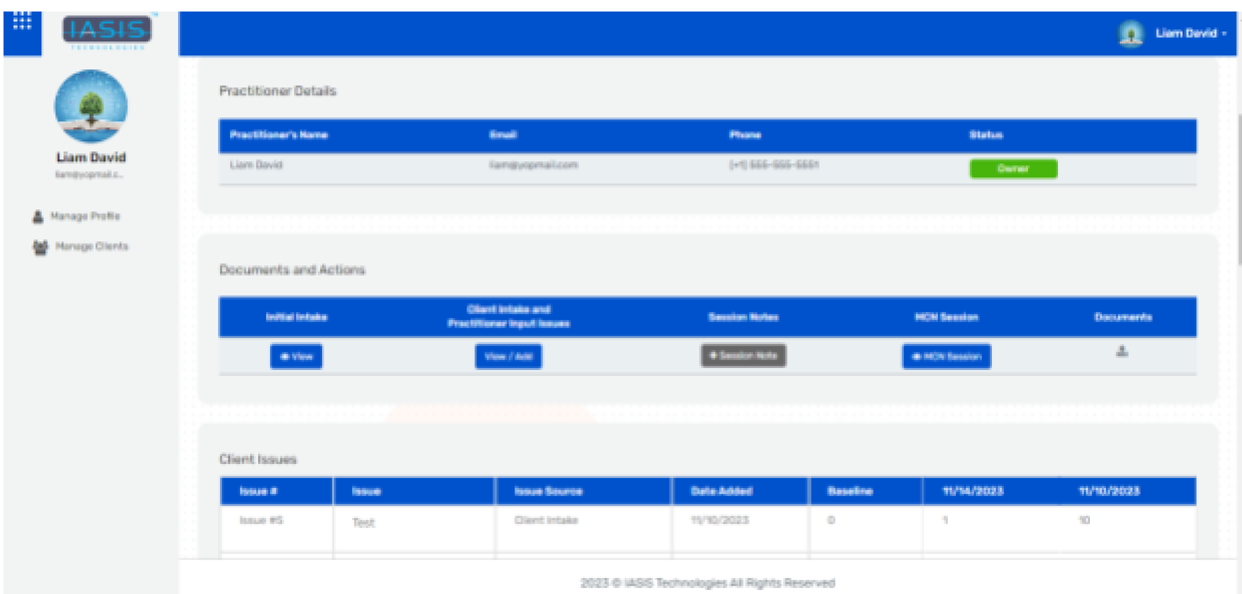
- **The "+ Session Note" Button Is Reactivated after 12 Hours**

  After 12 hours the "+ Session Notes" button changes from grey to blue and is once again active.

2.12.4 Documents Upload

- Access Upload and View Documents Page

  When clicking on the upload icon in the Documents column, you will be directed to the Upload and View Documents page.

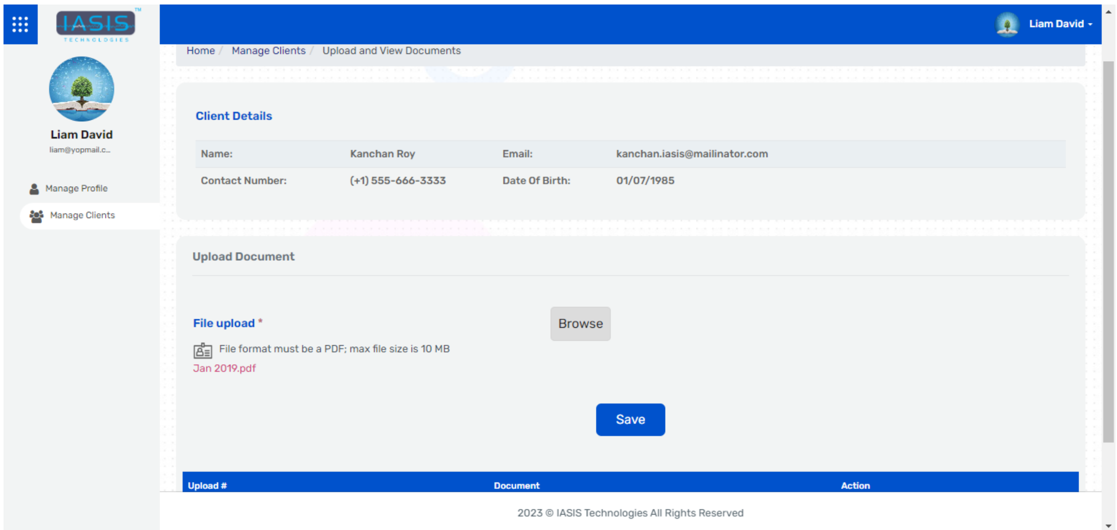


- Document Upload

  Follow the instructions below to upload new documents:

