

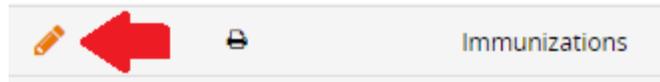
Quick Reference Guide: Welligent Attachment

FOR OFFICE VISIT ENTRY:

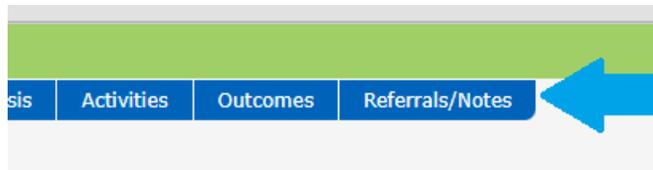
(1) Office Visits



(2) Click on **Edit** if the office visit is not already open



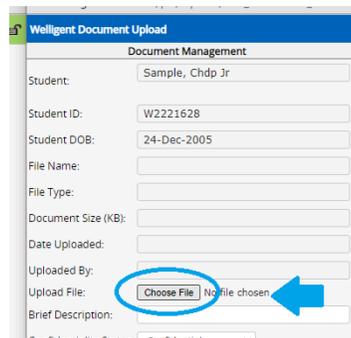
(3) Click on Referrals/Notes



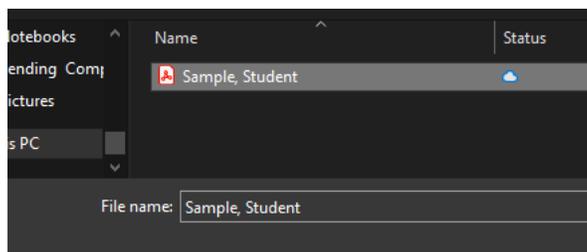
(4) **Attached Documents**, click on the green plus sign



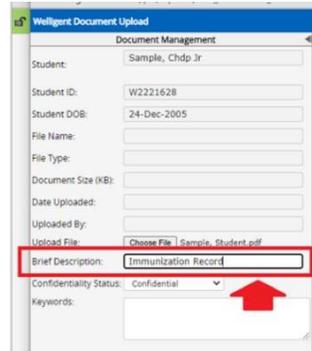
(5) Choose File



(6) Access the folder where the file to be uploaded was saved



(7) Enter a Brief Description i.e., if it's a doctor's note, use the date of the note and the doctor's name. *Example 2023 Sept. 11 Dr. Sample.*



(8) Click Upload

FOR MEDICATION OR PROTOCOL ORDER:

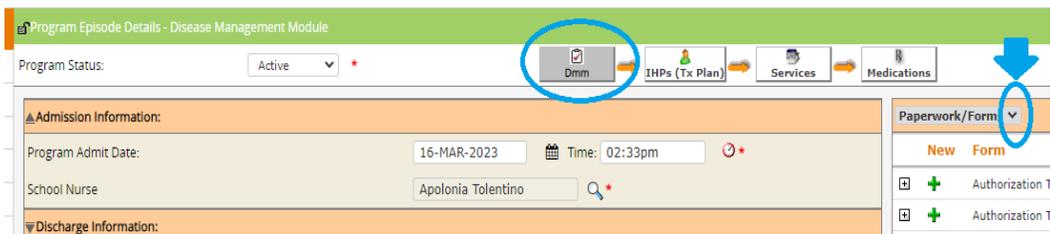
(1) Click on **Program History**



(2) Click Edit (orange pencil )



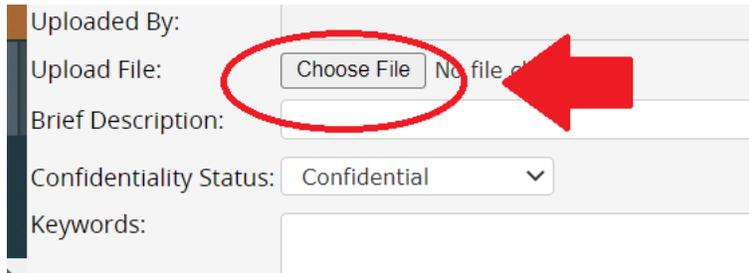
(3) DMM tab view. Click on the down arrow to the right of the **Paperwork/Forms**



