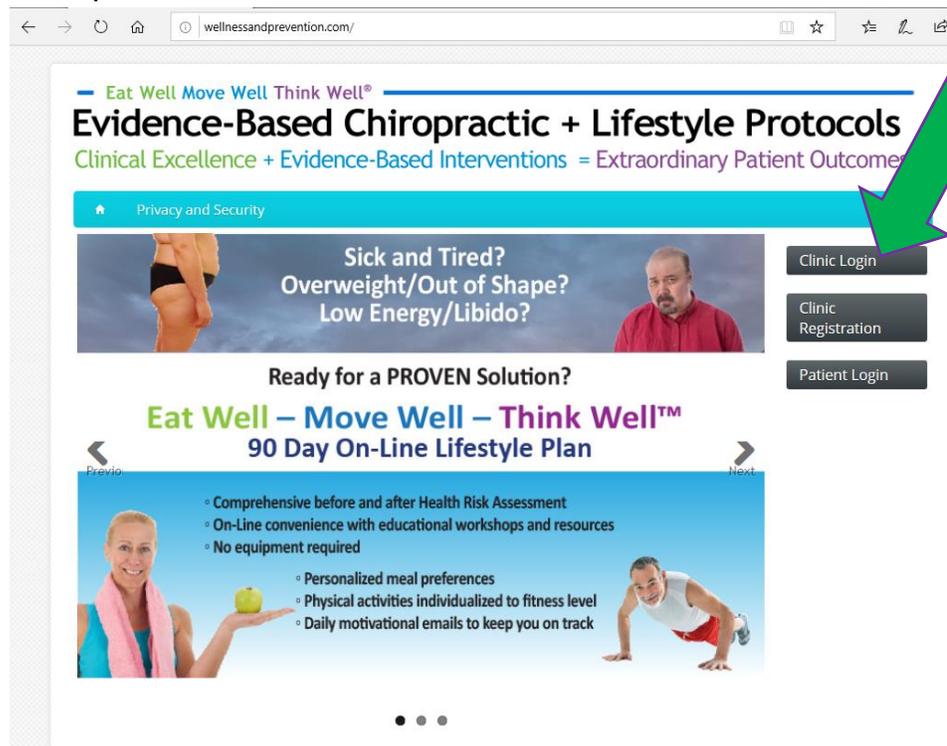


TRAINING MANUAL FOR EVIDENCE-BASED PROTOCOLS ONLINE SYSTEM FOR CLINICAL ACCESS

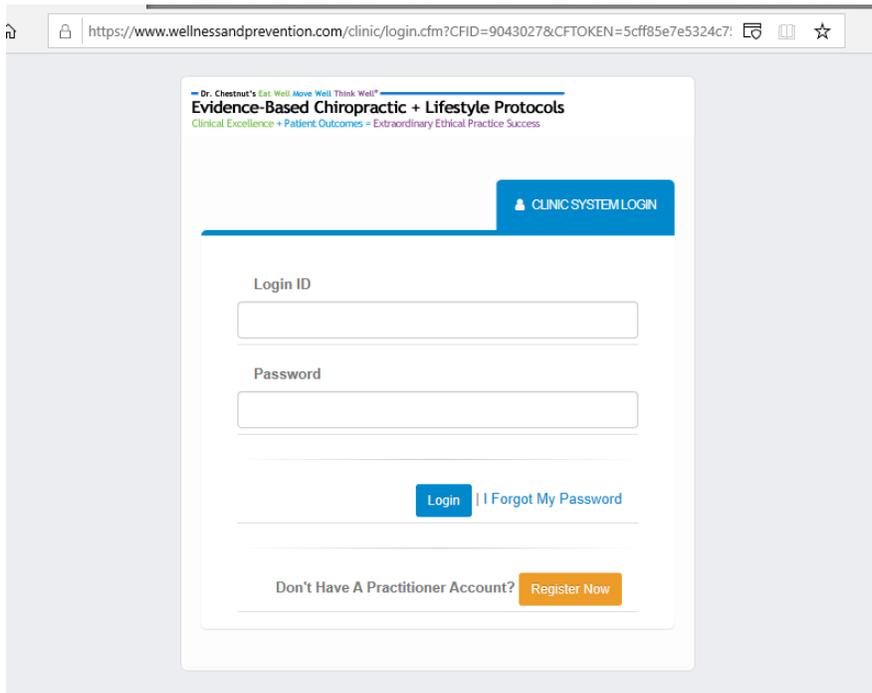
SECTION ONE: LOGGING IN AS A CLINICAL USER AND CREATING A BOOKMARK PAGE

- Go to www.wellnessandprevention.com (best browser to use is Google Chrome OR the new Microsoft Edge; Firefox is acceptable, and old Internet Explorer and Apple Safari are the worst).
- Click on “Clinic Login” button

Example:



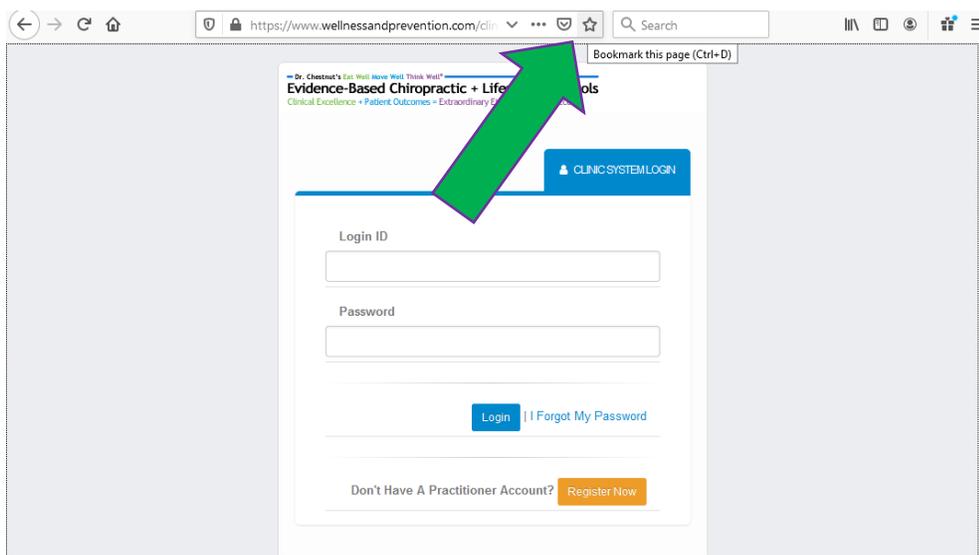
Next you will see a page that looks like this:



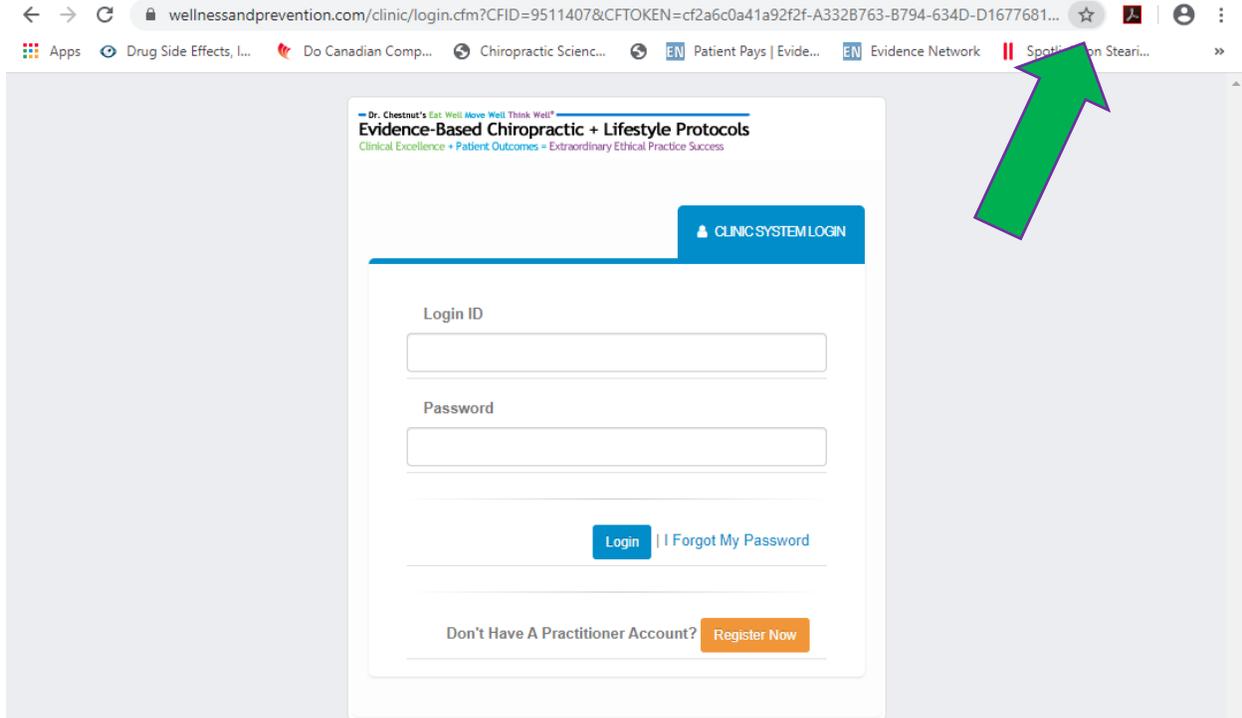
This is where you want to come every time you want to login, so it makes sense to bookmark this page.

