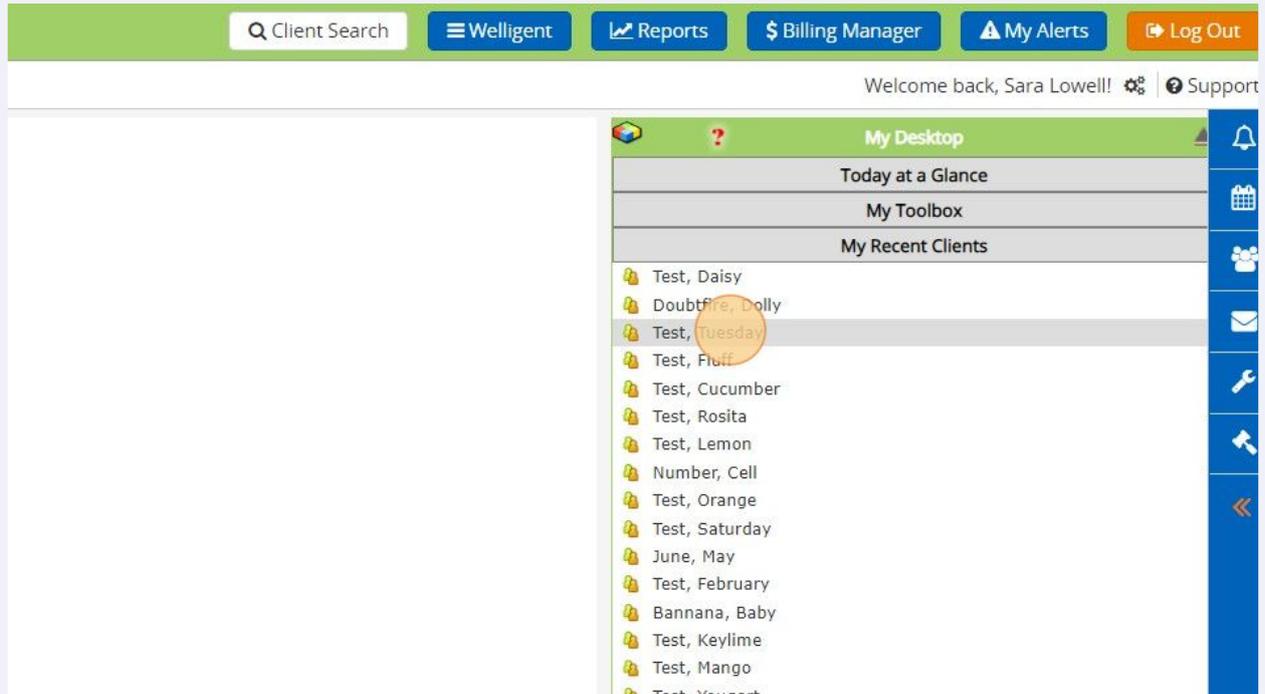


# Entering a Session Note



1 Select client (can also use Client Search)



## 2 Select Program History on the left side of the screen

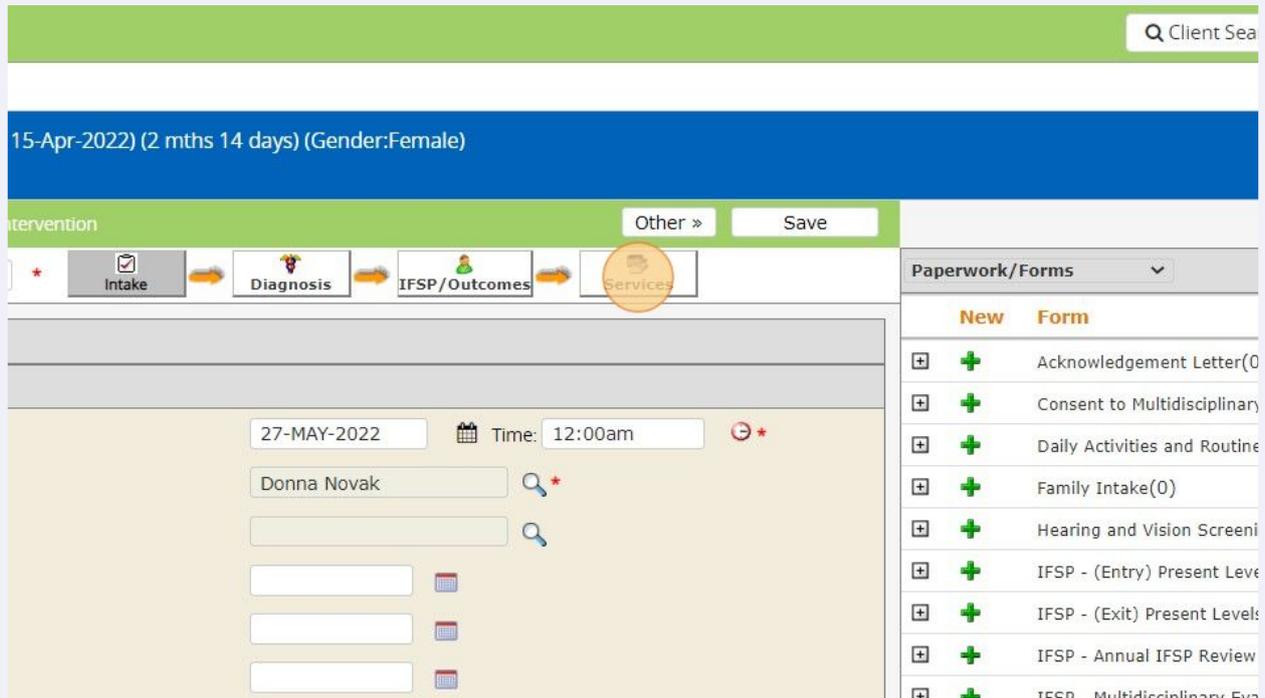
The screenshot shows a software interface with a sidebar menu on the left and a main content area on the right. The sidebar menu includes the following items: Billing- Statement, Billing-Claims/Invoices, Billing-Pay Sources, Billing-Payments, Call Tracking, Consents/Disclosures, Medications, Orders/Case Notes, Program History (highlighted with a green bar and a blue circle), and Treatment Plan. The main content area has a header for 'Outside Medications' with the text 'Tuesday Test has no Active Medications.' Below this is a section for 'Problems/Conditions'.

