



COUNTY OF SANTA CLARA
Behavioral Health Services

WELLNESS GROUPS CWS FORM

REV. 10/10/24

REVISIONS

Date	Slides	Revisions
03/01/2024	13	Old data will now not populate when adding a new form

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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, there is a section titled 'Here is what I found:' with a close button (X). Underneath, there are four filter buttons: 'All 1', 'Clients 1', 'Staff 0', and 'Forms 0'. The 'Clients 1' button is highlighted. Below the filters, there is a table titled 'Clients' with the following data:

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.

The screenshot displays a user interface for a web application. On the left, a sidebar menu is visible, including sections for 'LOGGED IN AS Chris S. Lee', 'My Forms', 'My Favorites', 'Recent Forms', 'Control Panel', and 'My Clients'. The 'My Clients' section is active, showing a 'Recent Clients' list with one entry: 'SERVICE,COS (000777777)'. This entry is highlighted with a dark gray background. A green box with the number '1' and an arrow points to this entry. In the main content area, there is a search bar with the placeholder text 'What can I help you find?' and a magnifying glass icon. A green box with the number '2' and an arrow points to the search bar. Below the search bar is a link labeled 'Advanced Client Search'. At the top right, there is a user profile icon and the text 'Welcome, Chris S. Lee' and 'Every Day Matters'.

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 Chris S. Lee. The top right corner displays 'Welcome, Chris S. Lee' and 'Every Day Matters'. A search bar contains the text 'Wellness|'. Below the search bar, a pop-up window titled 'Here is what I found:' displays search results. The results are categorized by 'All 1', 'Clients 0', 'Staff 0', and 'Forms 1'. The 'Forms' category is selected, and a table of results is shown. The table has columns for 'Undock', 'Name', and 'Menu Option'. The first row contains an undock icon, the name 'Wellness Groups CWS Form', and the menu option '/ Avatar CWS / Assessments / User Defined Assessments'. A blue arrow points to the 'Wellness Groups CWS Form' entry. The left sidebar shows navigation options like 'My Clients', 'My Forms', 'My Favorites', and 'Recent Forms'. The bottom left of the sidebar shows 'Control Panel' and 'My Clients' with a 'Site' button. The bottom of the sidebar shows a breadcrumb trail: '> SERVICE,COS (00002641)'. The background of the interface is light grey, and the search results pop-up has a white background with a blue border.

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.

The screenshot shows a web application interface for "Opening: Wellness Groups CWS Form". At the top right, the title "Opening: Wellness Groups CWS Form" is displayed with a blue arrow pointing to a green box labeled "1". Below the title is a breadcrumb trail: "Home > Select Client > Select Episode >". A blue checkmark icon is followed by the text "Selected Client : SERVICE,COS (000002641)", with a blue arrow pointing to a green box labeled "2". Below this is a dark blue header bar with the text "Select Episode". Underneath, client information is listed: "Name: COS SERVICE", "ID: 2641", "Sex: Male", and "Date of Birth: 07/01/1990". A table with three columns: "Episode", "Program", and "Start" is shown. A blue arrow points from a green box labeled "3" to the row where "Episode" is 4 and "Program" is "yMH VIVO- STIGMA-TRAUMA".

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 for 'WELLNESS GROUPS CWS FORM'. The form is divided into sections by dark blue headers with a downward arrow. The first section contains the following fields:

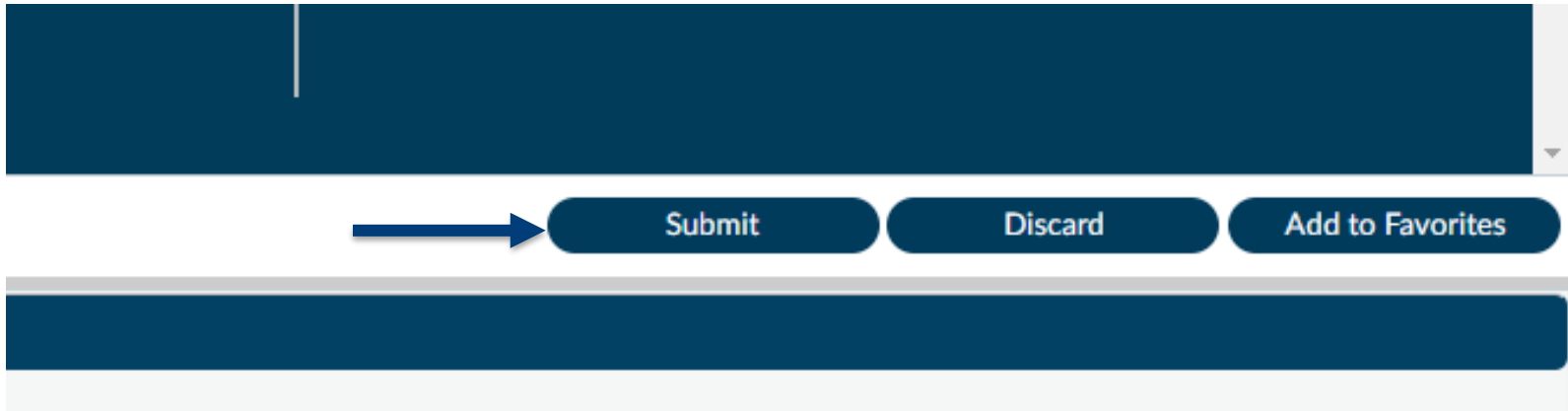
- What type of group was provided? ***: A dropdown menu with 'Select' as the current selection. An annotation 'Utilize drop-down box feature' with a blue arrow points to this field.
- What was the name of the group? ***: A text input field.
- How long did the group last (duration in minutes) ***: A text input field.
- How many people attended the group? ***: A text input field.
- Were any of the client who attended this group referred or linked to BHSD? ***: A dropdown menu with 'Select' as the current selection and a close button (x). An annotation 'Utilize drop-down box feature' with a blue arrow points to this field.
- If yes, how many?**: A text input field. A blue arrow points from this field to an annotation 'Need to answer, if yes was selected in the above question'.
- Who led/facilitated the group? ***: A text input field. An annotation 'Enter first and last name' with a blue arrow points to this field.

The second section contains the following fields:

- Date Completed ***: A date picker with a calendar icon and dropdowns for month (T) and year (Y). An annotation 'Enter date of event' with a blue arrow points to this field.
- Time ***: A time picker with a 'Current Time' button and dropdowns for hour (H), minute (M), and AM/PM. An annotation 'Enter start time of event' with a blue arrow points to this field.

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 search results are displayed under the heading 'Here is what I found:'. A table with the following data is shown:

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

A blue arrow points to the undock icon in the first row of the table.