You can click on “bookmark this page” in Firefox and Chrome:

Firefox:

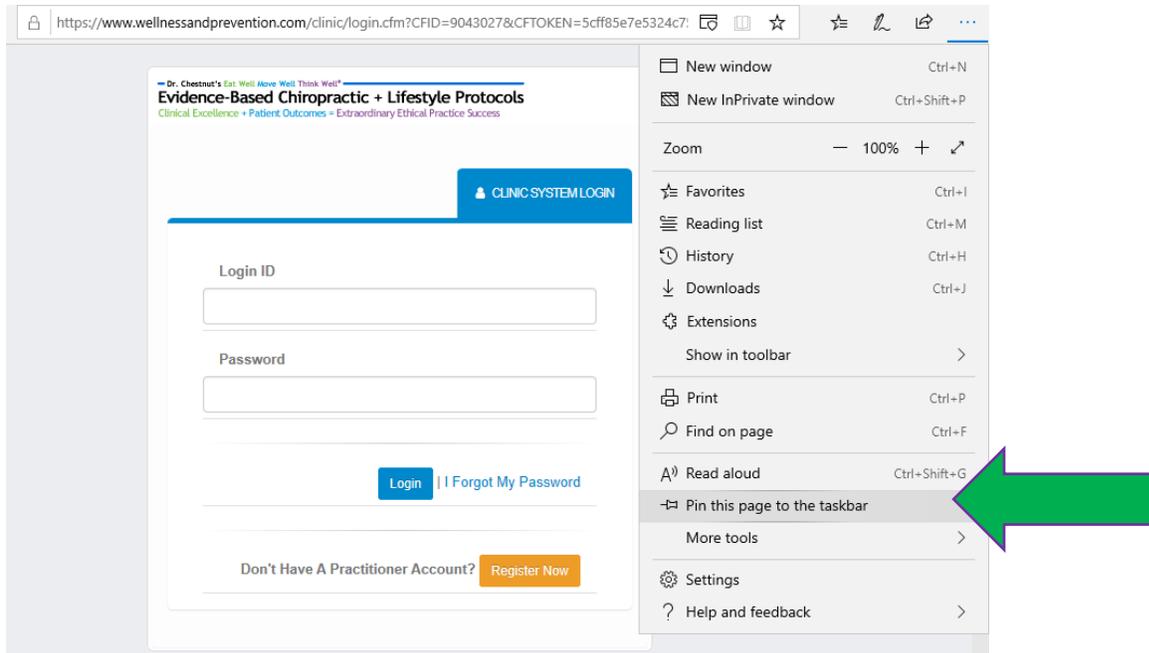


Chrome:



Microsoft Edge:

If you are running Windows 10 and Microsoft Edge, you can “pin to Start” and then you can use the Windows Icon to open the browser and access the link in one step.



Logging in:

Now it's time to login. The Login ID is simply the email address you used when you set up the account. If this is your **first time logging in**, you will use the **temporary password** that was assigned in an email from info@thewellnesspractice.com.

—Dr. Chestnut's

Evidence-Based Chiropractic + Lifestyle Protocols

Clinical Excellence + Patient Outcomes = Ethical Practice Success

Thank you for your interest in our new, revolutionary, unique, and evidence-based Evidence-Based Lifestyle Protocols Lifestyle Health Risk Assessment, Spinal Health Assessment, and 90 Day Innate Lifestyle™ Plan. Healthcare is about to change and you are about to become a pioneer.

Your Evidence-Based Lifestyle Protocols Clinic account has been created and we have given you 2 FREE Evidence-Based Lifestyle Protocols Lifestyle Health Risk Assessments, 2 Spinal Health Assessments, and one 1 90 Day Innate Lifestyle Plan. You may assign these resources to anyone you wish, although we recommend that you use the free assessments and plans on yourself, or staff, to get familiar with them.

Logging In

A temporary password has been created for you.

After your first time logging in, you will be prompted to set a new password to make future logins easier. **You may wish to bookmark the login page for future access.**

Clinic Login Information:

Go to <https://www.wellnessandprevention.com/clinic>. If this link does not work for you, go to [wellnessandprevention.com](https://www.wellnessandprevention.com) and click on the "Clinic Login" button. Use the following to log in:

Login ID:
Password (All alpha characters are lower case): C A X 3 5 T R U



We recommend that you type the password into the password field rather than copying and pasting.

Review the Terms of Service agreement and complete the additional information required for your account.

After Logging In

These 2 steps are VERY IMPORTANT!

1. **Activate your Public Profile.** The information in your public profile is what your patients, and anyone else viewing your profile, will see in reports and if they are searching for a clinic. **You can not add patients until your public profile has been activated!**
2. Please take time to view the videos in the **How-to/Information Videos** section. These videos cover everything you need to know about the system, setting up patient accounts, and assigning Lifestyle Health Risk Assessments and the 90 Day Innate Lifestyle™ Plan to patients.

Please contact us if you have any questions.

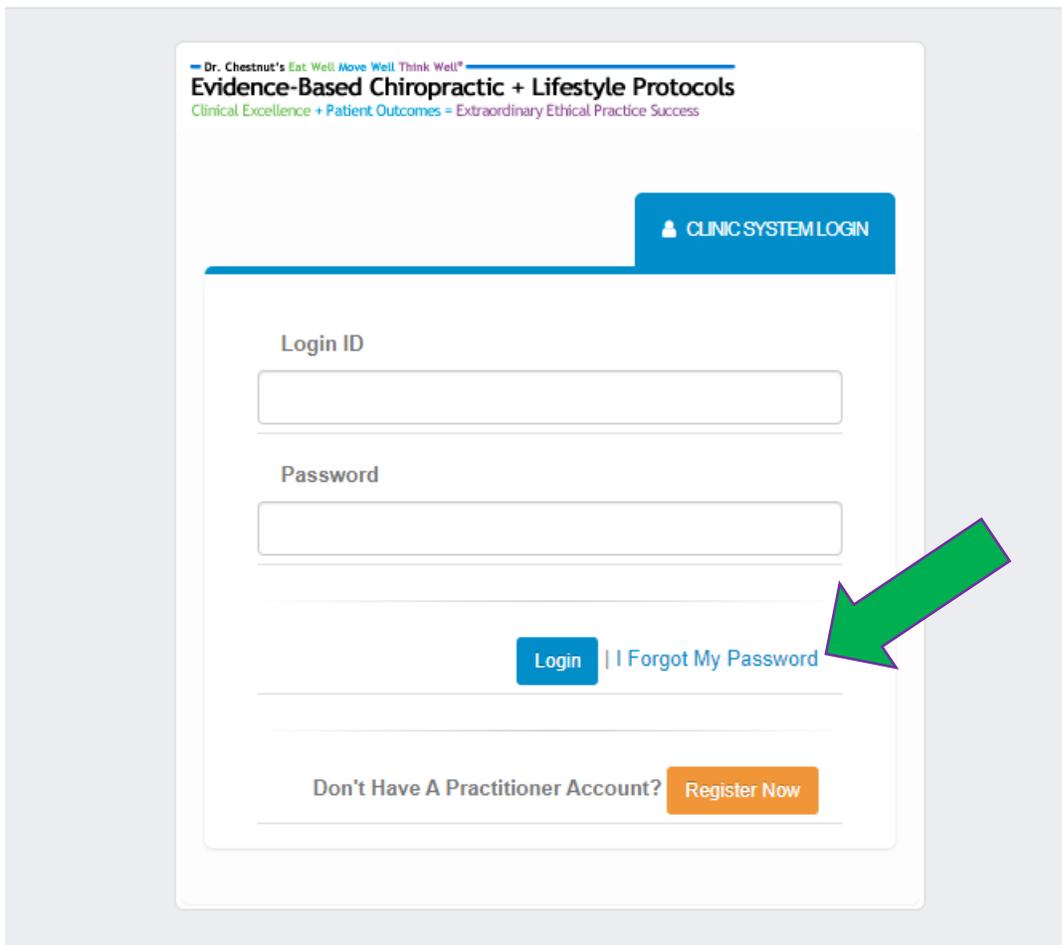
Thank you,

The Wellness Practice Team
(ph) 866-935-5362
(fax) 250-380-2681

If you cannot find this email, first check your junk mail filters. If you still cannot find the email with the temporary password, please contact The Wellness Practice at info@thewellnesspractice.com or at 1-866-935-5362 to gain assistance.

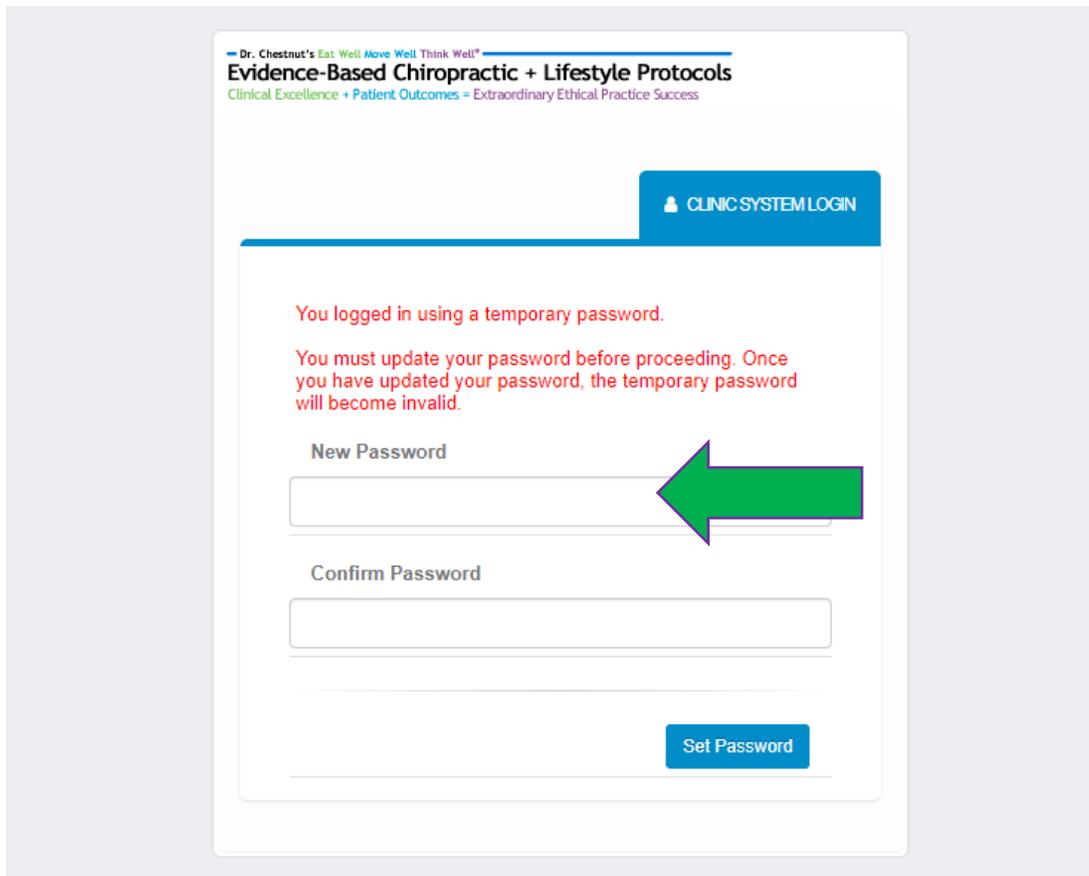
PLEASE NOTE: The digits of the temporary password are random numbers and letters. When entering them, please take care to not confuse “ones” (1) with “small case L” (l); and zero (0) with “small case O” (o). This is the number one reason that people fail to gain access to the next page. Also – if you cut and paste and inadvertently copy over a space either before or after the code, this will NOT work.

