WELLIGENT – SETTING UP DOCUMENT FOLDERS

There are several places in Welligent where documents/attachments can be uploaded. Four of these locations are particularly relevant for Early Intervention: Call Center Documents, Client Documents, Program Episode Documents, and Document Downloads. Think of each location as a separate file cabinet. In each of these file cabinets, you can decide how many folders/subfolders are inside, as well as what each of those folders/subfolders is named. ***Instructions for how to create/name folders can be found at the end of this document.***

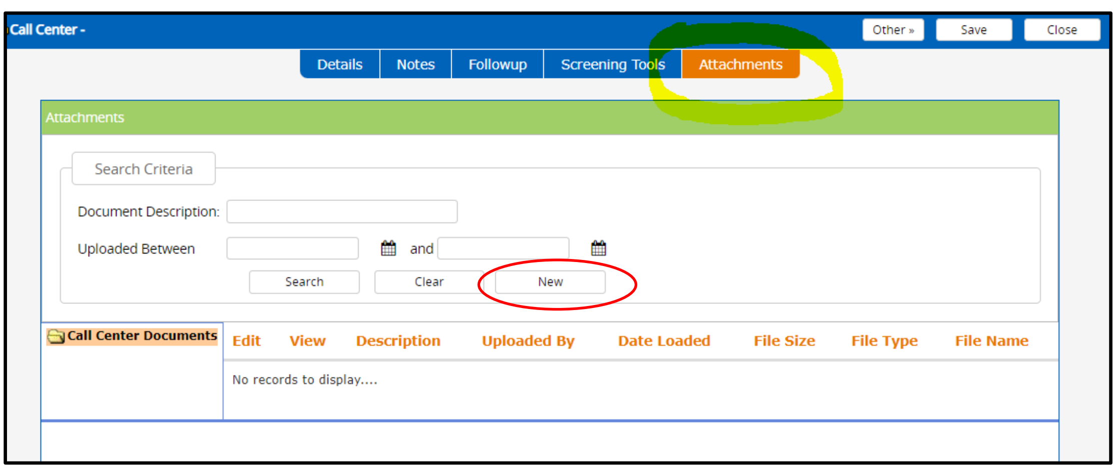
- **Client documents** can be stored in 3 locations:
  - CALL CENTER DOCUMENTS
  - CLIENT DOCUMENTS
  - PROGRAM EPISODE DOCUMENTS
- **Program documents** are stored in 1 location:
  - DOCUMENT DOWNLOADS

CALL CENTER DOCUMENTS

Client-specific attachments/documents received at time of referral can be added to the Call Center record by using the 'Attachments' tab. Once a client record is created, these files remain in Call Center and will also be available in Client Documents (*see next section re: Client Documents*).

To access Call Center Documents, click on the "Attachments" tab in the child's Call Center record.