## 3 Select the Early Intervention program

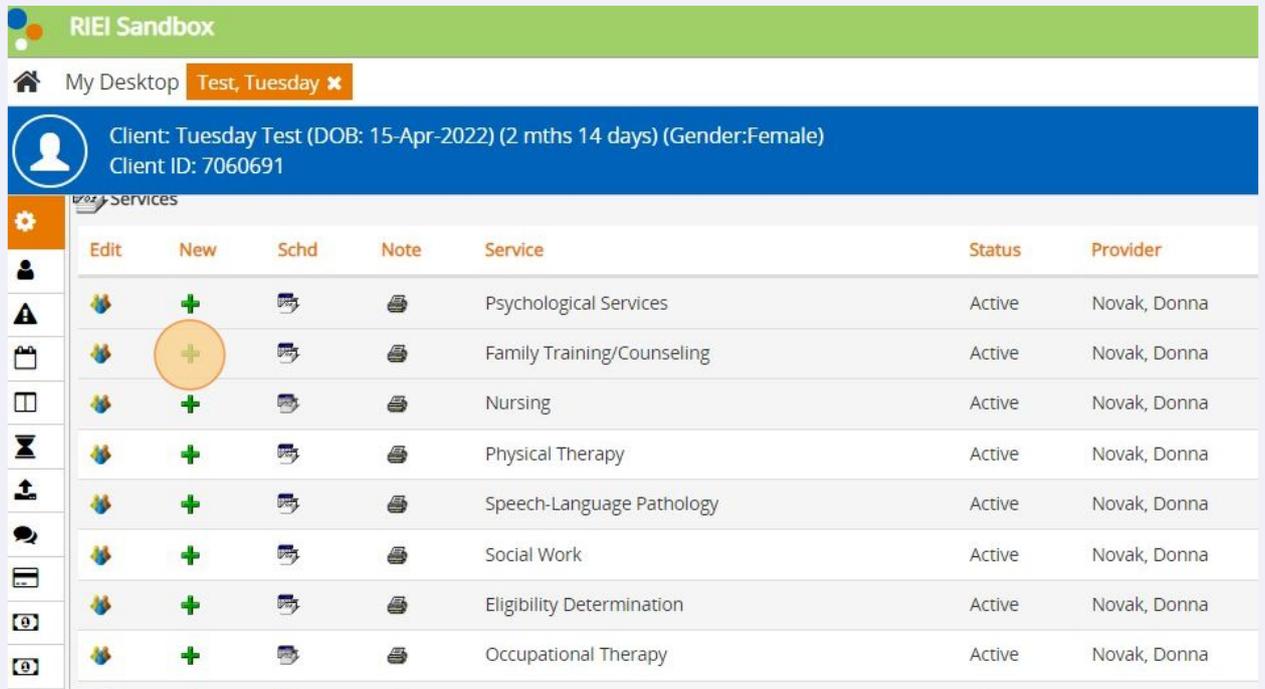
The screenshot shows a software interface for 'Client ID: 7060691'. The 'Program History' section is active, showing search criteria and filters. The table below lists the programs:

	Edit	Print	Program	Status	Admit
			Early Intervention	Active	27-Mar

4 In child's Program Episode Details, click on "Services" tile



5 Scroll down to child's services, find the appropriate service, and click on the green plus sign



## 6 Event Details - enter date and time

tes - TUESDAY TEST

View/Enter Appointment Details Enter Notes

Appointment Details	
Screen	0
Service:	<input type="text"/>
Scheduled/Start Time:	<input type="text"/> * 🕒
Appointment Duration (Face to Face):	<input type="text"/> (Minutes)
Provider:	Sara Lowell 🔍
Status:	Pending Completion 📄
Primary Action:	<input type="text"/> 🗨️ *
Timely Services:	<input type="text"/> 🗨️ *
Service Location (Billing Location):	Test Location
Place of Service:	<input type="text"/> 🗨️ *

Client  
Client  
Address  
City/State  
Home  
Cell Phone  
Primary Language  
Gender  
Date of Birth  
Age

Procedure  
Date of Service  
Type of Service  
Procedure

## 7 Enter duration

Session Notes - TUESDAY TEST

View/Enter Appointment Details Enter

Event Details	
Lock Screen	0
Date of Service:	29-JUN-2022 📅 *
Scheduled/Start Time:	12:33PM * 🕒
Appointment Duration (Face to Face):	<input type="text"/> (Minutes)
Provider:	Sara Lowell 🔍
Status:	Pending Completion 📄
Primary Action:	<input type="text"/> 🗨️ *
Timely Services:	<input type="text"/> 🗨️ *
Service Location (Billing Location):	Test Location
Place of Service:	<input type="text"/> 🗨️ *

**8** Select the appropriate primary action

Event Details	
Lock Screen	0
Date of Service:	29-JUN-2022 * 📅 *
Scheduled/Start Time:	12:33PM * 🕒 *
Appointment Duration (Face to Face):	60 (Minutes)
Provider:	Sara Lowell 🔍
Status:	Pending Completion ▾ ✅
Primary Action:	▾ 🗨️ *
Timely Services:	▾ 🗨️
Service Location (Billing Location):	Test Location ▾
Place of Service:	▾ 🗨️ *

**9** Timely Services - USE THIS FIELD ONLY WHEN PROVIDING A SERVICE FOR THE FIRST TIME. Leave this blank if not providing a first service. Select Place of Service using the menu.

