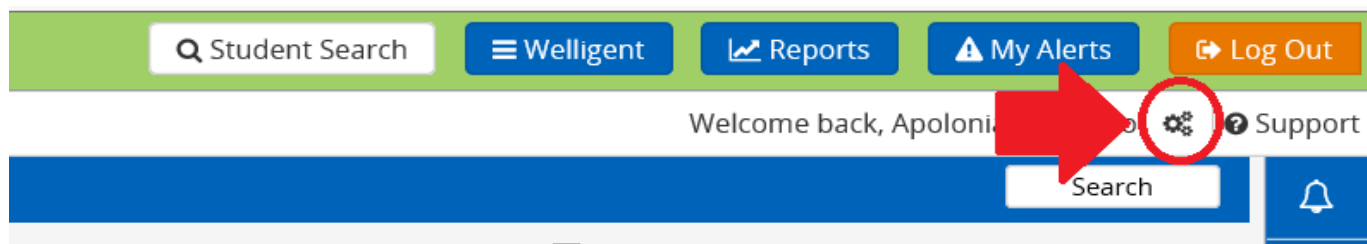# WELLIGENT QUICK REFERENCE GUIDE
MASS SCREENINGS

HOW TO SET-UP AND DOCUMENT MASS SCREENINGS if you service multiple locations, it is best to change your default location in *My Preferences* to the school where the screening took place. To change your default location, **click** on the **My Preferences** icon at the top right of the Welligent toolbar.
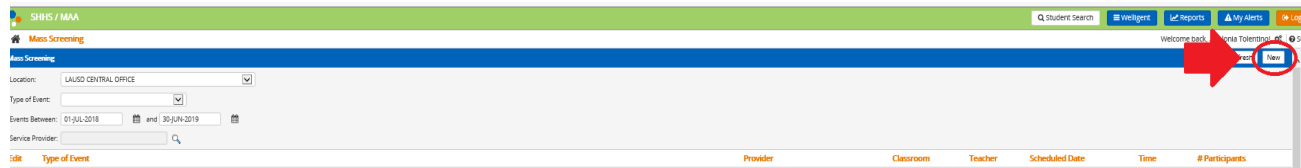

<div style="border:1px solid orange; text-align:center">

Mass Screenings

</div>

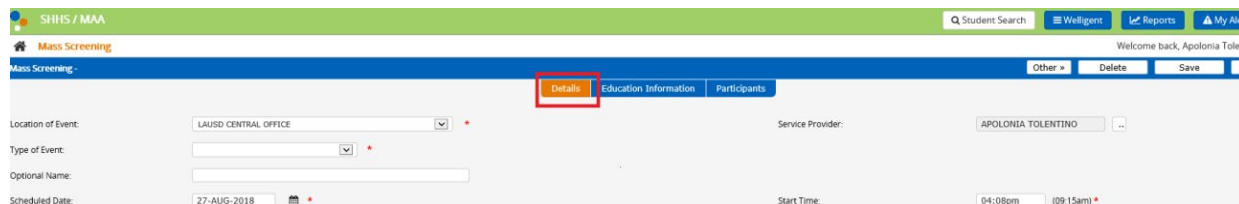☑ *Click* on **Welligen**t. From *WellProvider, click Mass Screening*
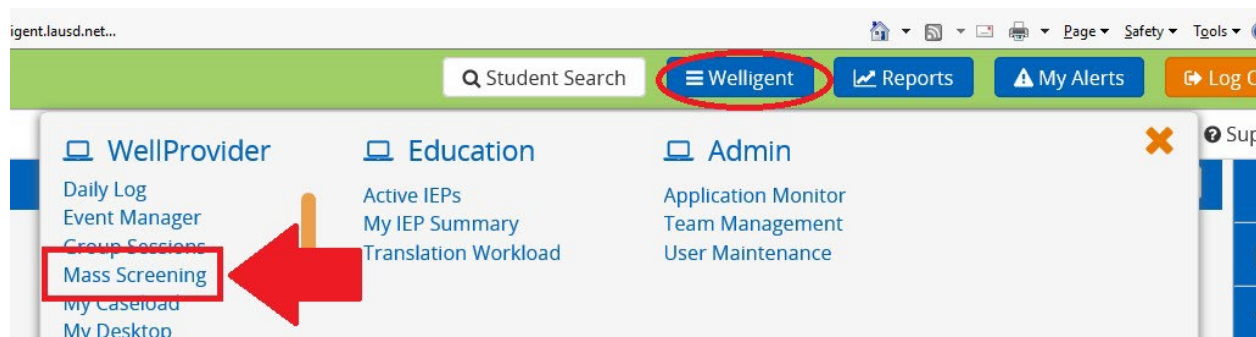
☑ The **Mass Screening** page appears. *Click* on the **New Event** button.

