



COUNTY OF SANTA CLARA
Behavioral Health Services

WELLNESS GROUPS CWS FORM

03/01/2024

REVISIONS

Date	Slides	Revisions
03/01/2024	14	Old data will now not populate when adding a new form

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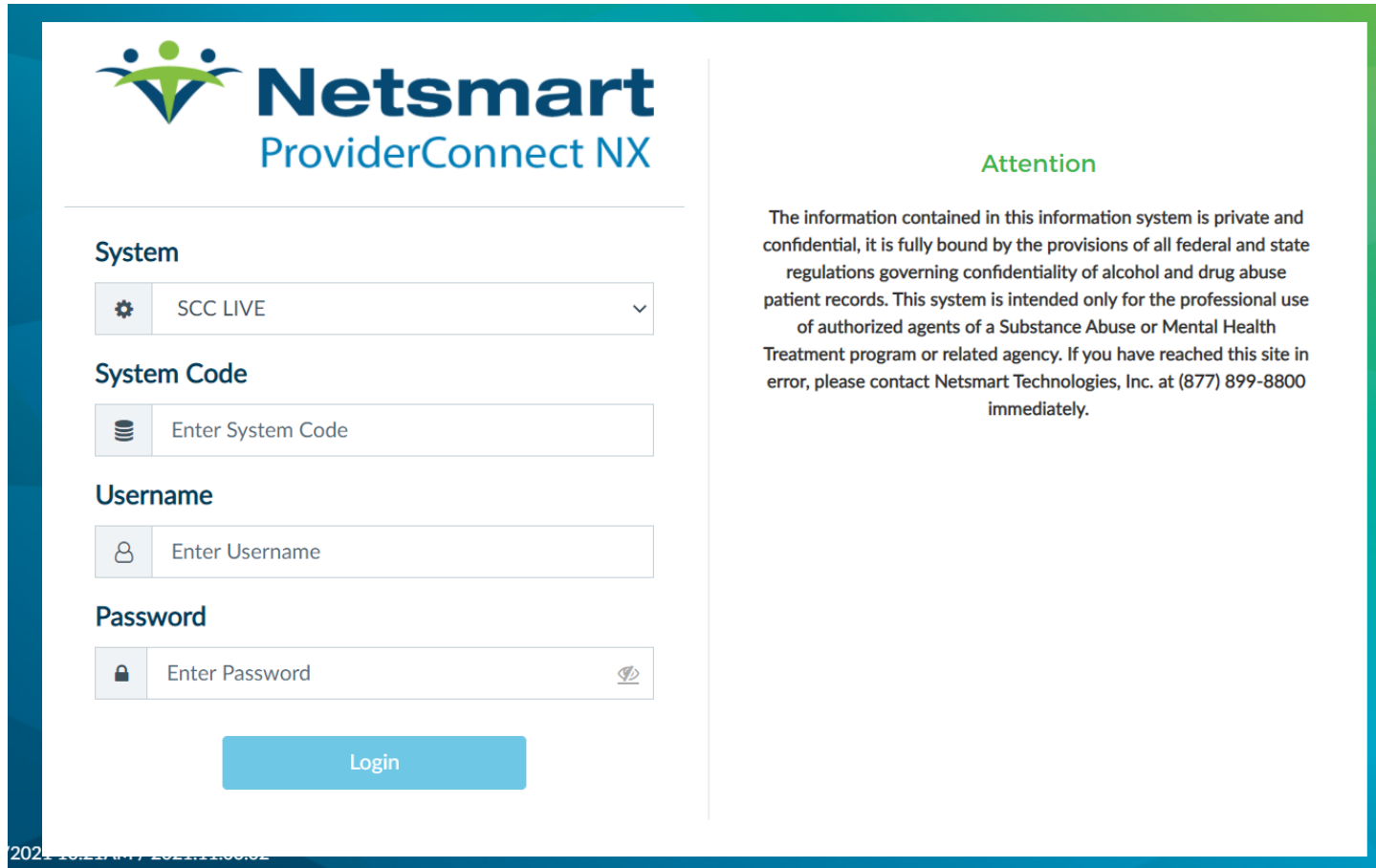
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SIGN ONTO PROVIDERCONNECTNX

Enter the System Code, Username, and Password that were provided to you.




