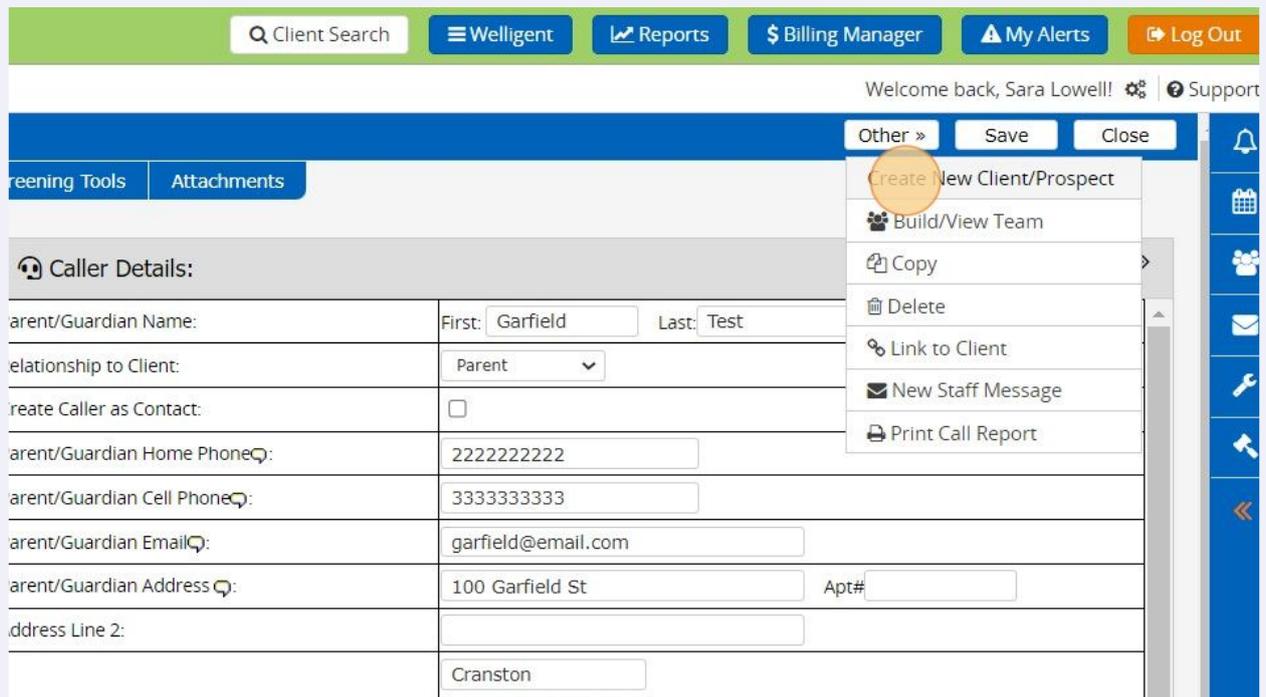


Creating Client from Call Center

1 In a saved Call Record, go to "Other" and click "Create New Client/Prospect"



The screenshot shows a web application interface with a green header bar containing navigation buttons: "Client Search", "Welligent", "Reports", "Billing Manager", "My Alerts", and "Log Out". Below the header, a blue bar displays "Welcome back, Sara Lowell!" and "Support". The main content area has a blue bar with "Other >>", "Save", and "Close" buttons. A dropdown menu is open under "Other >>", listing options: "Create New Client/Prospect", "Build/View Team", "Copy", "Delete", "Link to Client", "New Staff Message", and "Print Call Report". The "Create New Client/Prospect" option is highlighted with a red circle. Below the dropdown is a form titled "Caller Details:" with fields for "Parent/Guardian Name" (First: Garfield, Last: Test), "Relationship to Client" (Parent), "Create Caller as Contact" (checkbox), "Parent/Guardian Home Phone", "Parent/Guardian Cell Phone", "Parent/Guardian Email", "Parent/Guardian Address" (100 Garfield St, Apt#), "Address Line 2", and "Cranston".

| Caller Details: | |
|-----------------------------|----------------------------|
| Parent/Guardian Name: | First: Garfield Last: Test |
| Relationship to Client: | Parent |
| Create Caller as Contact: | <input type="checkbox"/> |
| Parent/Guardian Home Phone: | 2222222222 |
| Parent/Guardian Cell Phone: | 3333333333 |
| Parent/Guardian Email: | garfield@email.com |
| Parent/Guardian Address: | 100 Garfield St Apt# |
| Address Line 2: | |
| | Cranston |