Scheduled/Start Time:	12:33PM * 🕒 *
Appointment Duration (Face to Face):	60 (Minutes)
Provider:	Sara Lowell 🔍
Status:	Pending Completion ▾ ✅
Primary Action:	FTC (Level 1) ▾ 🗨️ *
Timely Services:	Timely Service Completed ▾ 🗨️
Service Location (Billing Location):	Test Location ▾
Place of Service:	▾ 🗨️ *

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10 Click "Save"

Other » Delete Save Print Close

Enter Notes Complete Paperwork

**Client Information:**

Client	Tuesday Test
Client ID	7060691
Address:	999 Friday Street
City/State/Zip:	Cranston RI 02920
Home Phone:	(401) 222-3333
Cell Phone:	(401) 333-2222
Primary Language:	English
Gender:	Female
Date of Birth:	15-Apr-2022
Age:	2 mths 14 days

**Program/Service Details:** Action ▾

Date of Birth:	15-Apr-2022
Type of Service:	Family Training/Counseling
Program:	Early Intervention

11 Click "Enter Notes"

Other » Delete

View/Enter Appointment Details Enter Notes Complete Paperwork

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	🔧 *

**Client Information:**

Client	Tuesday Test
Client ID	7060691
Address:	999 Friday Street
City/State/Zip:	Cranston RI 02920
Home Phone:	(401) 222-3333
Cell Phone:	(401) 333-2222
Primary Language:	English
Gender:	Female
Date of Birth:	15-Apr-2022
Age:	2 mths 14 days

**Program/Service Details:**

Date of Birth:	15-Apr-2022
Type of Service:	Family Training/Counseling
Program:	Early Intervention

**12** Complete relevant session note content as you normally would

<input type="button" value="Other »"/> <input type="button" value="Delete"/> <input type="button" value="Save"/> <input type="button" value="Print"/>	
<input type="button" value="Appointment Details"/> <input type="button" value="Enter Notes"/> <input type="button" value="Complete Paperwork"/>	
<hr/> <hr/>	
☞:	No <input type="button" value="✕"/>
	
	30000 Characters Left
last visit :	
	30000 Characters Left
ation provided at last visit and describe progress towards IFSP	
	30000 Characters Left

**13** Close sections you don't need by clicking the green plus signs.

	practicing:
	demonstrating activity to provider:
	reviewing strategies and information:
	other:
	Describe (optional):
	<input type="button" value="⊕"/> <b>ONGOING ASSESSMENT</b>
	<input checked="" type="button" value="⊕"/> <b>IFSP UPDATE MEETING</b>
	Prior Written Notice was provided for this IFSP Update Meeting:
	If needed, IFSP services were updated and parental consent was obtained:
	Summary (optional):
	<input type="button" value="⊕"/> <b>PERIODIC IFSP REVIEW MEETING</b>
	Prior Written Notice was provided for this Periodic IFSP Review Meeting:
	All outcomes reviewed, outcomes updated as needed:
	If needed, IFSP services were updated and parental consent was obtained:
	Summary (optional):

14

Once you are done writing the note, go back to "View/Enter Appointment Details" tab

The screenshot shows a software interface with a navigation bar at the top containing three tabs: "View/Enter Appointment Details" (highlighted with an orange circle), "Enter Notes", and "Complete Paperwork". Below the navigation bar is a table with several rows, including "Date Resolved" and "Exempt". To the right of the table is a form area titled "Actions" with a sub-section "Activities/Services". This section contains several text input fields with character limits: "Insurance Coverage Change" (No), "Visit Participants" (complete sessi, 29960 Character), "Important updates since our last visit :", "Reflect on strategies/information provided at last visit and describe progress towards IFSP outcomes:" (30000 Character), and "Outcomes addressed today:" (30000 Character).