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**

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

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? *

Support Group

What was the name of the group? *

Support Group

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

30

How many people attended the group? *

5

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

Yes

If yes, how many? *

3

Who led/facilitated the group? *

Chris Lee

Date Completed *

07/13/2022

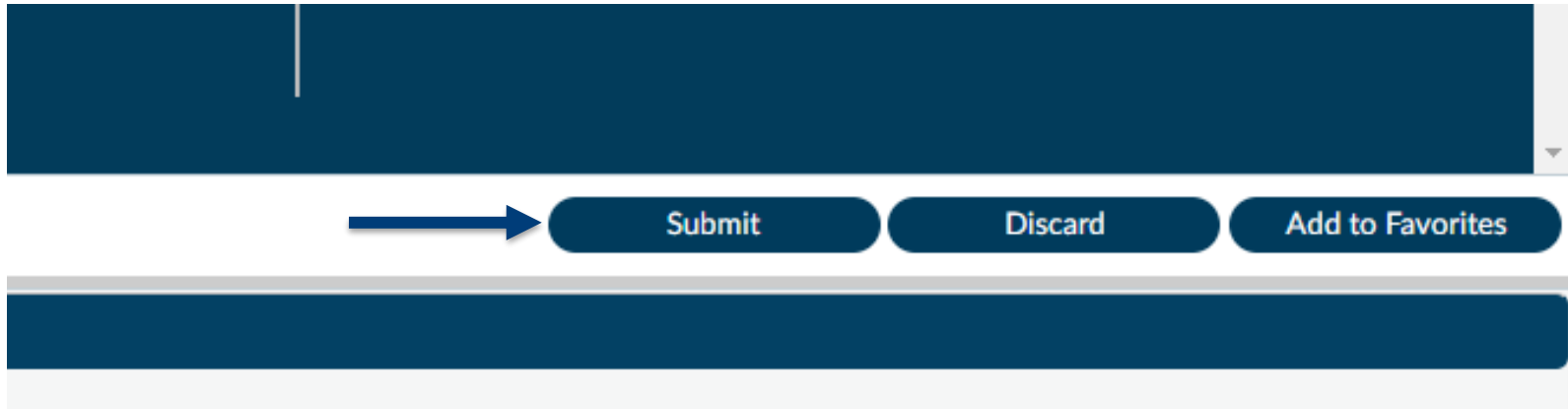
Time *

09:00 AM

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

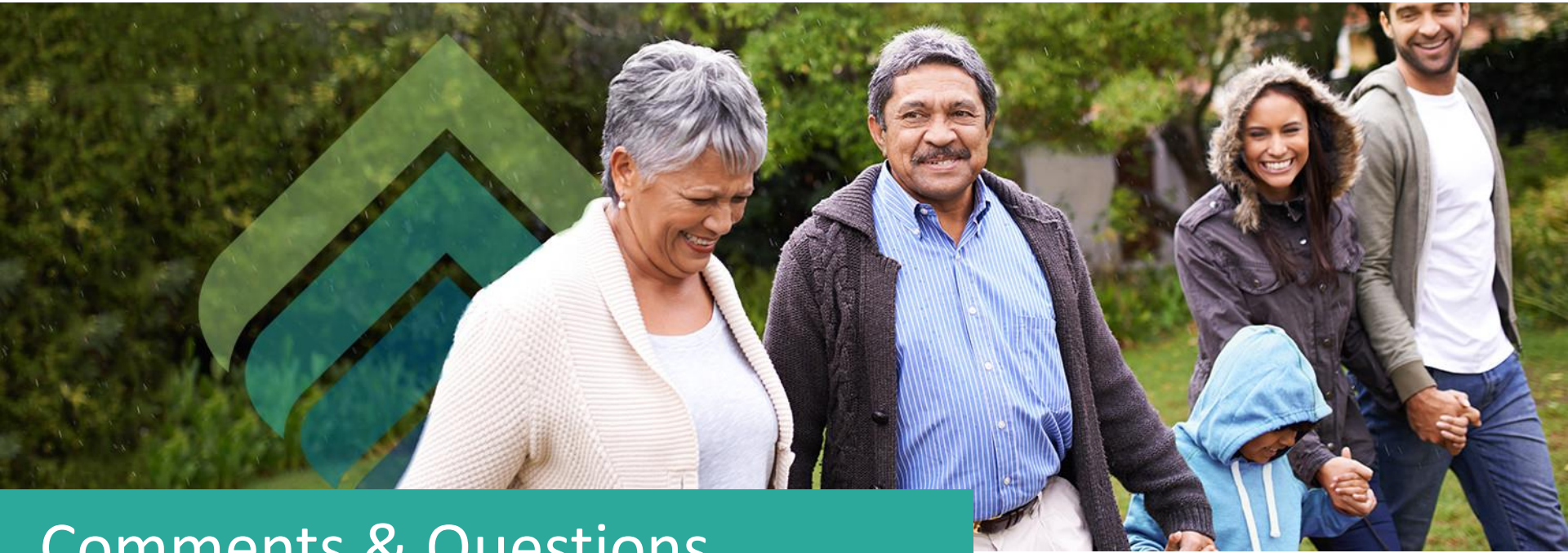
Name: COS SERVICE
ID: 2641
Sex: Male
Date of Birth: 07/01/1990

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

1 →

← **2**

Add Edit Delete Cancel



Comments & Questions