If you click the “I Forgot My Password” link on the screen, you will be sent a new temporary password:



The image shows a screenshot of a web application's login page. At the top, the header reads "Dr. Chestnut's Eat Well Move Well Think Well® Evidence-Based Chiropractic + Lifestyle Protocols" with the tagline "Clinical Excellence + Patient Outcomes = Extraordinary Ethical Practice Success". A blue button labeled "CLINIC SYSTEM LOGIN" is in the top right. Below it are two input fields: "Login ID" and "Password". At the bottom of the form area, there is a blue "Login" button and a link "I Forgot My Password" which is highlighted by a large green arrow. Below the form area, there is a link "Don't Have A Practitioner Account?" and an orange "Register Now" button.

When you enter the correct Login ID and temporary password you will be taken to a screen that gives you the chance to enter your new password (one that is secure to you and easier to remember than the temporary one).



The screenshot shows a web interface for a clinic system login. At the top left, there is a logo with the text "Dr. Chestnut's Eat Well Move Well Think Well®" and "Evidence-Based Chiropractic + Lifestyle Protocols". Below this, it says "Clinical Excellence + Patient Outcomes = Extraordinary Ethical Practice Success". On the right side, there is a blue button labeled "CLINIC SYSTEM LOGIN". The main content area has a red message: "You logged in using a temporary password. You must update your password before proceeding. Once you have updated your password, the temporary password will become invalid." Below this message are two input fields: "New Password" and "Confirm Password". A large green arrow points to the "New Password" field. At the bottom right of the form, there is a blue button labeled "Set Password".

Once you have entered a new password, you will be taken to the “Terms of Use” screen. Please take time to read these, as they protect you and your patients as well as The Wellness Practice. When you reach the bottom of the terms, you will be given a choice to “agree” or “not agree” with the Terms of Use. **By selecting “agree” you are bound by the Terms of Use.**



Terms of Use

Please read these Terms of Use carefully. They are a legal agreement between you and Wellness and Prevention™ Solutions, a division of The Wellness Practice-Global Self Health Corp.

By using Wellness and Prevention™ Solutions services or by clicking the I AGREE button I agree to be bound by these Terms of Use, including all amendments made from time to time. If I do not agree to these Terms of Use, I will not use *Wellness and Prevention™ Solutions products and services*.

Wellness and Prevention™ Solutions, a division of The Wellness Practice-Global Self Health Corp., is NOT a healthcare practitioner and thus does not offer medical diagnosis, treatment, or advice.

The Wellness Practice-Global Self Health Corp provides the Wellness and Prevention™ Solutions services as general information and NOT as medical advice or treatment or as a part of a practitioner-patient relationship.

The services provided by The Wellness Practice-Global Self Health Corp. are NOT intended to establish or to infer any formal healthcare relationship between The Wellness Practice-Global Self Health Corp. and the recipient(s) of said services.

As the recipient of this report I acknowledge and agree that neither myself, nor the patient/client for whom I have ordered the Wellness and Prevention™ Solutions services, is a patient of Wellness and Prevention™ Solutions, that Wellness and Prevention™ Solutions services do NOT include medical advice, and that these services do not constitute medical or healthcare intervention or advice but simply information to be interpreted and utilized by a healthcare practitioner.

Practice-Global Self Health Corp will be relieved of any and all future liability under these Terms of Use.

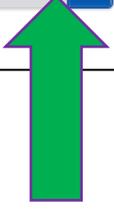
21. CONTRACTUAL LIMITATION PERIOD

You agree that regardless of any statute or law to the contrary, any claim or cause of action arising out of or related to use of *Wellness and Prevention Solutions Reports and Services* or these Terms of Use must be commenced within one year after such claim or cause of action arose.

22. SEVERABILITY OF TERMS

If any provision of these Terms of Use is deemed unlawful, void, or for any reason unenforceable, then that provision will be deemed severable from these Terms of Use and will not affect the validity and enforceability of any remaining provisions.

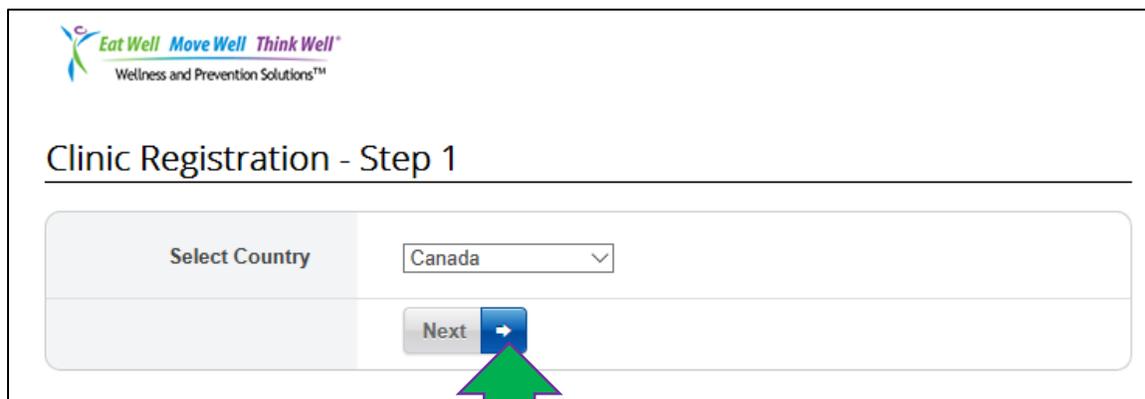
Do you agree to the terms of use:



Next, you will be taken through a series of steps to ensure accuracy of your information – TAKE CARE in entering the **correct country** as the next screen will default to that country and determine your choices for state/province:



The screenshot shows the "Clinic Registration - Step 1" form. At the top left is the logo "Eat Well Move Well Think Well" with the tagline "Wellness and Prevention Solutions™". Below the logo is the title "Clinic Registration - Step 1". The form contains a "Select Country" label next to a dropdown menu showing "United States". Below the dropdown is a "Next" button with a right-pointing arrow.



The screenshot shows the "Clinic Registration - Step 1" form. At the top left is the logo "Eat Well Move Well Think Well" with the tagline "Wellness and Prevention Solutions™". Below the logo is the title "Clinic Registration - Step 1". The form contains a "Select Country" label next to a dropdown menu showing "Canada". Below the dropdown is a "Next" button with a right-pointing arrow. A large green arrow points upwards from the bottom of the page towards the "Next" button.

Once you have entered all of the correct information, click on “Update Information” to submit the form.

 Eat Well Move Well Think Well
Wellness and Prevention Solutions™

Clinic Registration - Step 2

The following information is required to complete the setup of your account. You will be redirected back to the login page once the information has been updated.

Business Name	<input type="text" value="Your Chiropractic Office"/>
Business Type	<input type="text" value="Chiropractor"/>
Account Number	242096
First Name	<input type="text" value="Dr. Chiropractor"/>
Last Name	<input type="text" value="Palmer"/>
Report Name	<input type="text" value=""/>
Phone	<input type="text" value="555-555-1212"/>
Email Address	<input type="text" value="info@yourchiropracticoffice.com"/>
Time Zone	<input type="text" value="(GMT-08:00) Pacific Time (US & Canada)"/>
Street 1	<input type="text" value=""/>
Street 2	<input type="text" value=""/>
City	<input type="text" value=""/>
Prov/State/County	<input type="text" value="Alberta"/>
PC/ZIP	<input type="text" value=""/>
Country	Canada



SECTION TWO – VERIFYING PUBLIC PROFILE

THIS STEP IS WHERE MOST CLINICS WILL BEGIN SINCE THEY MUST LOGIN TO GET TO THIS POINT AND THUS TO ACCESS THE TRAINING MANUAL.

Once you have logged in successfully, you will see a “pop-up” dialogue box. This box indicates where to find the training guides. It also provides a link to your “Public Profile” so that you may go there and verify the accuracy of the information. Your public profile is what your patients see, and what is displayed in our list of offices using the protocols. When someone searches for a clinic using our protocols, you want your information to be displayed accurately.

The screenshot shows a web application interface with a pop-up dialog box titled "Your Chiropractic Office". The dialog box contains the following text:

Welcome to Your Chiropractic Office

A few points to get you up and running quickly:

- We have a number of videos in [Help > Step by Step Training](#) that walk you through the system.
- You will need to review and activate your [Public Profile](#) before you can add patients to the system.
- We have added 2 SHA's, 2 HRA's, and 1 90 Day Innate Lifestyle™ Plan to your inventory. We recommend trying these out for your staff to get familiar with them.

Please [contact support](#) if you need any assistance.

Don't Show Again

Close

A green arrow points to the "Public Profile" link in the second bullet point.

The background interface shows a dashboard with the following sections:

- Inventory:** A list of items with "Order" and "Assign to Patient" buttons.
 - 1 Spinal Health Assessment
 - 2 Health Risk Assessment
 - 1 90 Day Innate Lifestyle™ Plan
- Notifications:** A list of notifications with a "Remove Selected" button.
 - Mar 02, 2017 - What is the difference between the HRA with Extrapolated Allostatic Load Risk Rating and the HRA with the Blood Panel Allostatic Load Risk Rating?
 - Mar 02, 2017 - Getting Started Guide: Add Patients, Assigning Resources and Purchasing Resources - PDF
- Summary Table:** A table with columns for "Spinal Health Assessments", "Health Risk Assessments", and "90 Day Innate Lifestyle™ Plans". Each column has sub-columns for "P.O.A.", "Assigned", "Pending", and "Completed", with percentage indicators.

You do not have to fill out the entire form, but you must provide a name for the reports (green arrow). This choice is what shows anywhere the report identifies the practitioner (e.g. Your practitioner **Dr. Chiropractor** has provided you with this information...).

If your clinic has more than one practitioner, we recommend that you use the clinic name for this choice (e.g. Your practitioner **ABC Chiropractic** has provided you with this information....)

The screenshot shows a web browser window with the URL `wellnessandprevention.com/clinic/settings/profile.cfm`. The page title is "Public Profile". Below the title, there is a message: "This information is displayed to your patients when they are logged into the Patient System and also used in applicable forms and reports. Your profile must be active before any patient account can be created." The form contains the following fields:

Business Name	Your Chiropractic Office
Report Name	Dr. Chiropractor
Street 1	431 Durban St
Street 2	
City	Victoria
Prov/State	British Columbia
PC/ZIP	V8P5A9
Country	Canada

A green arrow points to the "Report Name" field, which contains "Dr. Chiropractor". A box highlights "Your Chiropractic Office" above the "Business Name" field.

You must also switch from “inactive” to “**active**” at the “Profile Status” section at the bottom of the form (blue arrow), and then click on “Update Profile” (purple arrow).