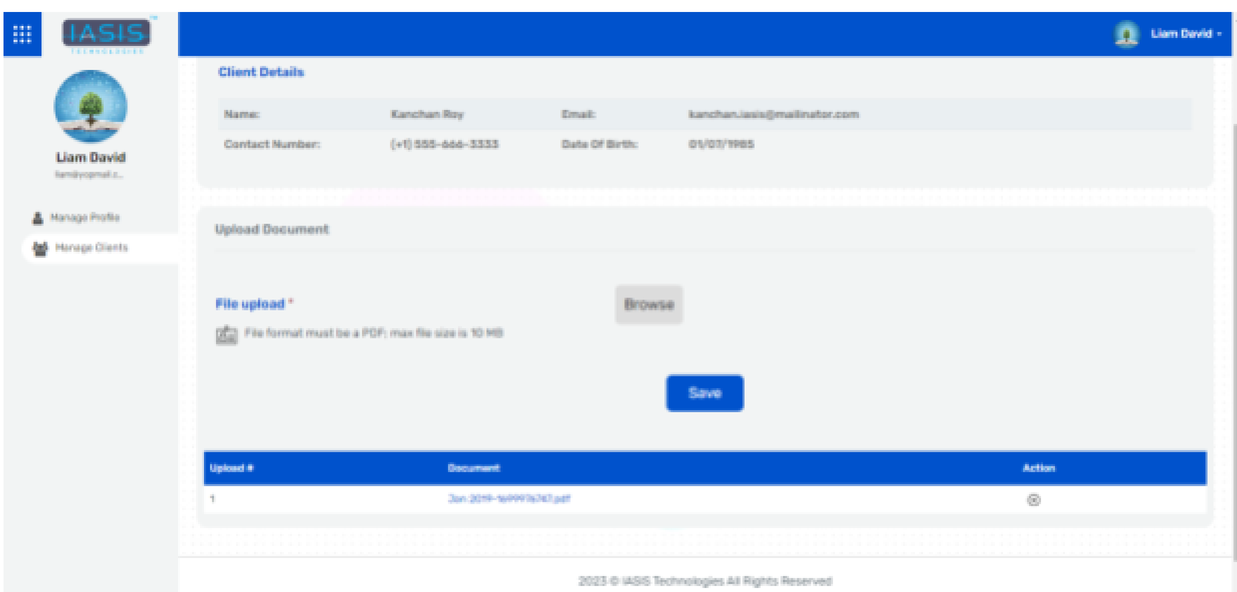
- ## File Selection

  Click the Browse button to select the PDF file you want to upload from your local device.



