



# TES Welligent User Guide 2010

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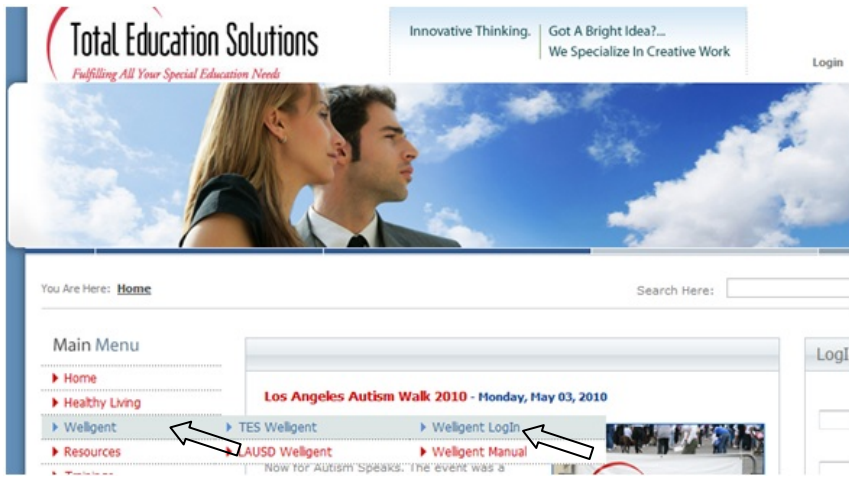
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# Logging in to Welligent

**Step 1.** : Scroll over the Welligent option and select *TES Welligent Login*.

\*You do not need to login to TESCentral.com to access Welligent.



.....**Step 2.** Enter your login information.

Remember that your TES Welligent username and password will be different from your TESCentral account information.



## TES Welligent Account Format

Example: John Doe

Username: tes.jdoe

Password: jd1234 (temporary)

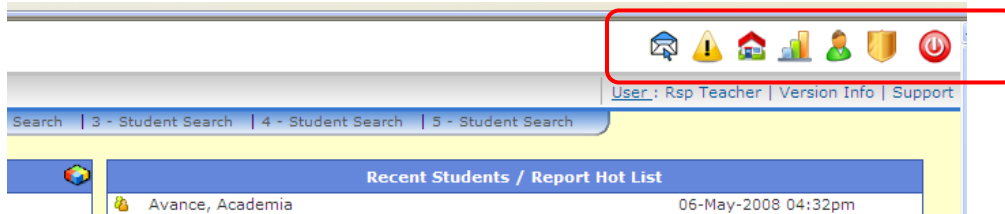
\*\*You will be asked to reset your password when you login for the first time.








**Please enter your new password here:**

\_\_\_\_\_

# Description of User Icons

Your User Icons are located at the top right corner of your Welligent Screen.



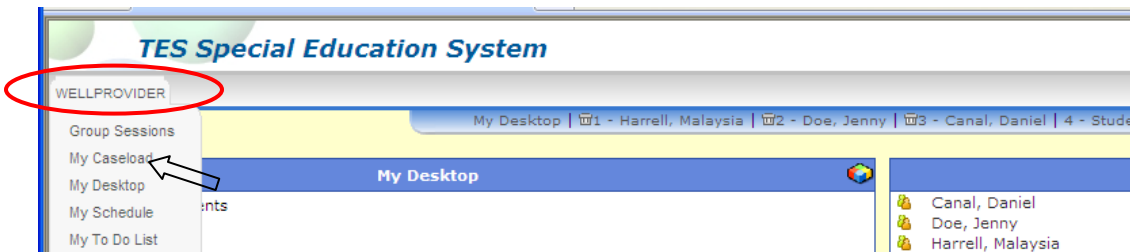
 <b>Communications Center</b>	<p>Access a list of announcements; the organization calendar; documents available for download; your mailbox for sending and receiving messages, alerts, and reminders.</p>
 <b>Alerts</b>	<p>Display a pop-up screen that summarizes the number of overdue progress notes, unopened messages in your mailbox, and announcements.</p>
 <b>My Desktop</b>	<p>Display your Desktop screen. The Desktop is a user configurable screen that gives you quick access to your most frequently-used functions.</p>
 <b>Run Reports</b>	<p>Open the Report Manager component.</p>
 <b>My Preferences</b>	<p>Update your contact information and your password.</p>
 <b>Hide My Screen</b>	<p>Protect sensitive information when you step away from your computer.</p>
 <b>Log Out of Welligent</b>	<p>End your Welligent session.</p>

# Accessing your Caseload/Billing for Client Services

If you are missing a student or school site in your caseload, contact your local office for a caseload update.

**\*\*LA Region DIS Service Providers should enter all Direct Services in LAUSD Welligent ONLY. All DIS service data entered in LAUSD will be downloaded into TES Welligent at 9:00PM PT daily.**

**Step 1.** Scroll over the *WELLPROVIDER* Tab to view your options, and select *My Caseload*.

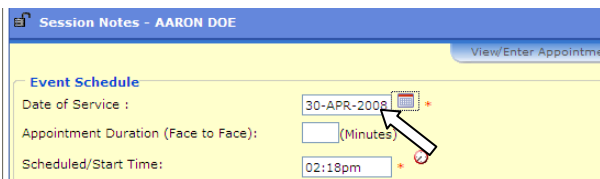


**Step 2.** Choose the student or school you are billing services for by clicking on the **green plus**.

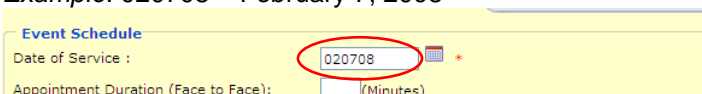


**Step 3.** Make sure that the **Date of Service** is correct. You can correct the date by clicking directly into the date box and typing the correct date (edit using two digit day, month and year or edit the existing format).

