



T E C H N O L O G I E S

Practitioner Portal WebApplication
Help Manual

IASIS Official Platform

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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:

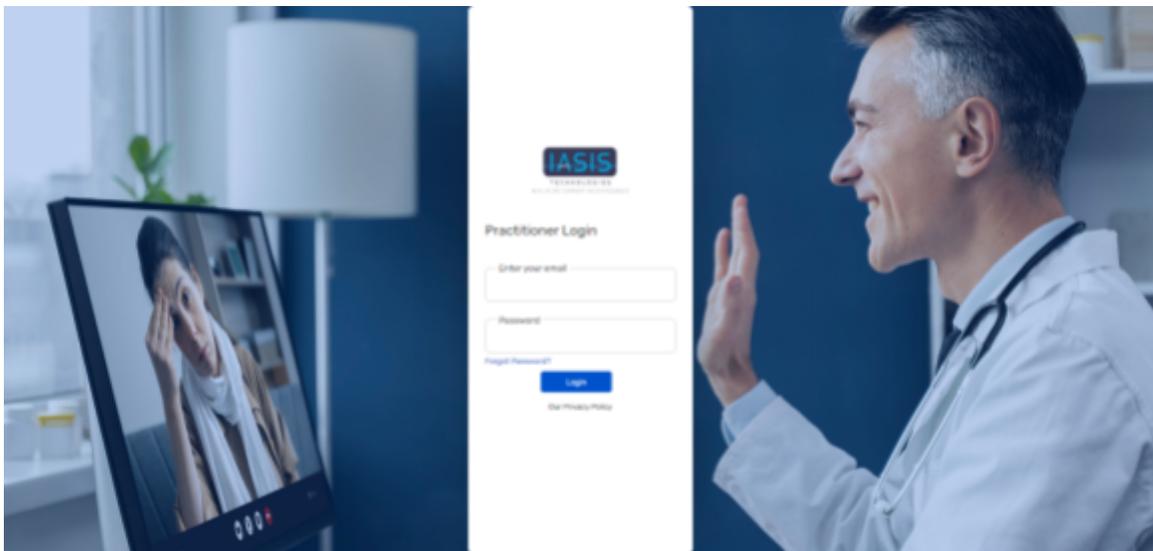
Now, let's log in to your Practitioner account:

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.

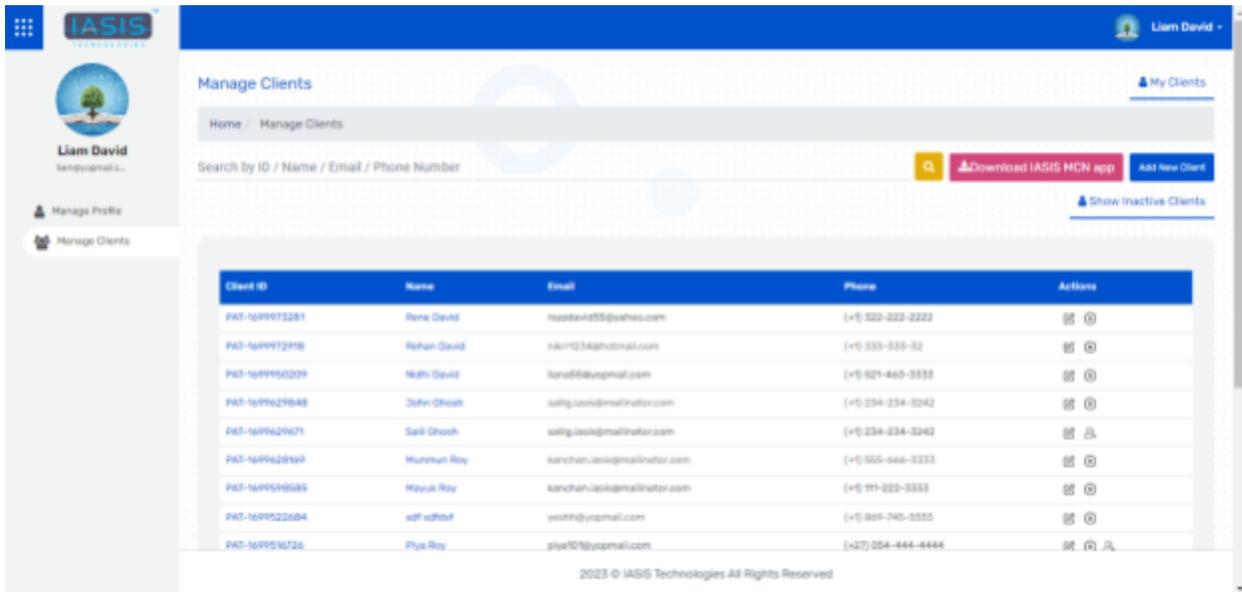


2. Manage Clients

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.



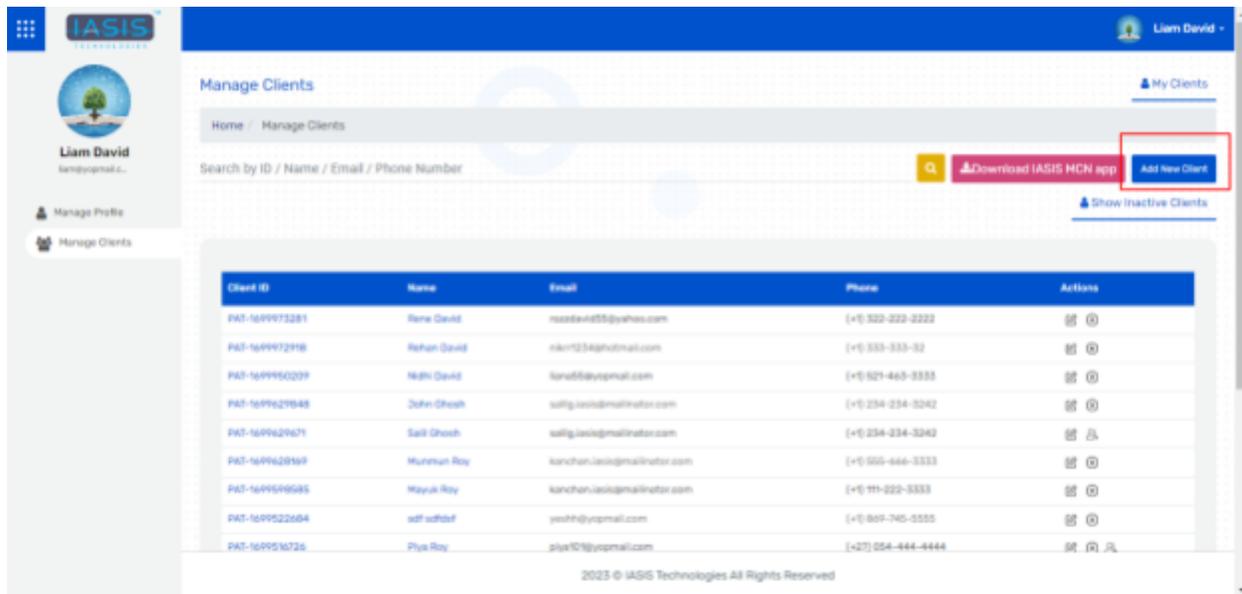
The screenshot displays the "Manage Clients" interface. On the left is a sidebar with the user's profile (Liam David) and navigation links for "Manage Profile" and "Manage Clients". The main content area has a header with "Manage Clients" and "My Clients" links. Below the header is a search bar and buttons for "Download IASIS MCN app" and "Add New Client". A "Show Inactive Clients" link is also present. The central part of the page features a table with the following data:

| Client ID | Name | Email | Phone | Actions |
|----------------|-------------|-----------------------------|--------------------|-----------------|
| PKT-1699973281 | Rene David | reodavid83@yahoo.com | (+1) 322-222-2222 | [Edit] [Delete] |
| PKT-1699972916 | Rohan David | rdavid234@hotmail.com | (+1) 333-333-32 | [Edit] [Delete] |
| PKT-1699950209 | Nishi David | nmishidave@gmail.com | (+1) 921-465-5555 | [Edit] [Delete] |
| PKT-1699629048 | John Ghosh | sdg.jocid@malinator.com | (+1) 234-234-3242 | [Edit] [Delete] |
| PKT-1699629671 | Sail Ghosh | sdg.jocid@malinator.com | (+1) 234-234-3242 | [Edit] [Delete] |
| PKT-1699629169 | Munmun Roy | konchan.jocid@malinator.com | (+1) 555-666-3333 | [Edit] [Delete] |
| PKT-1699598585 | Mayuk Roy | konchan.jocid@malinator.com | (+1) 99-222-3333 | [Edit] [Delete] |
| PKT-1699522684 | sd sdhdf | sdhdf@yopmail.com | (+1) 888-785-5555 | [Edit] [Delete] |
| PKT-1699536726 | Piya Roy | piya101@yahoo.com | (+27) 254-844-4444 | [Edit] [Delete] |

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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.



The screenshot displays the 'Manage Clients' page in the IASIS system. The page includes a search bar, a 'Download IASIS MCN app' button, and an 'Add New Client' button highlighted with a red box. Below these elements is a table listing existing clients with columns for Client ID, Name, Email, Phone, and Actions.

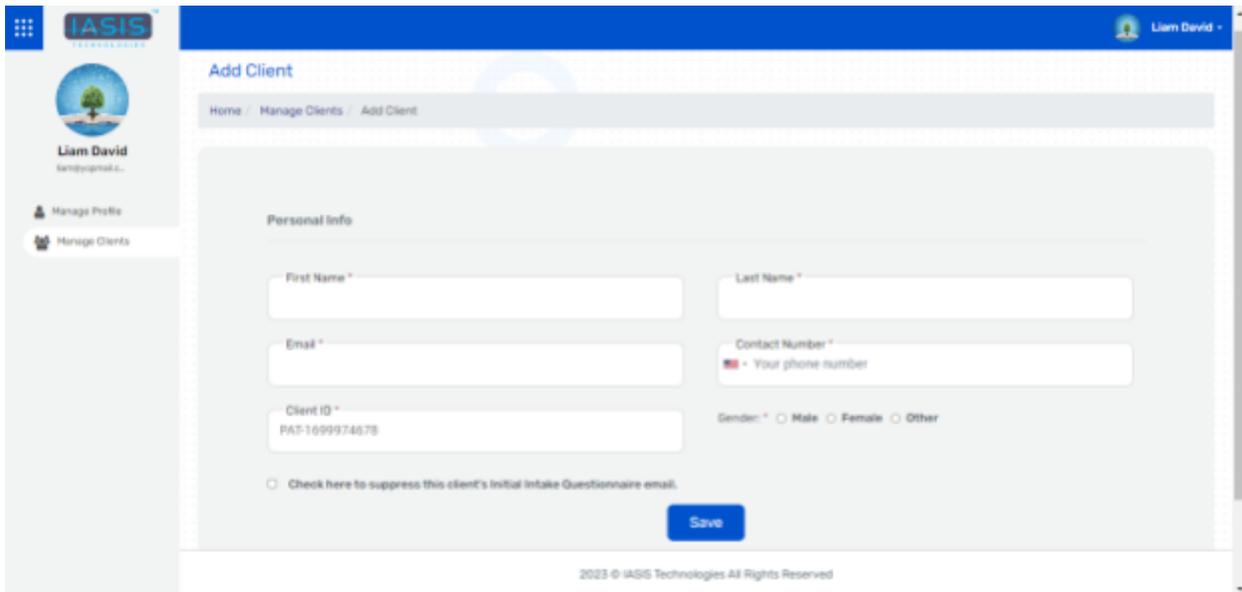
| Client ID | Name | Email | Phone | Actions |
|----------------|-------------|------------------------------|--------------------|---|
| PKT-1699973281 | Rene David | reodavid83@yahoo.com | (+1) 322-222-2222 |   |
| PKT-1699972916 | Rohan David | rdar1234@hotmail.com | (+1) 333-333-32 |   |
| PKT-1699960209 | Nishi David | knishi14@gmail.com | (+1) 921-465-5555 |   |
| PKT-1699629048 | John Ghosh | sdg.joosd@mailinator.com | (+1) 234-234-3242 |   |
| PKT-1699629671 | Sail Ghosh | sdg.joosd@mailinator.com | (+1) 234-234-3242 |   |
| PKT-1699629169 | Munmun Roy | konchan.jasid@mailinator.com | (+1) 555-666-3333 |   |
| PKT-1699598585 | Majuk Roy | konchan.jasid@mailinator.com | (+1) 99-222-3333 |   |
| PKT-1699522684 | sdj sdhdf | sdhfd@yopmail.com | (+1) 888-785-5555 |   |
| PKT-1699530726 | Piya Roy | piya107@yahoo.com | (+27) 254-844-4444 |   |

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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.