☑ *Locate* the (3) tabs. **Mass Screening Details, Education Information** and **Participants.**
☑ **Mass Screening Details** tab is your current view.

<div style="border:2px solid orange; text-align:center">

SETTING UP THE MASS SCREENING
DETAILS TAB

</div>

☑ Fields with *Red Asterisk* are mandatory fields.
☑ *Select* the appropriate location using the drop-down menu for the **Location** field.
☑ Your name appears in the **Service Provider** field.
☑ *Click* in the **Type of Event** field and *select* the appropriate event.
☑ *Optional Name* can be used for grade level (with gender in case of scoliosis screening)
☑ *Click* in the **Scheduled Date** field (Current date appears). **S***elect* the date of the event using the **Welligent date picker**.
☑ *Click* in the **Start Time** field (start time defaults to current time). Type in the time of the event, (EX: 09:15am).
☑ *Click* in the **End Time** field. Type the time in the correct format (HH:MM:AM/PM). MUST BE COMPLETED. Otherwise, Welligent prepopulates the field with current time.
☑ *Click* in the **Room** field and *select* the appropriate location where the screening has occurred.
☑ If you selected **Other, Specify,** proceed and *click* in the **Other Room** field and *type* in specific location.
☑ *Type* in the number of **Minutes per Individual.**
 ➢ **Elementary Schools only** Under the **Participant Location** area at the bottom of the screen, be sure the **Homeroom** and the
   Homeroom Teacher fields match. These must be correct in order to have the right student group.
 ➢ **Secondary Schools** –**proceed to the next steps**
 ➢ The Mass Screening Events Notes area is optional but you can add grade, track and other pertinent information.
☑ *Click* **SAVE then OK**

<div style="border:2px solid orange; text-align:center">
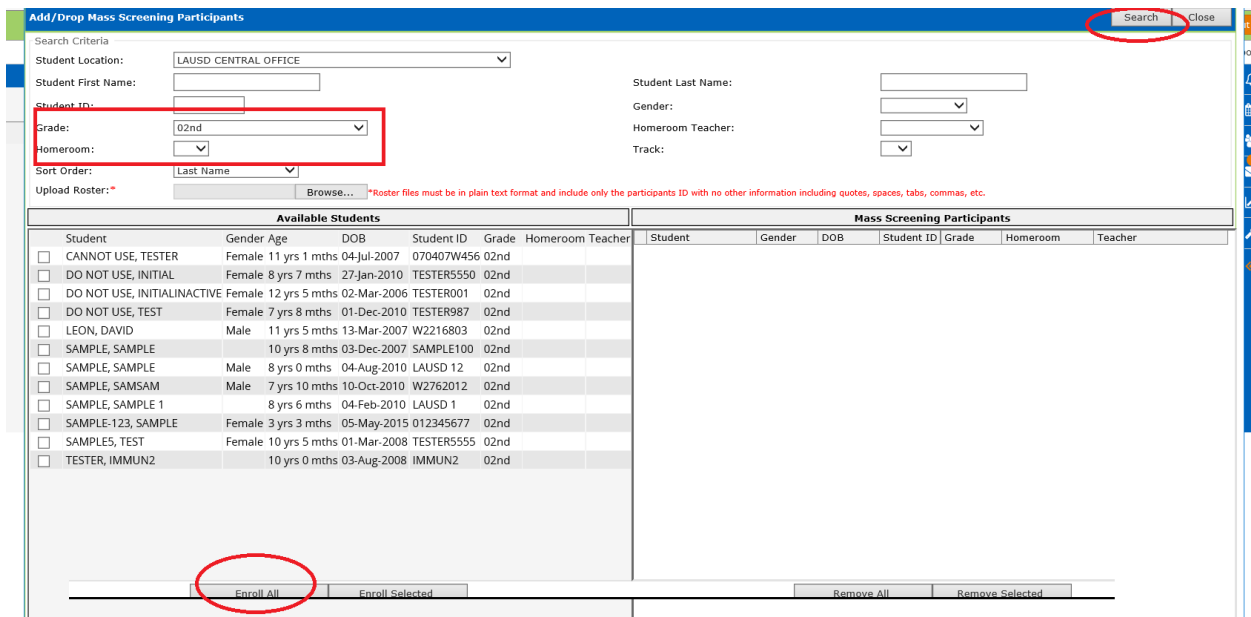
SETTING UP THE PARTICIPANTS TAB