Example: 020708 = February 7, 2008.

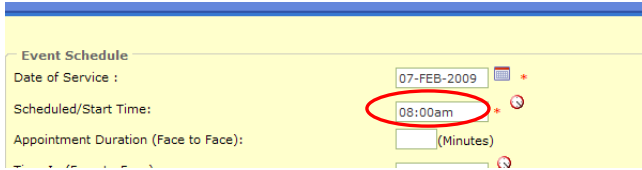


Example: 020708 = February 7, 2008



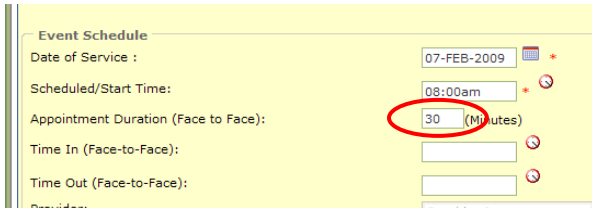
**Step 4.** Enter the **Scheduled time** that you began services for that student.

\*You must keep the time format --:--AM/PM.



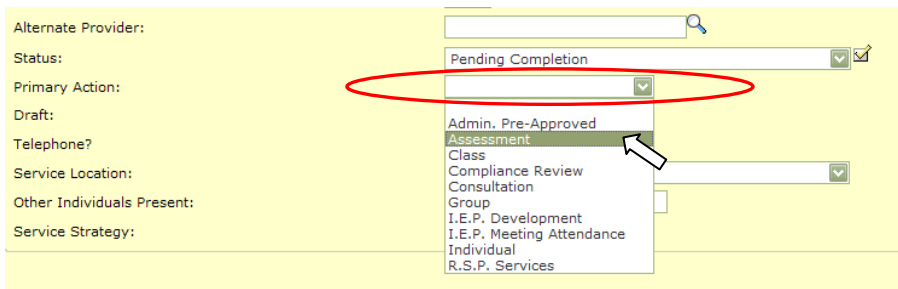
The screenshot shows the 'Event Schedule' form with the following fields: 'Date of Service' (07-FEB-2009), 'Scheduled/Start Time' (08:00am, circled in red), and 'Appointment Duration (Face to Face)' (Minutes). There are also icons for calendar and help next to the date and time fields.

**Step 5.** Enter the duration of the session.



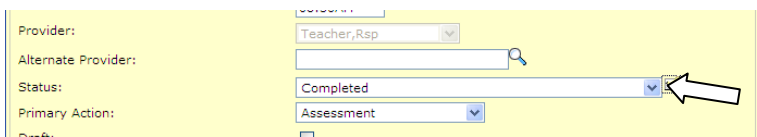
The screenshot shows the 'Event Schedule' form with the following fields: 'Date of Service' (07-FEB-2009), 'Scheduled/Start Time' (08:00am), and 'Appointment Duration (Face to Face)' (30 (Minutes), circled in red). There are also icons for calendar and help next to the date and time fields.

**Step 6.** Click on the **Primary Action** drop down menu and select the service type that you provided.



The screenshot shows the 'Event Schedule' form with the following fields: 'Alternate Provider', 'Status' (Pending Completion), 'Primary Action' (Admin. Pre-Approved Assessment, circled in red), 'Draft', 'Telephone?', 'Service Location', 'Other Individuals Present', and 'Service Strategy'. The 'Primary Action' dropdown menu is open, showing options: Admin. Pre-Approved Assessment, Class, Compliance Review, Consultation, Group, I.E.P. Development, I.E.P. Meeting Attendance, Individual, and R.S.P. Services. An arrow points to the selected option.

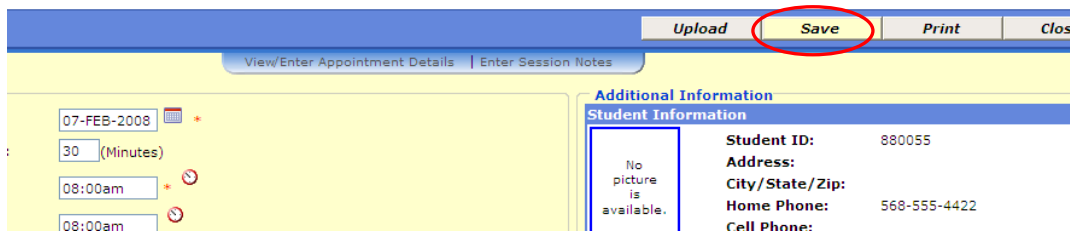
**Step 7.** After you have verified that each area has been correctly inputted, you can select complete by clicking on the **Status Check Box**.



The screenshot shows the 'Event Schedule' form with the following fields: 'Provider' (Teacher, Rsp), 'Alternate Provider', 'Status' (Completed), and 'Primary Action' (Assessment). An arrow points to the check box next to the 'Completed' status.

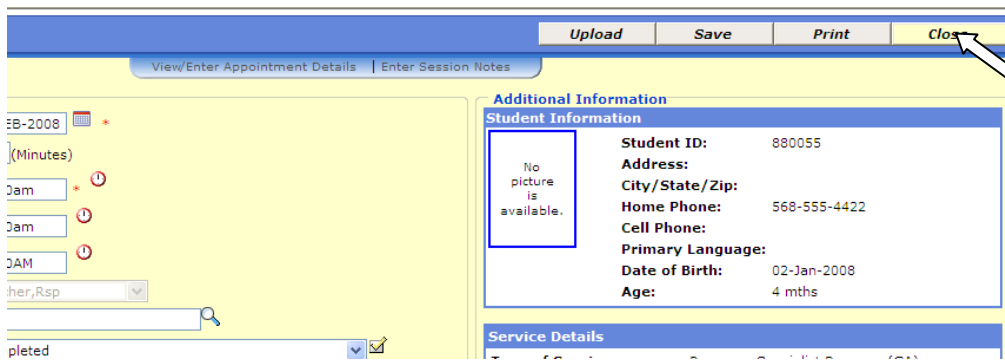
\*\*Clicking the Check box will select **Completed** for the Status and fill in the **Time in** and **Time Out**.