The screenshot displays the 'Add Client' form within the IASIS application. The interface includes a top navigation bar with the IASIS logo and a user profile for 'Liam David'. A left sidebar contains navigation options for 'Manage Profile' and 'Manage Clients'. The main content area is titled 'Add Client' and features a breadcrumb trail: 'Home / Manage Clients / Add Client'. The form is divided into a 'Personal Info' section with the following fields: 'First Name *', 'Last Name *', 'Email *', 'Contact Number *' (with a red phone icon and the text 'Your phone number'), 'Client ID *' (pre-filled with 'PAT-1099974678'), and 'Gender *' (with radio buttons for 'Male', 'Female', and 'Other'). At the bottom of the form, there is a checkbox labeled 'Check here to suppress this client's Initial Intake Questionnaire email.' and a blue 'Save' button. The footer of the page reads '2023 © IASIS Technologies All Rights Reserved'.

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

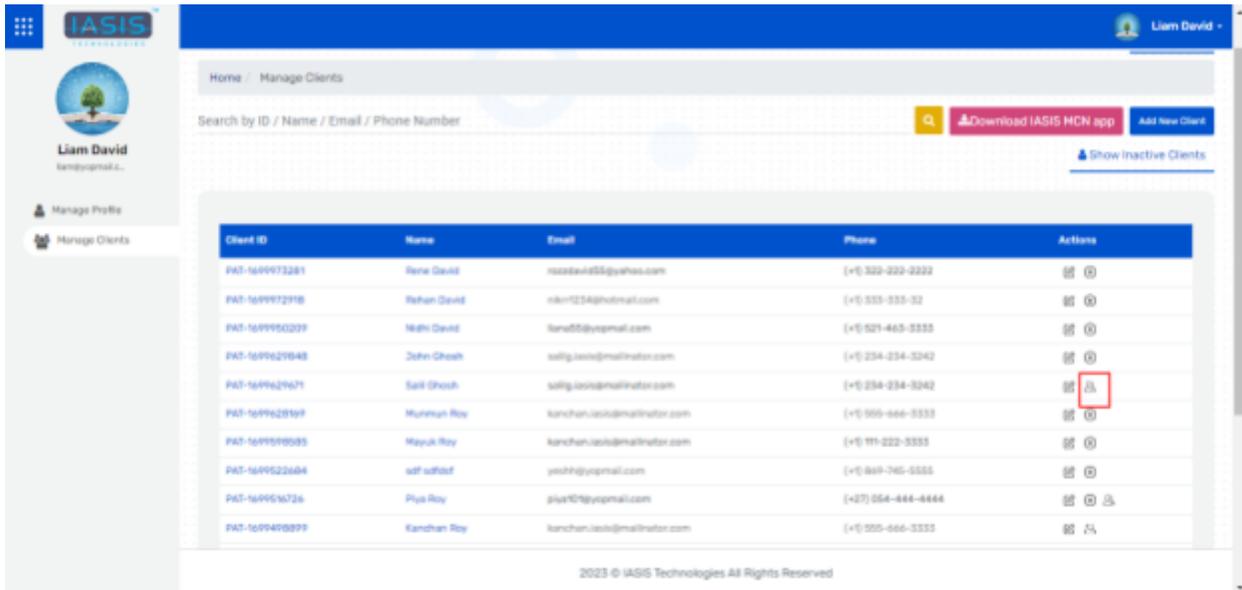
To add a family member to an existing client's account, follow these steps:

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.



| Client ID | Name | Email | Phone | Actions |
|----------------|-------------|-----------------------|-------------------|---------|
| PKS-169972281 | Rene David | rene@iatis.com | (+1) 322-222-2222 | 👤 |
| PKS-169972916 | Rohan David | rohan1234@hotmail.com | (+1) 333-333-32 | 👤 |
| PKS-169950209 | Nahn David | nanad55@gmail.com | (+1) 321-463-3333 | 👤 |
| PKS-1699629548 | John Ghosh | john.ghosh@iatis.com | (+1) 234-234-3242 | 👤 |
| PKS-1699629671 | Sail Ghosh | sail.ghosh@iatis.com | (+1) 234-234-3242 | 👤 |
| PKS-1699628399 | Munhan Roy | munhan.roy@iatis.com | (+1) 555-666-5555 | 👤 |
| PKS-169959585 | Mayuk Roy | mayuk.roy@iatis.com | (+1) 111-222-3333 | 👤 |
| PKS-169922684 | Jeff Wolff | jeffw@iatis.com | (+1) 888-765-5555 | 👤 |
| PKS-1699536726 | Piya Roy | piya@iatis.com | (+1) 554-444-4444 | 👤 |
| PKS-1699498999 | Kanchan Roy | kanchan.roy@iatis.com | (+1) 555-666-3333 | 👤 |

3. Completing the Form:

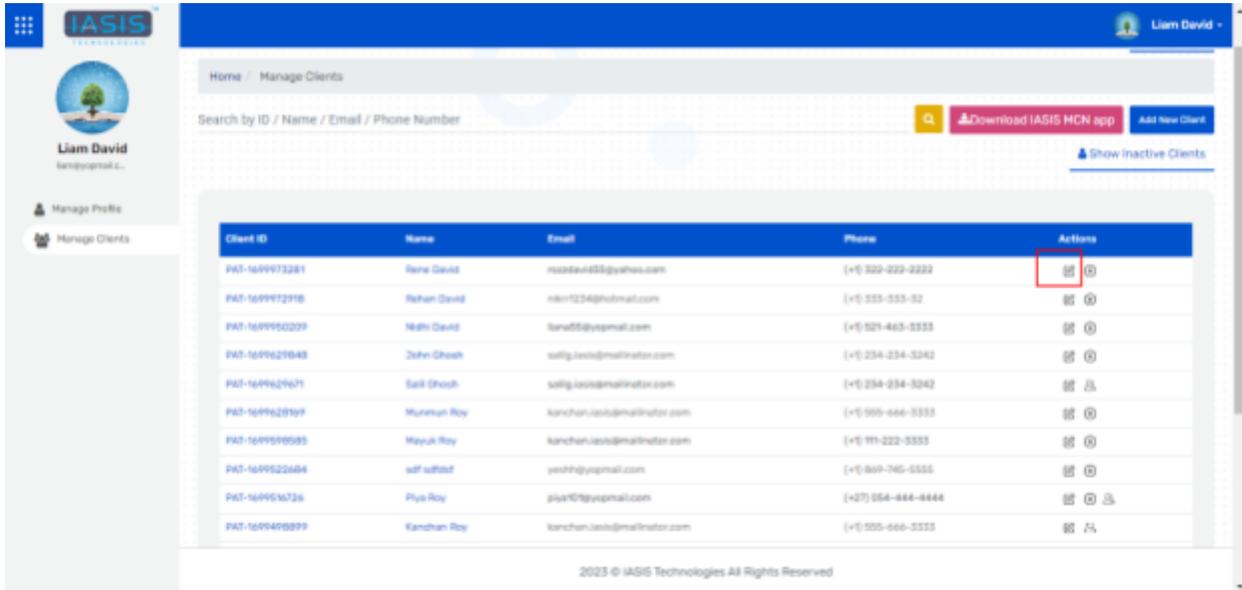
A form will appear wherein you can enter the information for the child/dependent client.

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

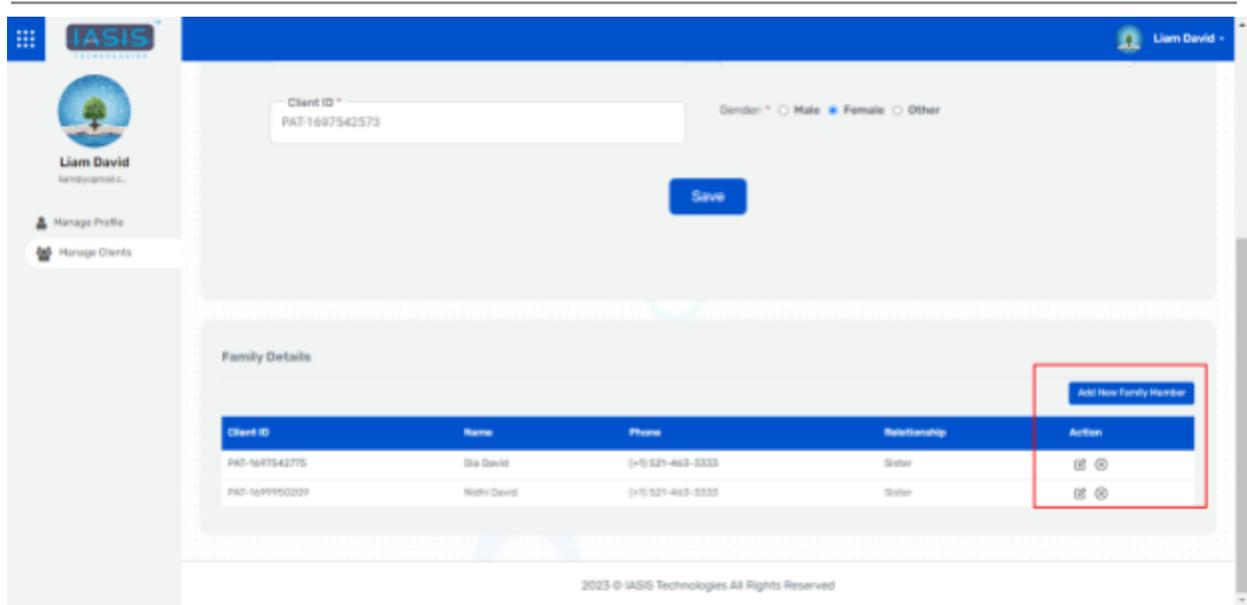
In the Manage Clients view, you'll notice a edit icon under the Actions column. Hovering over this icon will reveal the label "Edit Client". Click on this button to initiate the process.



The screenshot shows the IASIS Manage Clients interface. The table below lists client information with columns for Client ID, Name, Email, Phone, and Actions. The edit icon in the Actions column for the first client is highlighted with a red box.

| Client ID | Name | Email | Phone | Actions |
|----------------|-------------|--------------------------|-------------------|---|
| PKT-169973281 | Rene David | rene.david@yasho.com | (+1) 302-222-2222 |   |
| PKT-169972916 | Rohan David | rdavid1234@hotmail.com | (+1) 333-333-32 |   |
| PKT-169950209 | Nishi David | nishiD@yupmail.com | (+1) 521-465-5333 |   |
| PKT-169962948 | John Ghosh | john.ghosh@matinator.com | (+1) 234-234-3242 |   |
| PKT-169962947 | Sail Ghosh | sail.ghosh@matinator.com | (+1) 234-234-3242 |   |
| PKT-169962919 | Munhan Roy | munhan.roy@matinator.com | (+1) 555-666-5333 |   |
| PKT-169959585 | Majuk Roy | munhan.roy@matinator.com | (+1) 911-222-5333 |   |
| PKT-1699522484 | WJ edhof | wedhof@yupmail.com | (+1) 860-745-5555 |   |
| PKT-1699516726 | Piya Roy | piyaR@yupmail.com | (+1) 554-844-4444 |    |
| PKT-1699495899 | Kanhan Roy | kanhan.roy@matinator.com | (+1) 555-666-5333 |   |

- 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.