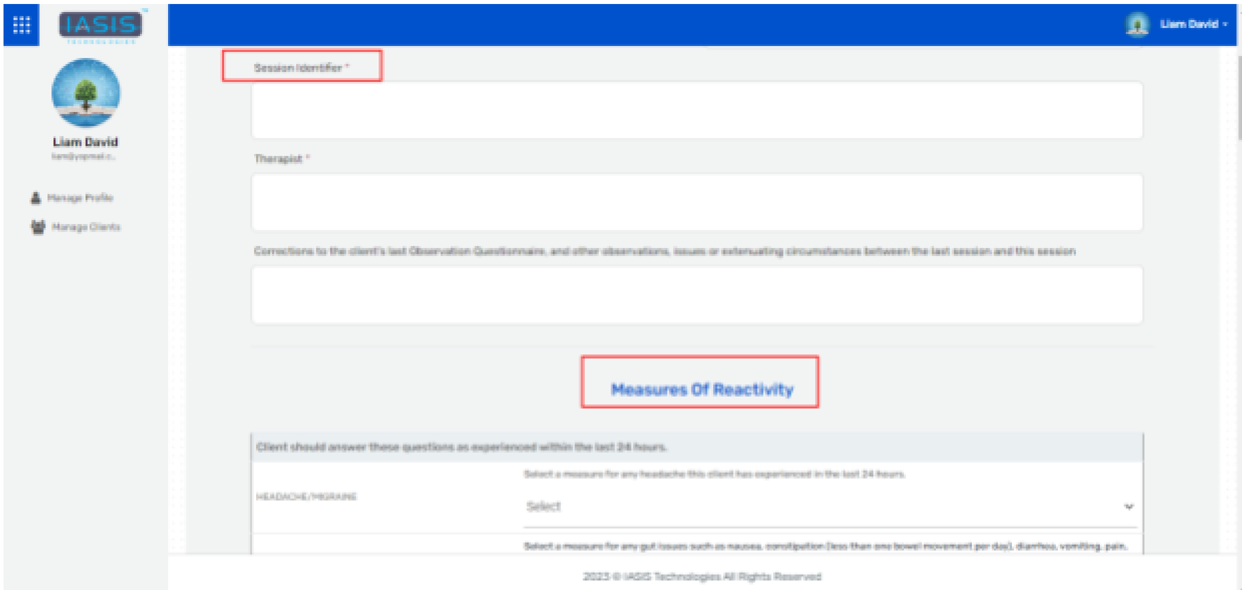
- ## Upload Process

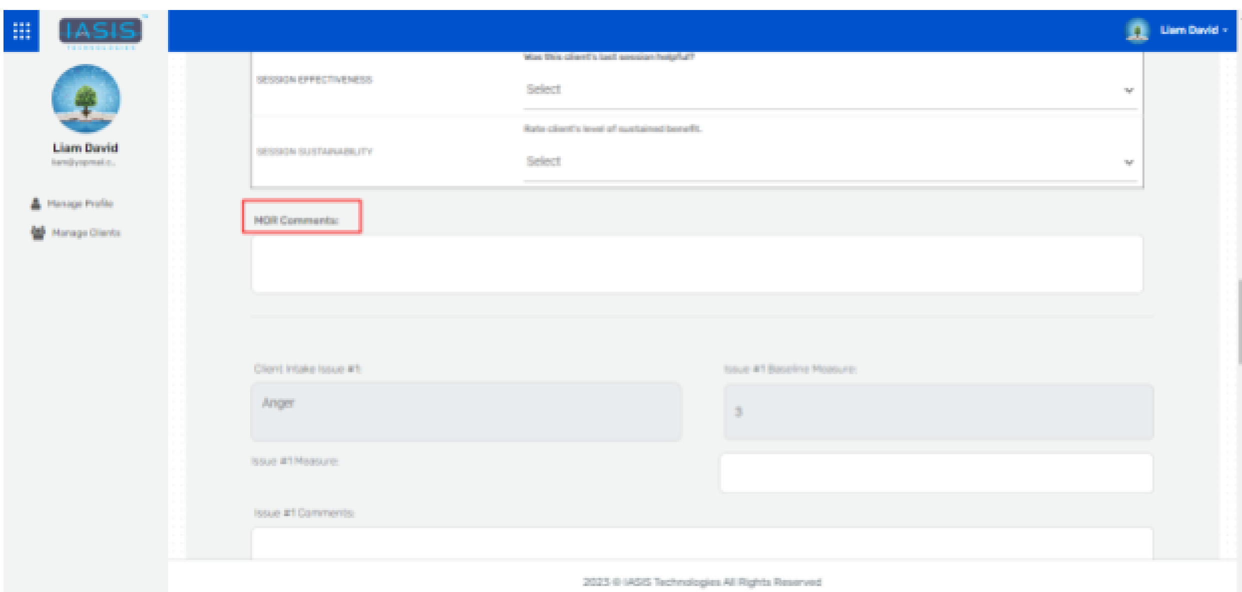
  Once the file is selected it will appear in red under "File upload*" on the left side of the screen. Click the Save button to upload. A list of uploaded documents appears at the bottom of the page.

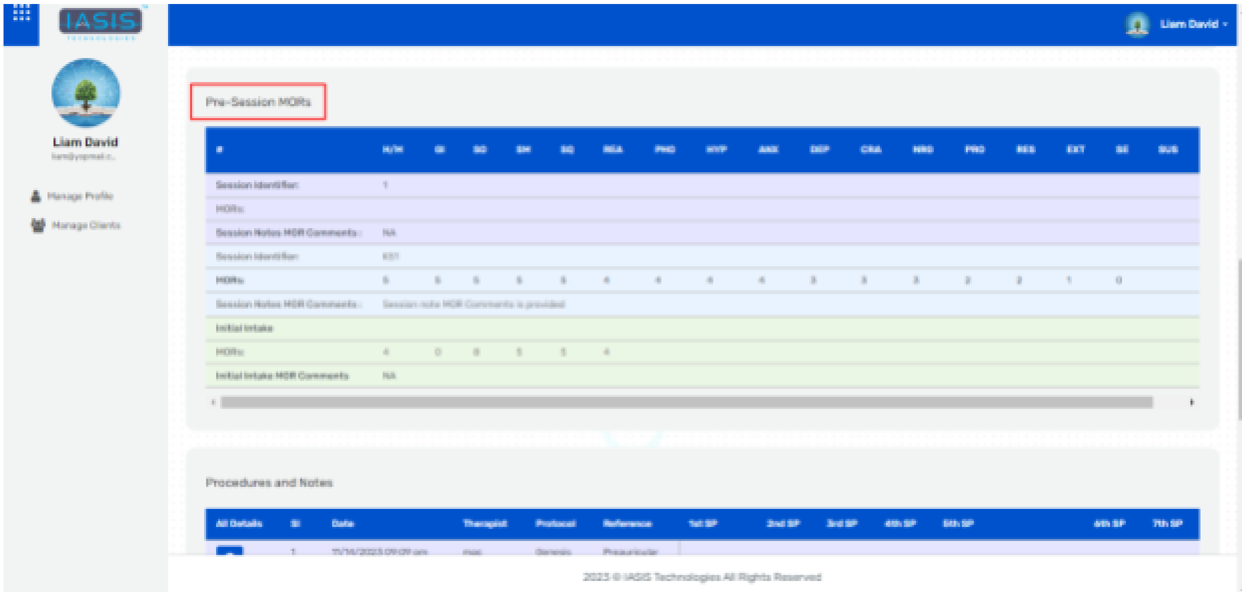


2. 13. Pre-Session MORs

This section includes information from Session Notes, such as the Session Identifier, MORs (Measures Of Reactivity), and MOR comments.