 **Netsmart**
ProviderConnect NX


System

 SCC LIVE 



System Code

 Enter System Code

Username

 Enter Username

Password

 Enter Password 

Login

Attention

The information contained in this information system is private and confidential, it is fully bound by the provisions of all federal and state regulations governing confidentiality of alcohol and drug abuse patient records. This system is intended only for the professional use of authorized agents of a Substance Abuse or Mental Health Treatment program or related agency. If you have reached this site in error, please contact Netsmart Technologies, Inc. at (877) 899-8800 immediately.

SEARCH FOR MOCK CLIENT (SERVICE, COS)

After login click on **Search** and type **Service, COS** (Community Outreach Services).

The screenshot shows a search interface with a search bar containing 'Service, COS|'. Below the search bar is a link for 'Advanced Client Search'. The results are displayed in a modal window titled 'Here is what I found:'. At the top of the modal, there are four filter buttons: 'All 1', 'Clients 1', 'Staff 0', and 'Forms 0'. Below the filters is a section titled 'Clients' which contains a table with one row of search results.

Info	Client Name / Client ID	Gender	Date Of Birth	Social Security Number
Info	SERVICE,COS (000002641)	Male	07/01/1990	000-00-0001

SEARCH FOR MOCK CLIENT (SERVICE, COS)

Ensure that 1) **Service, COS** is highlighted in dark gray. With the client highlighted in dark grey, go to 2) **Search**. This will ensure that the form opens for that specific highlighted client.

LOGGED IN AS
Chris S. Lee

My Forms
My Favorites
Recent Forms

Control Panel
My Clients Site
Recent Clients
SERVICE,COS (000777777)

Welcome, Chris S. Lee
Every Day M

What can I help you find?
Advanced Client Search

ADT LAST MESSAGE DT. & TIME

SEARCH FOR WELLNESS GROUPS CWS

Type **Wellness Groups CWS Form** into Search. Click on **Wellness Groups CWS Form**. You'll notice that **Service, COS** is highlighted in dark grey.

The screenshot shows a user interface for a search application. At the top right, a user is logged in as Chris S. Lee, with a welcome message and the tagline "Every Day Matters". A search bar contains the text "Wellness". Below the search bar, a modal window titled "Here is what I found:" displays search results. The modal has tabs for "All 1", "Clients 0", "Staff 0", and "Forms 1". The "Forms" tab is selected, and a table of results is shown. The table has columns for "Undock", "Name", and "Menu Option". One result is visible: "Wellness Groups CWS Form" with a menu option of "/ Avatar CWS / Assessments / User Defined Assessments". A blue arrow points to the "Wellness Groups CWS Form" entry in the table. On the left side of the interface, a sidebar menu includes "My Clients", "My Forms", "My Favorites", and "Recent Forms". Below the menu is a "Control Panel" with various icons and a "My Clients" section showing "Site" and a breadcrumb path "> SERVICE,COS (00002641)".

Undock	Name	Menu Option
	Wellness Groups CWS Form	/ Avatar CWS / Assessments / User Defined Assessments

SEARCH FOR WELLNESS GROUPS CWS

(PLEASE NOTE: If the below screen does not display move onto the next page.)
After you click on the form the below screen will display. Ensure that you see: 1) **Opening, Wellness Groups CWS Form** and 2) **SERVICE, COS**. After step one and two are confirmed, click on 3) **your program** and the Wellness Groups CWS will display.

Opening: **Wellness Groups CWS Form**

Home > Select Client > Select Episode >

✓ Selected Client : SERVICE,COS (000002641)

Select Episode

Name: COS SERVICE
ID: 2641
Sex: Male
Date of Birth: 07/01/1990

Episode	Program	Start
6	yMH CITY OF SJ- COMM BASED DROP-IN CNTR	07/11/2022
5	yMH UJIMA - STIGMA-TRAUMA	06/14/2020
4	yMH VIVO- STIGMA-TRAUMA	06/01/2022
3	yMH COM SOL - STRENGTH FAM	05/25/2022
2	yMH MOMENTUM - MH	07/01/2021
1	Screening Program	07/01/2021

COMPLETING WELLNESS GROUPS CWS

Fill out all fields.