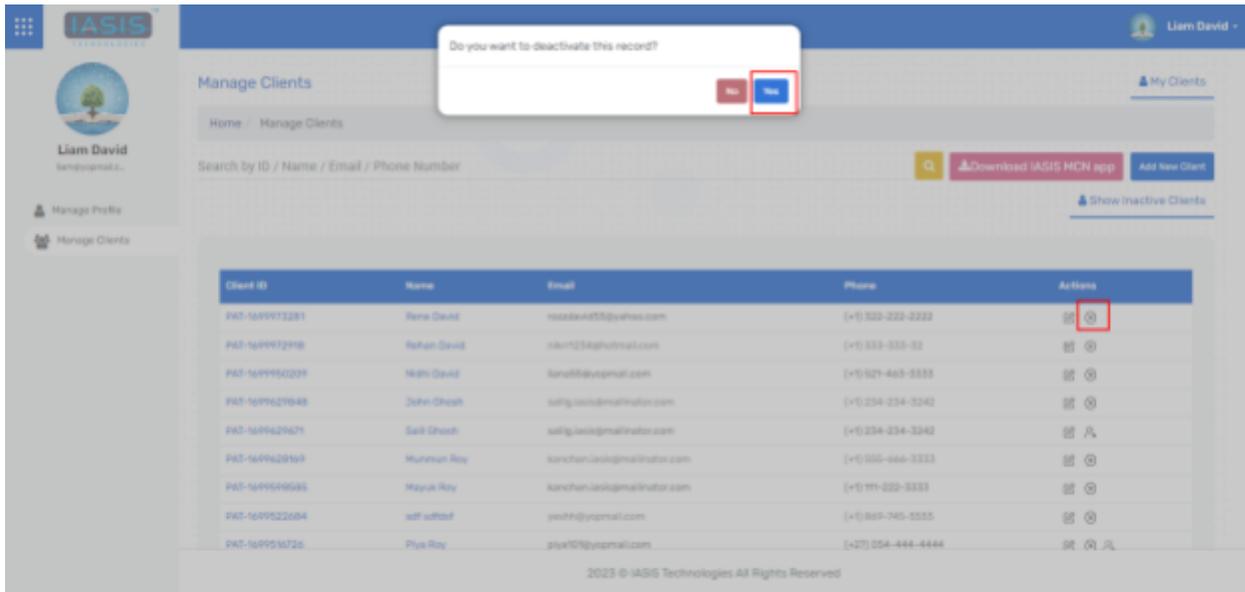
- In this list, there are options to edit or delete family member details.
- Additionally, you'll find a button at the top of the list that allows you to easily add a new family member to the client's account. This way, you can conveniently manage family member information as needed.

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.**

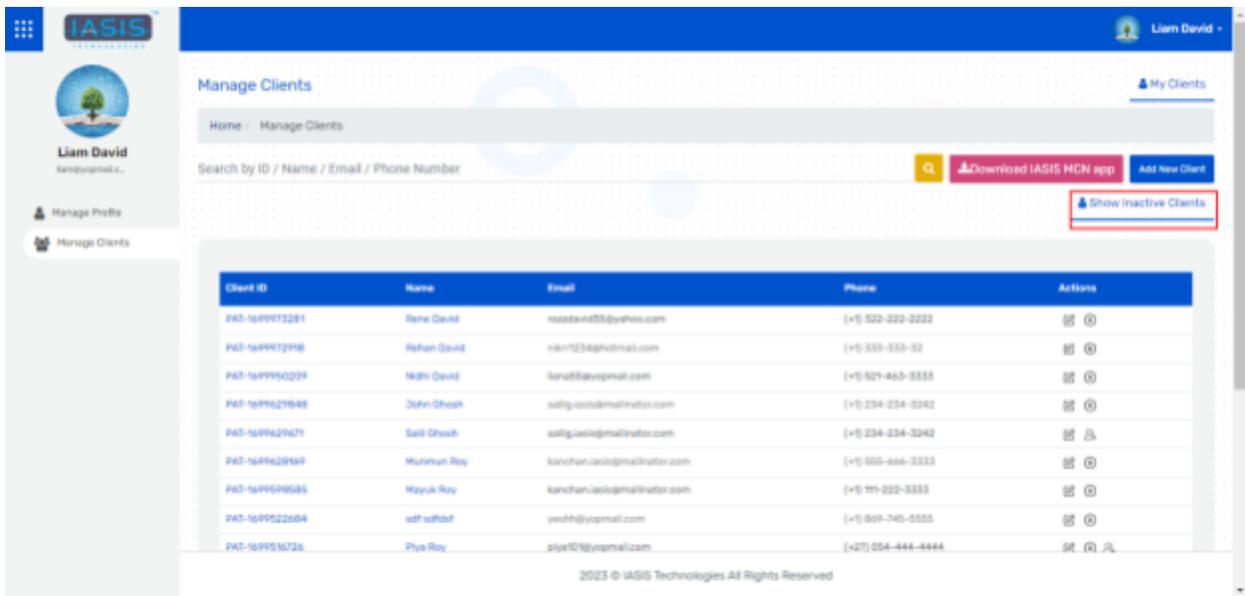


2.7.1. Show Inactive Client Button:

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

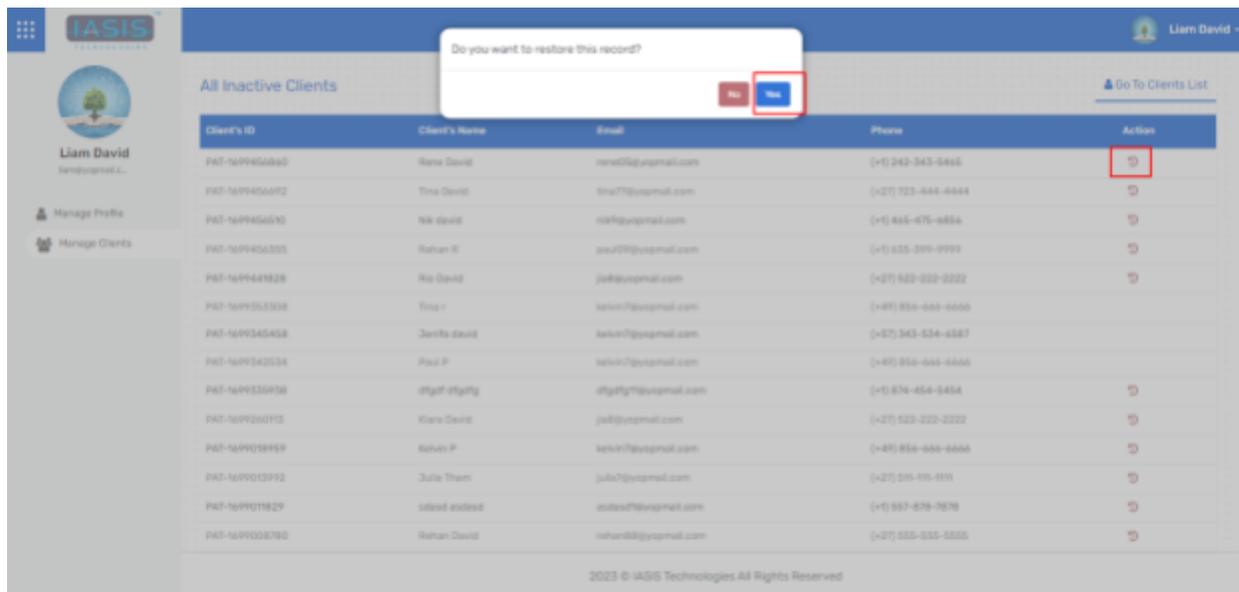
2.7.2 Accessing Inactive Clients:

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.



The screenshot shows the IASIS user interface. At the top, a confirmation dialog box asks "Do you want to restore this record?" with "Yes" and "No" buttons. Below the dialog is a table titled "All Inactive Clients". The table has columns for Client's ID, Client's Name, Email, Phone, and Action. The first row of the table is highlighted, and the "Action" column for that row contains a restore icon (a circular arrow) which is circled in red. A "Go To Clients List" link is visible in the top right corner of the table area.

| Client's ID | Client's Name | Email | Phone | Action |
|----------------|---------------|-------------------|--------------------|--|
| PAT-1619456680 | Rene David | rene01@gmail.com | (+1) 242-343-5455 |  |
| PAT-1619456672 | Tim David | tim77@gmail.com | (+27) 723-444-4444 |  |
| PAT-1619456670 | Nik David | nik0@gmail.com | (+1) 444-475-4444 |  |
| PAT-1619456670 | Nathan K | nath01@gmail.com | (+1) 633-379-7777 |  |
| PAT-1619461828 | Ric David | ric0@gmail.com | (+27) 522-222-2222 |  |
| PAT-1619355328 | Tim r | timr0@gmail.com | (+49) 856-666-6666 |  |
| PAT-1619345458 | Jerika david | jerika0@gmail.com | (+27) 343-534-6587 |  |
| PAT-1619342534 | Paul P | paull0@gmail.com | (+49) 856-666-6666 |  |
| PAT-1619332978 | stgfh stgfh | stgfh0@gmail.com | (+1) 876-456-8454 |  |
| PAT-1619220715 | Karen David | kar0@gmail.com | (+27) 522-222-2222 |  |
| PAT-1619018959 | Karen P | kar0@gmail.com | (+49) 856-666-6666 |  |
| PAT-1619012972 | Julia Thom | julia0@gmail.com | (+27) 531-111-1111 |  |
| PAT-1619018229 | edward edward | edward0@gmail.com | (+1) 857-876-7676 |  |
| PAT-1619022792 | Nathan David | nathan0@gmail.com | (+27) 522-222-2222 |  |

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:**

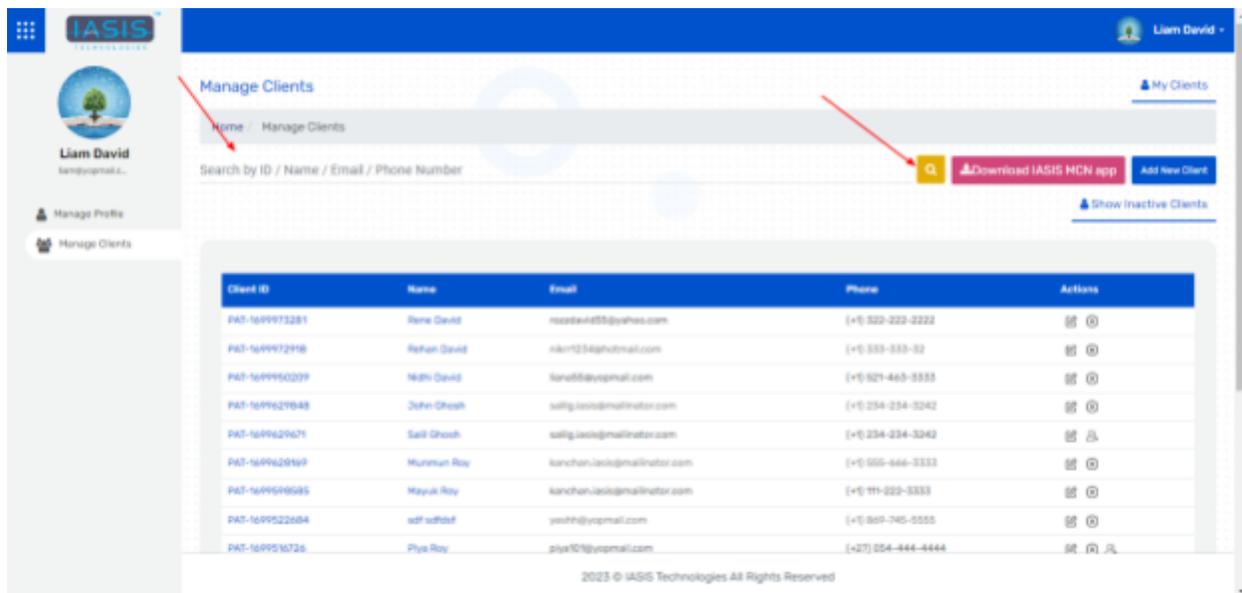
Input the client's ID, or a portion thereof. Matching client records will be displayed.

- **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.