- **To upload a new document/attachment, click 'New'.**



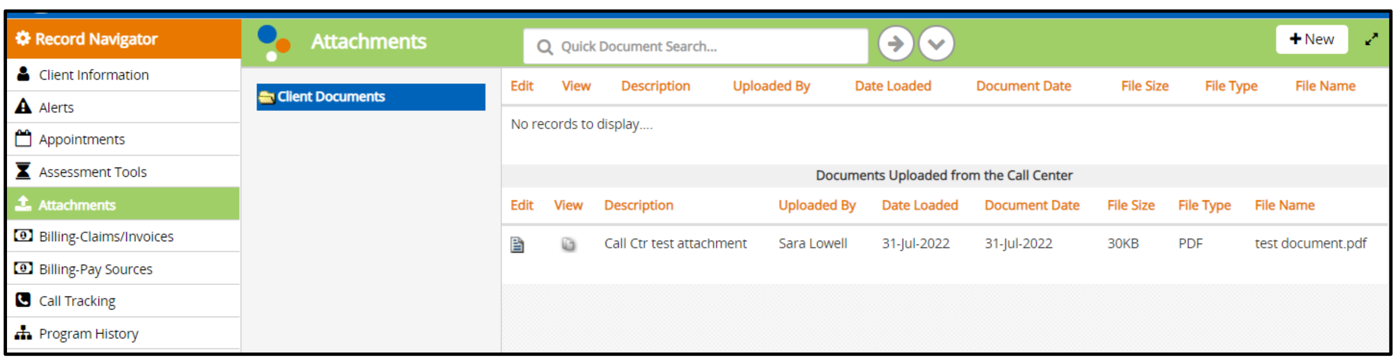
CLIENT DOCUMENTS

Client Documents stores client-specific (not program-specific) documents/attachments. While in the client record, it is always available by going to the 'Attachments' icon on the left. In addition to housing document/attachments uploaded while client is enrolled, Client Documents also contains any documents that were uploaded in Call Center.

NOTE: Documents stored in Client Documents can be viewed/accessed by ALL programs. For this reason, agencies who use Welligent for more than one program should use Program Episode Documents to store EI-specific documents/attachments (see next section re: Program Episode Documents).

To access Client Documents, open the "Attachments" icon on the left side in the child's record.

- **Click on a folder/subfolder to view/access uploaded documents/attachments.**
- **You can use the Search fields to look for a specific document.**
- **To upload a new document/attachment, click 'New' in the upper right.**



Accessing Client Documents in a session note: Client Documents are also able to be accessed in the session note, by clicking on the blue vertical bar on the right-hand side of the note. Also, if enabled**, documents/attachments can be uploaded directly to the View/Enter Appointment Details tab.

This is an option in Welligent Options. To enable, go to Welligent Options, search "attach", and select Yes for "Allow Users to attach Documents Directly to Session Notes". **Agencies who use Welligent for more than one program should NOT turn on this feature, as it would upload EI-specific documentation into Client Documents, which is accessible by other programs.

PROGRAM EPISODE DOCUMENTS

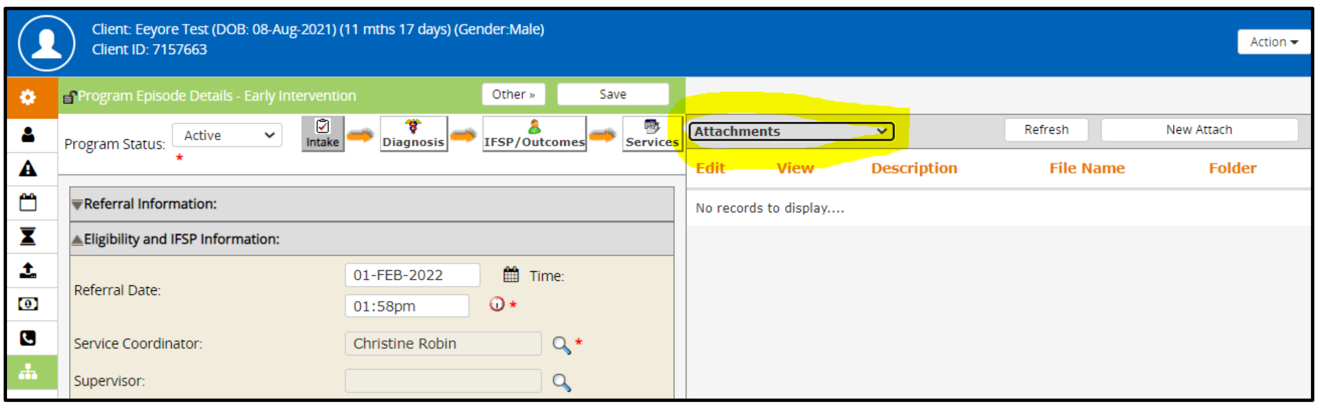
Program Episode Documents stores documents/attachments that are client-specific AND program-specific. If your agency is not using Welligent for any other programs, you may decide to just use Client Documents and opt not to use the Program Episode Documents.