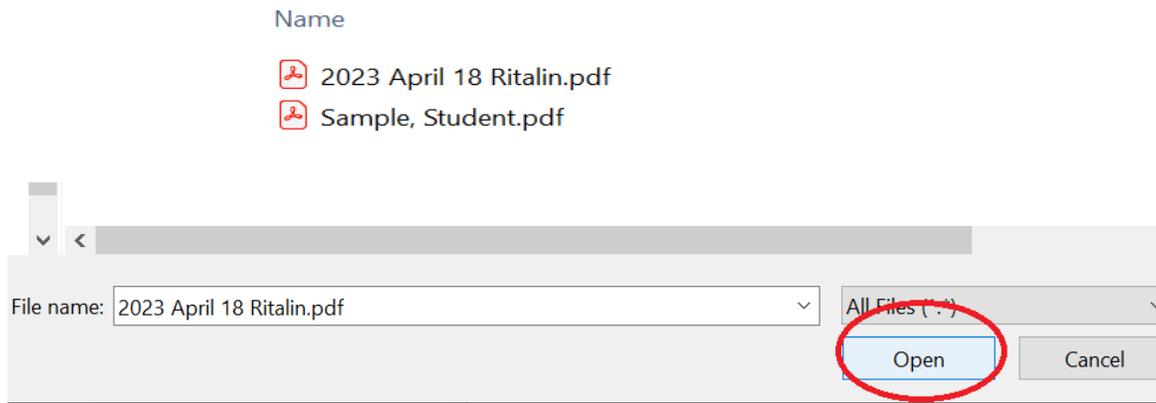
(4) Select **Attachments**. Click **New Attach**



(5) Click **Choose File**



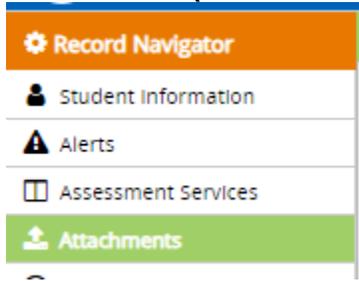
(6) Access the folder where the file was saved.



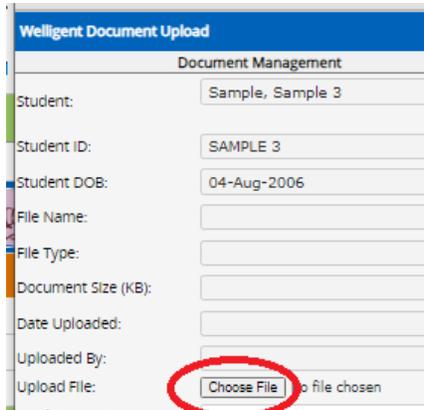
(7) Click **Upload**



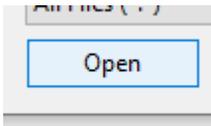
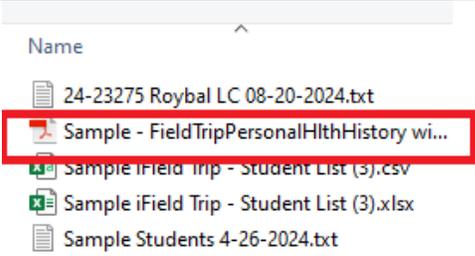
Attachment (Record Navigator)



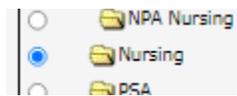
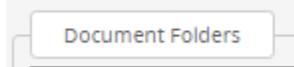
Click New



Click the document, click Open

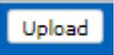


Select Nursing under Document Folders



Enter the Brief Description



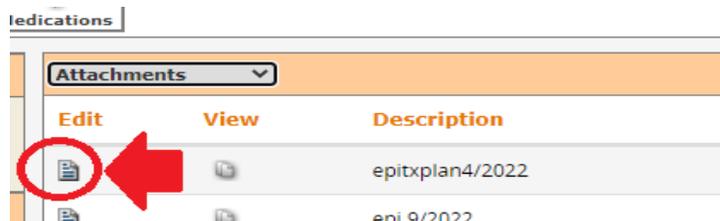
Click Upload  (right upper side of the screen)

ERRORS (how to rename the file)

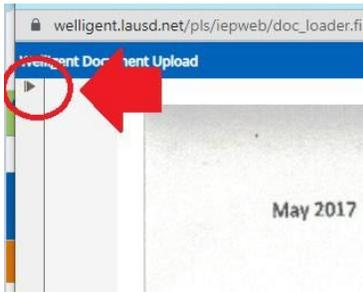
❖ Change the **Brief Description** of the uploaded document to ERROR.

Steps to changing the Brief Description of a document that was uploaded in the wrong student record. DMM Tab > Attachments

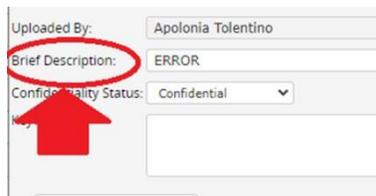
a. Click on the icon below **Edit** to the left of the document to be deleted



- b. Click on the arrow pointing to the right to access the **Document Management**. The arrow is found in the upper left corner of the screen.



- c. Enter **ERROR** in the Brief Description text box.



- d. Select **SAVE** and close screen.