The screenshot shows the 'Manage Clients' page in the IASIS system. A search bar is located at the top, with a magnifying glass icon and a search button. Below the search bar is a table of client records. The table has columns for Client ID, Name, Email, Phone, and Actions. The data is as follows:

| Client ID | Name | Email | Phone | Actions |
|----------------|-------------|-----------------------|--------------------|-----------------|
| PKT-169973281 | Rene David | reodavid33@yahoo.com | (+1) 322-222-2222 | [Edit] [Delete] |
| PKT-169972916 | Rehan David | rdavid234@hotmail.com | (+1) 333-333-32 | [Edit] [Delete] |
| PKT-169990209 | Nabil David | ndavid84@gmail.com | (+1) 921-465-5333 | [Edit] [Delete] |
| PKT-169962948 | John Ghosh | john.ghosh@gmail.com | (+1) 234-234-2342 | [Edit] [Delete] |
| PKT-169962947 | Sail Ghosh | sail.ghosh@gmail.com | (+1) 234-234-2342 | [Edit] [Delete] |
| PKT-169962949 | Murman Roy | murman.roy@gmail.com | (+1) 555-666-3333 | [Edit] [Delete] |
| PKT-169959685 | Mayuk Roy | mayuk.roy@gmail.com | (+1) 111-222-3333 | [Edit] [Delete] |
| PKT-1699522684 | edf edfdef | edfdef@gmail.com | (+1) 800-745-5555 | [Edit] [Delete] |
| PKT-1699530726 | Piya Roy | piya101@yahoo.com | (+27) 254-444-4444 | [Edit] [Delete] |

2.9 Client Record

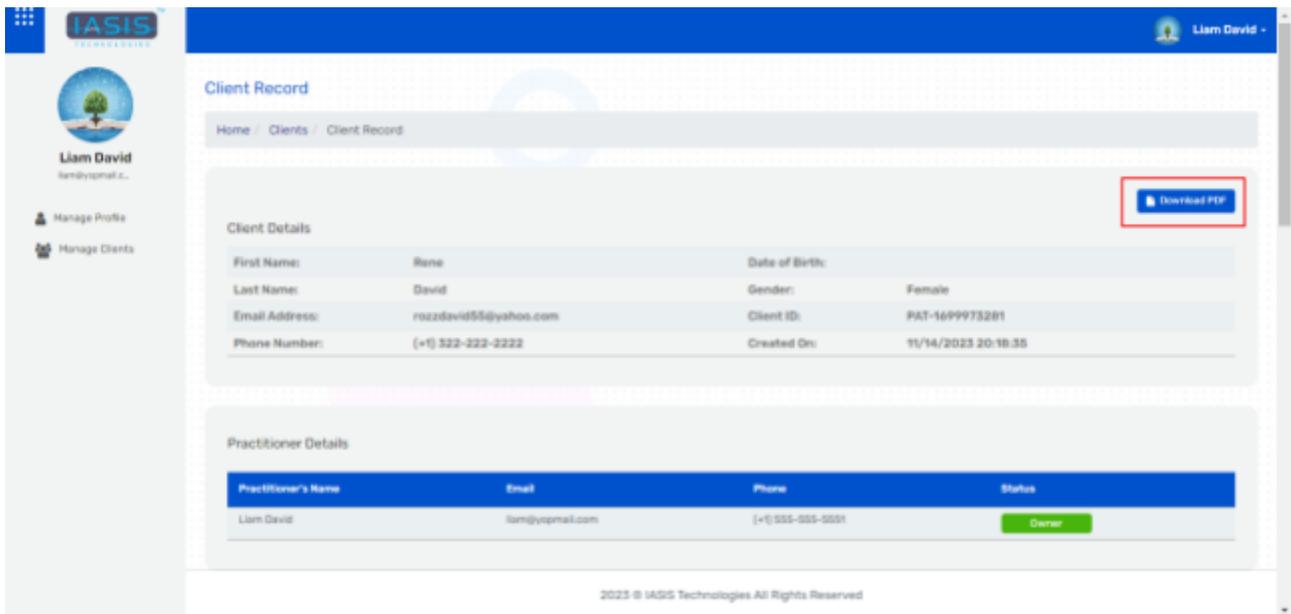
From the Manage Clients page, click on the Client ID or the client's Name. You will be directed to that client's Client Record page.

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.



The screenshot shows the IASIS Client Record page. The header includes the IASIS logo and the user name "Liam David". The page title is "Client Record". A breadcrumb trail shows "Home / Clients / Client Record". A "Download PDF" button is highlighted with a red box. The "Client Details" section contains the following information:

| | | | |
|----------------|-------------------------|----------------|---------------------|
| First Name: | Rene | Date of Birth: | |
| Last Name: | David | Gender: | Female |
| Email Address: | rene22david55@yahoo.com | Client ID: | PAT-1699973281 |
| Phone Number: | (+1) 322-222-2222 | Created On: | 11/14/2023 20:18:35 |

The "Practitioner Details" section contains a table with the following information:

| Practitioner's Name | Email | Phone | Status |
|---------------------|------------------|-------------------|--------|
| Liam David | liam@yopmail.com | (+1) 555-555-5551 | Owner |

At the bottom of the page, it says "2023 © IASIS Technologies All Rights Reserved".

2.9.2 Practitioner Details

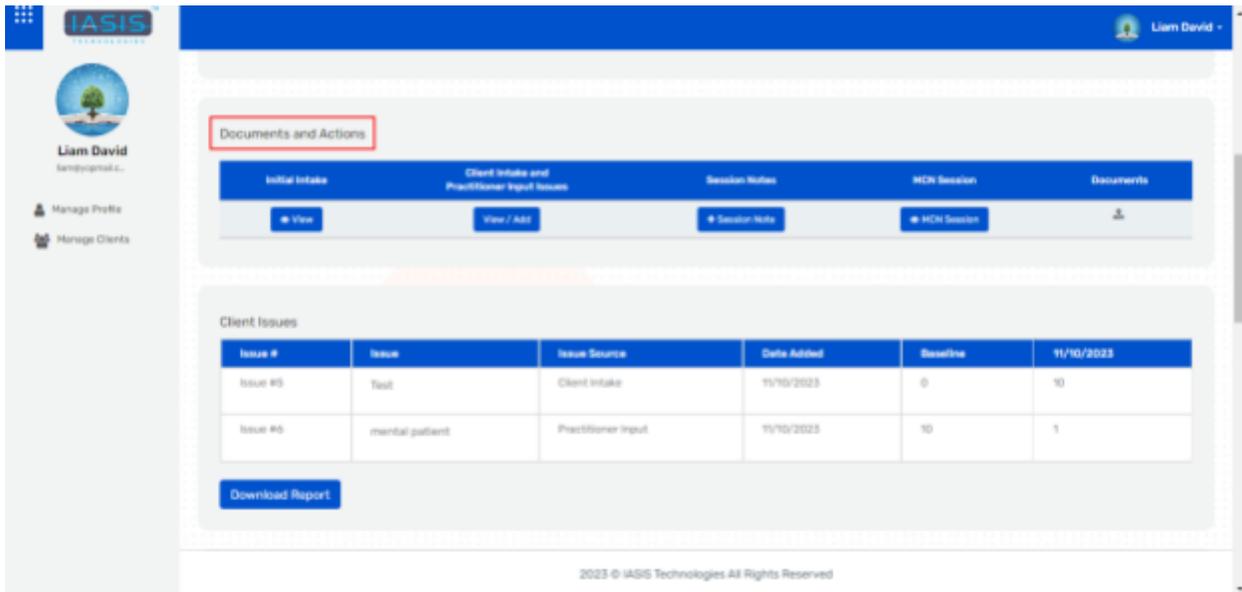
You can view a list of practitioners assigned to the client. This list is specific to the client, providing detailed information about the professionals collaborating in their care.

| 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



The screenshot displays the IASIS user interface. On the left is a sidebar with the user's profile for Liam David. The main area is titled 'Documents and Actions' and contains several navigation buttons: 'Initial Intake', 'Client Intake and Practitioner Input Issues', 'Session Notes', 'MCN Session', and 'Documents'. Below these buttons is a 'Client Issues' table.

| Issue # | Issue | Issue Source | Date Added | Baseline | 11/10/2023 |
|----------|----------------|--------------------|------------|----------|------------|
| Issue #0 | Test | Client Intake | 11/10/2023 | 0 | 10 |
| Issue #0 | mental patient | Practitioner Input | 11/10/2023 | 10 | 1 |

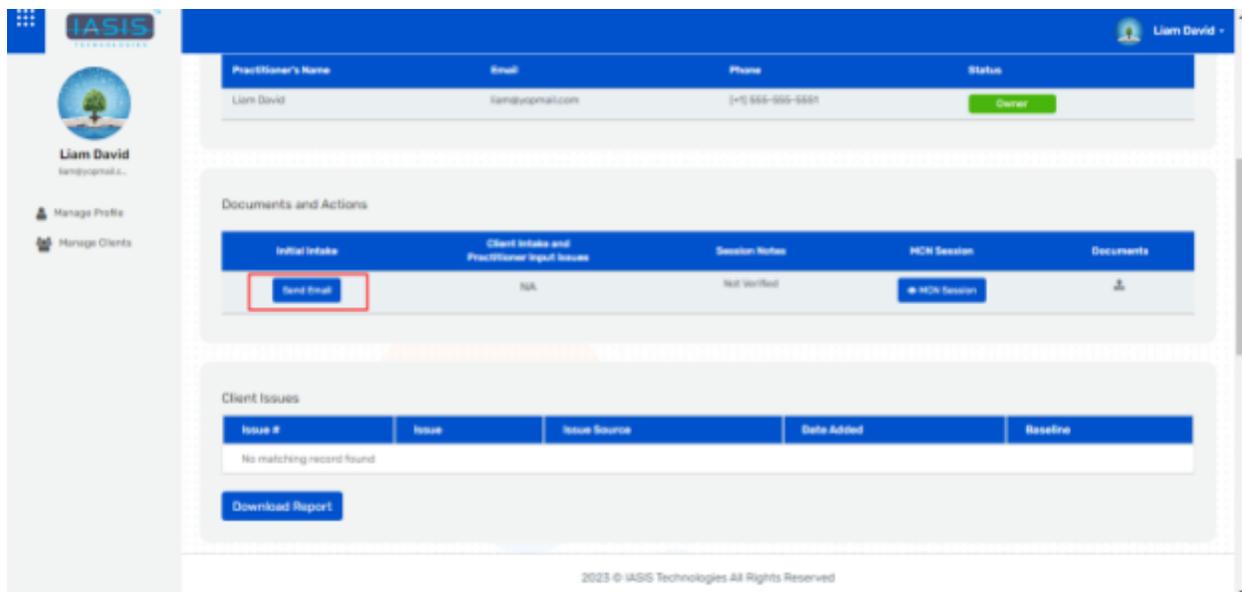
At the bottom of the table area, there is a 'Download Report' button. The footer of the page reads '2023 © IASIS Technologies All Rights Reserved'.

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.



The screenshot displays the IASIS user interface for a practitioner named Liam David. The interface includes a sidebar with navigation options like 'Manage Profile' and 'Manage Clients'. The main content area shows a table of practitioner details and a 'Documents and Actions' section. In the 'Documents and Actions' table, the 'Initial Intake' column has a 'Send Email' button highlighted with a red box. Below this, there is a 'Client Issues' section with a table that currently shows 'No matching record found' and a 'Download Report' button.

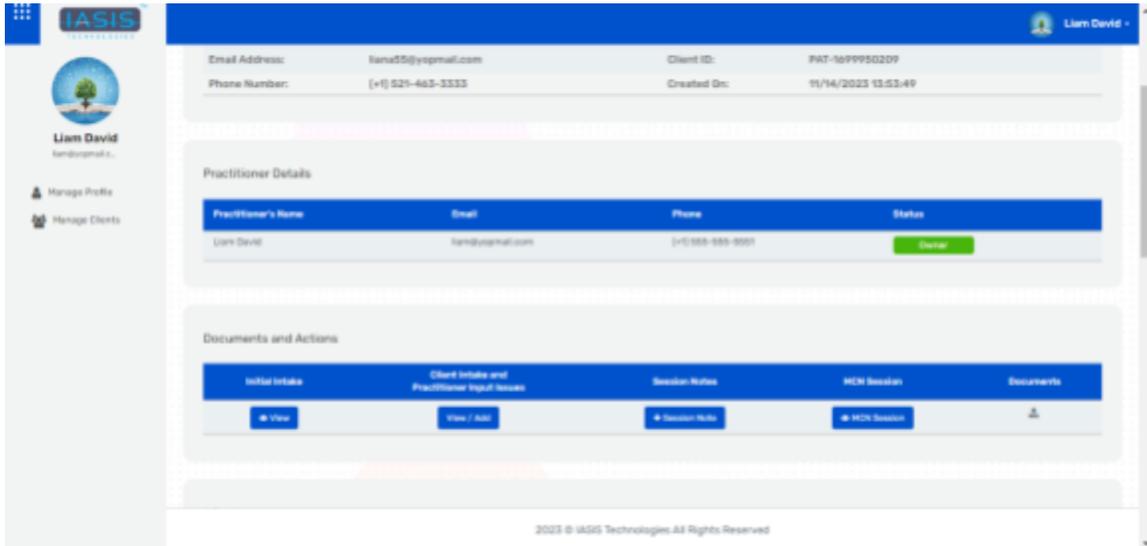
| Practitioner's Name | Email | Phone | Status |
|---------------------|---------------|-------------------|--------|
| Liam David | liam@pmat.com | (+1) 555-555-5551 | Owner |

| Initial Intake | Client Intake and Practitioner Input Issues | Session Notes | MCR Session | Documents |
|----------------|---|---------------|-------------|-----------|
| Send Email | N/A | Not Verified | MCR Session | |

| Issue # | Issue | Issue Source | Date Added | Baseline |
|--------------------------|-------|--------------|------------|----------|
| No matching record found | | | | |