**Step 8.** Now click **Save**.



The screenshot shows a software interface with a blue header bar containing buttons for 'Upload', 'Save', 'Print', and 'Close'. The 'Save' button is circled in red. Below the header, there are tabs for 'View/Enter Appointment Details' and 'Enter Session Notes'. The main area is divided into two sections: 'Appointment Details' on the left and 'Additional Information' on the right. The 'Appointment Details' section includes a date field with '07-FEB-2008', a duration field with '30 (Minutes)', and two time fields both set to '08:00am'. The 'Additional Information' section is titled 'Student Information' and contains a placeholder for a picture with the text 'No picture is available.' and a list of fields: 'Student ID: 880055', 'Address:', 'City/State/Zip:', 'Home Phone: 568-555-4422', and 'Cell Phone:'.

**Step 9.** Close out of the session before moving on to the next entry.



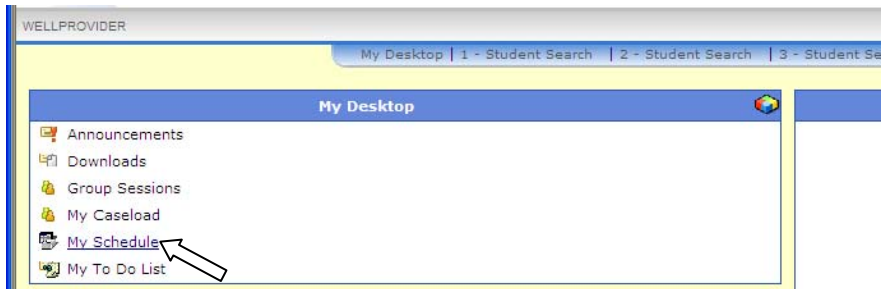
The screenshot shows the same software interface as in Step 8. The 'Close' button in the blue header bar is now highlighted with a white arrow. The 'Appointment Details' section on the left shows a date field with '07-FEB-2008', a duration field with '(Minutes)', and three time fields, all with red 'X' icons next to them. The 'Additional Information' section on the right is titled 'Student Information' and contains the same placeholder for a picture and the same list of fields as in Step 8, but with an additional field: 'Primary Language:'. Below the 'Student Information' section, there is a 'Service Details' section which is partially visible.

If you are entering multiple sessions for the same student, you must close out of each entry once saved, and begin again at step 2.

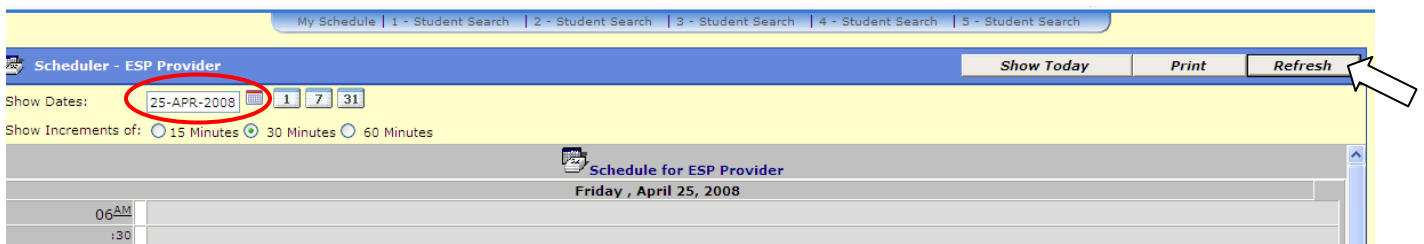
# Billing Time to TES

\*\*Use these steps when billing employee benefit hours (Holiday, Sick & Vacation) and other hours not billable to TES Clients.

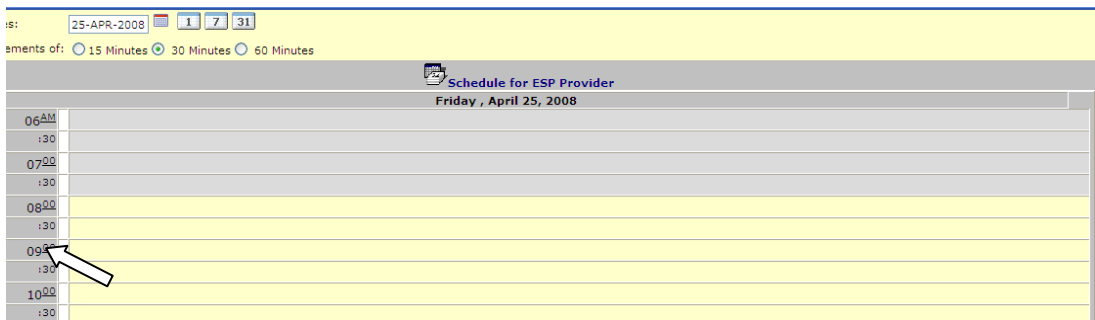
**Step 1.** From your Desktop, click on *My Schedule*.



