Quick Reference Guide: Welligent Attachment

FOR OFFICE VISIT ENTRY:

- (1) Office Visits 🔒 Office Visits
- (2) Click on **Edit** if the office visit is not already open

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(3) Click on Referrals/Notes



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

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(5)	Choose	File
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r	Welligent Document U	pload	
Document Management			
	Student:	Sample, Chdp Jr	
	Student ID:	W2221628	
	Student DOB:	24-Dec-2005	
	File Name:		
	File Type:		
	Document Size (KB):		
	Date Uploaded:		
	Uploaded By:		
	Upload File:	Choose File No file chosen	
	Brief Description:		
1	Confidentiality Status	Confidential ¥	

(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.**

	Document Management	
Student:	Sample, Chdp Jr	
Student ID:	W2221628	
Student DOB:	24-Dec-2005	
File Name:		
File Type:		
Document Size (KB):		
Date Uploaded:		
Uploaded By:		
Upload File:	Choose File Sample, Student.pdf	_
Brief Description:	Immunization Record	
Confidentiality Statu	S: Confidential	
Keywords:		



(8) Click Upload

FOR MEDICATION OR PROTOCOL ORDER:

(1)	Click on Program Histo	ory	
		🔓 Office Visits	
		Program 504 Listing	
		📥 Program History	
		😲 Screenings	
		A Services	
(2)	Click Edit (orange penc	il <u>~</u>	
+		ease Management Module	Active

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

Program Episode Details - Disease Management Module				_	
Program Status: Active V *	services	R Iedicatio	ons		
Admission Information:		Pa	perwork,	/Form	
Program Admit Date: 16-MAR-2023 🛗 Time: 02:33pm 🥝	*		New	Form	
School Nurse Apolonia Tolentino 🔍 *		Ŧ	+	Authoriz	zation T
▼Discharge Information:		Ŧ	+	Authoriz	zation T

(4) Select Attachments. Click New Attach

	Paperwork/Forms Paperwork/Forms Case Notes IEP Forms Vitals Attachments Consents Disclosures
(5)	Click Choose File Uploaded By: Upload File: Choose File No file c Brief Description: Confidentiality Status: Confidential Keywords:
(6)	Access the folder where the file was saved. Name 2023 April 18 Ritalin.pdf Sample, Student.pdf
	File name: 2023 April 18 Ritalin.pdf All Files (***) Open Cancel
(7)	Click Upload



Attachment (Record Navigator)

Record Nav	igator				
Student Information					
A Alerts					
Assessment	Services				
Attachments	c	_		_	
	•	Click New	New		
1		_			
Welligent Document Up	pload				
Student:	Sample, Sample 3	Click the doc	ument, cli	ck Open	
Student ID:	SAMPLE 3				An thes ()
Student DOB:	04-Aug-2006	Name	^		Open
File Name: File Type: Document Size (KB):		24-23275 Roybal	LC 08-20-2024.t pPersonalHlthH p - Stugent List (istory wi (3).csv	
Date Uploaded:		Sample iField Trip	p - Student List ((3).xlsx	
Upload File:	Choose File of file cho	sen Sample Students	4-26-2024.txt		
Select Nurs	ing under Do	ocument Folders	_		
Document P	Folders			Enter the Br	ief Description
	Nursing				. <u>-</u> .
Nursing	g	Brief Des	cription:	2024 Aug 7 - F	T Personal H/H Form
Click Uploa	d Upload (rig	ght upper side of the s	screen)		

ERRORS (how to rename the file)

Change the Brief Description of the uploaded document to ERROR.

Steps to changing the <u>Brief Description</u> 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.

