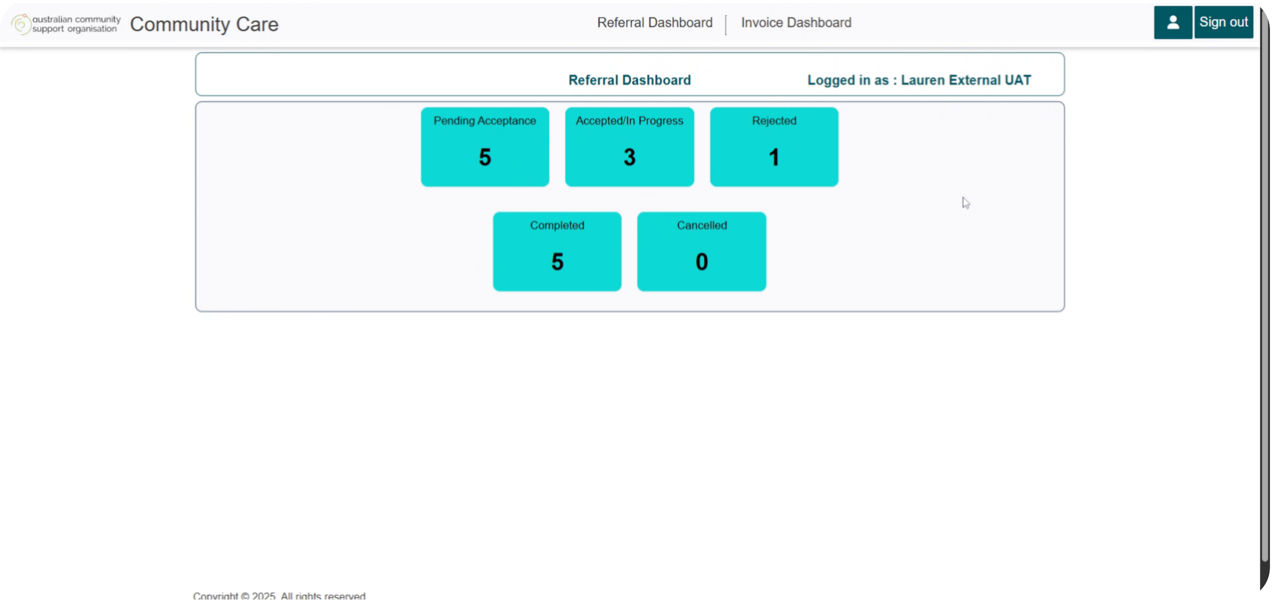
Community Care Portal: Capture Treatment Details and Attendance

This tutorial guides you through capturing treatment session details and attendance for workorders in the Community Care Portal. You will learn how to navigate the portal to accurately record session information.