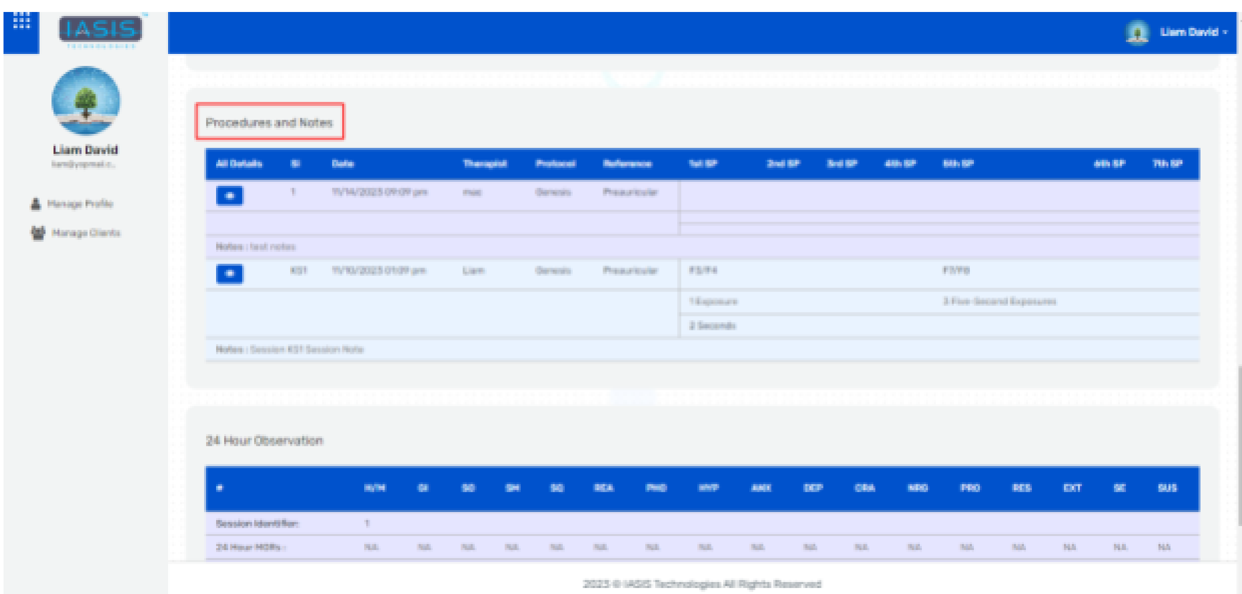




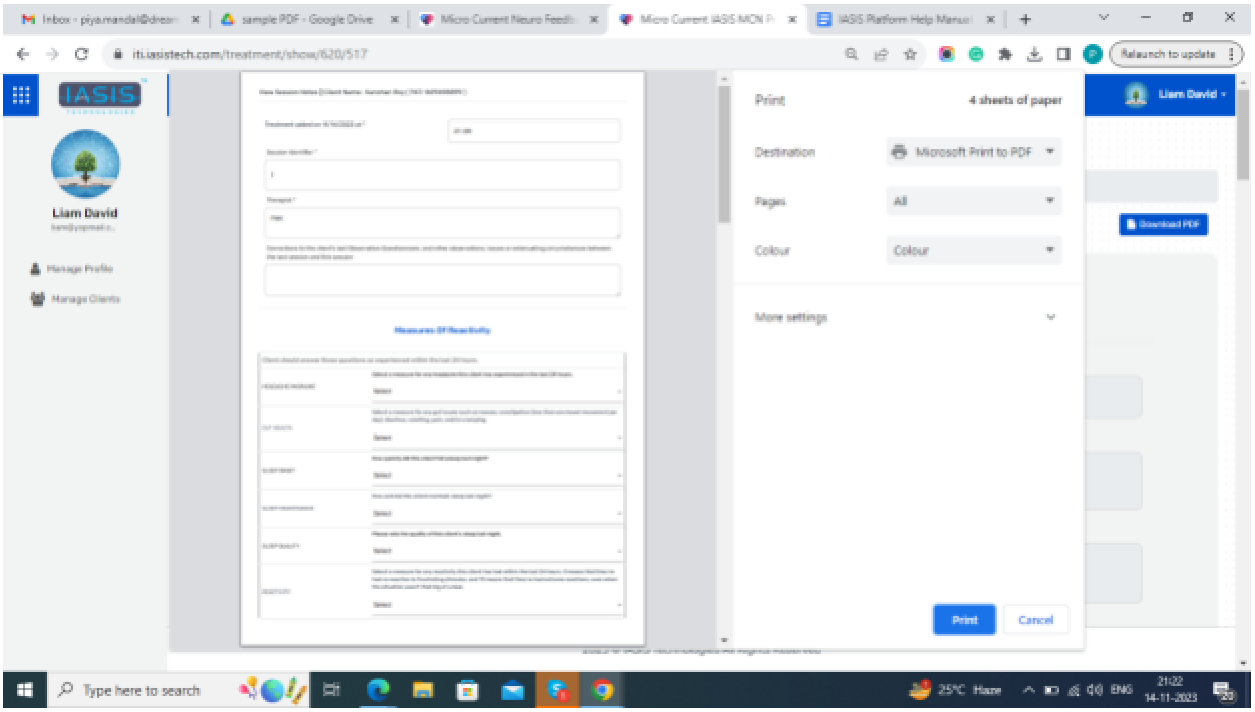


2.14 Procedures and Notes

- This section includes an at-a-glance view of select information from submitted Session Notes
- Click the “View” button associated with each session note to view the entire submitted Session Note form. You will be taken to the View Session Notes page.