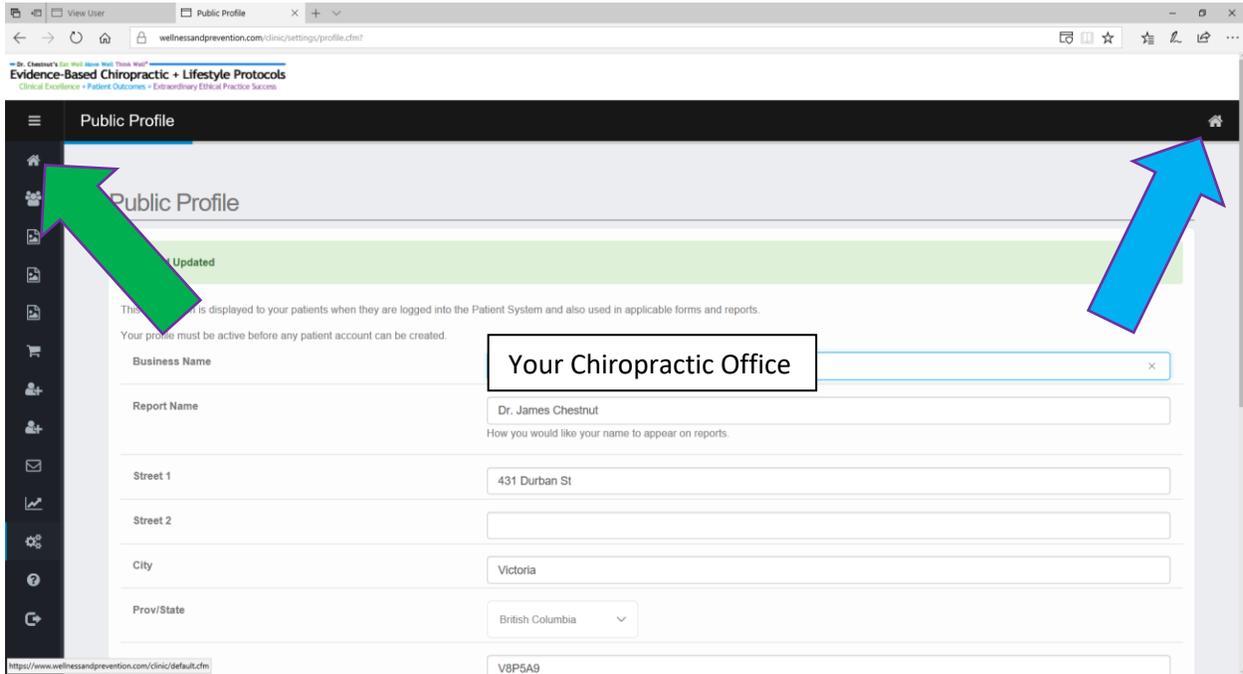
The screenshot shows a web browser window with the URL `wellnessandprevention.com/clinic/setting/profile.cfm`. The page title is "Public Profile". The form contains the following fields:

- Province: British Columbia
- PC/ZIP: V8P5A9
- Country: Canada
- Phone: 250-381-2084
- FAX: (empty)
- Website: (empty)
- Email Address: info@yourchiropracticoffice.com
- Logo: (empty) with a "Browse..." button

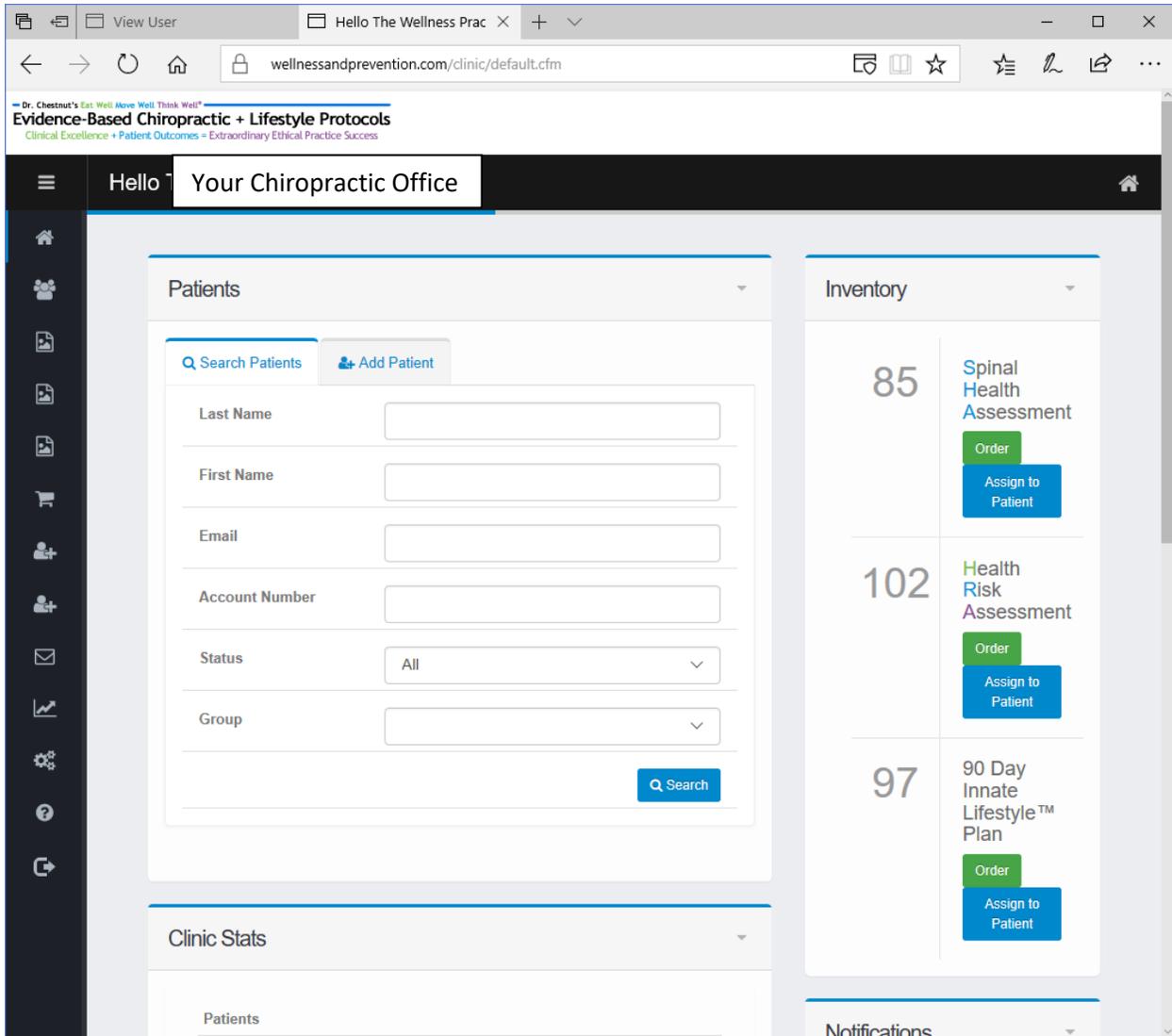
Below the logo field, there is a note: "Currently, logos are only displayed in the footer of the monthly newsletters available to Affiliates. Logo file must in jpg, gif or png format. Files will be displayed in an area 80px x 175px. Images larger than those measurements will be resized. We recommended using a resolution of 150-300 dpi and that the files have a white or transparent background."

The "Profile Status" section at the bottom has two radio buttons: "Active" (selected) and "Inactive". A blue arrow points to the "Active" radio button. To the right of the "Profile Status" section is an orange "Update Profile" button, which is pointed to by a purple arrow.

Once you have done this, use the “Home” button to go back to the home page (green arrow). You can also use the “Home” icon in the upper right corner (blue arrow).



Now you are fully functional. You have access to all features and resources of the system. Depending on how wide your screen is, it may look like this (content “stacked” and you need to scroll down to access certain elements):



Or like this (content displayed across the screen in a “wide-screen” format):

Your Chiropractic Office

Patients

Search Patients | Add Patient

Last Name:

First Name:

Email:

Account Number:

Status: All

Group:

Search

Inventory

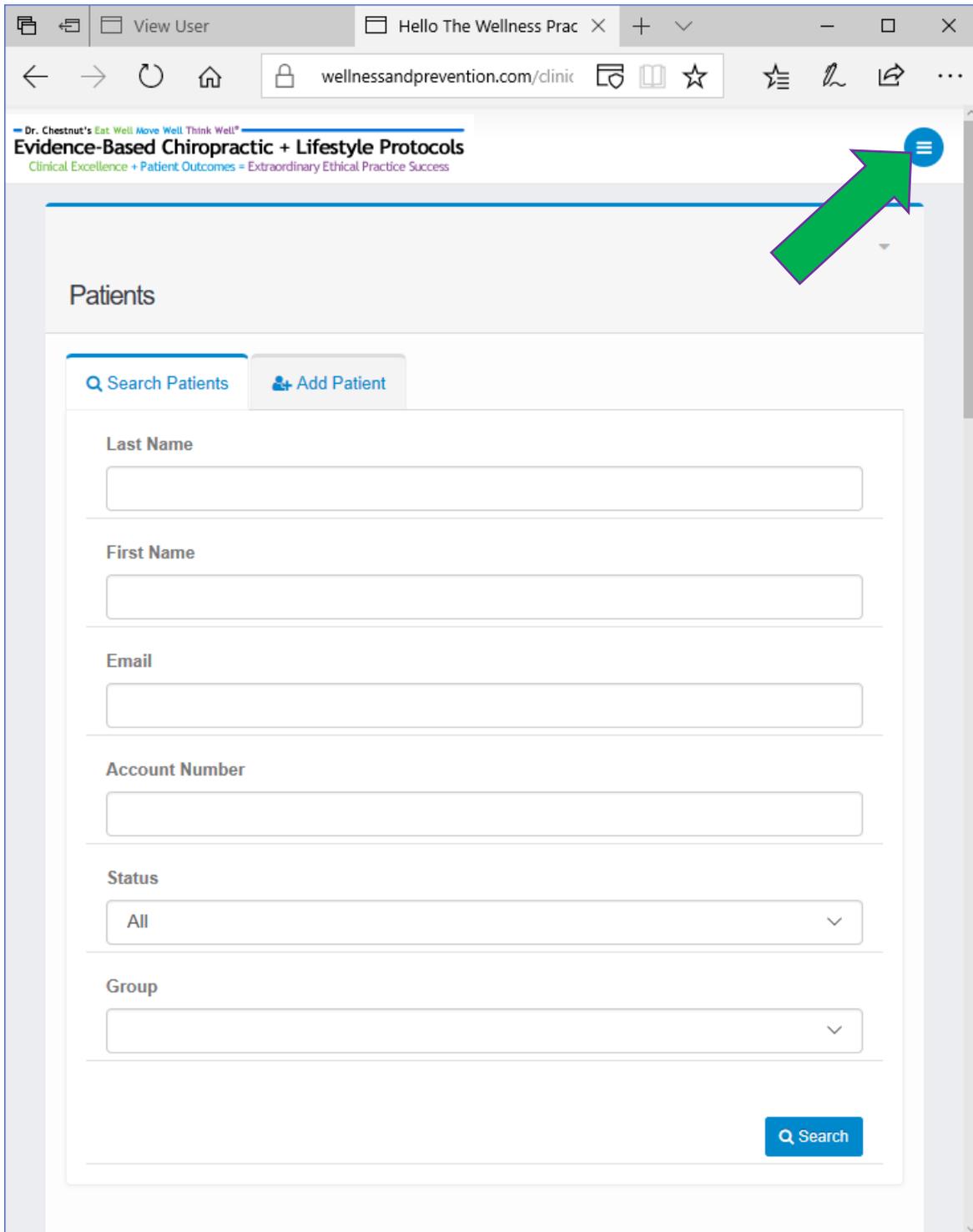
- 85 Spinal Health Assessment
Order | Assign to Patient
- 102 Health Risk Assessment
Order | Assign to Patient
- 97 90 Day Innate Lifestyle™ Plan
Order | Assign to Patient