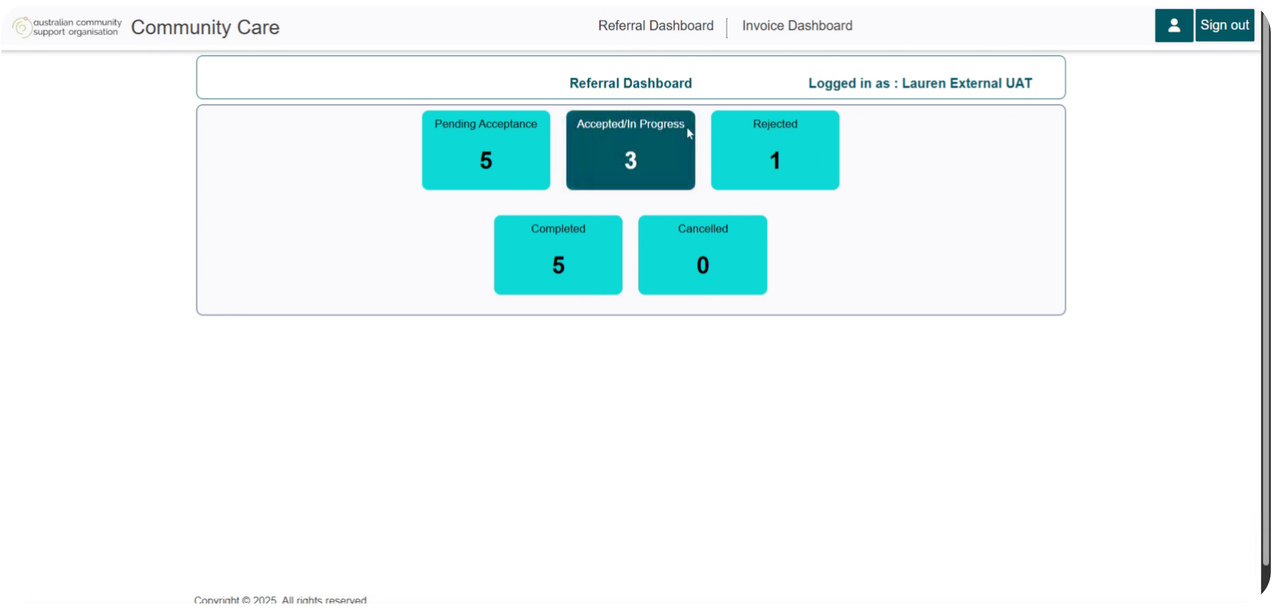
01 Open the Portal

To capture treatment details and attendance on Accepted / In Progress workorders where treat-ment is being provided to a client, log into the Community Care Portal



02 Access Accepted/In Progress Tile