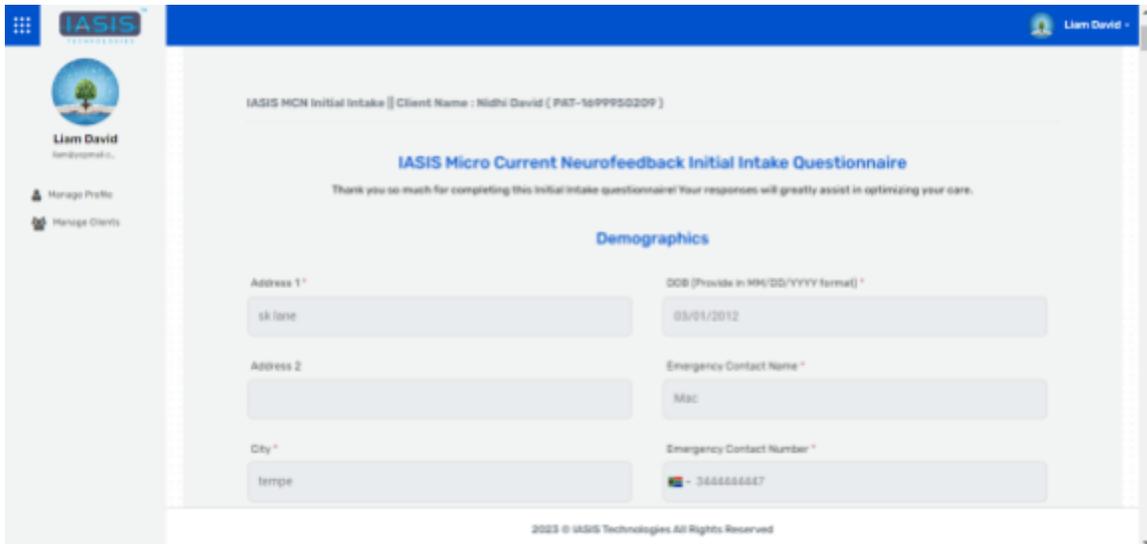
- View Initial Intake

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.



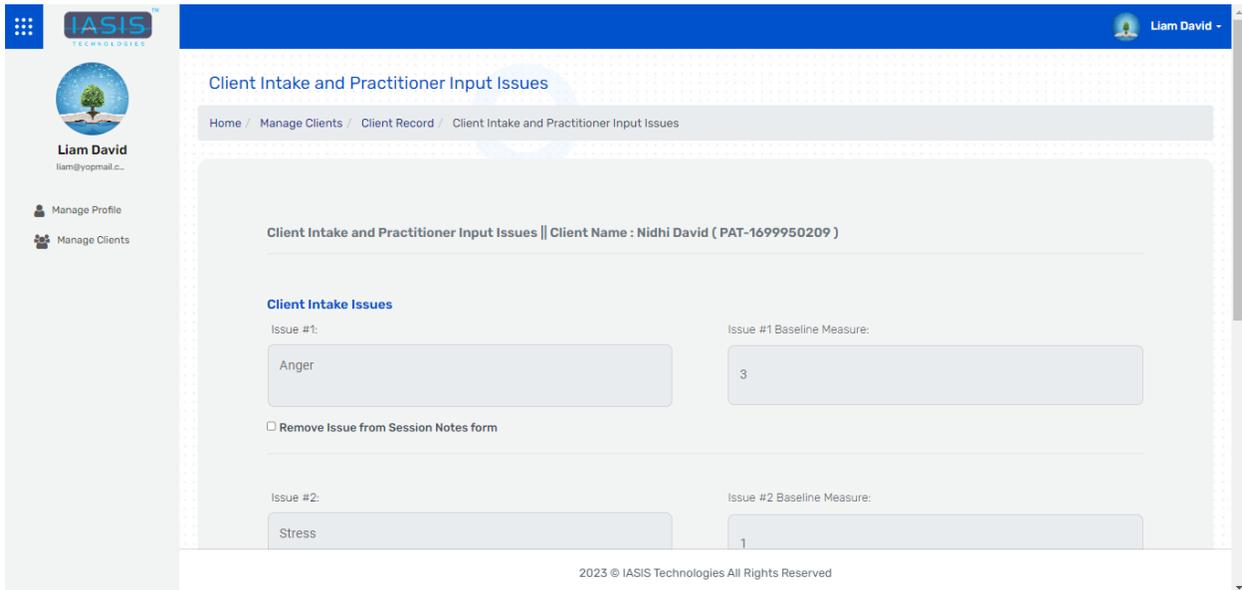
2.9.3.2 Client Intake and Practitioner Input Issues

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.

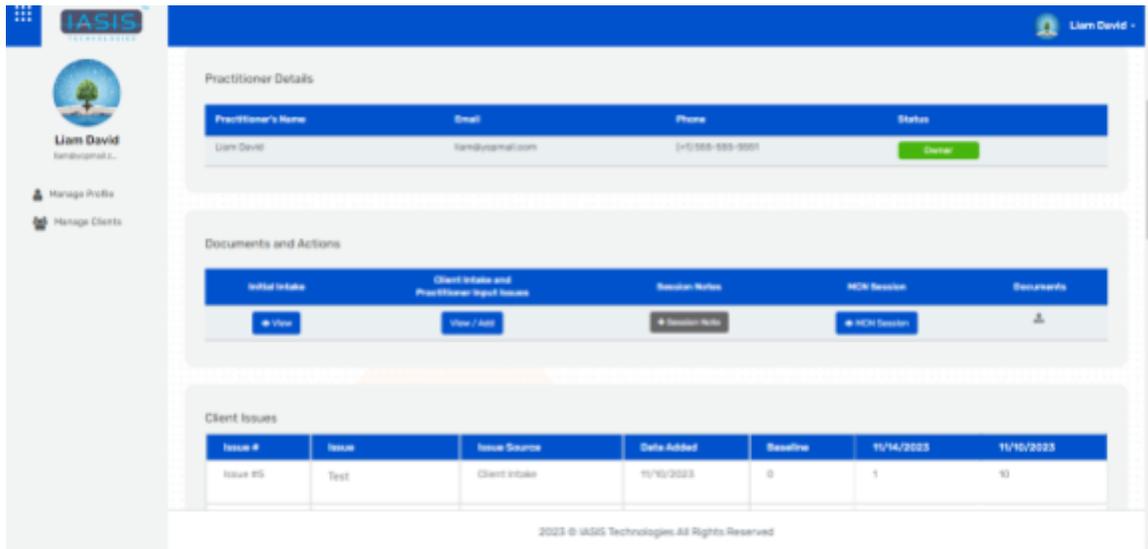
If the checkbox “Remove Issue from Session Notes form” associated with an Issue is checked, those Issues will not appear on the Session Notes form.



The screenshot shows the IASIS web interface. The top navigation bar is blue with the IASIS logo on the left and the user name 'Liam David' on the right. A sidebar on the left contains the user's profile picture and name 'Liam David' with the email 'liam@yopmail.c...'. Below the profile are two menu items: 'Manage Profile' and 'Manage Clients'. The main content area has a breadcrumb trail: 'Home / Manage Clients / Client Record / Client Intake and Practitioner Input Issues'. The title of the page is 'Client Intake and Practitioner Input Issues'. Below the title, there is a header for the client: 'Client Intake and Practitioner Input Issues || Client Name : Nidhi David (PAT-1699950209)'. The form is titled 'Client Intake Issues' and contains two sections. The first section is for 'Issue #1', with a text input field containing 'Anger' and a 'Baseline Measure' input field containing '3'. Below this is a checkbox labeled 'Remove Issue from Session Notes form'. The second section is for 'Issue #2', with a text input field containing 'Stress' and a 'Baseline Measure' input field containing '1'. At the bottom of the page, there is a copyright notice: '2023 © IASIS Technologies All Rights Reserved'.

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.

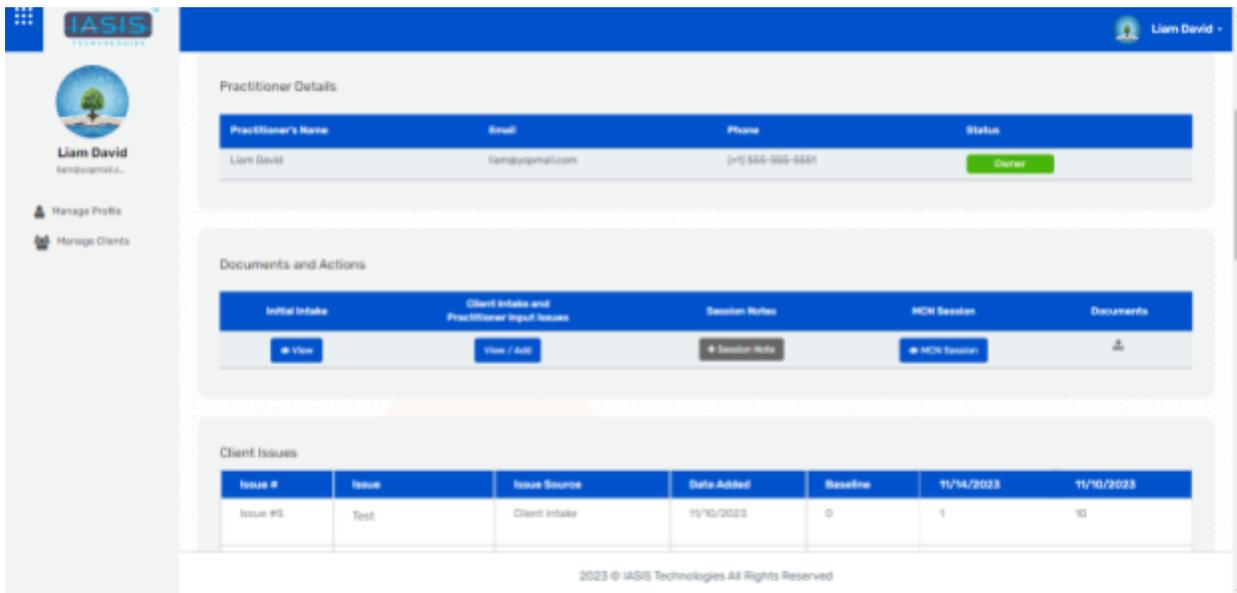
- The "+ Session Note" Button Is Reactivated after 12 Hours

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.



The screenshot displays the IASIS user interface for a practitioner named Liam David. The interface is divided into three main sections:

- Practitioner Details:** A table with columns for Practitioner's Name, Email, Phone, and Status. The Status column shows a green "Owner" button.
- Documents and Actions:** A table with columns for Initial Intake, Client Intake and Practitioner Input Issues, Session Notes, HCN Session, and Documents. The Documents column contains an upload icon.
- Client Issues:** A table with columns for Issue #, Issue, Issue Source, Date Added, Baseline, and two date columns (11/14/2023 and 11/10/2023). A single row is visible with Issue # "Issue #5", Issue "Test", Issue Source "Client Intake", Date Added "11/10/2023", Baseline "0", and values "1" and "10" in the date columns.

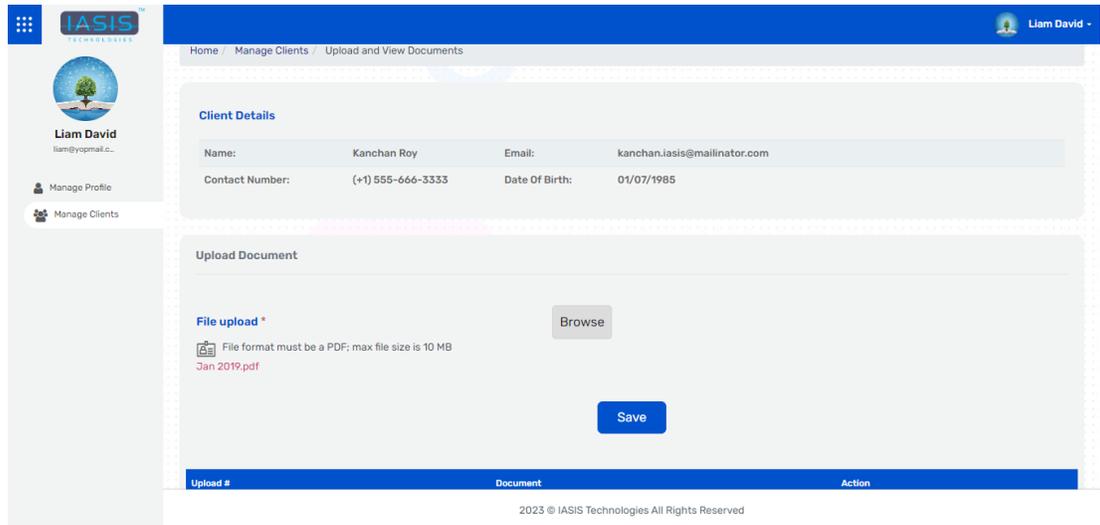
At the bottom of the page, the text "2023 © IASIS Technologies All Rights Reserved" is visible.