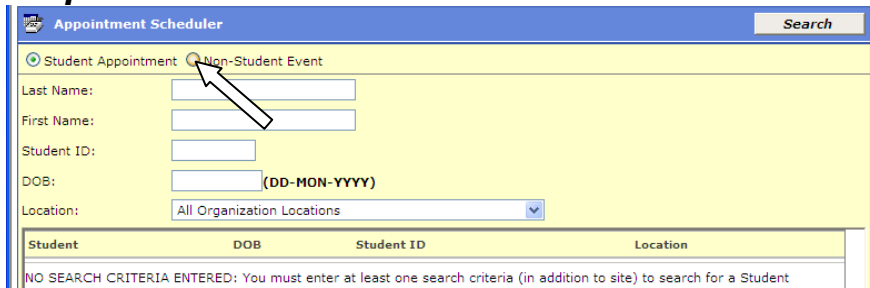
**Step 2.** Enter the date of your session and click the *Refresh* button.  
(Date must be entered in two digit Day, Month and Year ex: 042508 = April 25, 2008)



**Step 3.** Once the date has refreshed, double-click directly on your start time.



**Step 4.** Click on *Non-Student Event*.





**Step 5.** Adjust the Date(s) and Start Time of your session if necessary, and enter an End Time (if the End Date is after the Start Date, duplicate sessions will be created for each day within that span).

The screenshot shows the 'Appointment Details' form with the following fields highlighted by a red box:

- Start Date: 25-Apr-2008
- End Date: 25-Apr-2008
- Work Status: Working
- Start Time: 05:00pm (Format 11:15am)
- End Time: 06:00pm (Format 11:15am)

**Step 6.** Select the Type of Event you are billing to TES and enter a short description of the event.

The screenshot shows the 'Appointment Details' form with the following fields highlighted by arrows:

- Type of Event: Training
- Description: Staff Development

**Step 7.** Select your department.

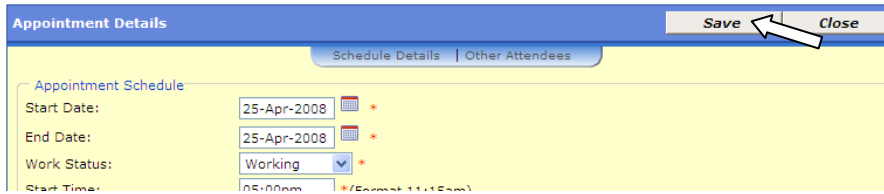
The screenshot shows the 'Appointment Details' form with the 'Department' dropdown menu open. The following options are visible in the dropdown:

- CSES-LA
- ESP-LA
- SES-LA
- CSES-MI
- CSES-OH
- CSES-SAC
- SES-SAC
- CSES-SD
- SES-SD
- TES-HQ
- CLINIC-LA
- IT-HQ
- IRL-Comm

The 'IRL-Comm' option is highlighted with a blue background and an arrow pointing to it.

**\*\*Admin/Manager options should only be selected by full time internal office staff.**

**Step 8.** Review all of your information and click **Save**.



The screenshot shows a web form titled "Appointment Details" with two tabs: "Schedule Details" (selected) and "Other Attendees". The "Appointment Schedule" section contains the following fields:

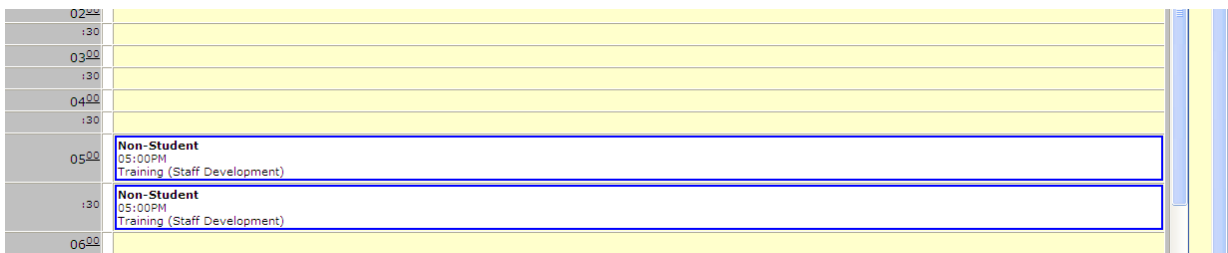
Start Date:	25-Apr-2008	Calendar icon	*
End Date:	25-Apr-2008	Calendar icon	*
Work Status:	Working	Dropdown arrow	*
Start Time:	05:00pm	*	(Except 11:15pm)

At the top right of the form, there are two buttons: "Save" and "Close". A white arrow points to the "Save" button.

\*This pop-up will confirm that the entry was completed correctly.



You can now **Close** out of this session and see the entry on your scheduler.



The screenshot shows a scheduler grid with time slots on the left and appointment entries on the right. The time slots are 15-minute intervals from 02:00 to 06:00. Two appointments are visible, both starting at 05:00 and ending at 05:30.

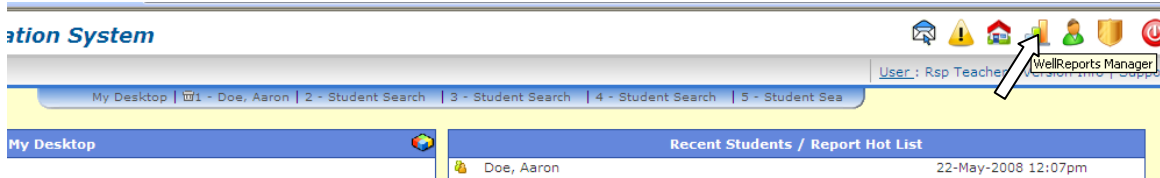
Time Slot	Appointment
02:00 - 02:30	
03:00 - 03:30	
04:00 - 04:30	
05:00 - 05:30	<b>Non-Student</b> 05:00PM Training (Staff Development)
05:30 - 06:00	<b>Non-Student</b> 05:00PM Training (Staff Development)

# Setting-up Your Report Hot List

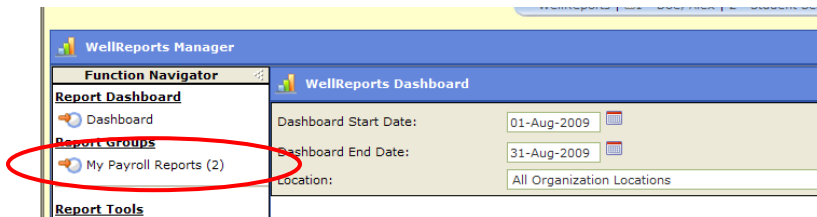
\*\*You have two reports available to you that will help you verify your time:

- TES – My Summary Payroll Report
- TES – My Detail Payroll Report

**Step 1.** Click on the WellReports icon.



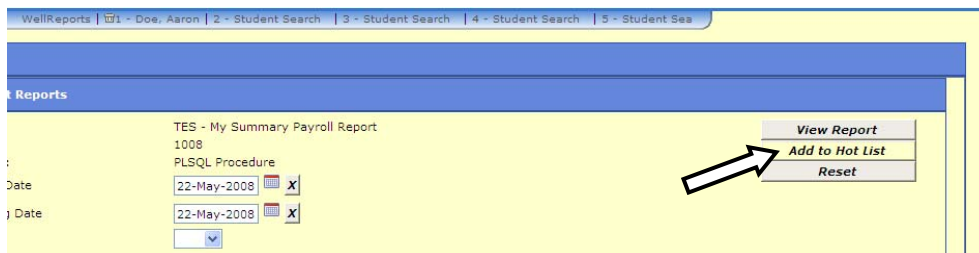
**Step 2.** Click on My Payroll Reports.



**Step 3.** Click on the icon next to “TES-My Summary Payroll Report”. To open the search filter for that report.





Run	Report Name	Report Description
	Caseload Monthly Notes	
	Location - IEP Services By Student	A listing by student of all services being delivered at a
	Monthly Service Report	
	Provider Productivity (Individual)	
	Service Caseload Report	
	TES - My Summary Payroll Report	
	TES - My Detail Payroll Report	

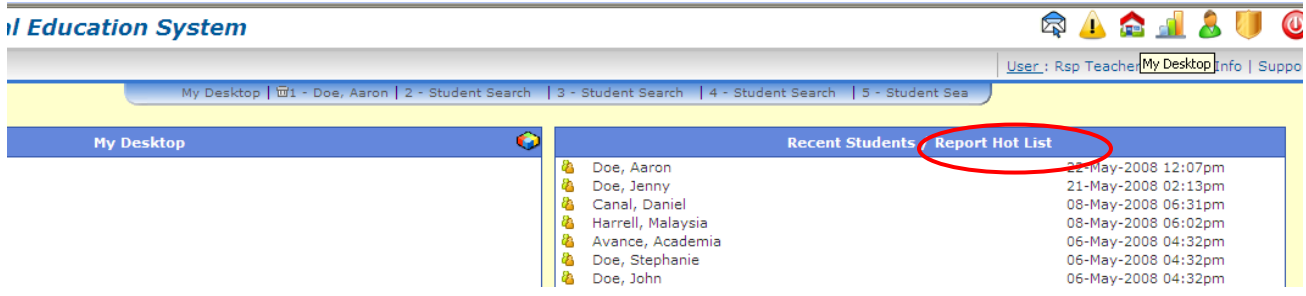
**Step 4.** Click on Add to Hot List.



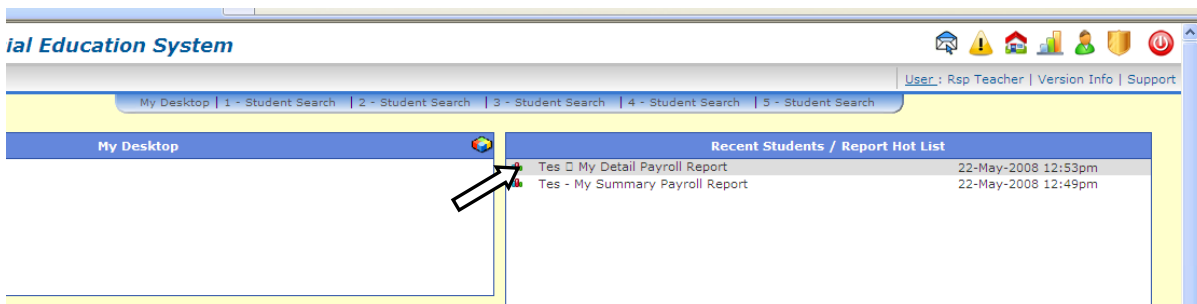
**REPEAT steps 3 and 4 for the “TES – My Detail Payroll Report”.** This will add a link to both reports on your desktop.

# Checking Your Reports

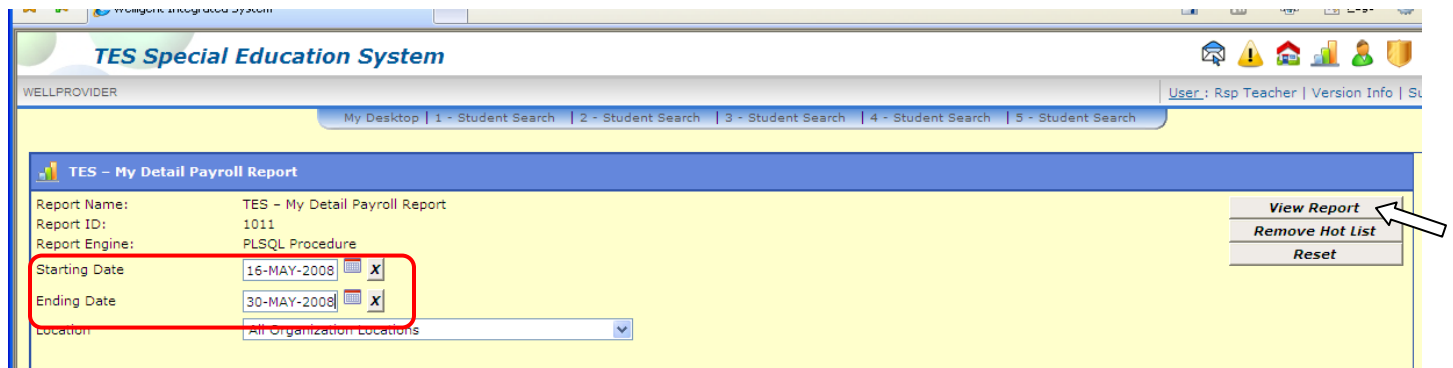
**Step 5.** From your **Desktop**     click on Report Hot List (it may take a few minutes for the reports you've just added to appear on your Hot List).