2

Client Demographics will open; select record type (Client or EI Client, depending on what your program is using in this menu)

RIEI Sandbox

Call Center **Test, Odie** ✕

New Client

Basic Extended

| Basic Demographics: | |
|---------------------|--|
| Welligent ID: | |
| Type of Record: | <input type="text" value=""/> * |
| Location: | <input type="text" value="Test Location"/> * |
| First Name: | <input type="text" value="Odie"/> * Middle: <input type="text"/> |
| Last Name: | <input type="text" value="Client"/> * |
| Other Name/AKA: | <input type="text"/> |
| Date of Birth: | <input type="text" value="01-JAN-2022"/> <input type="checkbox"/> Estimated or Unknown |
| Client ID: | <input type="text" value=""/> (Auto Generated) |

3

Save Demographic record

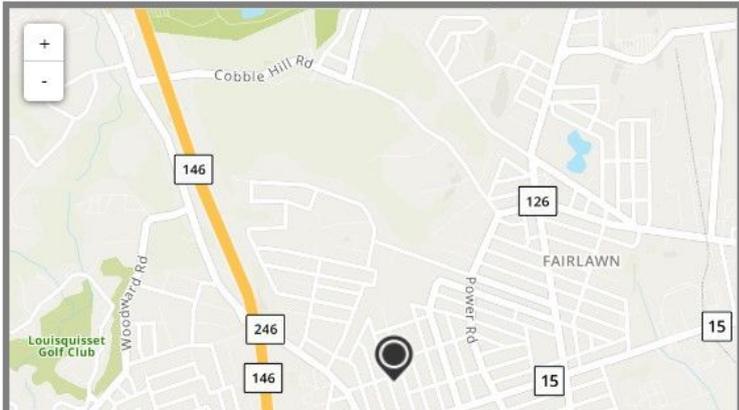
Client Search Welligent Reports Billing Manager My Alerts Log Out