From the "Referral Dashboard" navigate to the Accepted / In Progress tile.



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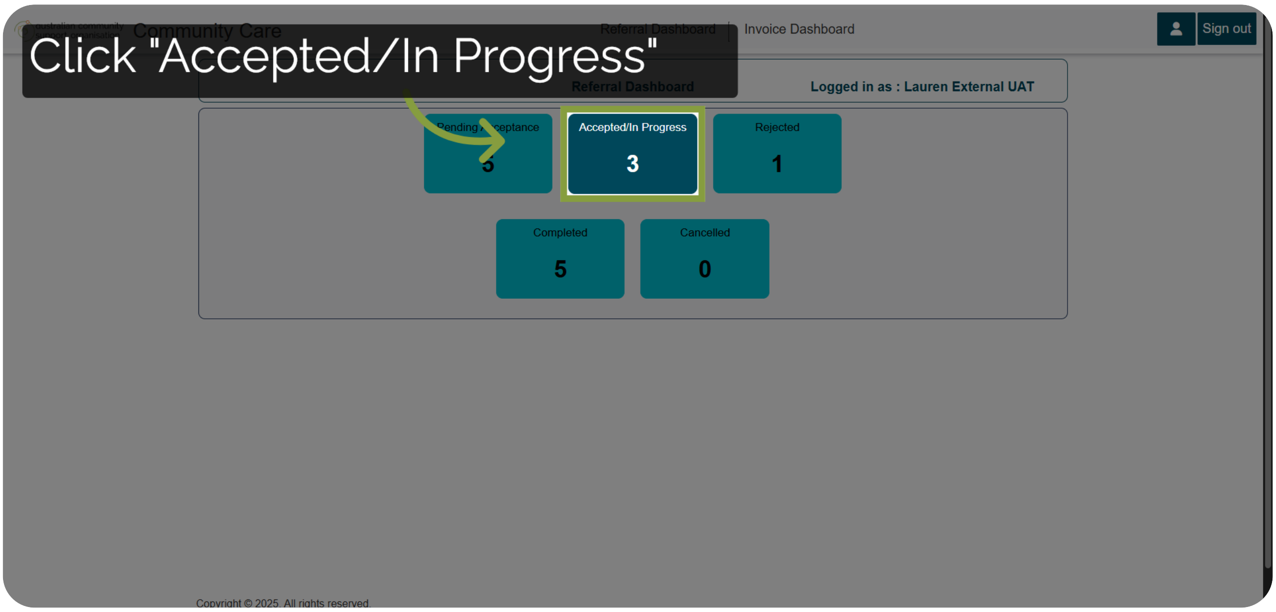
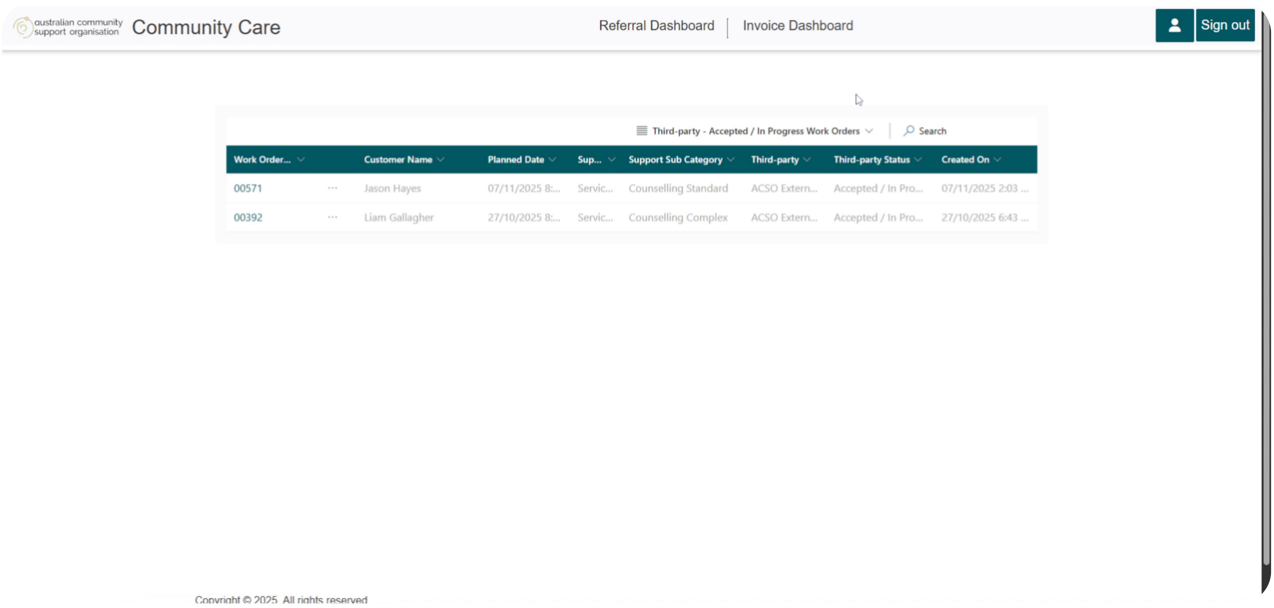
03 Select Accepted/In Progress Work Orders