**Step 6.** Select the report you would like to view.



**Step 7.** Change the dates of the report to reflect the pay period you would like to check. Then click "View Report".



**\*\*See next page for description of both reports.**

**TES – My Detail Payroll Report:** Itemizes all entries (organized by date and time), lists student names and service types and includes total hours.

Total Education Solutions 625 Fair Oaks Ave Suite 200 South Pasadena CA 91030 <b>TES - My Detail Payroll Report</b>						
Provider: 1 , Rsp						
Location	Student	Service	Appt Date	Start Time	End Time	Units
No Location Specified	Not A Student Event	Sick Leave	10-MAR-08	08:00am	03:00pm	7
No Location Specified	Not A Student Event	Training	11-MAR-08	01:00pm	02:30pm	1.5
Academia Avance	Doe, Aaron	Resource Specialist Program (CA)-Individual	11-MAR-08	08:15AM	08:45AM	.5
Academia Avance	Avance, Academia	Resource Specialist Program(CA)-Consultation	11-MAR-08	09:00AM	10:00AM	1
Academia Avance	Doe, John	Resource Specialist Program (CA)-Group	11-MAR-08	11:45AM	12:30PM	.75
Academia Avance	Doe, Stephanie	Resource Specialist Program (CA)-Group	11-MAR-08	11:45AM	12:30PM	.75
Academia Avance	Doe, Jenny	Resource Specialist Program (CA)-IEP Meeting Atte	11-MAR-08	08:45PM	10:45PM	2
<b>Total Provider Units:</b>						<b>13.5</b>

\*If no location is specified, entry will be billed to TES.

Things to look for:

- Make sure date and time of service is accurate.
- Verify that your Department selection in entries billed to TES are correct.
- Overlapping times should only occur for grouped students.
- Make sure service provided is accurate.
- Make sure all students and services are on this report (if items are not completed properly, they will not be on this report and you will not be compensated for that service).

**TES – My Summary Payroll Report:** includes a summary of hours for each bill site and includes total combined hours.

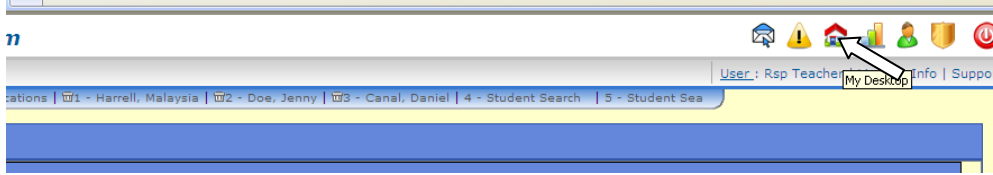
Total Education Solutions  
 625 Fair Oaks Ave Suite 200  
 South Pasadena CA 91030  
**My Summary Payroll Report**  
**16-JUN-2009 to 30-JUN-2009**

Salaried	Employee ID	Last Name	First Name	Regular Hours	Overtime Hours	Bereavement	Snow Days	Holiday	Sick	Vacation	Total Hours
Active Welligent User	Training1	Provider	Joe	1.5	0	0	0	0	7	0	8.5
	<b>Department Code</b>	<b>Department Name</b>	<b>Hours</b>								
	el	Los Angeles-ESP	1.5								
		<b>Total Regular Hours:</b>	1.5								
	<b>School Code</b>	<b>School Name</b>	<b>Hours</b>								
	10403	Academia Avance	4.25								
		<b>Total School Hours:</b>	4.25								
										<b>Combined Total Hours:</b>	12.75

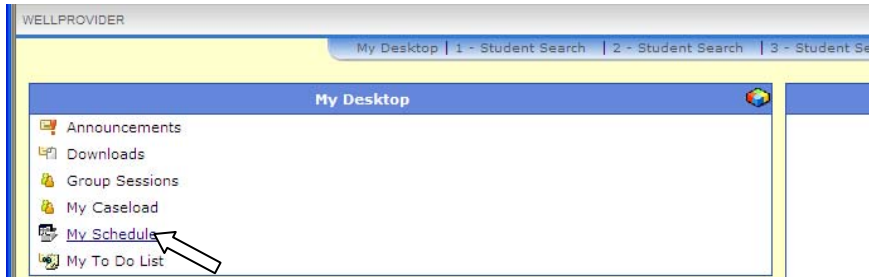
\* "Regular Hours" include hours billed to TES not related to benefits.

# Editing/Deleting Entries

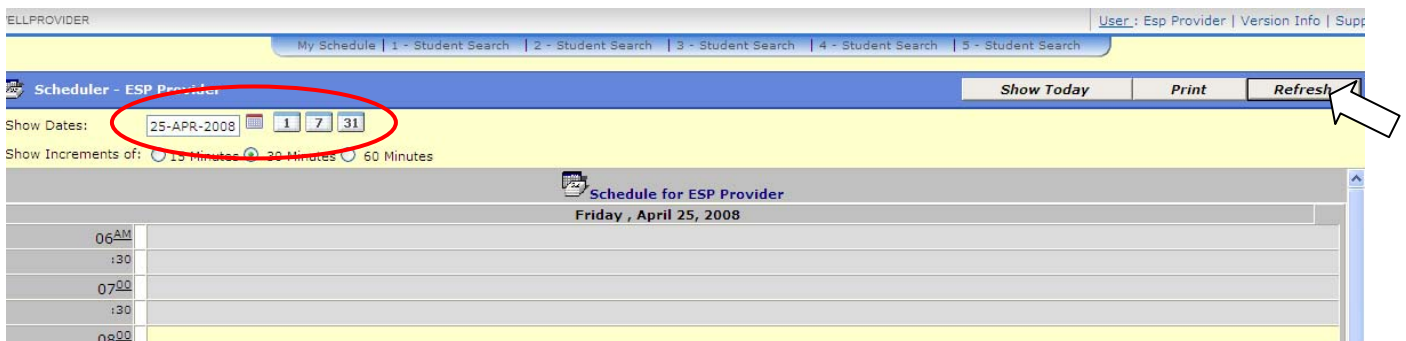
**Step 1.** Click on the Desktop Icon.