WELLNESS GROUPS CWS FORM

The screenshot shows a web form titled "WELLNESS GROUPS CWS FORM" with a "Main" tab selected. The form contains several required fields, each with a red asterisk. Annotations in green boxes with blue arrows point to specific fields:

- "Utilize drop-down box feature" points to the "What type of group was provided?" dropdown menu.
- "Utilize drop-down box feature" points to the "Were any of the client who attended this group referred or linked to BHSD?" dropdown menu.
- "Enter first and last name" points to the "Who led/facilitated the group?" text input field.
- "Enter date of event" points to the "Date Completed" date picker.
- "Enter start time of event" points to the "Time" time picker.

Additional annotations include:

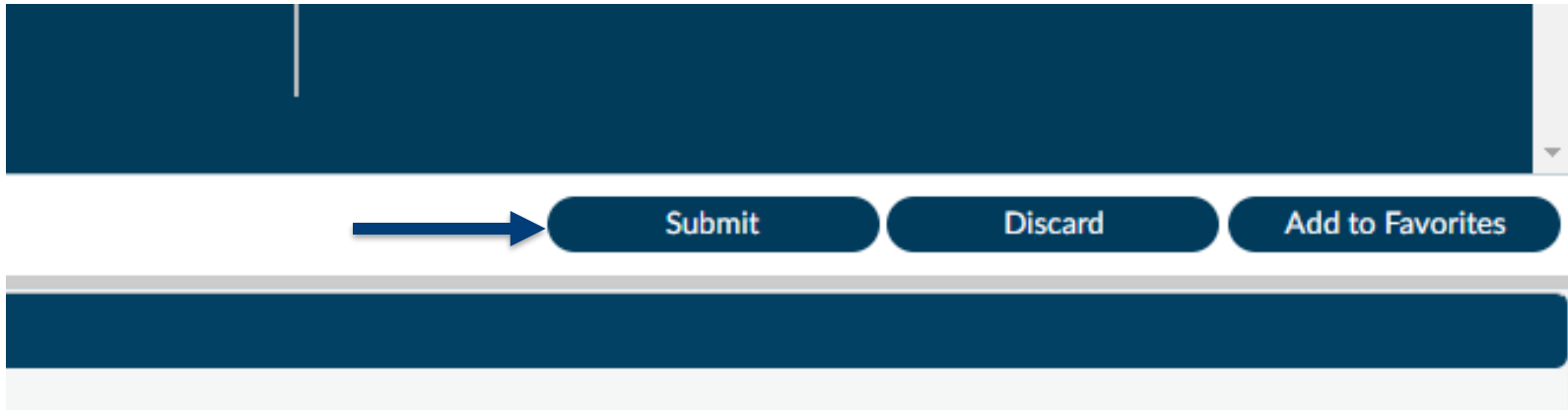
- A green box with the text "Need to answer, if yes was selected in the above question" and a blue arrow pointing to the "If yes, how many?" input field.

The form fields are:

- What type of group was provided? *
- What was the name of the group? *
- How long did the group last (duration in minutes) *
- How many people attended the group? *
- Were any of the client who attended this group referred or linked to BHSD? *
- If yes, how many?
- Who led/facilitated the group? *
- Date Completed *
- Time *

COMPLETING WELLNESS GROUPS CWS


Click **Submit** (located in the top right of the screen) to complete to process.



ADDING ADDITIONAL WELLNESS GROUPS CWS


Search and type **Wellness Groups CWS Form**. Click on **Wellness Groups CWS Form**.

The screenshot shows a search interface with a search bar containing 'Wellness Groups'. Below the search bar, there are filter buttons for 'All 1', 'Clients 0', 'Staff 0', and 'Forms 1'. The 'Forms 1' button is highlighted with a red box. Below the filters, a table displays search results under the heading 'Forms'. The table has three columns: 'Undock', 'Name', and 'Menu Option'. The first row contains an undock icon (a square with an arrow pointing out), the name 'Wellness Groups CWS Form', and the menu path '/ Avatar CWS / Assessments / User Defined Assessments'. A red arrow points to the undock icon.