Possible drawbacks of using this document location: Call Center records will not appear here, and documents uploaded here will not appear in Client Documents.

NOTE: For agencies with more than one program using Welligent, these is where you should store document/attachments that should be viewed by Early Intervention only.

To access the "Program Episode Documents, go to the child's record > Program History > EI. Use the dropdown menu at the top of the Paperwork/Forms section - select Attachments.

- **A list of documents already uploaded and be viewed/selected.**
- **New documents can be uploaded by clicking 'New Attach'**

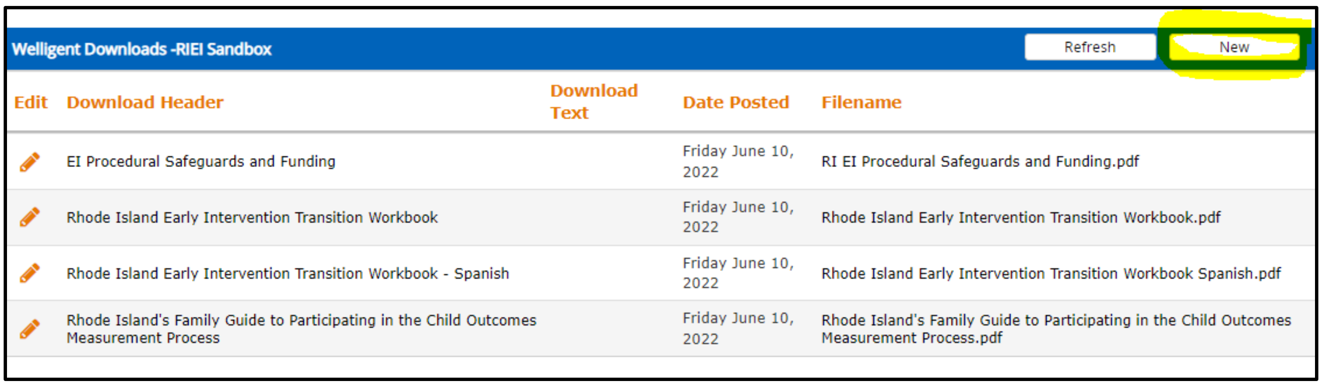


DOCUMENT DOWNLOADS

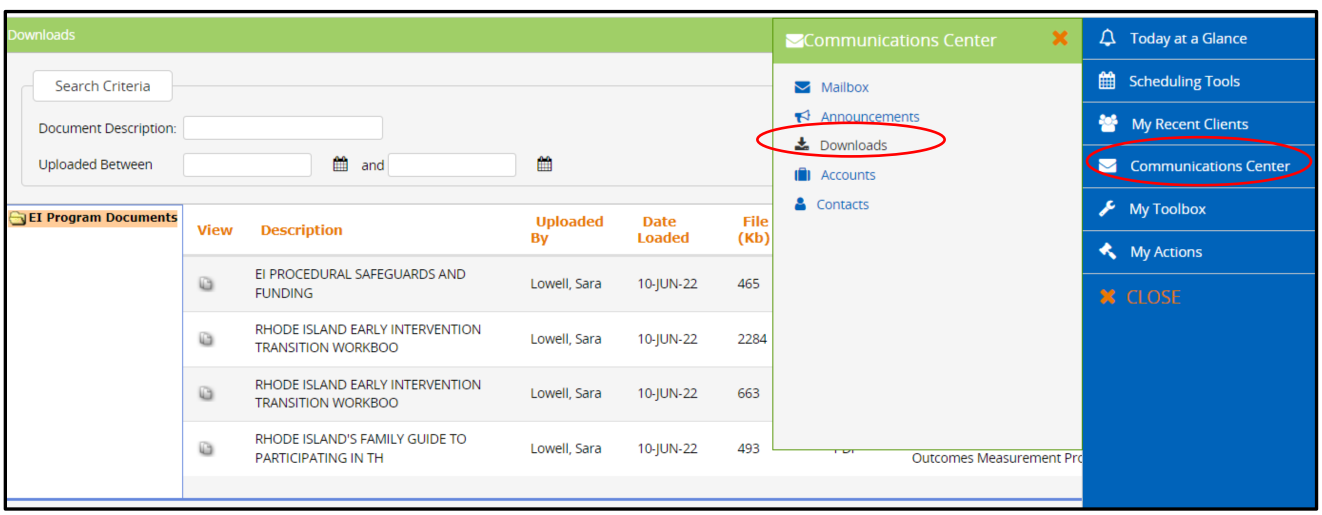
Document Downloads can store program documents/handouts such as the Procedural Safeguards and Funding booklet. These files are agency- or program-specific, but not client-specific.