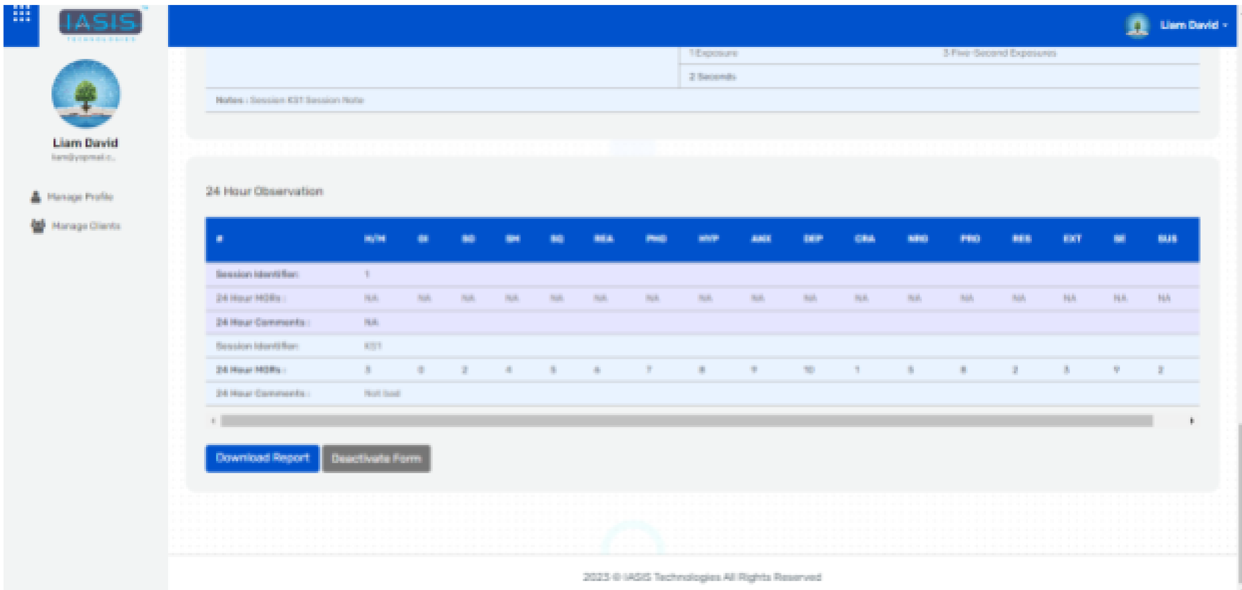


From the View Session Notes page, click the “Download PDF” button to generate a PDF of the Session Note.