Notifications

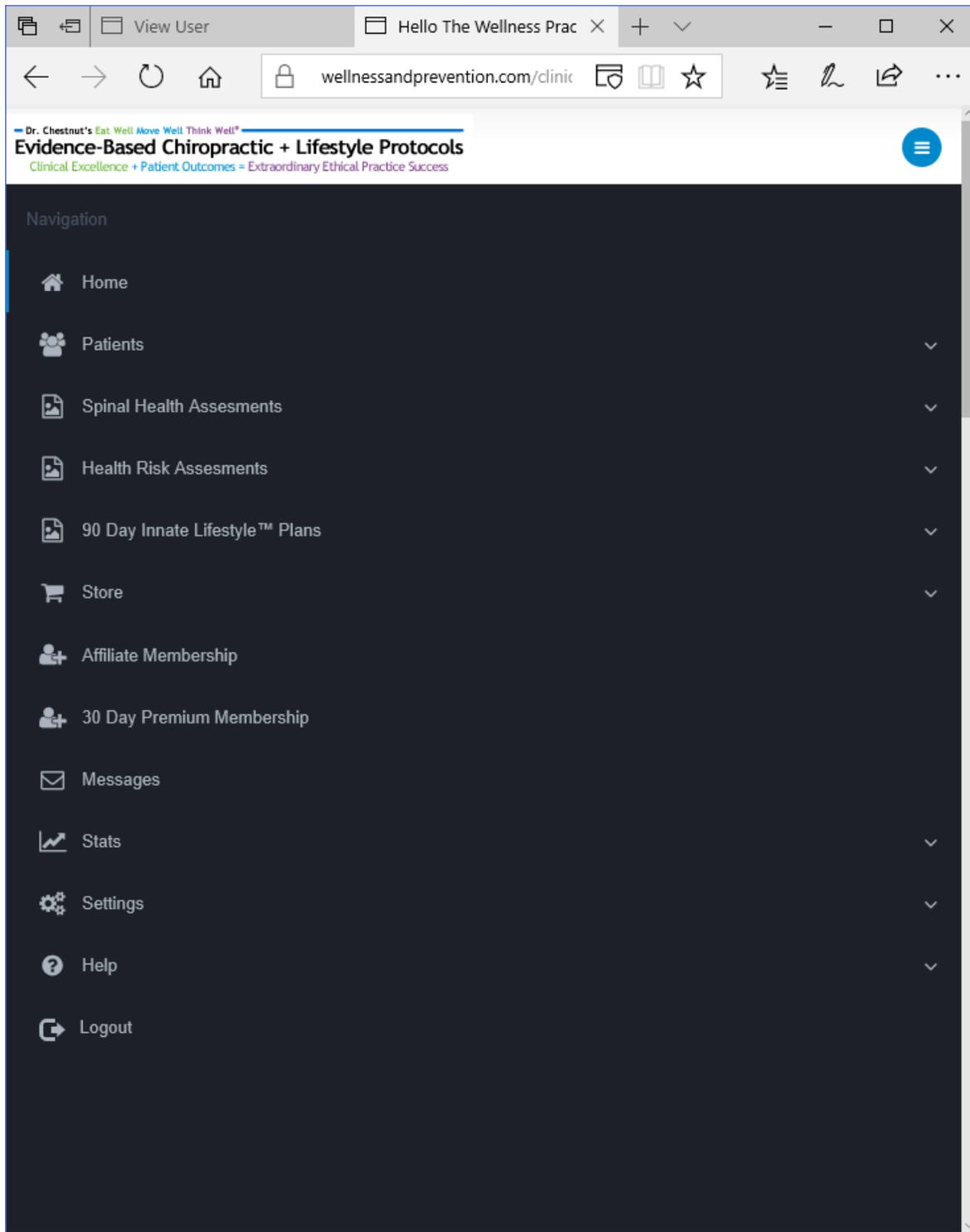
Clinic Stats

Patients	Spinal Health Assessments		Health Risk Assessments		90 Day Innate Lifestyle™ Plans		
	P.O.A.	—%	P.O.A.	—%	P.O.A.	—%	
Added Last 30 Days	0	Assigned	15	Assigned	18	Assigned	6
Not Activated	8	Pending	8	Pending	12	Not Started	4
	13	Completed	7	Completed	6	In Process	0

If your screen is very narrow, the left-side menu buttons may get minimized. To reveal the items, click on the “menu button” (green arrow)



In this layout, you see that the menu buttons cover the entire screen. Menu items with “sub-items” have arrows to indicate that you can “drill down” by clicking on the arrow or item name.



SECTION THREE – ADDING A PATIENT ACCOUNT

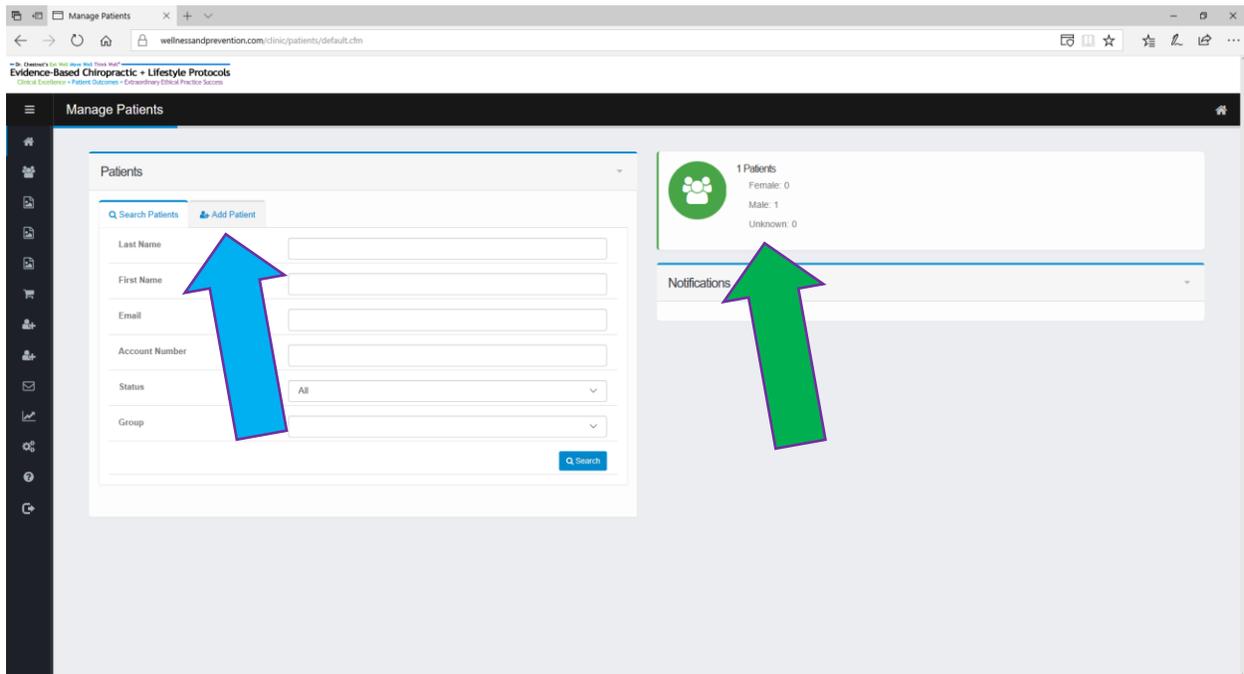
The first skill to learn is ADDING A PATIENT. Always start from the Home Page. Using the menu on the left side, click on “Patients”

The screenshot shows the 'Your Chiropractic Office' dashboard. On the left sidebar, the 'Patients' menu item is highlighted with a green arrow. The main content area features an 'Add Patient' button and several input fields for patient information. Below these fields is a search bar and a table with columns for 'Spinal Health Assessments', 'Health Risk Assessments', and '90 Day Innate Lifestyle™ Plans'. The table contains data for P.O.A., Assigned, Pending, and Completed status across different categories. On the right side, there are sections for 'Inventory' (listing Spinal Health Assessment, Health Risk Assessment, and 90 Day Innate Lifestyle™ Plan) and 'Notifications'.

Then click on “Manage Patients”

The screenshot shows the 'Your Chiropractic Office' dashboard. On the left sidebar, the 'Manage Patients' menu item is highlighted with a green arrow. The main content area is identical to the previous screenshot, showing the 'Add Patient' button, input fields, search bar, and data table. The right sidebar also remains the same, with 'Inventory' and 'Notifications' sections.

You will see a screen that indicates how many patients are currently in your system – green arrow (in this example there is one male patient). You have two choices – the default tab is “Search Patients” and the other tab is “Add Patient”. Click on “Add Patient” (blue arrow).