Click "Accepted/In Progress"



04 Choose Work Order to Update

Select the workorder you wish to update from the list.



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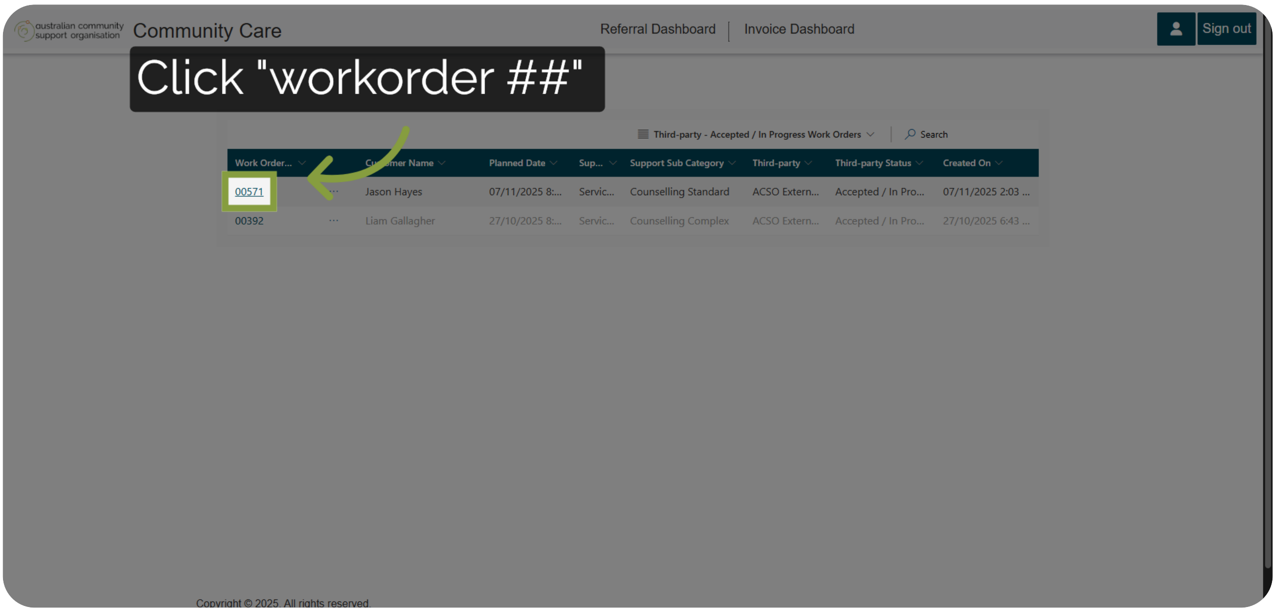
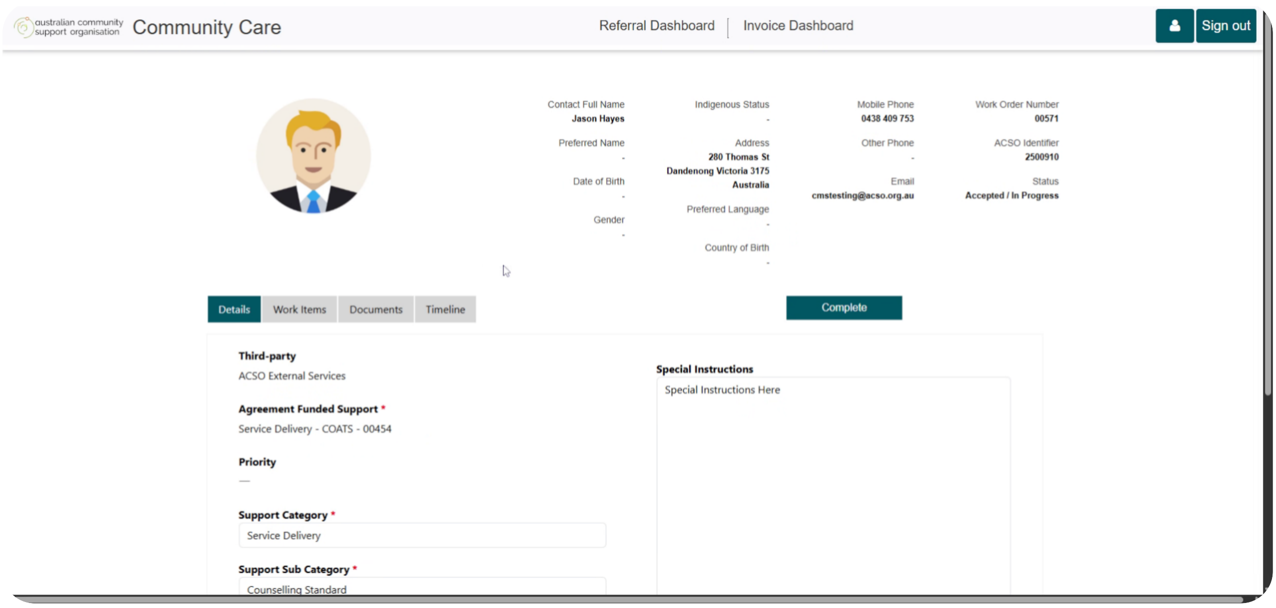
05 Click Work Order Number

Click the workorder number, hyperlink, to open the workorder record.



06 Locate Work Items Tab

To capture the treatment details and sessions attended or non attended navigate to the "Work Items" tab.