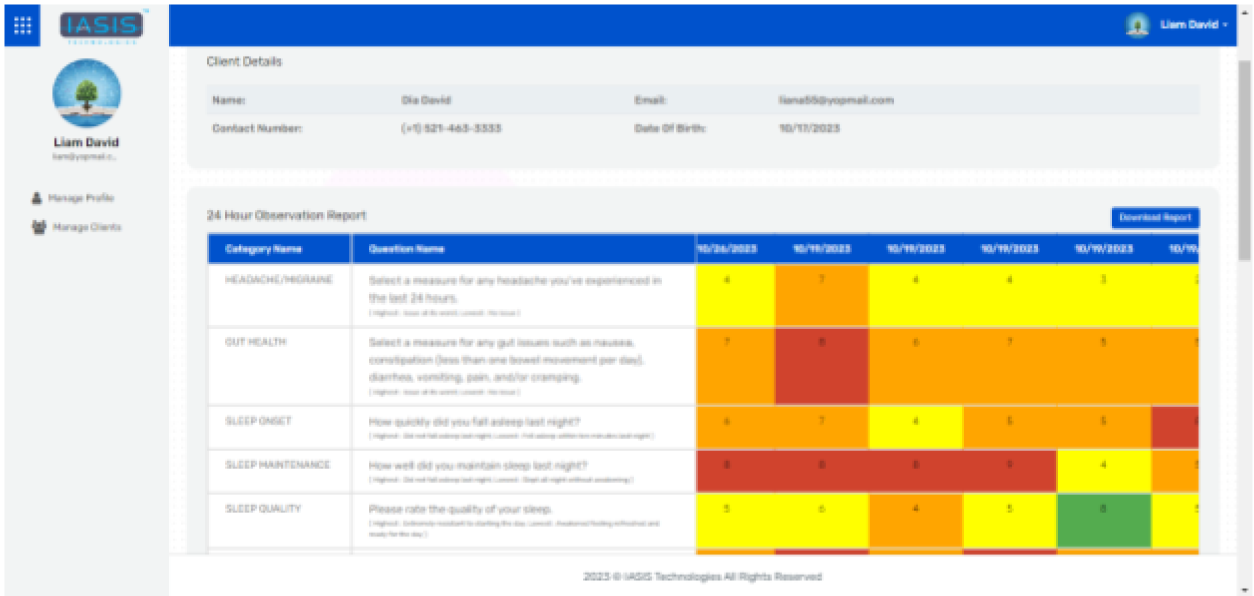
2.12 24-Hour Observation

This section shows information from the 24 Hour Observation questionnaire submitting by the client on the IASIS app. Displayed information includes the Session Identifier, MOR responses submitted by the client, and comments submitted by the client.

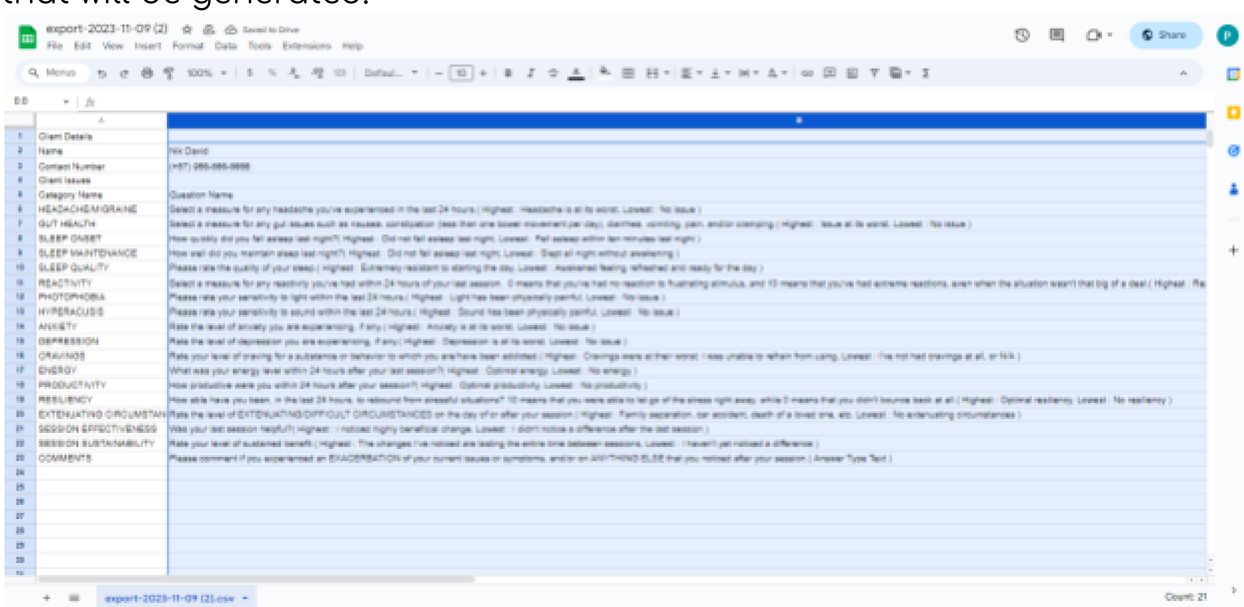


- Download Report

  To download the 24 Hour Observation questionnaire responses collected from the client, click the Download Report button. You will be taken to the 24 Hour Observation Report Details page.



To download the report, click the Download Report button on the right side of the screen. The following screenshot shows the report that will be generated:



- ## Deactivate Form

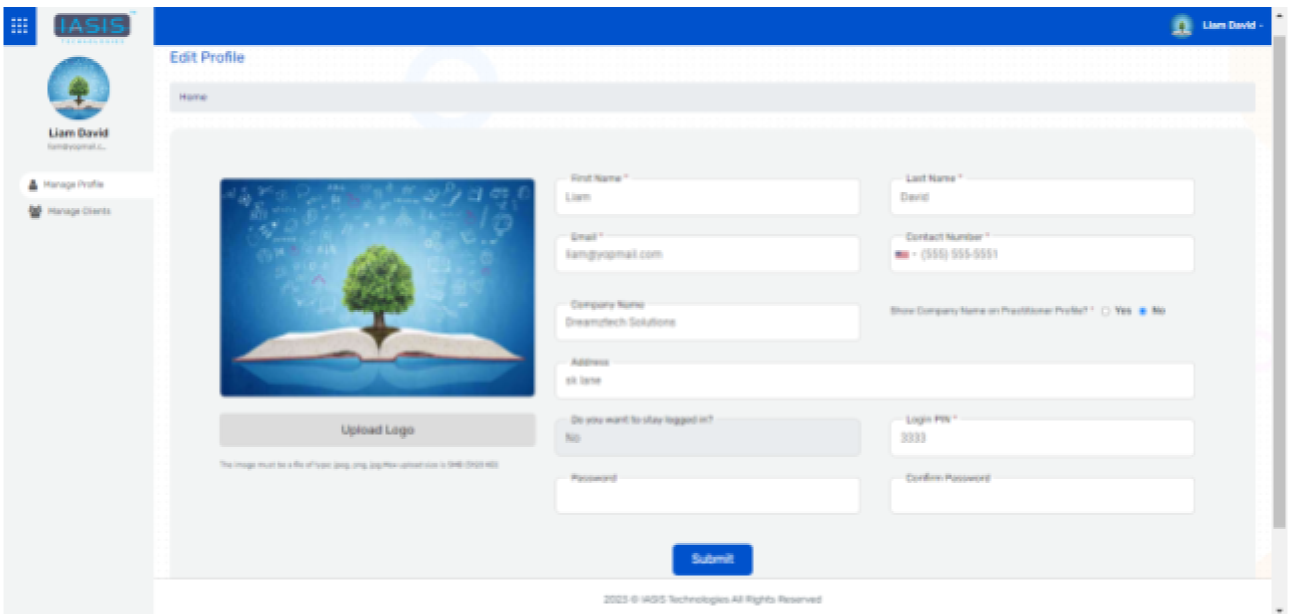
  To suppress the 24 Hour Observation Questionnaire from being sent to the app, click the Deactivate Form button. The button will disappear and a check mark will take its place.

  To reactivate the form, click the check mark.

3. Manage Profile

Practitioners can update their personal and company information from the Edit Profile page. Click on "Manage Profile" from the menu bar on the left to be directed to the Edit Profile page.

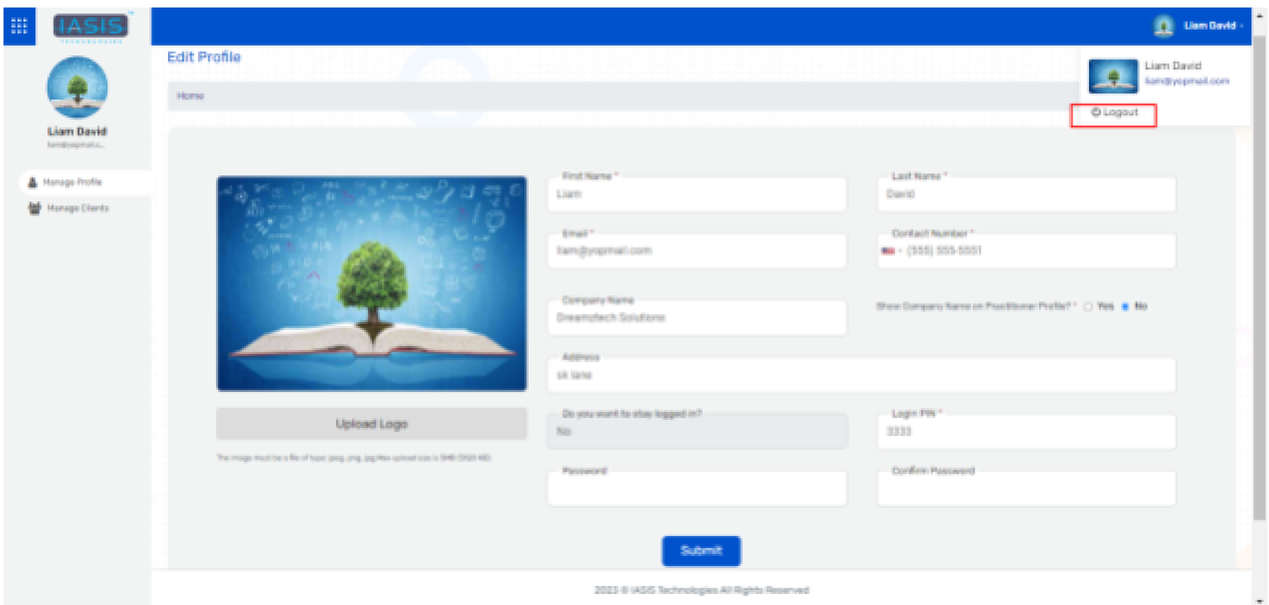
If the practitioner has added a company name and has set 'Show Company Name on Profile' to 'Yes,' the client-facing app and the Practitioner portal will display the company name instead of the Practitioner's first name and last name.



4. Logout

Practitioners can log out of the system by first clicking the drop down arrow to the right of their name (or the company name) in the upper right corner of the portal.

