



How to record Service Hours on Welligent

This document will explain how to properly record service hours for both the Primary Provider and additional Service Providers in LAUSD Welligent. This is particularly important as LAUSD's replicates its database with TES' Welligent at midnight every day.

- From the **Summary** page, click on **Student** menu and select **Available** to search for a student.

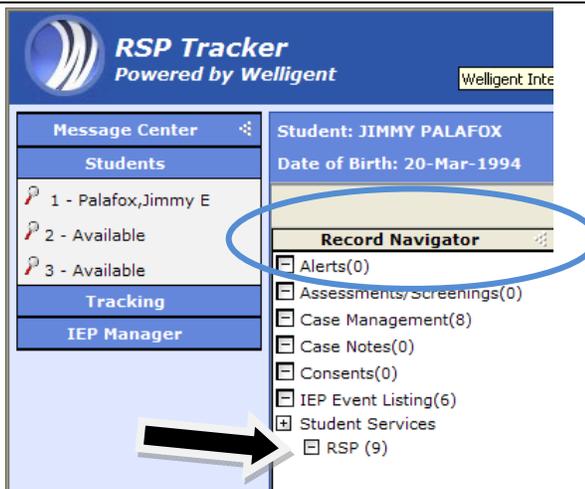


- In the following screen, search for the student you wish to access by either typing their full last name and first name, or by simply using their first initials of their first and last name. Be sure to select a location if it's not selected already next to the **Location** menu, and the appropriate status of the student next to the **Status** menu. When ready, click on the **Search Button**.



- After the search displays the student you wish to access, click on the student's name to access their record.

- A new frame will appear called the **Record Navigator**. From here, select the **RSP** option located in the bottom.



- The **RSP Encounters** frame will appear. Locate the appropriate service and click on the **View/Edit** option.

The screenshot shows a 'Record Navigator' on the left with a tree view containing 'Alerts(0)', 'Assessments/Screenings(0)', 'Case Management(8)', 'Case Notes(0)', 'Consents(0)', 'IEP Event Listing(6)', and 'Student Services' (expanded to show 'RSP (9)'). The main area is titled 'RSP Encounters' and displays two service entries. Each entry includes fields for 'Begin Date', 'End Date', 'Individual Frequency', 'Group Frequency', 'Service Delivery Model', 'Setting', 'Primary Service Provider', 'Performance Area', 'Additional Service Provider', and 'Status'. A black arrow points to the 'View/Edit' link under the first service entry.

- You should now be able to see the student's information. To select a **Primary Provider**, click on the three dots next to box marked with an "x".

The screenshot shows the 'RSP' service details form. At the top are buttons for 'Close', 'Save', 'Cancel', and 'Print'. Below are tabs for 'Details', 'Background', 'Goals', 'Disposition', 'Addendums', 'Events/Referrals/Notes', and 'IEP'. The 'Service Details' section includes 'Duration' (From: 30-Mar-2007, To: 30-Mar-2008) and a table with columns for 'Type', 'Frequency', and 'Time'. Below the table are various form fields: 'Assistive Tech Required', 'Service Delivery Model', 'Confidential', 'Setting', 'Service Status', 'Program ID', 'Transp. Needed', 'Diagnosis (ICD)', 'Included in the IEP?', 'Performance Area', 'Date Closed', and 'Status Reason'. The 'Service Assignment Information' section at the bottom includes 'Primary Provider' and 'Additional Provider' fields, each with a dropdown menu and a button with three dots and an 'X'. A blue circle highlights the 'Primary Provider' dropdown. Other fields include 'Service Location' (set to 'ACADEMIA AVANCE(CHARTER)') and 'From'.

- A new window should appear which will allow you to select a **Primary Provider** by clicking on the circle next to the Providers name. When finished, click on **Select**.

Note: Providers names have been removed from this image for confidentiality. In production, you will be able to see the names in this window.

Service Assignment Wizard - JIMMY PALAFOX(RSP)

Service Location: ACADEMIA AVANCE(CHARTER)

Provider	ID	Role	Active Caseload	Weighted Caseload (% of Week)	Caseload Max.
<input type="radio"/> NONE			0	0%	0
<input type="radio"/> SA3370	SA3370	NPS 2Tier - RSP/IEP Mgr	0	0%	Not Specified
<input type="radio"/> 185454	185454	School - RSP Tchr/IEP Mgr (V5)	7	57%	Not Specified
<input checked="" type="radio"/> MC8498	MC8498	NPS 2Tier - RSP/IEP Mgr	33	257%	Not Specified
<input type="radio"/> JL3474	JL3474	NPS 2Tier - RSP/IEP Mgr	0	0%	Not Specified
<input type="radio"/> NM3046	NM3046	NPS 2Tier - RSP/IEP Mgr	5	38%	Not Specified
<input type="radio"/> TP2617	TP2617	NPS 2Tier - RSP/IEP Mgr	12	140%	Not Specified
<input type="radio"/> 160194	160194	School - RSP Tchr/IEP Mgr (V5)	0	78%	Not Specified

Cancel Select

- You should be back in the student's information page. From here, click on the **Save** button.