</div>

☑ *Click* on the **Participants** tab.
☑ The **Mass Screening** page appears.
☑ *Click* on the **Other Button** and select **Add/Drop Participants**.
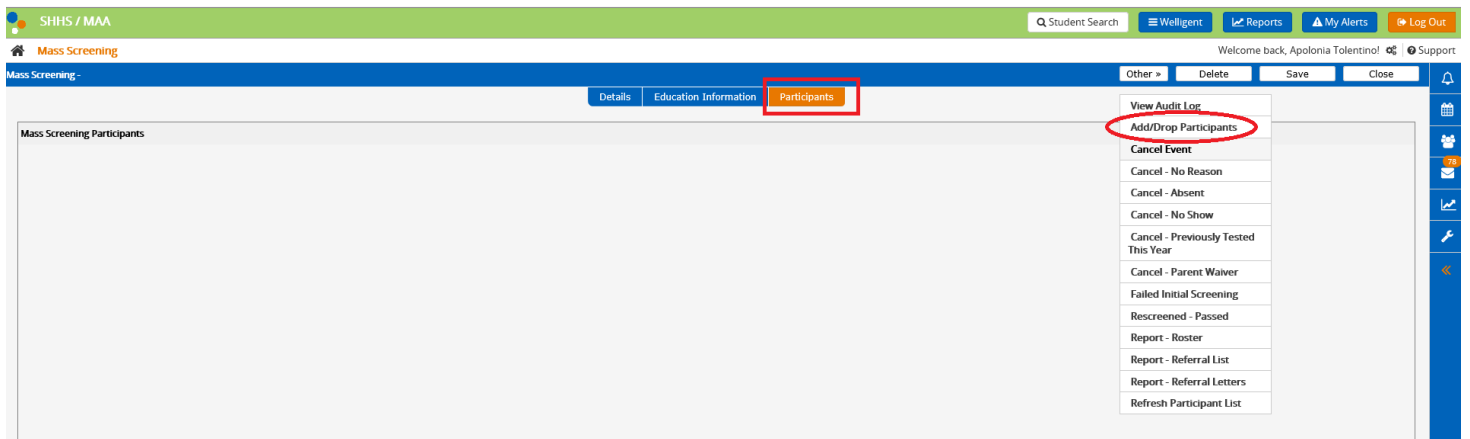
- ☑ The **Add/Drop Mass Screening Participants** screen will appear.
- ☑ ** Secondary schools only- Click* in the **Grade** field and select the desired grade level and track if this is a multi-track school.
  You may also sort by gender if needed.
- ☑ *Click* on the **Search** button.
- ☑ A list of student's names will appear in the **Available Students** area.
- ☑ **Click** *ONCE* on the **Enroll All** button at the bottom of the screen to enroll all of the students on the list.(Multiple clicks will duplicate students)
  OR
- ☑ *Click* in the box next to the student's names to enroll selected students in the screening.
- ☑ The available student participant names will appear in the **Mass Screening participant's** side.
- ☑ **Click** Close

HOW TO DOCUMENT PASSED RESULTS

☑ **Click** on **Other Tab** and select **Document by Exception** button. This will make all of the screenings Passed Screening.