Welcome back, Sara Lowell! Support

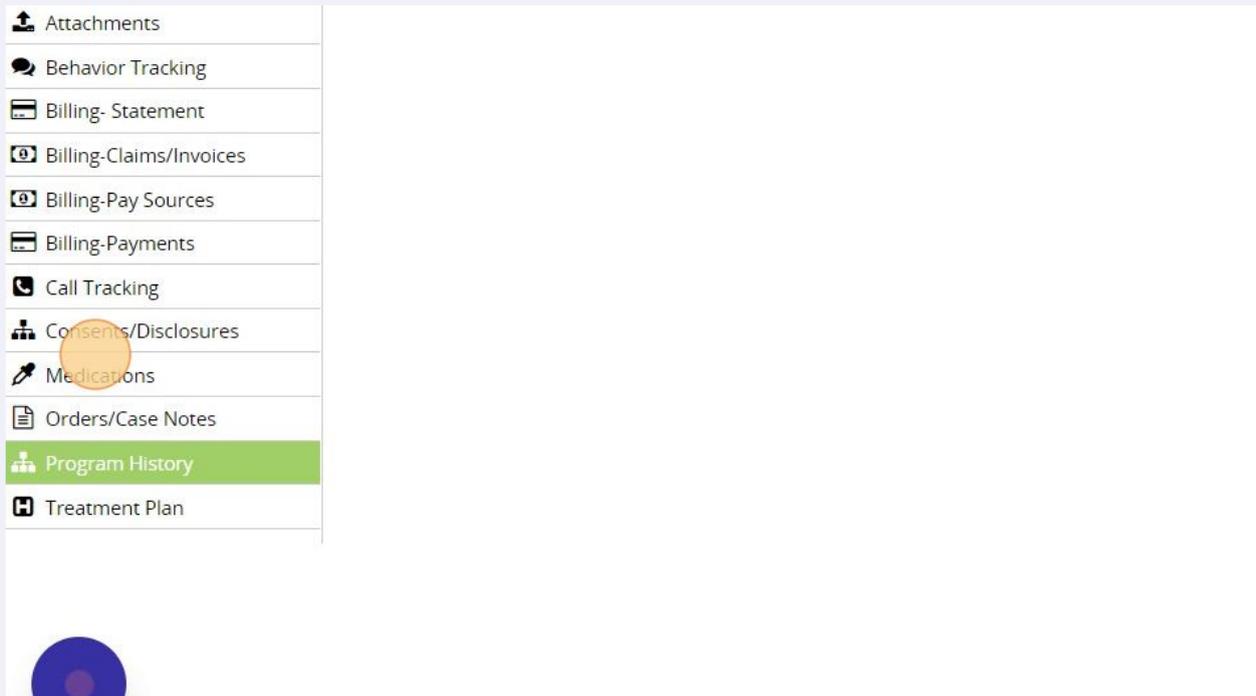
Other » **Save**

Other

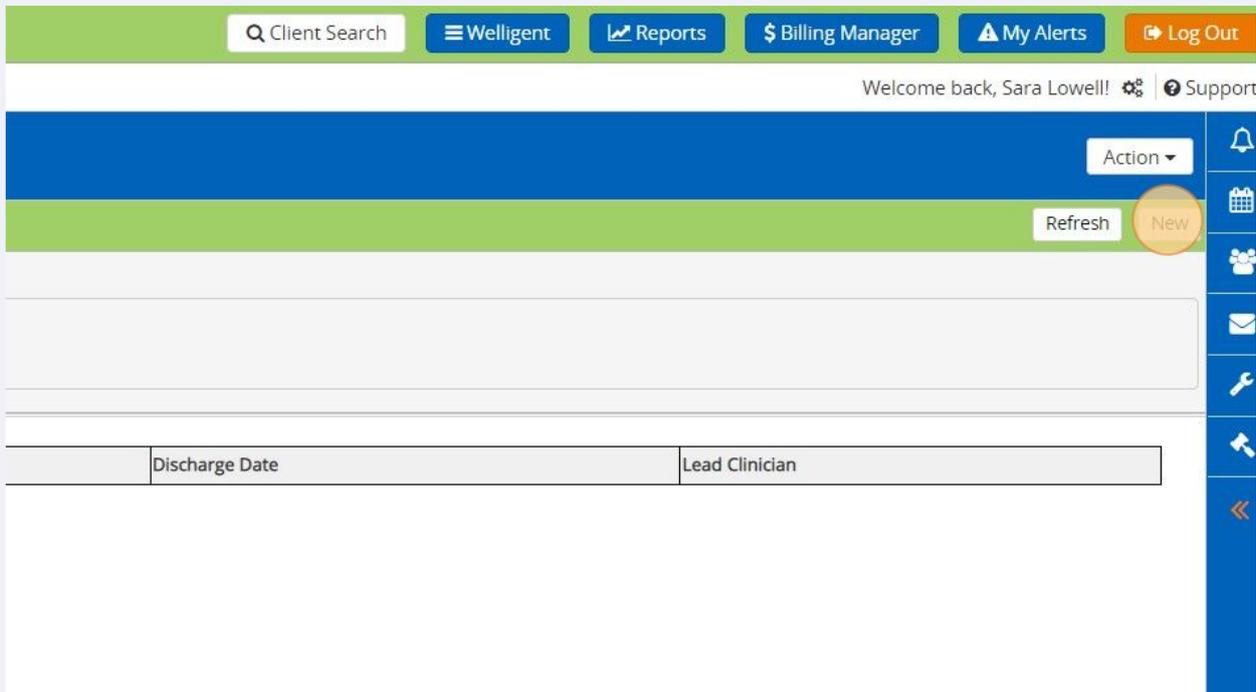
Address Map:



4 On the left hand side rail, select "Program History"



5 Click "New"



6 Select Early Intervention program

RIEI Sandbox

Call Center **Test,Odie** ✕

Client: Odie Test (DOB: 01-Jan-2022) (5 mths 28 days) (Gender:Male)
Client ID: 7155603

Select a Program

| | Enroll | Wait List | Program Name | Program Director | Active |
|----------------------------------|--------------------------|-----------|--------------------|------------------|--------|
| <input checked="" type="radio"/> | <input type="checkbox"/> | | Early Intervention | Not Specified | 31 |
| <input type="radio"/> | <input type="checkbox"/> | | First Connection | Not Specified | 1 |
| <input type="radio"/> | <input type="checkbox"/> | | HBTS | Not Specified | |

7 Click "Save"

Client Search Welligent Reports Billing Manager My Alerts Log Out

Welcome back, Sara Lowell! Support

Action ▾

Save Cancel

| Pending | Wait Listed | Max Capacity | Available Slots |
|---------|-------------|--------------|-----------------|
| 1 | 0 | -- | -- |
| 0 | 0 | -- | -- |
| | 0 | -- | -- |