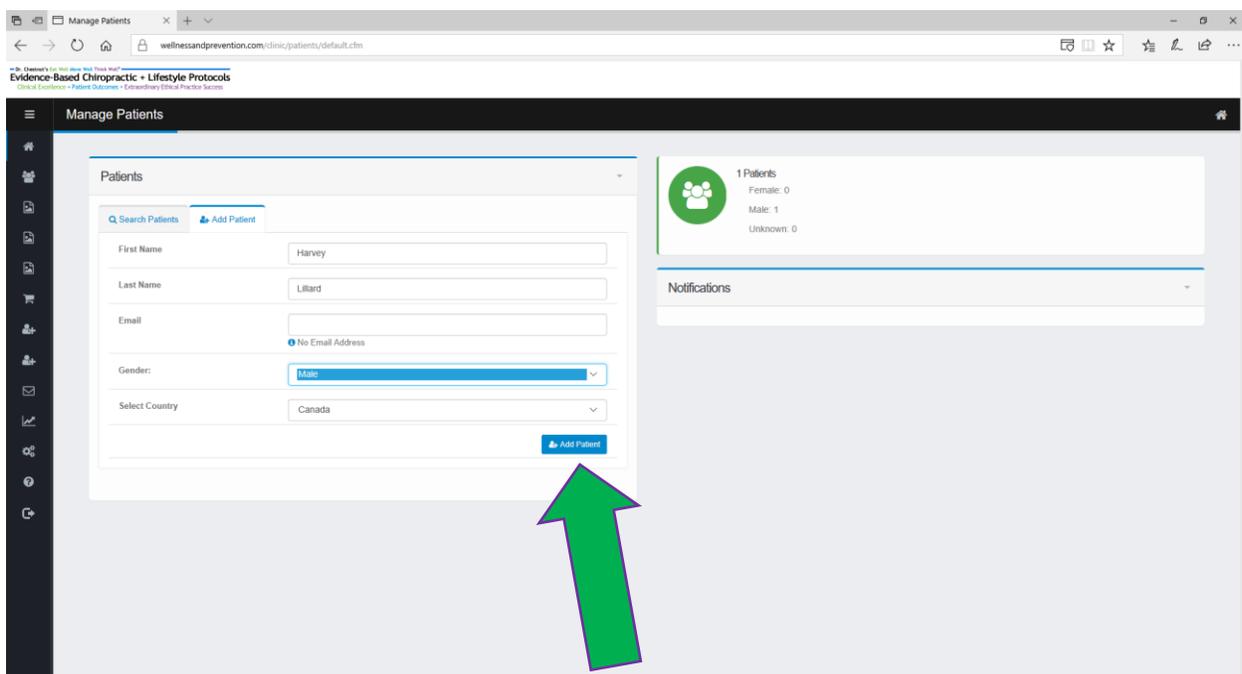
You will see that all you need to add is “First Name”, “Last Name”, “Email”, “Gender”, and Country.

PLEASE take care to enter the first and last name in the correct field; otherwise when you attempt to search you will not be able to find the patient. The country tab will default to your home country however, you may change this for any patient if you wish.

If your patient does not have an email address, you may leave this field blank and our system will assign a non-functioning email address as a unique identifier (it will be something like patient12345@wellnessandprevention.com).

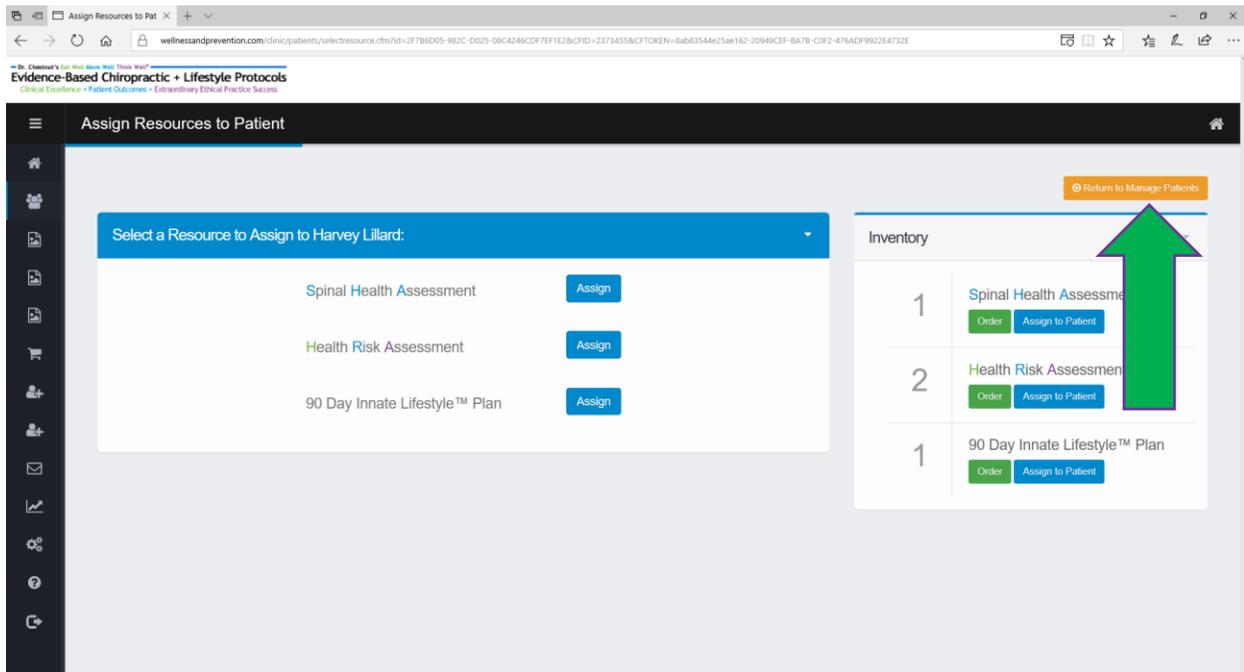
This option is also useful if you have two people sharing an email address. The first of the two entered can use their actual email address, and the second will need to be assigned one. You will need to print out the Access Instructions and provide them to this patient, since they won't be receiving a welcome email (this will be covered later).

When you have filled out the fields, click on “Add Patient”



The system is designed to be efficient. As soon as you click on “Add Patient”, an email is sent to that patient welcoming them and providing login instructions. This email comes from info@thewellnesspractice.com.

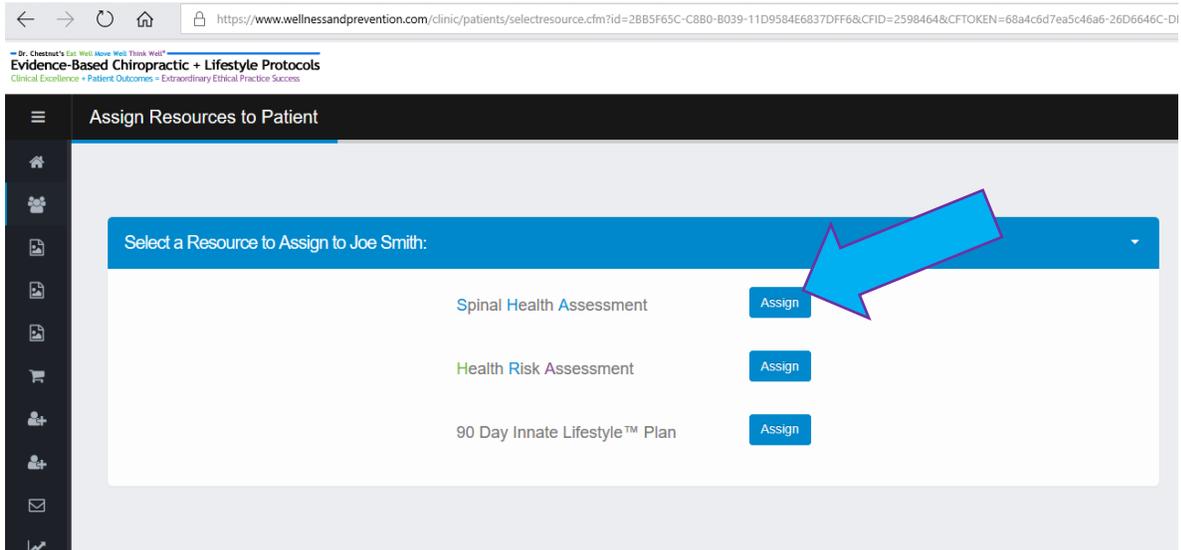
The next screen that comes up gives you the ability to assign a resource immediately (the SHA, the LHRA, or the 90 Day Innate Lifestyle Plan). If you do not wish to assign a resource at this time, you may click on “Return to Manage Patients” (green arrow).



SECTION FOUR – ASSIGNING A RESOURCE (ASSESSMENT OR 90 DAY INNATE LIFESTYLE PLAN)

FROM ADDING A NEW PATIENT ACCOUNT: Remember that as soon as you click on “Add Patient” (after entering name, email, and gender; the next screen that comes up gives you the ability to assign a resource immediately (the SHA, the LHRA, or the 90 Day Innate Lifestyle Plan).

In this example we will assign a Spinal Health Assessment (SHA) – blue arrow.



The system defaults to the “Adult/Youth/Child” version of the SHA. We recommend this version for anyone older than age 6 (as soon as they begin sitting at school). If you wanted to assign a “Pediatric” version (palpatory exam only, no questionnaire or ROM required), you would click on that tab (Green arrow).

For the “Adult/Youth/Child” version, the system will allow you to choose between the “New Protocols Short Version”; the “Original Protocols Version”; the “Original Full Version”; and the “Original Short Version”. The differences are explained beside the choice (Blue arrow).

As of February 2020, we HIGHLY recommend the “New Protocols Short Version” (orange font). This is the most powerful and the most efficient version.

When you are satisfied with the selections, click on “Assign SHA” (Purple arrow).

Chiropractic + Lifestyle Protocols
A Outcome + Extraordinary Clinical Practice Success

Spinal Health Assessment

Return to Assign Resource

Assign a Spinal Health Assessment to Joe Smith

Please select an SHA version:

Adult/Youth/Child Version Pediatric Version

Adult/Youth/Child Version

Mandatory Questionnaire and Physical Measurements
35 item questionnaire.
A few basic measurements such age, height and weight are also required.

Mandatory Spinal Exam and Range of Motion
Spinal segmental examination and spinal range of motion assessment is mandatory for all SHAs.

Functional Test Battery Options

- New Protocols Short Version** (Questionnaire, Spinal Segmental exam, Range of Motion assessment only - has New Report Format - [View Changes](#))
- Original Protocols Version (as above PLUS Spinal Regional exam, Squat Test, Wall Y Test, Active Wall AHC Test, Plank Test, Grip Strength Test - Original Report Format)
- Original Full Version (as above PLUS Overhead Squat Test, One-Legged Stand Test, and Tandem Gait Test - Original Report Format)
- Original Short Version (Questionnaire, Spinal Segmental AND regional exam, Range of Motion assessment - Original Report Format)

Cancel Assign SHA

The next screen that you see will show that this patient has been assigned the resource you selected. This resource assignment will trigger another email to be sent to the patient (informing them that an assessment has been assigned and instructing them to login to complete the assessment).

Any resource that has not been completed may be removed by clicking on the red icon with the depiction of a garbage can (blue arrow). Once an assessment has been completed and the report generated, you can not remove it.

You will also see a section labelled “Actions” (green arrow). If you click on “Print Access Info”, a new tab will open and you will see a PDF document that mimics the welcome email (and acts as the instructions for those without functioning email accounts). You will need to hand this document to those who do not have a functioning email address.