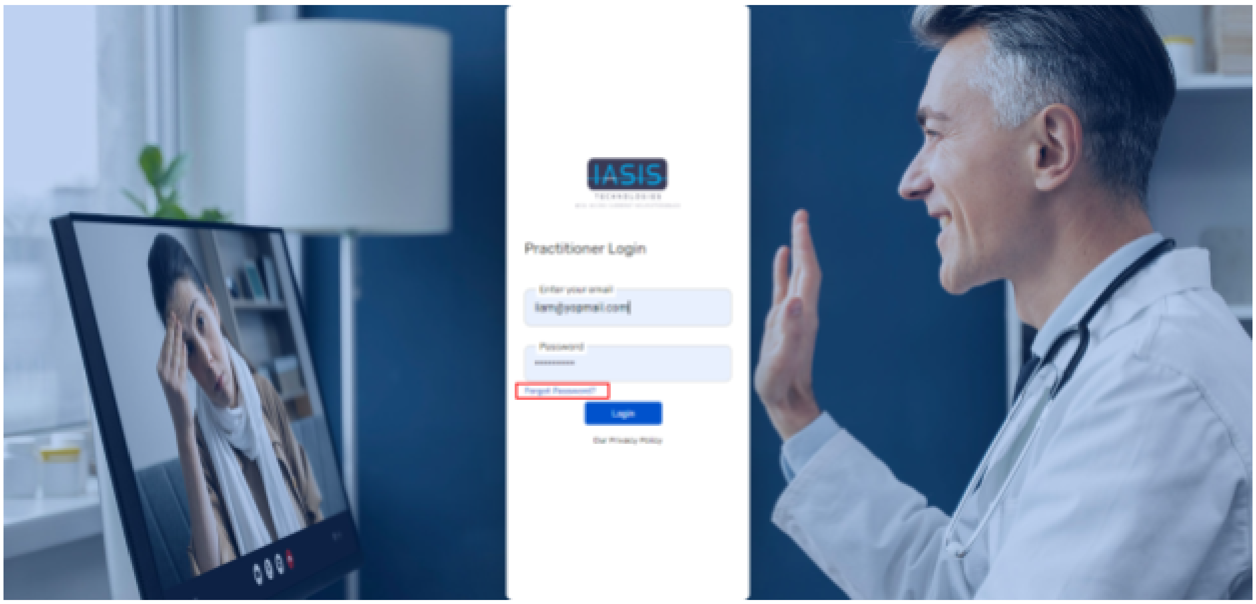
Click the "Logout" button to log out.

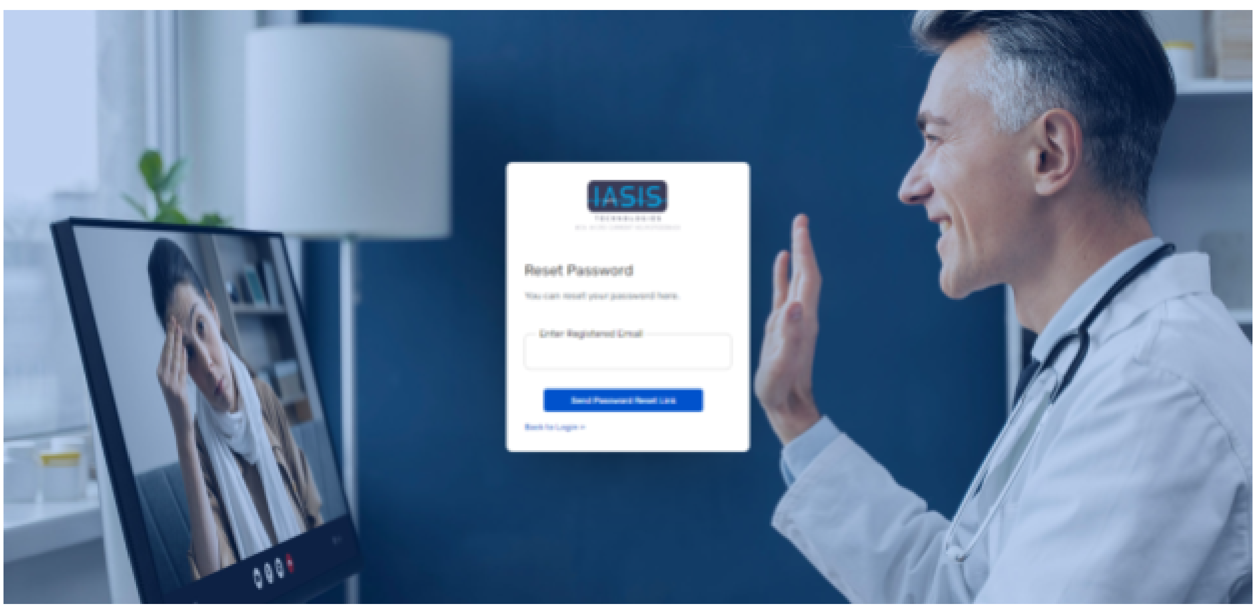


5. Forgot Password

- ## Open the Application

Visit the application's login page where you usually enter your credentials. Click on “Forgot Password” to redirect to the "Reset Password" page.





- ## Enter Registered Email

  On the "Reset Password" page, you will see a field labeled "Email Address." Enter the email address associated with your account. Click the "Send Password Reset Link" button.

- ## Check Your Email

  Open the email inbox associated with the provided email address. In your inbox, you will find an email regarding the password reset.

- ## Set a New Password

  On the "Reset Password" page, you will see fields for "New Password" and "Confirm Password."

  After entering your new password in both fields, click the "Set New Password" button.