*Note: Be sure to fill out all of the appropriate fields accordingly corresponding to the student's information, such as the **Duration Time, Frequency, and Time per session.***

RSP Close Save Cancel Print

Details Background Goals Disposition Addendums Events/Referrals/Notes IEP

Service Details

Duration: From 30-Mar-2007 * To: 30-Mar-2008

Type	Frequency	Time
Individual Direct Service	<input checked="" type="checkbox"/> Weekly	Minutes Per Session
Individual Indirect Service	<input checked="" type="checkbox"/>	Minutes Per
Group Direct Service	<input checked="" type="checkbox"/>	Minutes Per

Assistive Tech Required: Transp. Needed: Total (Roundtrip) Mileage: mile(s)

Service Delivery Model:

Confidential: Confidential * Diagnosis (ICD):

Setting: Co-Teaching Included in the IEP?

Service Status: Active Performance Area: Math

Date Closed:

Program ID: Status Reason:

Service Assignment Information

Primary Provider: ... x Service Location: ACADEMIA AVANCE(CHARTER) *

Additional Provider: ... x From: to

Served by an Unidentified Substitute

- To add an **Additional Provider**, follow the same steps as adding a **Primary Provider** but select the three dots next to the **Additional Provider** section.

*Note: Doing this will allow Welligent to give the service hours to the correct Service Providers when LAUSD's Welligent duplicates the database nightly with TES' Welligent system. Also, please be aware that this feature **only** applies to the LAUSD Welligent.*

Creating a new Event on your Active Caseload

To create a new event on your Active Caseload, use the following steps:

- From LAUSD Welligent, click on the “My Active Caseload” option located on the menu options on the left hand side.

After clicking on “My Active Caseload”, you should now see any active caseloads assigned that are assigned to you.



- From your Active Caseloads, click on the green plus sign next to the student that you wish to create a new event for:

Active Caseload for										Print	Refresh List
Site: All Assigned Locations											
	New	Type of Service	Student	Duration		Total Sessions Prescribed/Delivered		Sessions			
				Start Date	End Date	Ind.	Group	Compl.	Pending		
	+	RSP		08-May-2007	08-May-2008	208/30	NA/0	30	0		
	+	RSP	Daniel	08-May-2007	08-May-2008	208/24	NA/0	24	0		
	+	RSP		30-Jan-2007	30-Jan-2008	104/22	NA/0	22	0		
	+	RSP		30-Jan-2007	30-Jan-2008	208/23	NA/0	23	0		
	+	RSP		07-May-2007	07-May-2008	208/6	NA/0	6	0		
	+	RSP		09-Feb-2007	09-Feb-2008	52/21	NA/0	21	0		
	+	RSP		09-Feb-2007	09-Feb-2008	104/28	NA/0	28	0		
	+	RSP		25-Oct-2007	25-Oct-2008	208/15	NA/0	15	0		
	+	RSP		25-Oct-2007	25-Oct-2008	208/21	NA/0	21	0		
	+	RSP		05-Mar-2007	05-Mar-2008	208/7	NA/0	7	0		
	+	RSP		05-Mar-2007	05-Mar-2008	52/3	NA/0	3	0		
	+	RSP		10-Apr-2007	10-Apr-2008	104/16	NA/0	16	0		
	+	RSP		10-Apr-2007	10-Apr-2008	104/22	NA/0	22	0		
	+	RSP		12-Jun-2007	12-Jun-2008	52/38	NA/0	38	0		
	+	RSP		12-Jun-2007	12-Jun-2008	52/28	NA/0	28	0		
	+	RSP		06-Dec-2007	06-Dec-2008	104/5	NA/0	5	0		
	+	RSP		06-Dec-2007	06-Dec-2008	208/5	NA/0	5	0		
	+	RSP		02-May-2007	02-May-2008	104/25	NA/0	25	0		

Click on the folder icon to pull the individual's electronic record.

- After clicking on the green plus sign, the “Encounter Activity Details” page will open. Here you will need to specify the following:

- Date of Service (*Verify that this is accurate*)
- Appointment Duration
- Scheduled Time (*Please verify that this is accurate as well*)
- Time-in
- Time-out
- Status
- Location (*Double check that this is correct*)

Upon verifying that all the information is correct, click on Save. Depending on the status of the event, you may need to go back into this encounter and change the status to, for example, completed.

These steps will allow you to successfully assign an encounter to yourself and create a new event in your “My Active Caseload”.