Undock	Name	Menu Option
	Wellness Groups CWS Form	/ Avatar CWS / Assessments / User Defined Assessments

ADDING ADDITIONAL WELLNESS GROUPS CWS

(PLEASE NOTE: If the below screen does not display move onto the next page.)
After you click on the form the below screen will display. Ensure that you see: 1) **Opening, Wellness Groups CWS Form** and 2) **SERVICE, COS**. After step one and two are confirmed, click on 3) **your program** and the Wellness Groups CWS will display.

Opening: **Wellness Groups CWS Form**  **1**


Home > Select Client > Select Episode >

✓ Selected Client : SERVICE,COS (000002641)  **2**

Select Episode

Name: COS SERVICE
ID: 2641
Sex: Male
Date of Birth: 07/01/1990

Episode	Program	Start
6	yMH CITY OF SJ- COMM BASED DROP-IN CNTR	07/11/2022
5	yMH UJIMA - STIGMA-TRAUMA	06/14/2020
4	yMH VIVO- STIGMA-TRAUMA	06/01/2022
3	yMH COM SOL - STRENGTH FAM	05/25/2022
2	yMH MOMENTUM - MH	07/01/2021
1	Screening Program	07/01/2021

 **3**

ADDING ADDITIONAL WELLNESS GROUPS CWS FORMS

Click on **Add** to pull up a new **Wellness Groups CWS Form**. Please note: the **Data Entry Date** is the date the form was submitted.

Opening **WELLNESS GROUPS CWS FORM**

Home > Select Client > Select Episode > Select Record >

✓ Selected Client : SERVICE,COS (000002641)
✓ Selected Episode: 4

Select Record

Name: COS SERVICE
ID: 2641
Sex: Male
Date of Birth: 07/01/1990

Episode	Data Entry By (Option)	Data Entry Date
4	Chris S. Lee	06/10/2022

Add **Edit** **Delete** **Cancel**

ADDING ADDITIONAL WELLNESS GROUP CWS FORMS

Fill out all fields.

WELLNESS GROUPS CWS FORM

Main

▼

What type of group was provided? *

Select ▼

What was the name of the group? *

How long did the group last (duration in minutes) *

How many people attended the group? *

Were any of the client who attended this group referred or linked to BHSD? *

Select x ▼

If yes, how many?

Who led/facilitated the group? *

▼

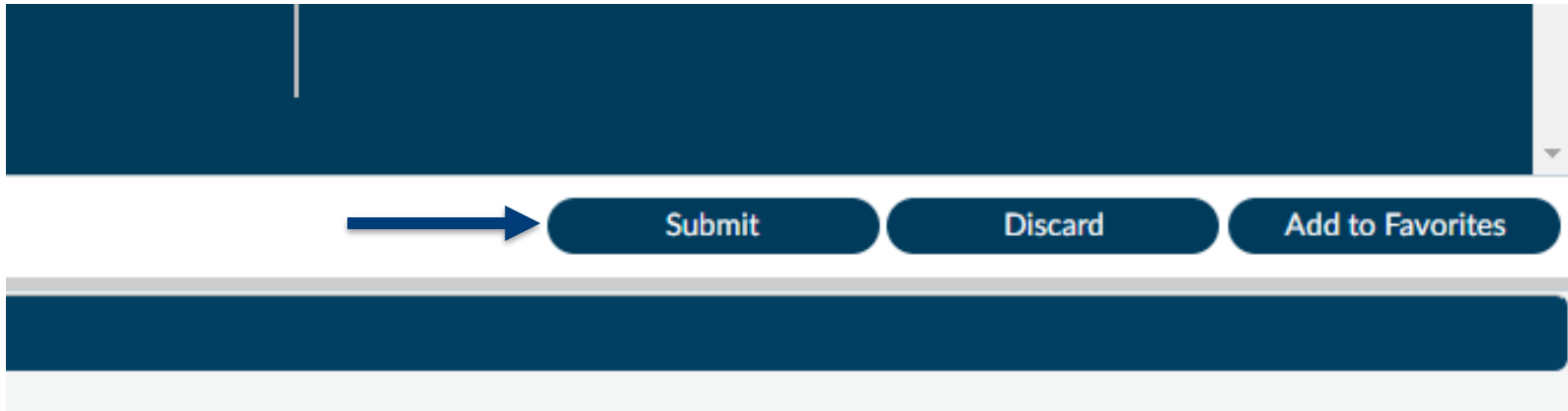
Date Completed *

Time *

Current Time H M AM/PM

ADDING ADDITIONAL WELLNESS GROUPS CWS FORMS

Click Submit (located in the top right of the screen) to complete to process.