- Document Upload

Follow the instructions below to upload new documents:

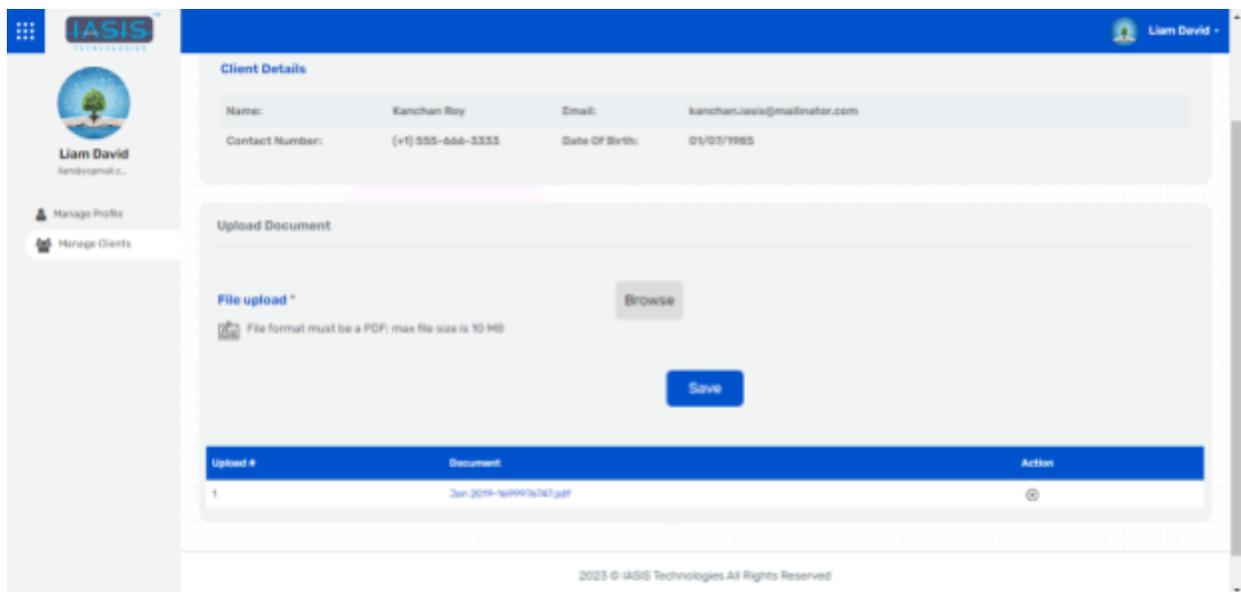
- **File Selection**

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



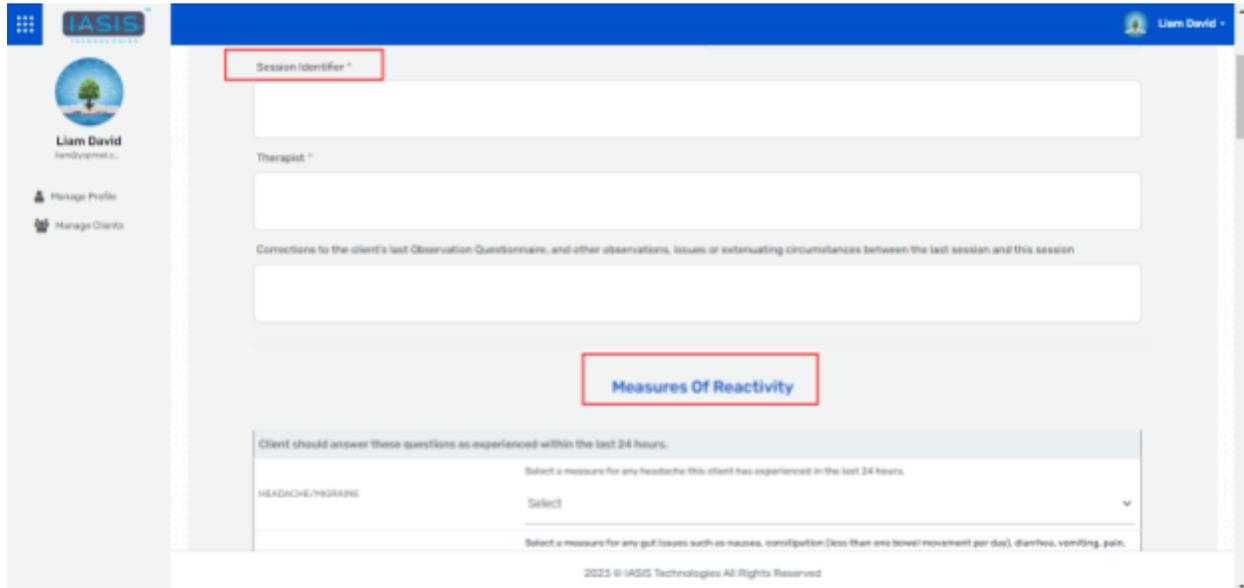
- **Upload Process**

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

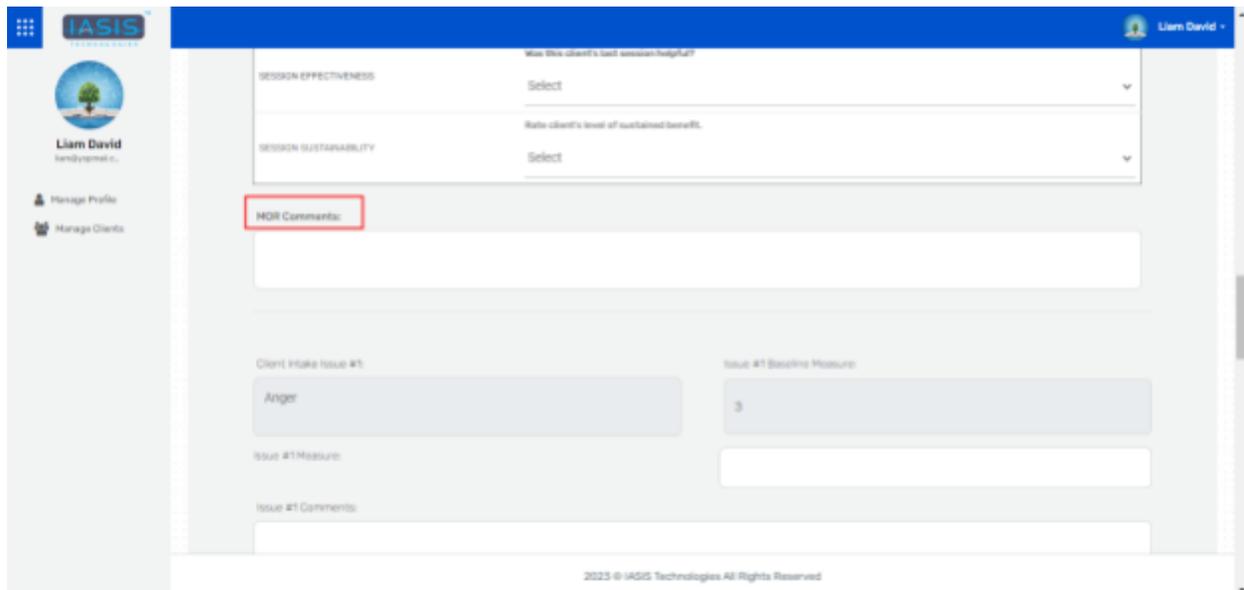
This section includes information from Session Notes, such as the Session Identifier, MORs (Measures Of Reactivity), and MOR comments.



The screenshot shows the IASIS Pre-Session MORs form. The form includes a sidebar with the user's profile (Liam David) and navigation options (Manage Profile, Manage Clients). The main content area contains the following fields:

- Session Identifier ***: A text input field.
- Therapist ***: A text input field.
- Corrections to the client's last Observation Questionnaire, and other observations, issues or extenuating circumstances between the last session and this session**: A text input field.
- Measures Of Reactivity**: A section header for the reactivity measures.
- Client should answer these questions as experienced within the last 24 hours.**: A heading for the reactivity questions.
- HEADACHE/MIGRAINE**: A dropdown menu with the text "Select a measure for any headache this client has experienced in the last 24 hours." and a "Select" button.
- Other reactivity measures**: A dropdown menu with the text "Select a measure for any gut issues such as nausea, constipation (less than one bowel movement per day), diarrhea, vomiting, pain." and a "Select" button.

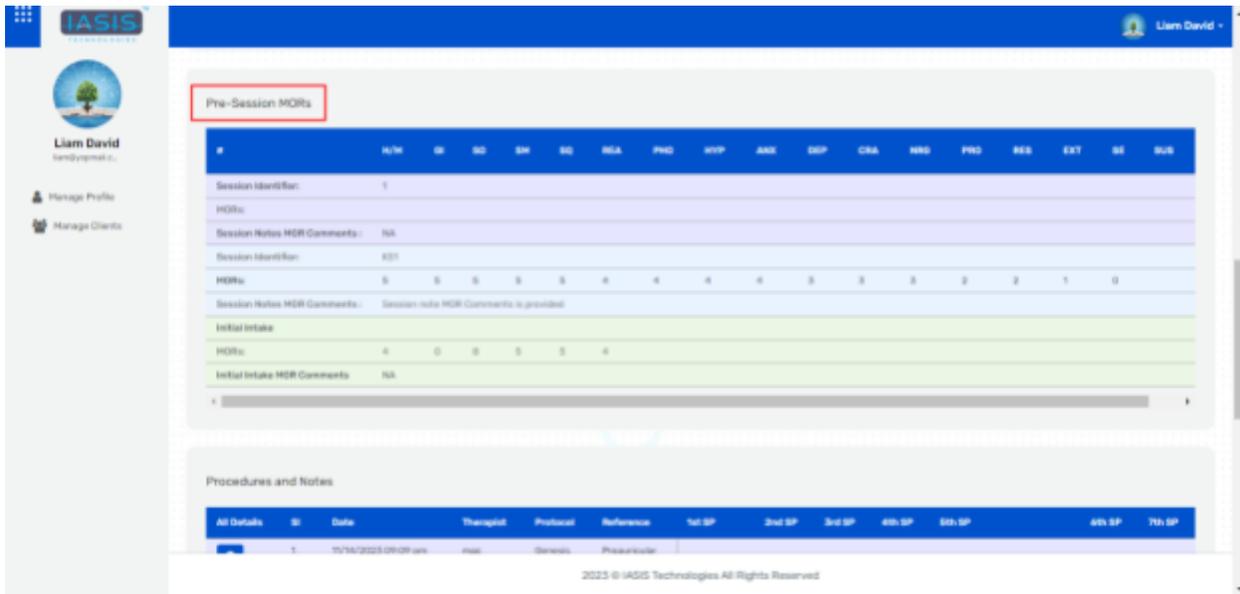
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The screenshot shows the IASIS Session Effectiveness and Sustainability form. The form includes the same sidebar as the previous screenshot. The main content area contains the following fields:

- Session Effectiveness**: A dropdown menu with the text "Rate the client's last session (high/low)" and a "Select" button.
- Session Sustainability**: A dropdown menu with the text "Rate client's level of sustained benefit." and a "Select" button.
- MOR Comments**: A text input field.
- Client Issue #1**: A text input field with the value "Anger".
- Issue #1 Baseline Measure**: A text input field with the value "3".
- Issue #1 Measure**: A text input field.
- Issue #1 Comments**: A text input field.