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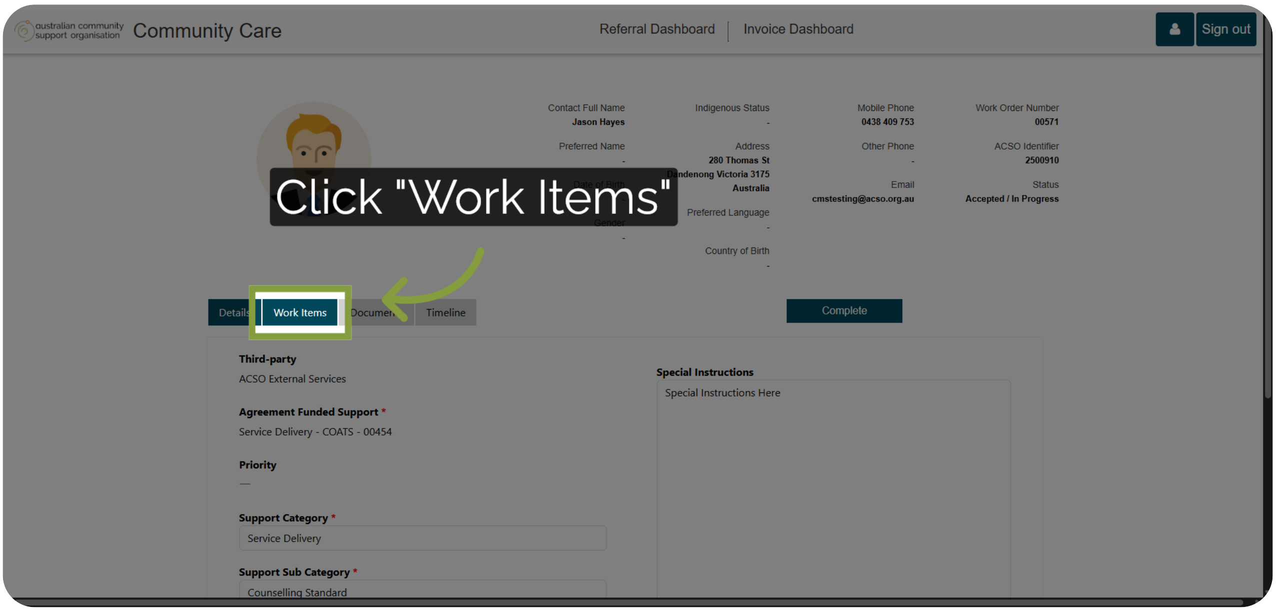
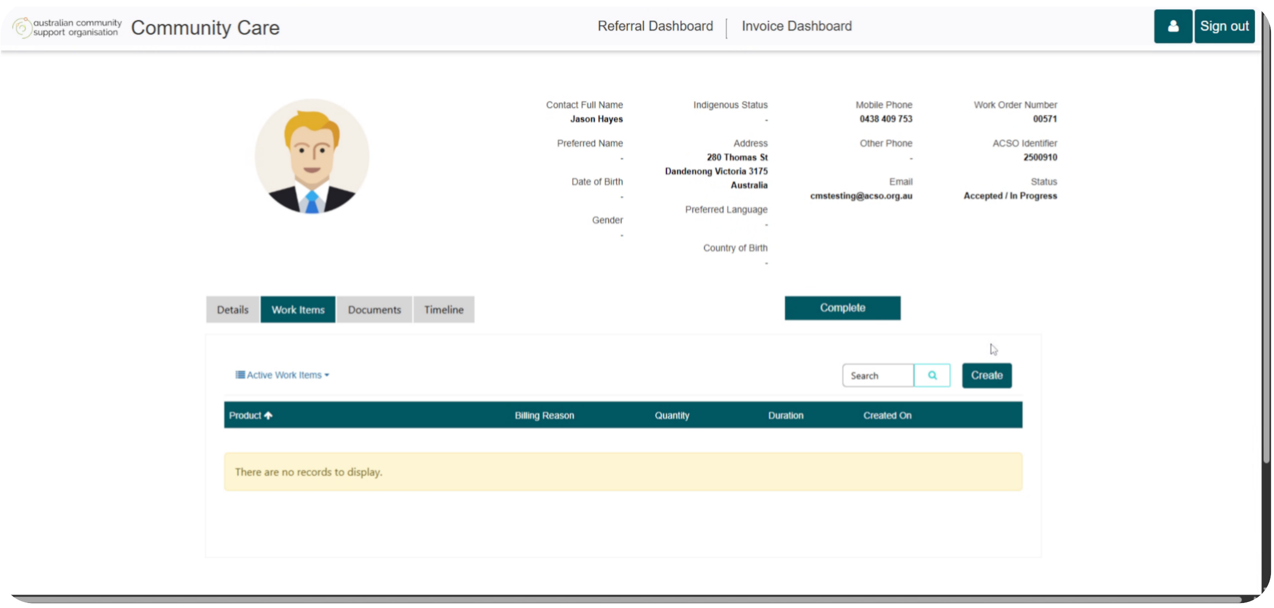
07 Open Work Items Tab

Click "Work Items"



08 Initiate New Work Item Capture

To commence the capture of treatment sessions, attended, create a new work item record.