☑ A dialogue box appears

☑ Read and *click* **OK** to accept and continue.

☑ *Click* **OK** to the next dialogue box that appears to continue.

☑ The student's were all marked **Passed Screening** in the **Results** field

☑ To mark a student who turned in a Waiver from a screening, click in the box next to the student's name, click other button, select Cancel-Waiver.

☑ To mark a student if absent from a screening, click in the box next to the student's name, *click other button, select* **Cancel-Absent.**

☑ *Click* **OK.**

☑ *Click OK to message. Click* **CLOSE when completed**

  ❖ **The Mass Screening Participants** screen record will appear on the list of screening events. If you need to edit the information for a particular event, *click* on the type of event or the edit icon to open the record.

HOW TO DOCUMENT FAILED INITIAL SCREENING

☑ The appropriate screening page will appear. (EX: Vision or Dental screening)
☑ *Complete* all relevant fields.
   For Vision Screening: 5yo – enter the Visual Acuity
   For Vision Screening: 6yo and above – Enter R/L Pass or Fail

☑ The **Screening Notes/Comments** field is used for additional information, with a maximum of (2000 characters). Ex-Health note sent for follow-up with Private Medical Doctor.
☑ *Click* **SAVE** then **OK**
☑ *Click Close* to go back to the *Participant's* page

HOW TO DOCUMENT RE-SCREENINGS

If the Vision Screening was performed by a Credentialed School Nurse (RN), Re-Screening is not necessary**.**
Result = Failed Initial screening, if done by a credentialed school nurse may be issued a vision referral note after the initial screening.

☑ **Repeat steps**
   o **Mass Screening**
   o **Setting up the Mass Screening Details Tab**
   o **Setting up the Participants Tab**
☑ **Click** on the **Red Check Mark** from the right side of the screen
☑ The appropriate screening page will appear. (EX: Scoliosis Screening, Vision or Dental Screening).
☑ Select **Re-screened-Failed-Referred from the Results** using the drop down list.
☑ **Complete all relevant fields**
☑ The screening Notes/Comments field is used for additional information, with a maximum of (2000 characters). Ex-Health note sent
   for follow-up with Private medical doctor.
☑ **Click Save then OK**
☑ **The list of students will appear on the Mass Screening Participants list**
☑ Click **Refresh List** and the changes that were made will appear

HOW TO PRINT A REFERRAL LETTER

☑ Click the box to left of the **Student's name** who has a result of Failed Initial Screening. One student name at a time.

☑ From the **Other** menu**,** click on the **Report – Referral**

Report - Referral Letters

OR

☑ Click on the **Referrals/Notes Tab.** Locate the **"NEW"** column and click on the first plus (+) button.
☑ The **E-Forms Editor** screen will appear in the main viewing area. Fields with a **Red Asterisk** are mandatory fields.
☑ Click in **the E-Form** field and select the appropriate form.
☑ Click in the **Forms Context** and select the appropriate notification or letter .
☑ Verify the date in the **Form Date** field or edit by clicking the **Welligent Date Picker**
☑ Click on **Form Status** and select from the drop down.
☑ Complete the form and Click **Save**
☑ Click on **Print** which gives you a preview of the form, and then **Click Print** a second time once previewed
☑ Click **Print** from the printer dialogue screen

HOW TO VIEW OR PRINT A SCREENING REPORT

☑ From the **Mass Screening** list, *click* on the **Type of Event** or the **Edit icon** to open up the event.
☑ *Click Other, select Report -Roster (this is the Mass Screening Report)*
☑ *Click* the **Printer Icon**. *Select File.* Print
☑ *Right-click* on the page and click on Print

OR use the Clinic Report > Completed Screenings (Rpt ID 2504)