8

In Referral Information, enter 45 Days From Referral. In Eligibility and IFSP Information section, enter referral date

Program Status: Active

Intake → Diagnosis → IFSP/Outcomes → Services

Referral Information:

Referral Date: 29-JUN-2022 Time: 01:04pm

Referring Agency: [Search]

Referring Individual: Garfield Test [Search]

45 Days from Referral: [Calendar]

Eligibility and IFSP Information:

Discharge Information:

9

Use lookup to add Service Coordinator

(DOB: 01-Jan-2022) (5 mths 28 days) (Gender:Male)

03

ails - Early Intervention Other » Save

Intake → Diagnosis → IFSP/Outcomes → Services

Paperwork/Forms

| | New | Form |
|-----|-----|------------------|
| [+] | + | Acknowledgen |
| [+] | + | Consent to Mu |
| [+] | + | Daily Activities |
| [+] | + | Family Intake(|
| [+] | + | Hearing and Vi |
| [+] | + | IFSP - (Entry) |
| [+] | + | IFSP - (Exit) P |
| [+] | + | IFSP - Annual |
| [+] | + | IFSP - Multidis |
| [+] | + | IFSP - Service: |
| [+] | + | IFSP - Transiti |
| [+] | + | Physician's Aut |

Referral Date: 29-JUN-2022 Time: 01:08PM

[Search]

Date: [Calendar]

Date: [Calendar]

Date: [Calendar]

Date: [Calendar]

Date: [Calendar]

10 Click "Save"

Client Search Wellig

s 28 days) (Gender:Male)

Other » Save

Diagnosis IFSP/Outcomes Services

29-JUN-2022 Time: 01:08PM

Donna Novak

Paperwork/Forms

| New | Form |
|-----|--|
| + + | Acknowledgement Letter(0) |
| + + | Consent to Multidisciplinary Evaluation/Assess |
| + + | Daily Activities and Routines(0) |
| + + | Family Intake(0) |
| + + | Hearing and Vision Screening(0) |
| + + | IFSP - (Entry) Present Levels of Development |
| + + | IFSP - (Exit) Present Levels of Development a |
| + + | IFSP - Annual IFSP Review (0) |
| + + | IFSP - Multidisciplinary Evaluation/Assessmen |

11 Click "Diagnosis" tile

RIEI Sandbox

Call Center Test, Odie x

Client: Odie Test (DOB: 01-Jan-2022) (5 mths 28 days) (Gender:Male)
Client ID: 7155603

Program Episode Details - Early Intervention Other » Save

Program Status: Active * Intake Diagnosis IFSP/Outcomes Services

Referral Information:

Eligibility and IFSP Information:

Referral Date: 29-JUN-2022 Time: 01:08PM

Service Coordinator: Donna Novak

Supervisor:

Eligibility/IFSP Mtg. Date:

RBI Date:

IFSP Start Date:

12 Scroll down and enter diagnosis. Context = Principal Diagnosis.

Diagnosis Effective Date:   DX History Diagnosis UniqueID?:

Diagnosis Code - New Diagnosis:

Diagnosis Codeset: 

Diagnosis Context:  *

Diagnosis Code/Description:

Valid From:  * to 

Associated Service: 

Signs/Symptoms/Comments(4000 Characters):
Principal Diagnosis
Clinical Disorders Related to Treatment
Admitting Diagnosis (Residential Only)
Other Conditions that May be the Focus of Clinical Attention
External Cause of Injury
Patient's Reason for Visit

Diagnosed By:

13 Use lookup for Diagnosis Code/Description

  **Diagnosis Search**

 Code Sets

 ICD-10

 ICD 10

Description Code

Select ICD-10 Description

Encntr screen for global developmental delays (milestones)

14 Enter "Valid From" Date (date of referral). Leave "Valid To" blank.

gnosis Effective Date:   History Diagnosis UniqueID?:

Diagnosis Code - New Diagnosis:

Diagnosis Codeset: 

Diagnosis Context:  *

Diagnosis Code/Description:

Valid From:  * to 

Associated Service: 

Signs/Symptoms/Comments(4000 Characters):

Diagnosed By :

Diagnosis Code - New Diagnosis:

15 Click "Save" at the top of the screen (above Tiles)

 We

ths 28 days) (Gender:Male)