15

Change status from Pending Completion to Completed

The screenshot shows an "Event Details" form with the following fields: "Clock Screen" (0), "Date of Service:" (29-JUN-2022), "Scheduled/Start Time:" (12:33pm), "Appointment Duration (Face to Face):" (60 (Minutes)), "Provider:" (Sara Lowell), "Status:" (Pending Completion, highlighted with an orange circle), "Primary Action:" (FTC (Level 1)), "Primary Services:" (Timely Service Completed), "Billing Location (Billing Location):" (Test Location), and "Location of Service:" (Home). A vertical sidebar on the right contains a list of categories: "Client", "Appointment", "Client History", "Client Profile", "Legal", "Documents", "Appointment", "Document Type", "Profile", and "In".

16 Click "Save"

Other » Delete Save Print Close

Enter Notes Complete Paperwork

**Client Information:**

Client	Tuesday Test
Client ID	7060691
Address:	999 Friday Street
City/State/Zip:	Cranston RI 02920
Home Phone:	(401) 222-3333
Cell Phone:	(401) 333-2222
Primary Language:	English
Gender:	Female
Date of Birth:	15-Apr-2022
Age:	2 mths 14 days

**Program/Service Details:** Action ▾

Date of Birth:	15-Apr-2022
Type of Service:	Family Training/Counseling
Program:	Early Intervention

17 Go to "Approval/Signatures" tab

Other » Delete Save

\*\*\* This note was approved on 29-Jun-2022 \*\*\*

Appointment Details Enter Notes Complete Paperwork Approval/Signatures

**Client Information:**

Client	Tuesday Test
Client ID	7060691
Address:	999 Friday Street
City/State/Zip:	Cranston RI 02920
Home Phone:	(401) 222-3333
Cell Phone:	(401) 333-2222
Primary Language:	English
Gender:	Female
Date of Birth:	15-Apr-2022
Age:	2 mths 14 days

**Program/Service Details:**

Date of Birth:	15-Apr-2022
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18

Sign session note with password (or, select mouse signature and sign with touchscreen/mouse)

Add Electronic Signatures

Signature Type	
<input checked="" type="radio"/> E-Signature <input type="radio"/> Mouse Signature	
Logged in As	<input checked="" type="radio"/> Signee? <input type="radio"/> Other Welligent User?
Signature Title	Administrator <input type="button" value="✎"/>
User Account	SARA.LOWELL@RIEISAND *
Password	<input type="password"/> *
Notes	<input type="text"/>

Signatures Collect	
Title	Date
No Signatures Collected...	

19

Click "Verify/Sign"

Signature	
<input type="button" value="Verify/Sign"/> <input type="button" value="E-Sign"/>	
s Collected <input type="button" value="🖨"/>	
Signed By	Delete?

Vertical toolbar on the right:

20

Session note is now saved and signed - click "Close"

The screenshot shows a software interface with a blue header bar containing buttons for "Other »", "Print", and "Close". Below the header, there is a text field containing "proved on 29-Jun-2022 \*\*\*". A navigation bar below that has tabs for "es", "Complete Paperwork", and "Approval/Signatures". The main content area is divided into two sections: "Client Information:" and "Program/Service Details:". The "Client Information:" section lists various details for a client named Tuesday Test. The "Program/Service Details:" section shows a date of birth of 15-Apr-2022. On the right side of the interface, there is a vertical toolbar with icons for user profile, edit, car, eye, clipboard, person, dollar sign, upload, pencil, and a plus sign.

Client Information:	
Client	Tuesday Test
Client ID	7060691
Address:	999 Friday Street
City/State/Zip:	Cranston RI 02920
Home Phone:	(401) 222-3333
Cell Phone:	(401) 333-2222
Primary Language:	English
Gender:	Female
Date of Birth:	15-Apr-2022
Age:	2 mths 14 days

Program/Service Details:	
Date of Birth:	15-Apr-2022