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Pre-Session MDRs

| # | N/T | SI | SD | SH | SO | SLA | PHD | WPP | AKK | DEP | CBA | NRG | FRG | RES | EXT | SE | BUS |
|------------------------------|-----|---------------------------------------|----|----|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|----|-----|
| Session Identifier: | | 1 | | | | | | | | | | | | | | | |
| MDRs: | | | | | | | | | | | | | | | | | |
| Session Notes MDR Comments: | | NA | | | | | | | | | | | | | | | |
| Session Identifier: | | 431 | | | | | | | | | | | | | | | |
| MDRs: | | 5 | 5 | 5 | 5 | 5 | 4 | 4 | 4 | 4 | 3 | 3 | 3 | 2 | 2 | 1 | 0 |
| Session Notes MDR Comments: | | Session-note MDR Comments is provided | | | | | | | | | | | | | | | |
| Initial Intake | | | | | | | | | | | | | | | | | |
| MDRs: | | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Initial Intake MDR Comments: | | NA | | | | | | | | | | | | | | | |

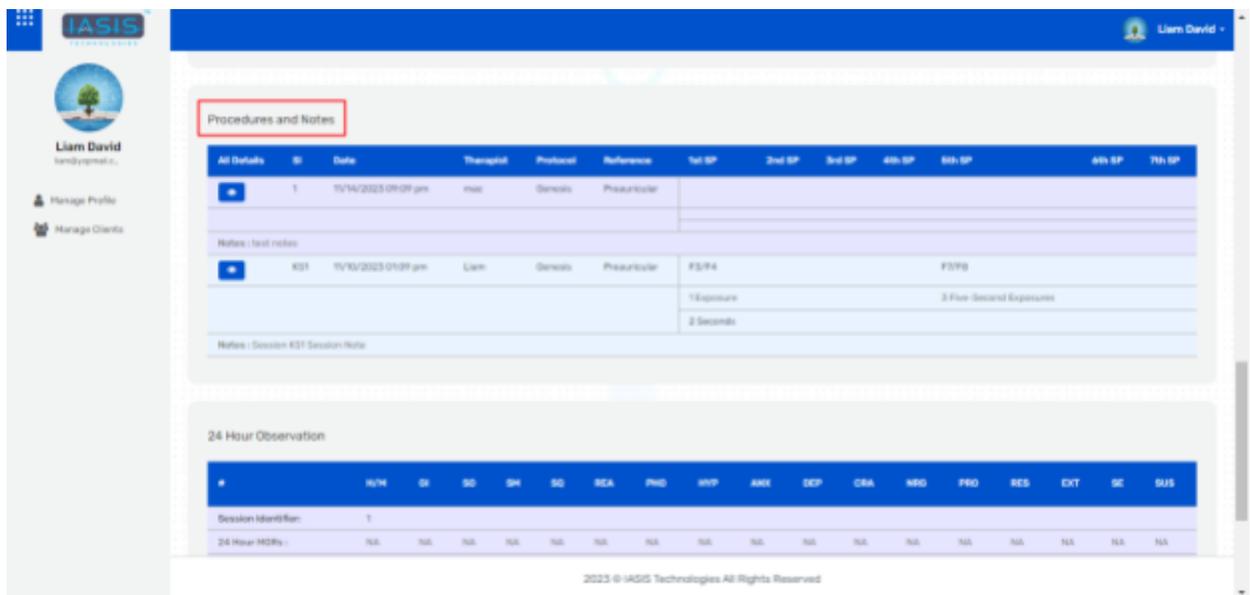
Procedures and Notes

| All Details | SI | Date | Therapist | Protocol | Reference | 1st SP | 2nd SP | 3rd SP | 4th SP | 5th SP | 6th SP | 7th SP |
|--------------------------|----|---------------------|-----------|----------|-------------|--------|--------|--------|--------|--------|--------|--------|
| <input type="checkbox"/> | 1 | 11/14/2023 01:07 pm | Max | General | Presurcular | | | | | | | |

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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.



Procedures and Notes

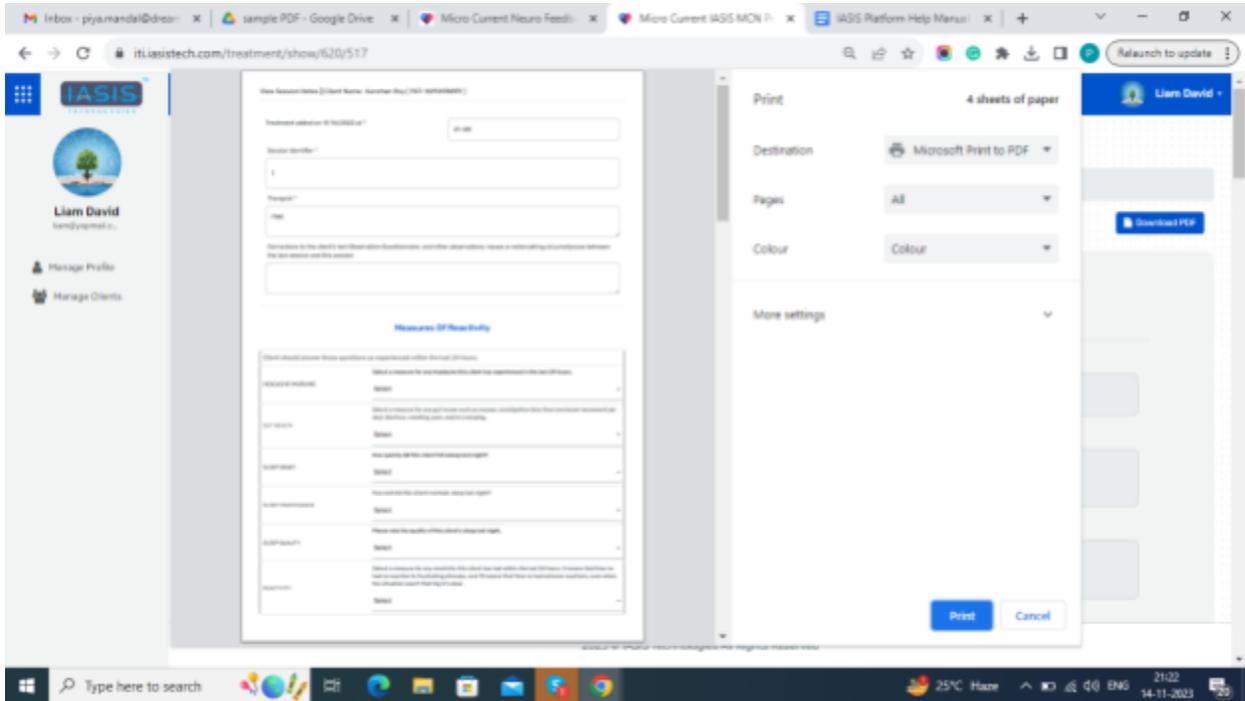
| All Details | SI | Date | Therapist | Protocol | Reference | 1st SP | 2nd SP | 3rd SP | 4th SP | 5th SP | 6th SP | 7th SP |
|---------------------------------|-----|---------------------|-----------|----------|-------------|------------|-------------------------|--------|--------|--------|--------|--------|
| <input type="checkbox"/> | 1 | 11/14/2023 01:07 pm | Max | General | Presurcular | | | | | | | |
| Notes: first notes | | | | | | | | | | | | |
| <input type="checkbox"/> | 431 | 11/16/2023 01:09 pm | Liam | General | Presurcular | F5/F4 | | | | F5/F6 | | |
| | | | | | | 1 Exposure | 3 Five-Second Exposures | | | | | |
| | | | | | | 2 Seconds | | | | | | |
| Notes: Session 431 Session Note | | | | | | | | | | | | |

24 Hour Observation

| # | N/T | SI | SD | SH | SO | SLA | PHD | WPP | AKK | DEP | CBA | NRG | FRG | RES | EXT | SE | BUS |
|---------------------|-----|----|----|----|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|----|-----|
| Session Identifier: | | 1 | | | | | | | | | | | | | | | |
| 24 Hour MDRs: | | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |

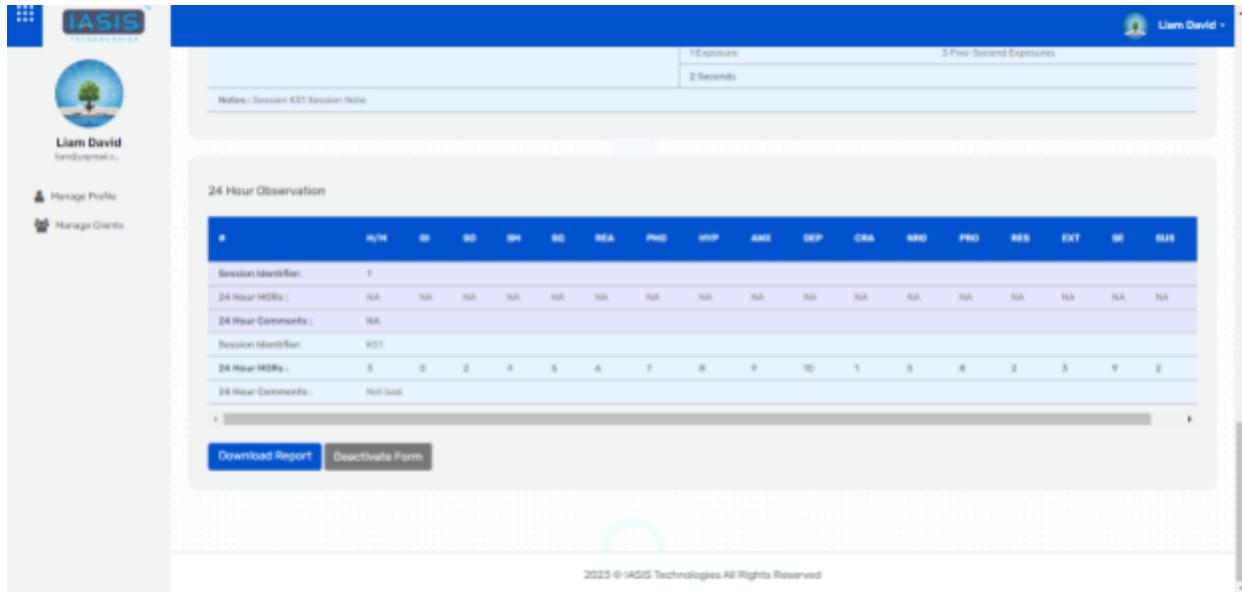
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From the View Session Notes page, click the “Download PDF” button to generate a PDF of the Session Note.



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.



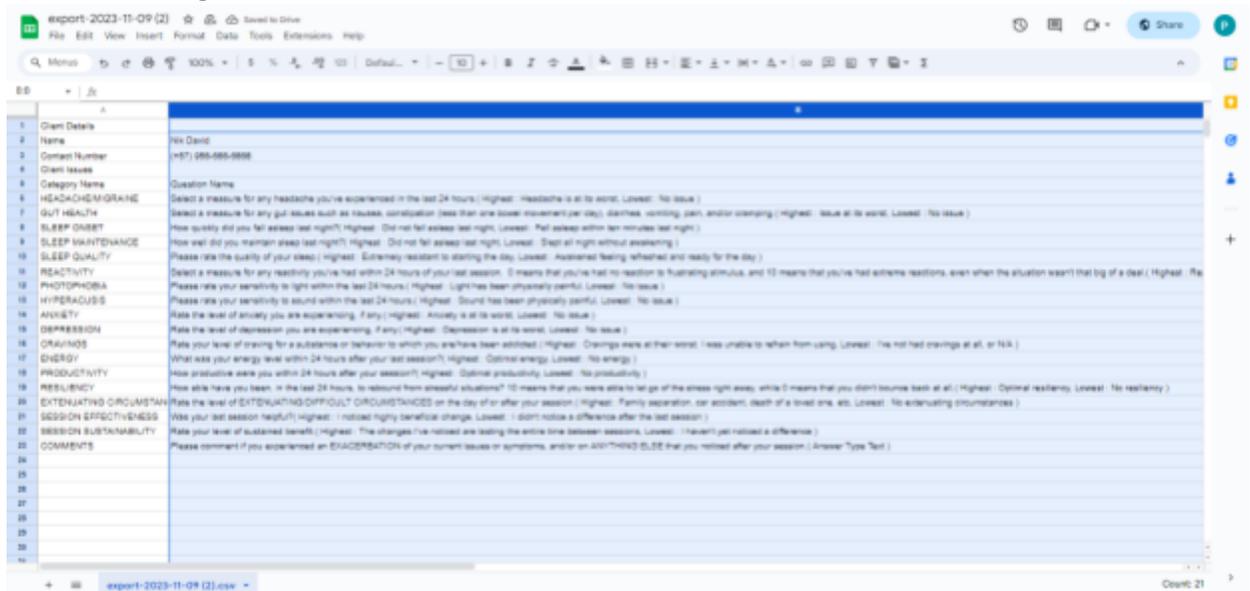
The screenshot shows the IASIS web application interface. On the left is a sidebar with the user profile 'Liam David' and navigation options 'Manage Profile' and 'Manage Clients'. The main content area displays the '24 Hour Observation' results. At the top, there are two rows of 'Exposure' data: '1 Exposure' and '3 Five Second Exposures', and '2 Seconds'. Below this is a 'Notes' section with the text 'Session K21 Session Note'. The main data is presented in a table with columns for various metrics: #, H7M, SE, SD, SH, SO, SIA, PHO, HOP, AAK, SEP, CRA, HRO, PBO, RES, EXT, HE, SLS. The table contains two rows of data for different sessions. The first row shows 'Session Identifier: 1' and '24 Hour MORs: NA' for all metrics. The second row shows 'Session Identifier: K21' and '24 Hour MORs: 5, 0, 2, 4, 5, 6, 7, 8, 9, 10, 1, 5, 8, 2, 3, 9, 2' for the metrics. At the bottom of the table are two buttons: 'Download Report' and 'Deactivate Form'. The footer of the page reads '2023 © IASIS Technologies All Rights Reserved'.