The screenshot displays a web application interface for patient management. The page title is "Patient Details" for "Joe Smith". The main content area is divided into tabs: "Personal Information", "Spinal Health Assessments" (active), "Health Risk Assessments", and "90 Day Innate Lifestyle™ Plan". Under the "Spinal Health Assessments" tab, there is a section for "Incomplete Spinal Health Assessments" with a table containing one entry. The table has columns for "Date Created", "Questionnaire", and "Patient Data". The entry shows "Date Created: Dec 13, 2017", "Questionnaire: Pending", and "Patient Data: Pending". To the right of the table is a red trash icon with a white "X" and the text "Open". A green arrow points to the "Actions" panel on the right, which contains buttons for "Print Access Info", "Send Access Info", and "Launch Console". A blue arrow points to the red trash icon.

Date Created	Questionnaire	Patient Data
Dec 13, 2017	Pending	Pending

This PDF contains the information required for a patient to log in to their account. In this example, the email address is a “system generated” one (ends in @wellnessandprevention.com - mentioned previously to be used for patients who do not have an email address; or for couples who share one email address).

Patient Access Instructions

Hello Joe.

Welcome to **Wellness and Prevention Solutions**.

Your account has been created by Test Durban in order to provide you with access to tools to assess your health and educational information to help you improve your health.

Logging In

A temporary password has been created for you.

After your first time logging in, you will be prompted to set a new password to make future logins easier.

Login Information:

Go to www.wellnessandprevention.com/patient/. Use the following to log in:

Email Address: patient7927787@wellnessandprevention.com

Password: 2ivba6we



You may wish to bookmark the login page for future access.

After Logging In

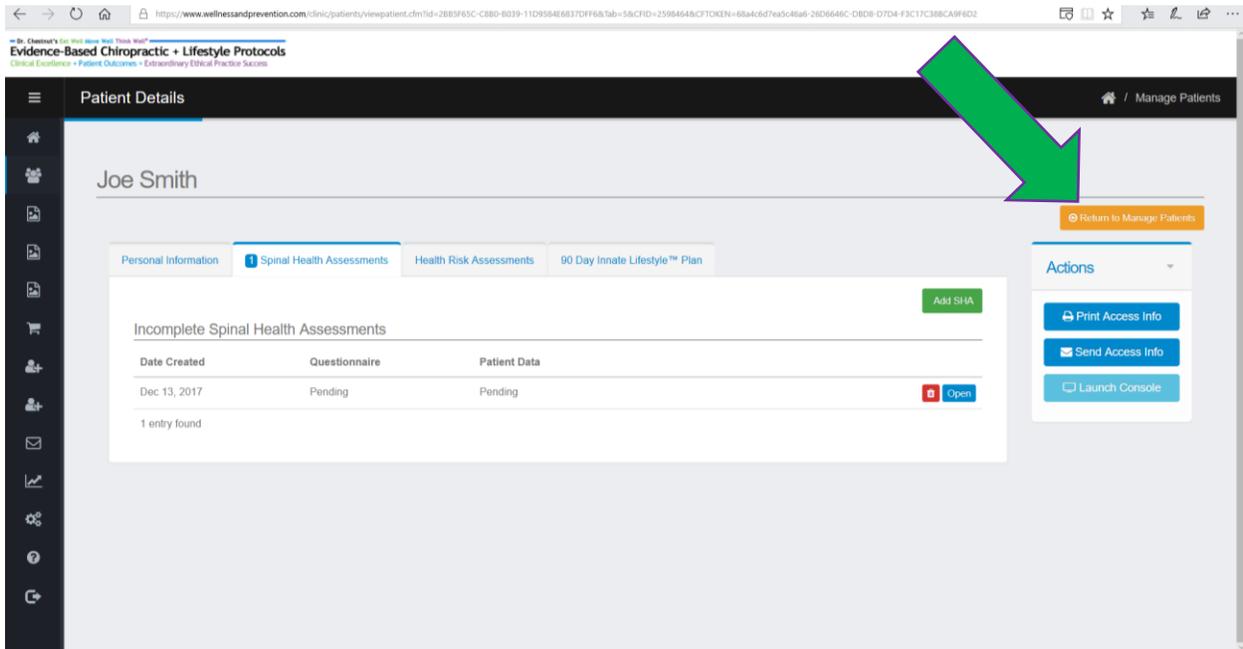
Any pending items (HRA, 90 Day Innate Lifestyle™ Plan, SHA) that require action will be displayed on your home page.

Your practitioner may assign an HRA, 90 Day Innate Lifestyle™ Plan, or SHA at a later date. You will receive a separate email each time a new resource is added to your account and a new pending message will appear under the applicable section of your home page.

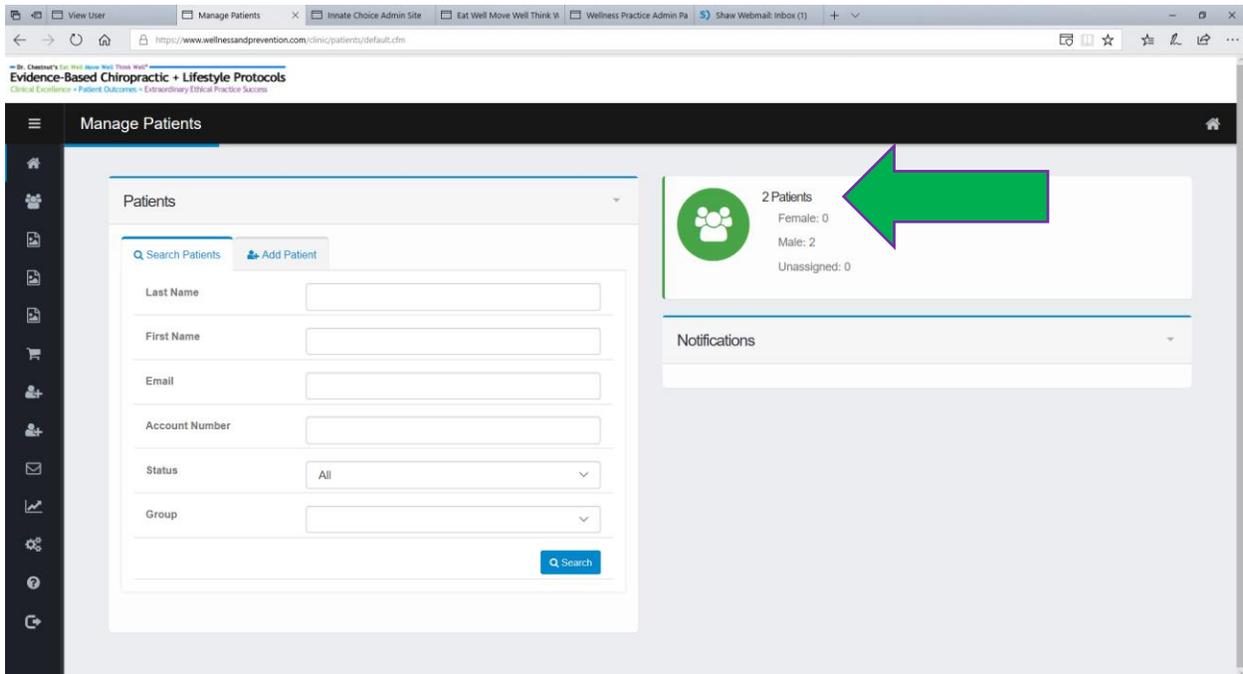
Additional information can be found in the Help section.

Contact

When you have finished with this patient, click on “Return to Manage Patients” to go back to the screen that you started from (the “Manage Patients” page).



As you can see in this example, now there are two male patients in the system (Green arrow).



SECTION FOUR continued – ASSIGNING A RESOURCE (ASSESSMENT OR 90 DAY INNATE LIFESTYLE PLAN)

FROM AN EXISTING PATIENT ACCOUNT: This method is used when the patient account already exists – as in the case for re-evaluations; or for assigning a resource AFTER the patient account has been entered.

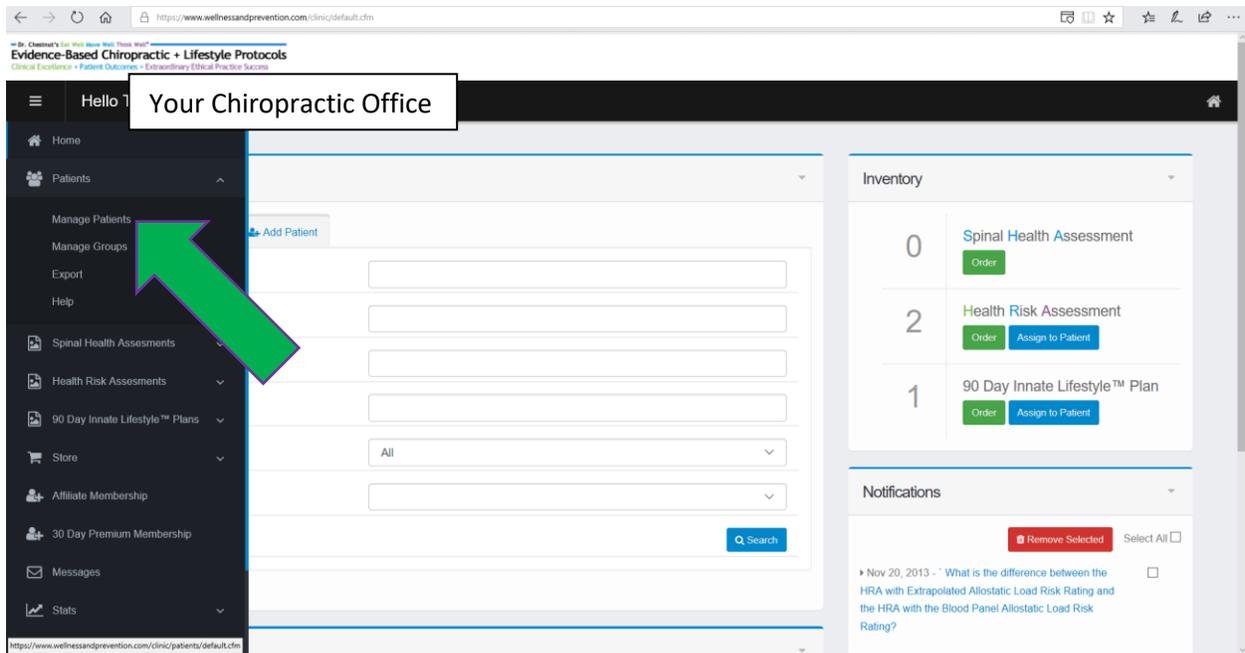
Start at the Home page and click on “Patients” in the left hand menu (Green arrow).