ADDING WELLNESS GROUPS CWS FORMS

You can see your new entry when you go into to the Wellness Groups CWS form.

✓ Selected Client : SERVICE,COS (000002641)

✓ Selected Episode: 4

Select Record

Name: COS SERVICE

ID: 2641

Sex: Male

Date of Birth: 07/01/1990

Episode	Data Entry By (Option)	Data Entry Date
4	Chris S. Lee	06/10/2022
4	Chris S. Lee	06/10/2022



EDITING WELLNESS GROUPS CWS FORMS

To edit a submitted form, 1) **Click** on the form you want to edit then click 2) **Edit**. You will be taken to the form. Make your edits and click **Submit**.

Home > Select Client > Select Episode > Select Record >

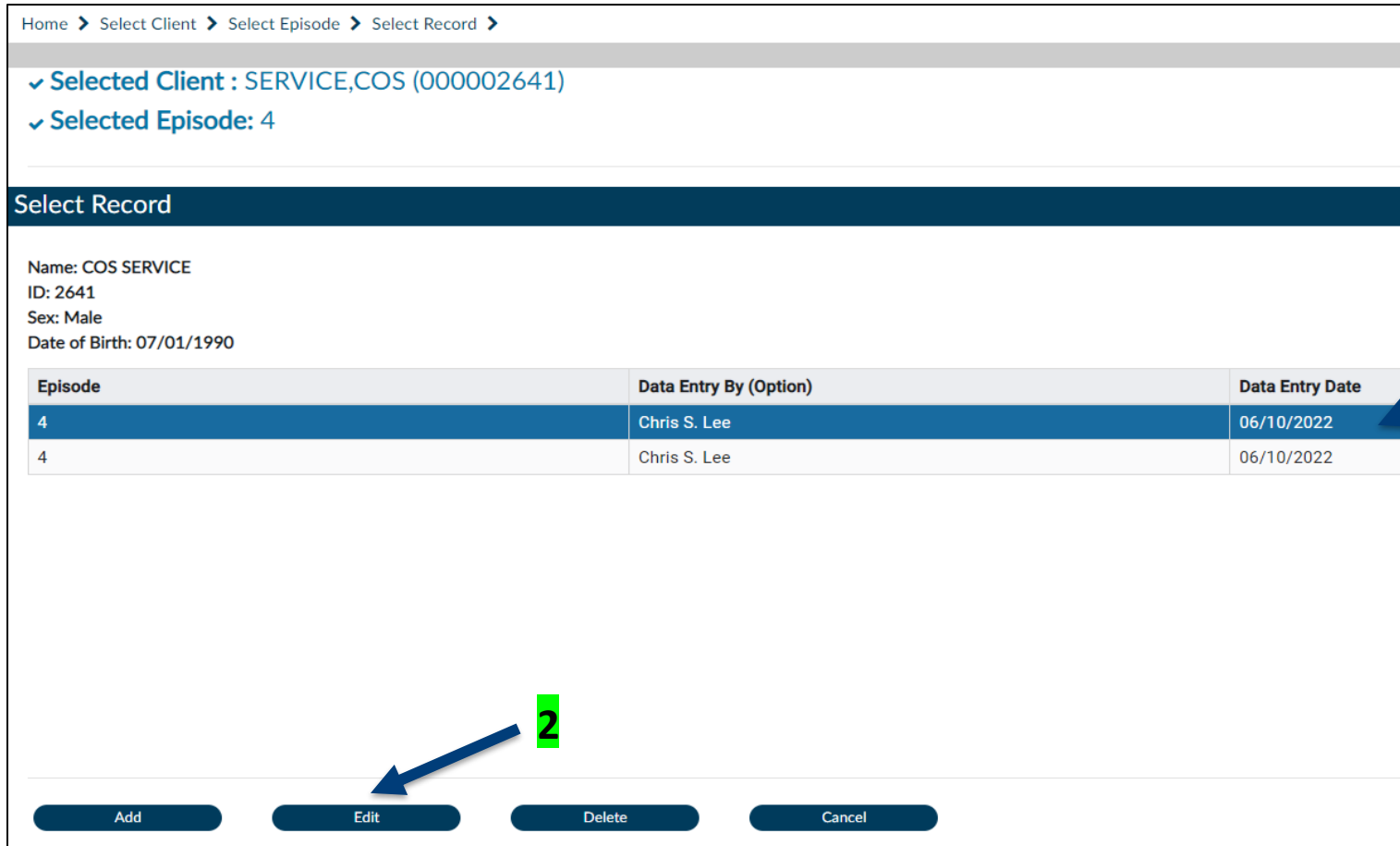
✓ Selected Client : SERVICE,COS (000002641)
✓ Selected Episode: 4