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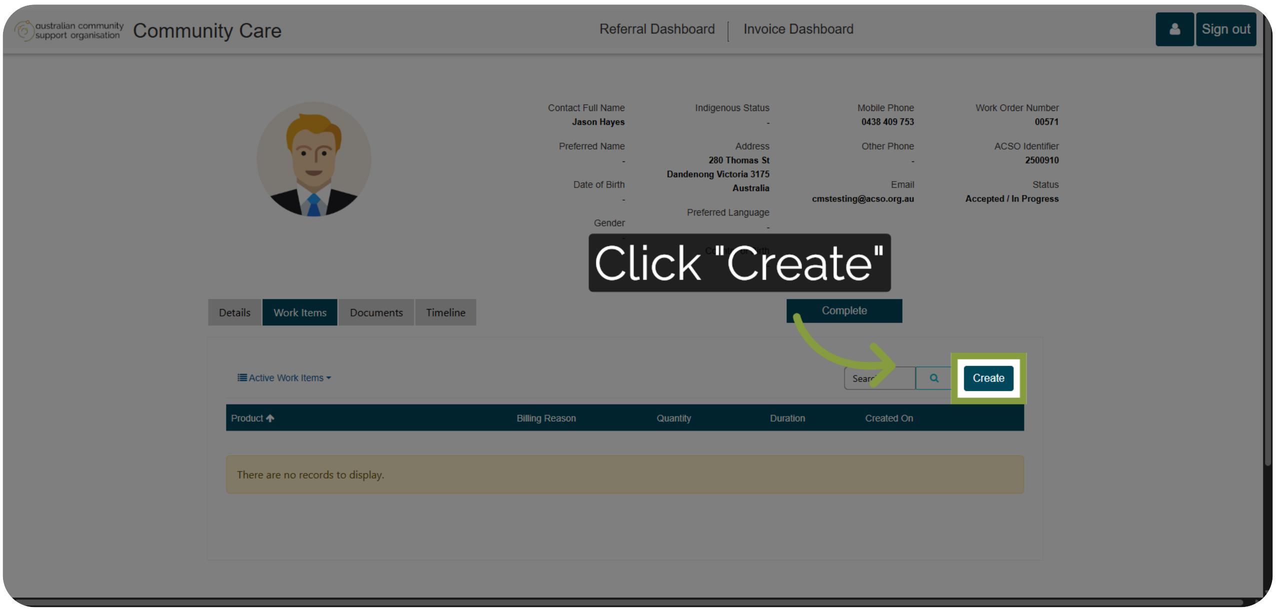
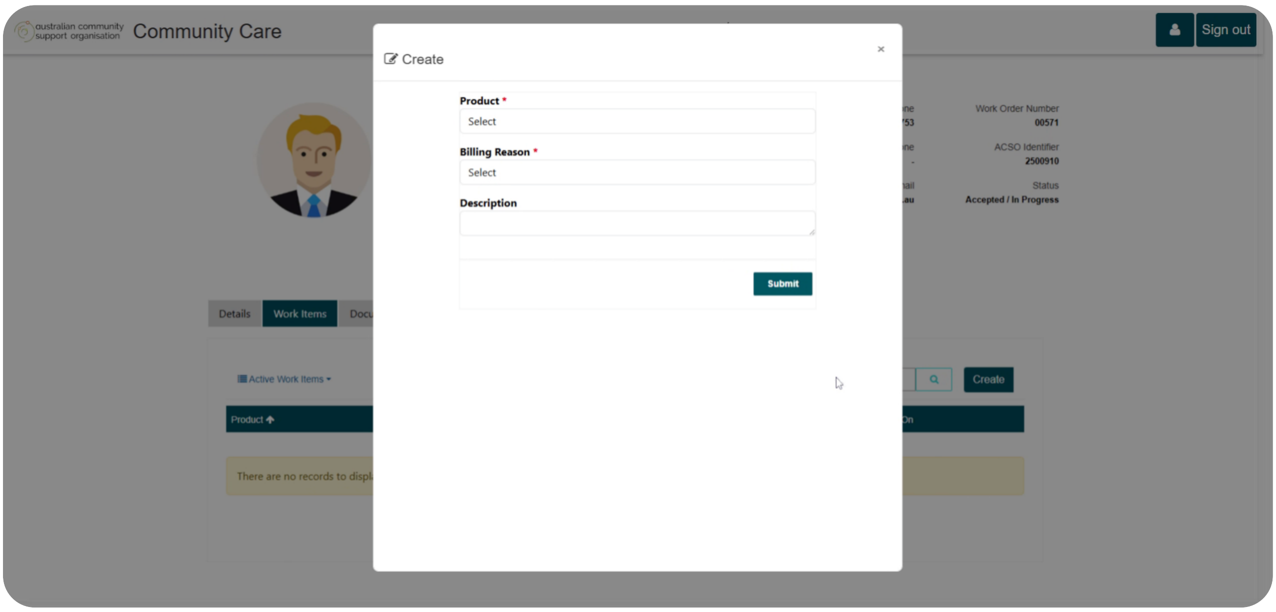
09 Click Create Button