The screenshot shows a web application interface for a chiropractic office. The browser address bar displays <https://www.wellnessandprevention.com/clinic/default.cfm>. The page header includes the text "Hello, Your Chiropractic Office" and a home icon. The left sidebar menu is open, showing options: Home, Patients, Spinal Health, Health Risk Assessment, 90 Day Innate Lifestyle, Store, Affiliate Membership, 30 Day Premium Membership, Messages, Stats, Settings, Help, and Logout. A green arrow points to the "Patients" option. The main content area features an "Add Patient" button and a form with several input fields and a search button. The right sidebar contains an "Inventory" section with a table of resources:

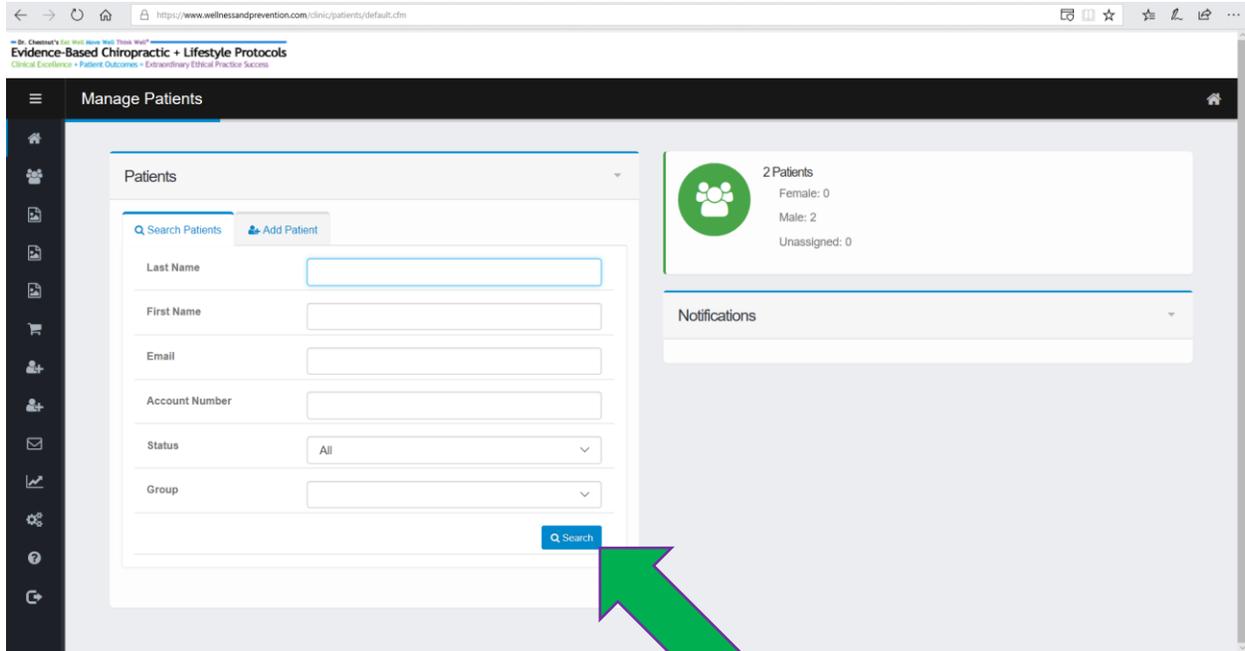
Quantity	Resource Name	Order	Assign to Patient
0	Spinal Health Assessment	Order	
2	Health Risk Assessment	Order	Assign to Patient
1	90 Day Innate Lifestyle™ Plan	Order	Assign to Patient

Below the inventory is a "Notifications" section with a "Remove Selected" button and a "Select All" checkbox. A notification is visible: "Nov 20, 2013 - What is the difference between the HRA with Extrapolated Allostatic Load Risk Rating and the HRA with the Blood Panel Allostatic Load Risk Rating?"

Then click on “Manage Patients” (Green arrow):



On the “Manage Patients” page, click “Search” (Green arrow). If you have a long list of patients, enter the patient’s last name to narrow the search result.



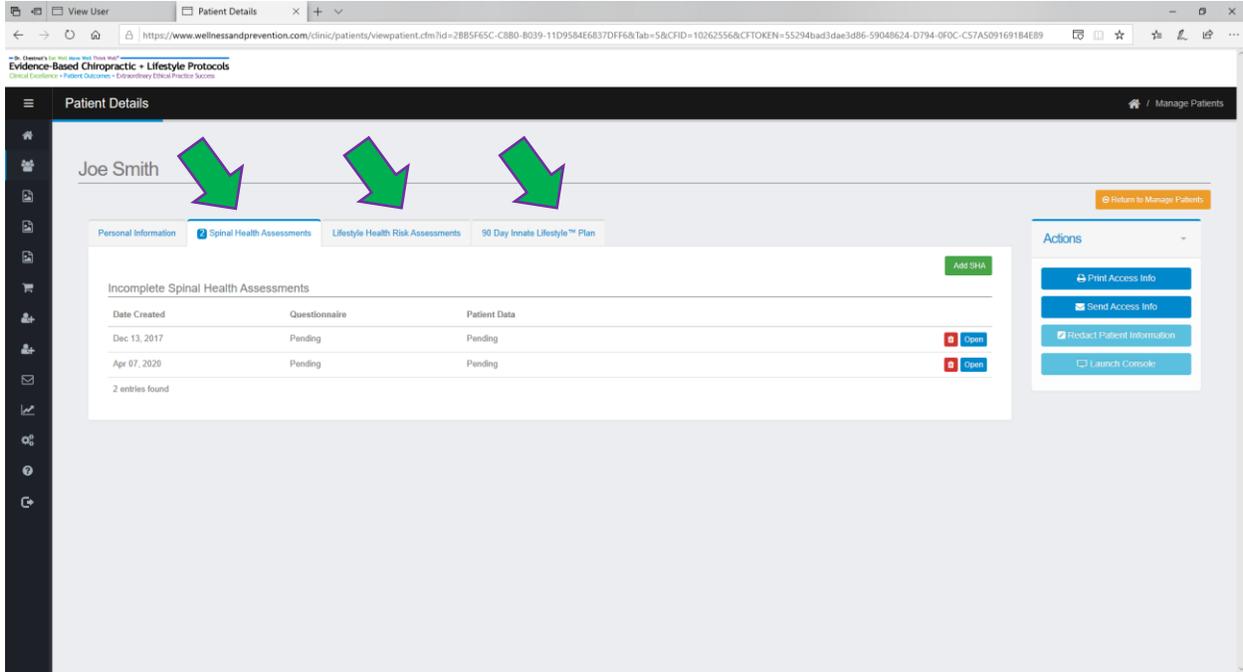
From the list of patients, choose the one you want and click on “View”:

The screenshot shows a web browser window with the URL <https://www.wellnessandprevention.com/clinic/patients/default.cfm>. The page header includes the text "Dr. Chestnut's Oh Well How Well Think Well!" and "Evidence-Based Chiropractic + Lifestyle Protocols". The main content area is titled "Manage Patients" and features a search bar with a "Search" button. Below the search bar is a table of search results:

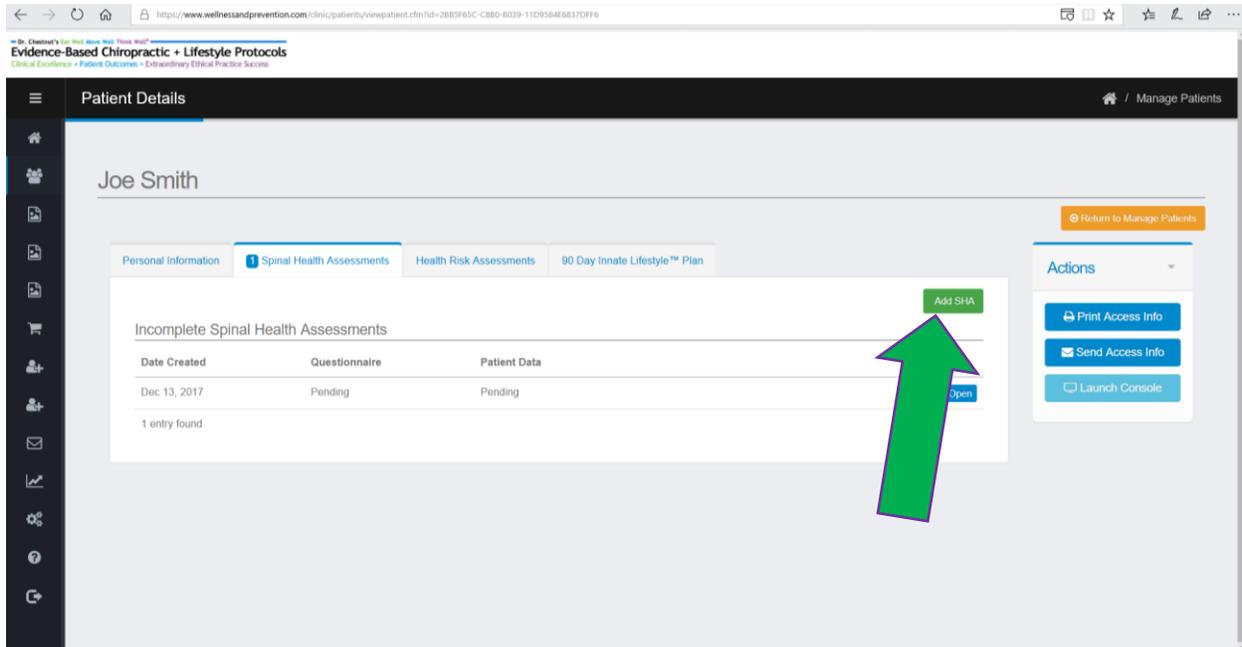
Patient	Status	
Baxter, Rick 7858843	Active	View
Smith, Joe 7927787	Active	View

At the bottom of the table, it says "2 entries found". A large green arrow points to the "View" button for the patient "Smith, Joe". To the right of the table, there is a summary box with a green icon of three people and the text "2 Patients", "Female: 0", "Male: 2", and "Unassigned: 0". Below this is a "Notifications" section.

The next page will display the “Personal Information” for that patient, and will also have the tabs for the SHA, LHRA, and 90 Day Innate Lifestyle Plan (green arrows). Click on the tab corresponding to the resource that you want to assign:



In each case, there will be a button in the upper right corner labelled “Add SHA” (or “Add LHRA”; or “Add 90 Day Plan”). In each case, clicking this button will take you to the “Assignment Menu” – where you get to select the options for that particular resource. From that point forward it is the same as assigning to a new patient (refer to page 22 above if necessary).



Congratulations! You have completed the BASIC training. You are now ready to move on to the ADVANCED training document! Well done.