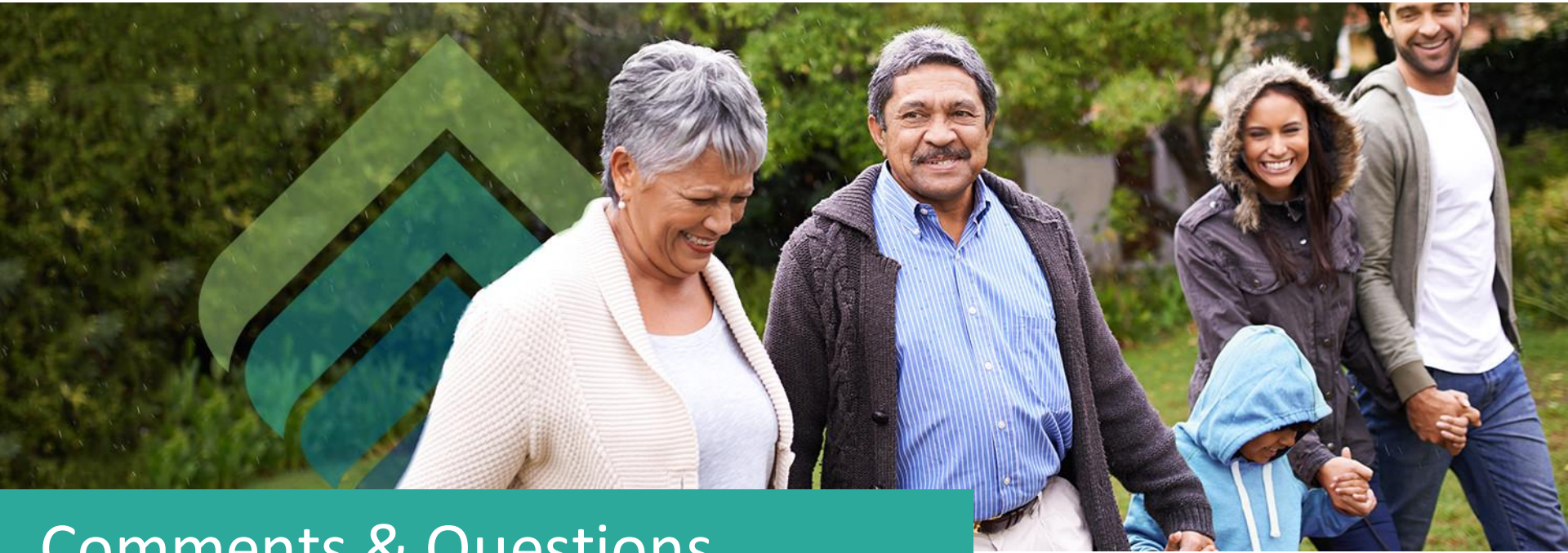
Select Record

Name: COS SERVICE
ID: 2641
Sex: Male
Date of Birth: 07/01/1990

Episode	Data Entry By (Option)	Data Entry Date
4	Chris S. Lee	06/10/2022
4	Chris S. Lee	06/10/2022

Add Edit Delete Cancel





Comments & Questions