- **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**

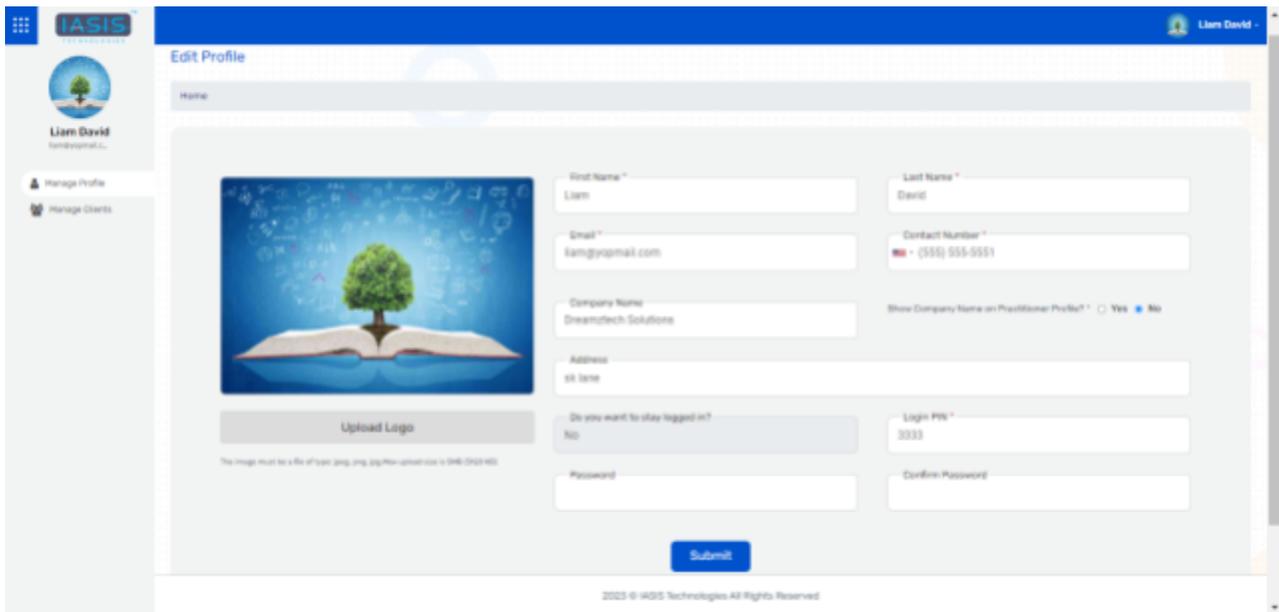
To suppress the 24 Hour Observation Questionnaire from being sent to the app, click the Deactivate Form button. The button will disappear and a check mark will take its place.

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.



The screenshot shows the 'Edit Profile' page in the IASIS system. The page has a blue header with the IASIS logo and the user's name 'Liam David'. A left sidebar contains a user profile card for 'Liam David' and two menu items: 'Manage Profile' and 'Manage Clients'. The main content area is titled 'Edit Profile' and contains a form with the following fields:

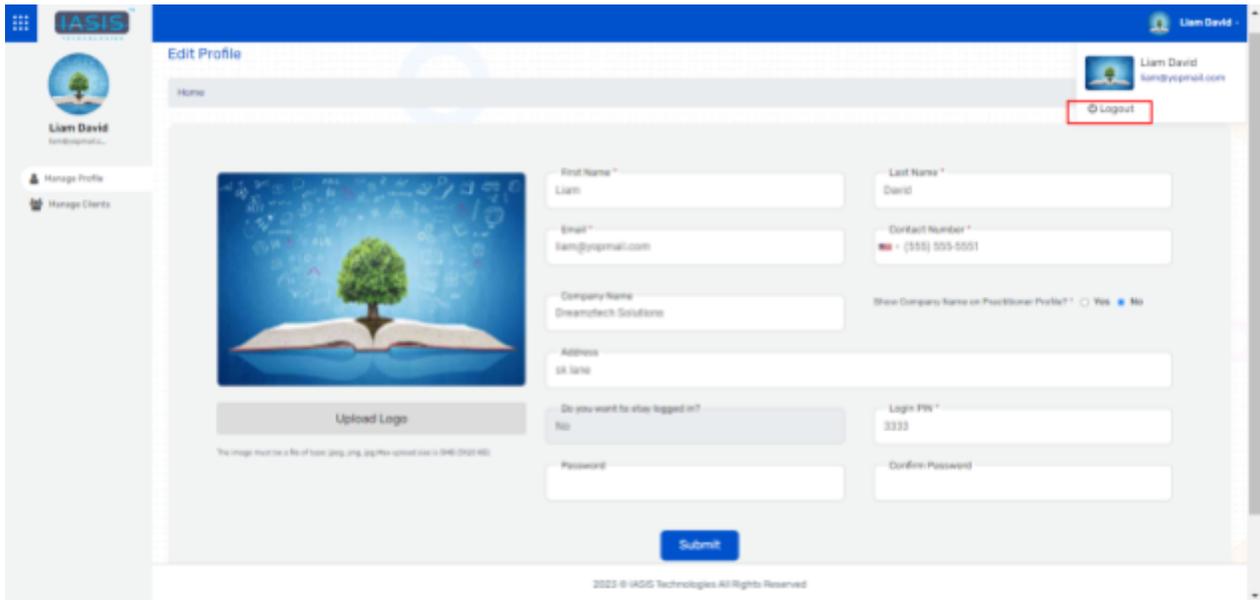
- First Name ***: Text input with 'Liam' entered.
- Last Name ***: Text input with 'David' entered.
- Email ***: Text input with 'sam@gmail.com' entered.
- Contact Number ***: Text input with '(555) 555-5551' entered.
- Company Name**: Text input with 'Dreamtech Solutions' entered.
- Show Company Name on Practitioner Profile ***: Radio button selection with 'Yes' selected and 'No' unselected.
- Address**: Text input with '66 Lane' entered.
- Do you want to stay logged in?**: Radio button selection with 'No' selected and 'Yes' unselected.
- Login PIN ***: Text input with '5555' entered.
- Password**: Text input (empty).
- Confirm Password**: Text input (empty).

Below the form is a blue 'Submit' button. At the bottom of the page, there is a copyright notice: '© 2023 IASIS Technologies All Rights Reserved'.

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.

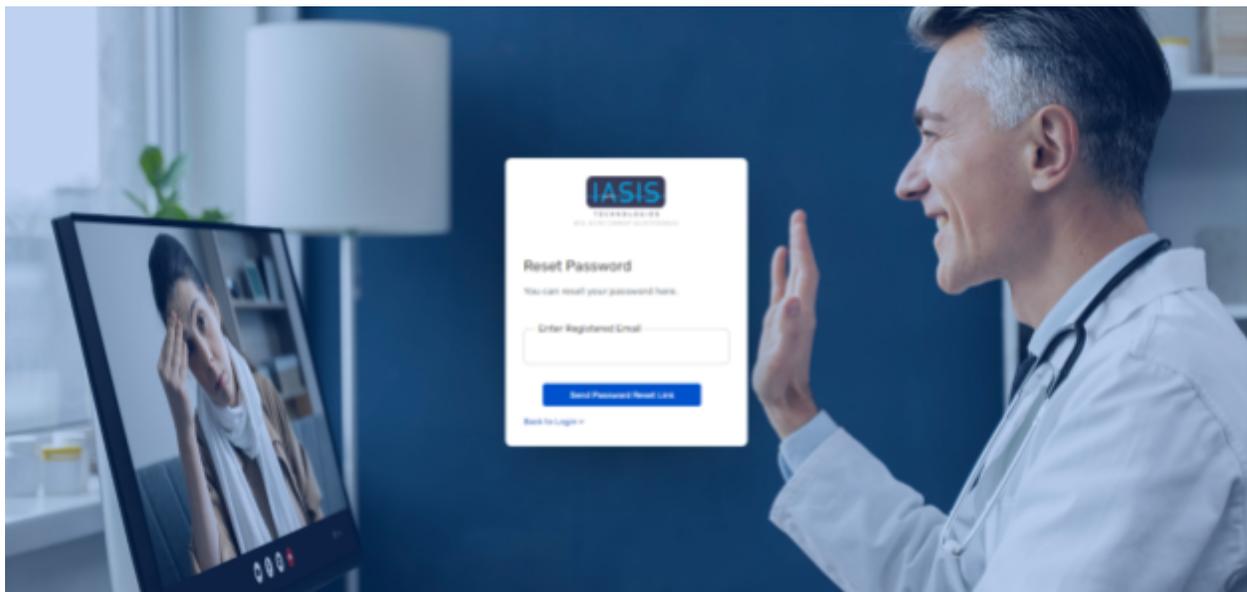
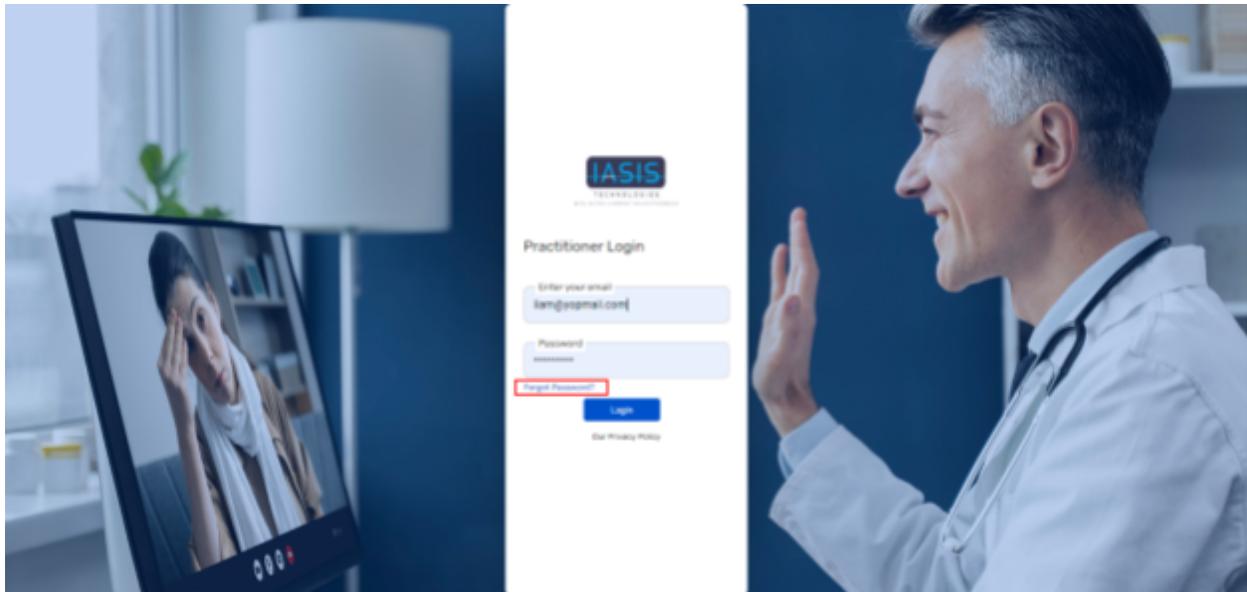


The screenshot displays the 'Edit Profile' interface. At the top right, the user's name 'Liam David' is shown with a dropdown arrow. A red box highlights the 'Logout' button next to the name. The main content area contains several input fields: 'First Name' (Liam), 'Last Name' (David), 'Email' (liam@gmail.com), 'Contact Number' (+ (555) 555-5551), 'Company Name' (Dreamtech Solutions), 'Address' (54 54th), 'Do you want to stay logged in?' (No), 'Login PIN' (3333), and 'Password'. A 'Submit' button is located at the bottom center. The footer indicates '2023 © IASIS Technologies All Rights Reserved'.

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.