Click "Create"



10 Prepare to Record Attended Sessions

To record attended sessions, select the treatment session type from the Product list.



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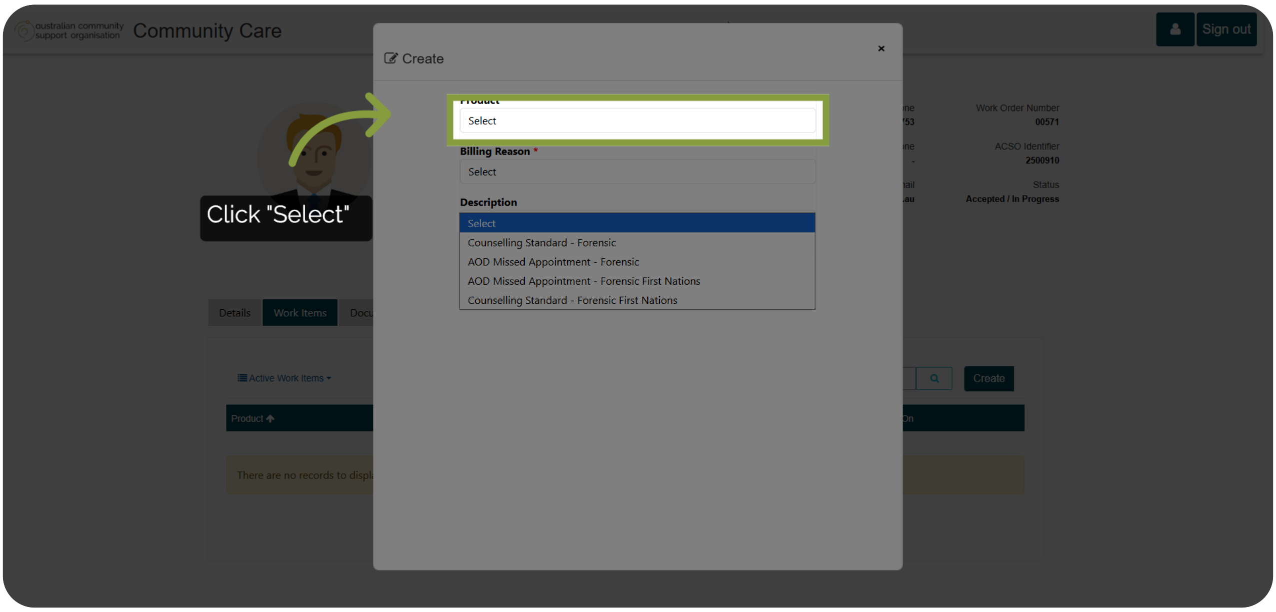
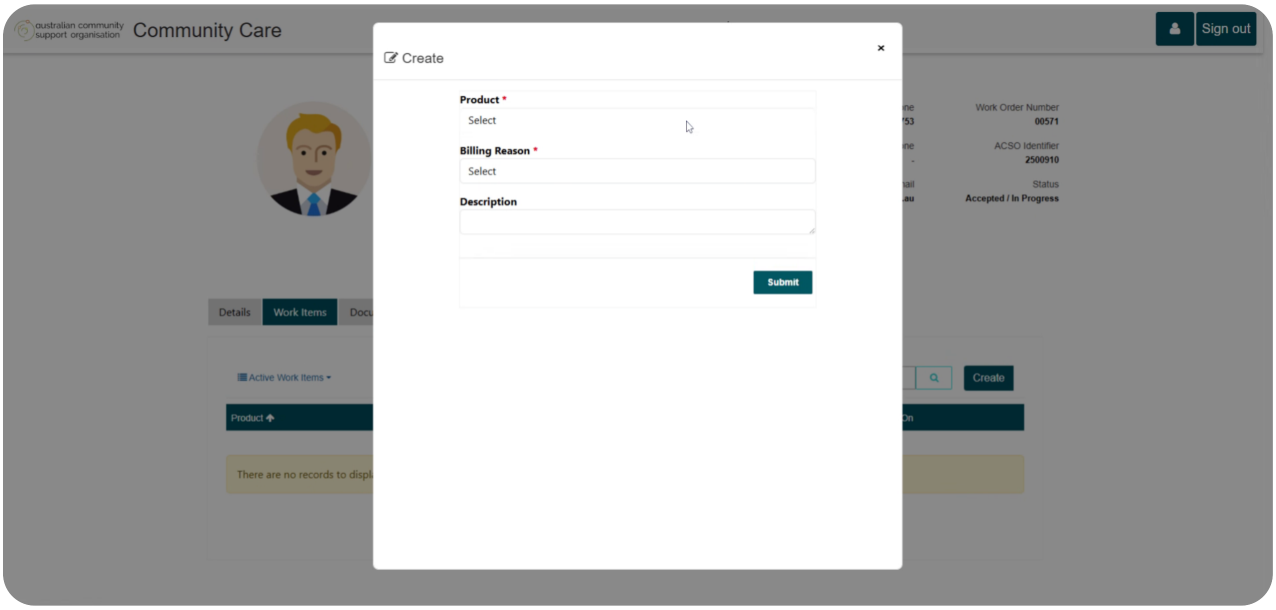
11 Select Session Type