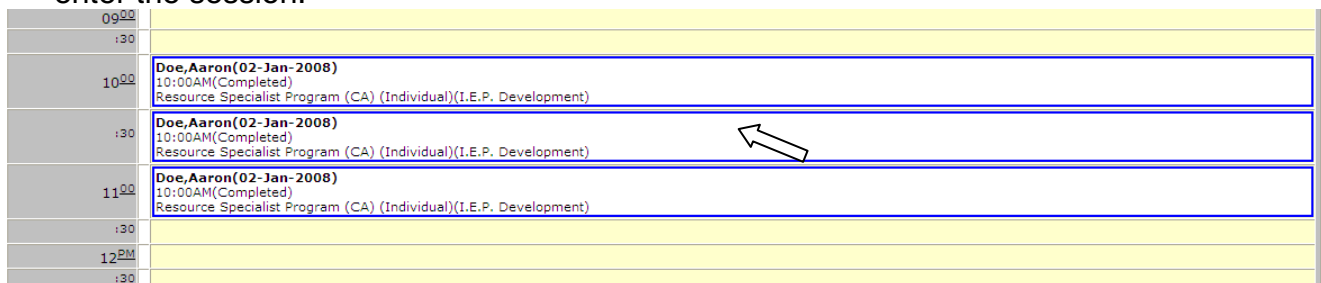
**Step 2.** Click on *My Schedule*.



**Step 3.** Enter the date of your session and click *Refresh*. You can also use the different view options    to search for an entry.  
(Date must be entered using a two digit Day, Month and Year ex: 042508 = April 25, 2008)



**Step 4.** Once you have located the entry, double click on any of the corresponding blocks to re-enter the session.

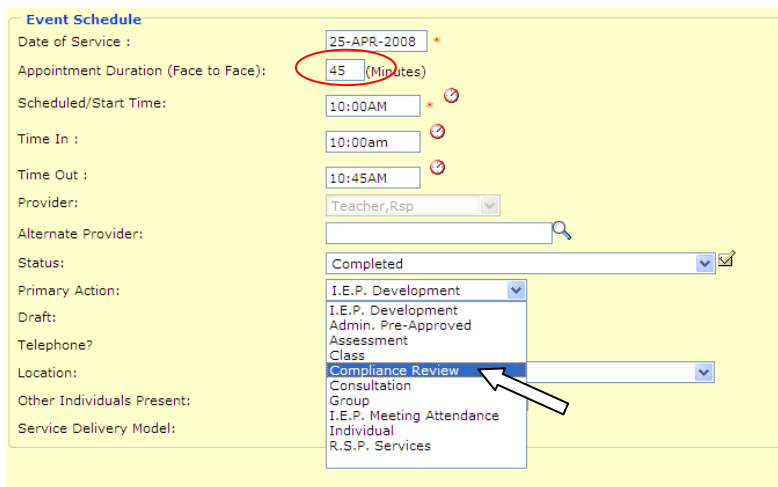


\*\*Skip to Step 6 to edit or delete entries billed TES.

## Step 5. Editing/Deleting entries billed to clients

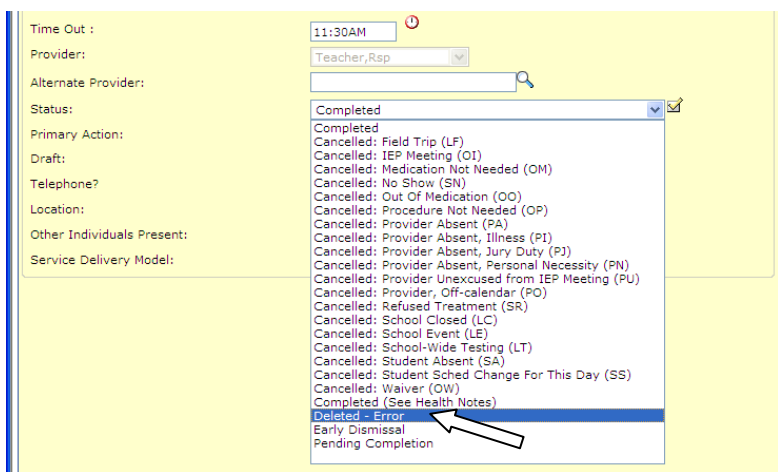
Only certain fields can be changed (Appointment Duration, Time in/out, Primary Action).

\*Changing the Appointment Duration will automatically change the Time Out of this session.



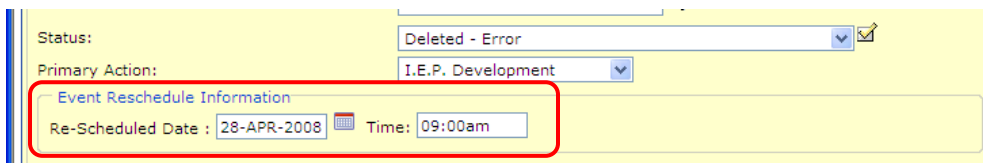
The screenshot shows the 'Event Schedule' form with the following fields: Date of Service (25-APR-2008), Appointment Duration (45 Minutes), Scheduled/Start Time (10:00AM), Time In (10:00am), Time Out (10:45AM), Provider (Teacher,Rsp), Alternate Provider, Status (Completed), Primary Action (I.E.P. Development), Draft, Telephone?, Location, Other Individuals Present, and Service Delivery Model. The Primary Action dropdown menu is open, showing options: I.E.P. Development, I.E.P. Development Admin. Pre-Approved, Assessment, Class, Compliance Review (highlighted with a white arrow), Consultation, Group, I.E.P. Meeting Attendance, Individual, and R.S.P. Services.