To ADD to Document Downloads, go to Welligent MegaMenu > Admin > Downloads

(note: the ability to add to Downloads is dependent on profile settings)



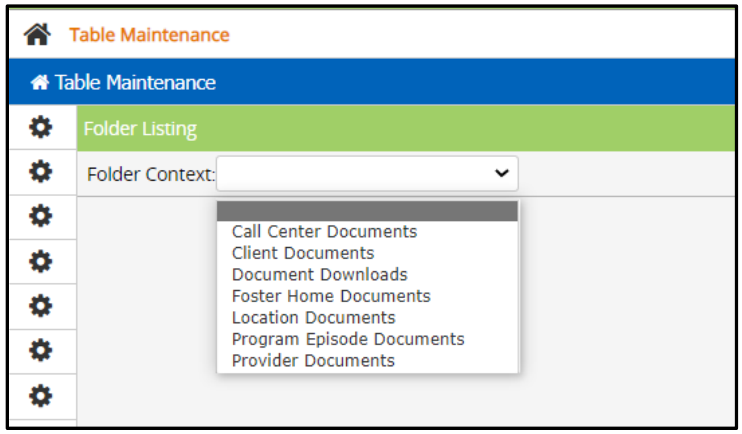
To VIEW Document Downloads, go to Communications Center > Downloads



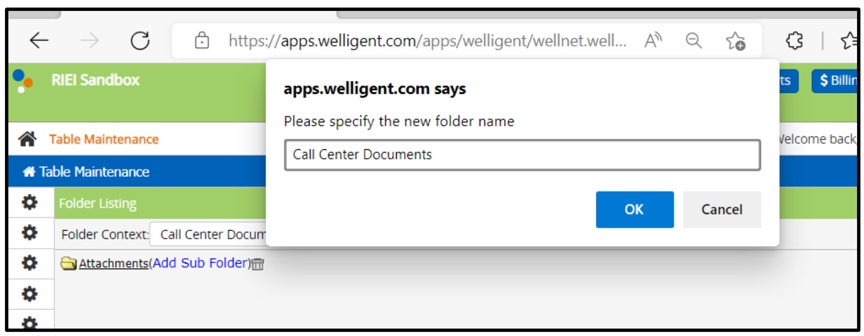
INSTRUCTIONS FOR CREATING/NAMING FOLDERS AND SUBFOLDERS

Go to Table Maintenance > Document Folders

- **Select Folder Context:** This refers to the particular "file cabinet" location (described above) where you want to create folders.



- **To rename the main folder**, click on the word 'Attachments'; enter the new name in the pop-up window.



- Click "Add Sub-folder" next to the main folder to create sub-folders.
- You can also create sub-folders within sub-folders. Do this by clicking "Add Sub-folder" next to the *Sub-folder* in which you want to create second level sub-folders.
- All folders can be renamed by clicking on their names.
- Folders can be deleted by clicking on the trash can next to their name.
- Repeat this process for each "file cabinet" (Folder Context) you would like to set up.

Here is a sample folder setup for Client Documents (this is not all-inclusive, it's just an example). The main folder is "Client Documents"; there are 3 subfolders (Legal/Medical/Releases). The Legal sub-folder has its own sub-folder (DCYF).