**Deleting/Rescheduling the Event:** If you would like to delete or change the date of this entry, you must change the Status to *Deleted - Error*.



The screenshot shows the 'Event Schedule' form with the following fields: Time Out (11:30AM), Provider (Teacher,Rsp), Alternate Provider, Status (Completed), Primary Action, Draft, Telephone?, Location, Other Individuals Present, and Service Delivery Model. The Status dropdown menu is open, showing options: Completed, Cancelled: Field Trip (LF), Cancelled: IEP Meeting (OI), Cancelled: Medication Not Needed (OM), Cancelled: No Show (SN), Cancelled: Out Of Medication (OO), Cancelled: Procedure Not Needed (OP), Cancelled: Provider Absent (PA), Cancelled: Provider Absent, Illness (P1), Cancelled: Provider Absent, Jury Duty (P3), Cancelled: Provider Absent, Personal Necessity (PN), Cancelled: Provider Unexcused from IEP Meeting (PU), Cancelled: Provider, Off-calendar (PO), Cancelled: Refused Treatment (SR), Cancelled: School Closed (LC), Cancelled: School Event (LE), Cancelled: School-Wide Testing (LT), Cancelled: Student Absent (SA), Cancelled: Student Sched Change For This Day (SS), Cancelled: Waiver (OW), Completed (See Health Notes), Deleted - Error (highlighted with a white arrow), Early Dismissal, and Pending Completion.

Once the status reads "Deleted – Error", you will be able to enter the correct date and time for this event.



The screenshot shows the 'Event Reschedule Information' form with the following fields: Status (Deleted - Error), Primary Action (I.E.P. Development), Re-Scheduled Date (28-APR-2008), and Time (09:00am). The Re-Scheduled Date and Time fields are highlighted with a red box.

**Important:** Once saved, a "Pending Completion" event will be created on your Schedule. The rescheduled event will need to be completed in order to be compensated for the corrected event.

If you only want to delete a session, do not enter a rescheduled date and time; simply click Save after the status has been changed to Deleted - Error.

**Session Notes - AARON DOE** [Upload] [Save] [Print]

View/Enter Appointment Details | Enter Session Notes

**Event Schedule**

Date of Service : 25-APR-2008 \*

Appointment Duration (Face to Face): 90 (Minutes)

Scheduled/Start Time: 10:00AM \* ⓧ

Time In : ⓧ

Time Out : ⓧ

Provider: Teacher, Rsp

Alternate Provider: [Search]

Status: Deleted - Error ⓧ

Primary Action: I.E.P. Development ⓧ

**Event Reschedule Information**

Re-Scheduled Date : [Calendar] Time: [Time]

**Additional Information**

**Student Information**

No picture is available.

Student ID: 880055  
 Address:  
 City/State/Zip:  
 Home Phone: 568-555-4422  
 Cell Phone:  
 Primary Language:  
 Date of Birth: 02-Jan-2008  
 Age: 4 mths

**Service Details**

Type of Service: Resource Specialist Program (CA)  
 Beginning Date: 04-Feb-2008  
 Ending Date:  
 Primary Diagnosis: ()  
 Ind. Frequency: x/

You can now *Close* out of this session and verify that the entry has been deleted or rescheduled by clicking *Refresh*.

**Scheduler - RSP Teacher** [Show Today] [Print] [Refresh]

25-APR-2008 [1] [7] [31]

Events of: 15 Minutes 30 Minutes 60 Minutes

**Schedule for RSP Teacher**  
Friday, April 25, 2008

06:00	
07:00	
08:00	
09:00	
10:00	<b>Doe, Aaron (02-Jan-2008)</b> 10:00AM (Completed) Resource Specialist Program (CA) (Individual) (I.E.P. Development)
10:30	<b>Doe, Aaron (02-Jan-2008)</b> 10:00AM (Completed) Resource Specialist Program (CA) (Individual) (I.E.P. Development)
11:00	<b>Doe, Aaron (02-Jan-2008)</b> 10:00AM (Completed) Resource Specialist Program (CA) (Individual) (I.E.P. Development)
12:00	

**Scheduler - RSP Teacher** [Show Today] [Print] [Refresh]

25-APR-2008 [1] [7] [31]

Events of: 15 Minutes 30 Minutes 60 Minutes

08:00	
09:00	
10:00	
11:00	
12:00	
01:00	
02:00	
03:00	

\*\*If event was rescheduled, search for the new event on your Scheduler and mark the event Completed.



## Step 6. Editing/Deleting entries billed to TES.

All fields in sessions billed to TES can be edited directly on this window without having to reschedule.

The screenshot shows the 'Appointment Details' window with the 'Appointment Schedule' section highlighted by a red circle. The fields in this section are:

- Start Date: 25-Apr-2008
- End Date: 25-Apr-2008
- Work Status: Working
- Start Time: 09:30am
- End Time: 11:30am
- Type of Event: Training
- Description: TES Welligent Training
- 1st Task Category: [Dropdown]
- 2nd Task Category: [Dropdown]
- 3rd Task Category: [Dropdown]
- Department: CSES-LA

At the top right of the window, there are three buttons: 'Save', 'Delete', and 'Close'. A white arrow points to the 'Delete' button.

Click *Delete* to completely erase this entry. Verify that this session has been correctly updated by Refreshing your scheduler.