Click "Select" to expand the list.



12 Choose Session Attendance / Outcome

To record the session outcome, select the outcome from the Billing Reason list.



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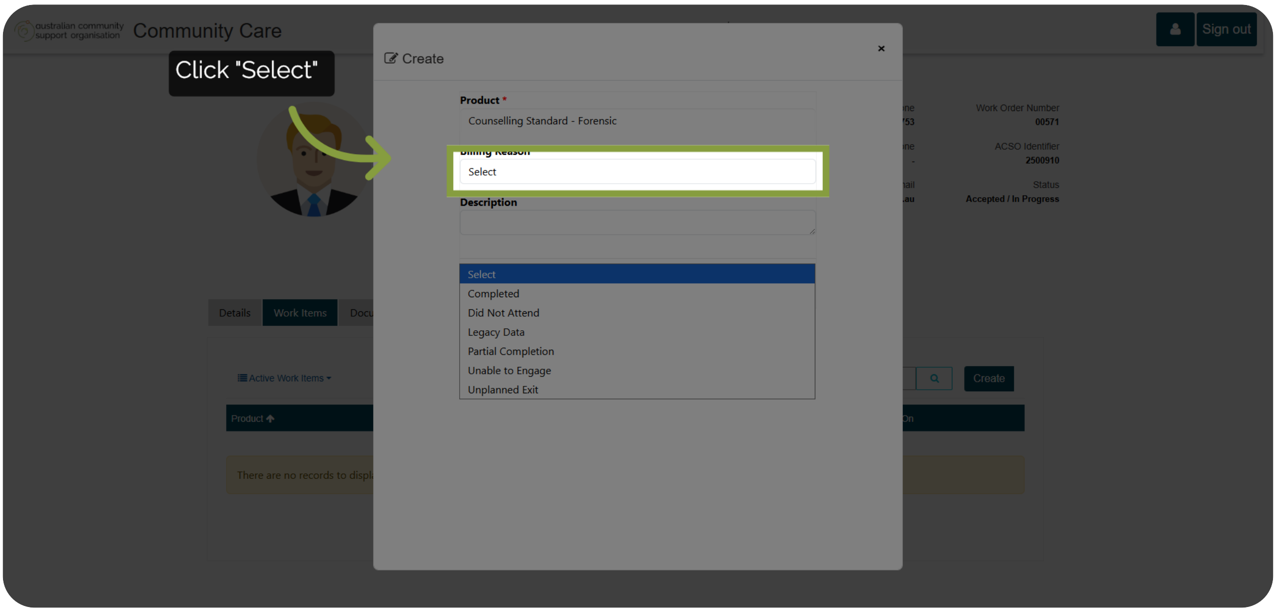
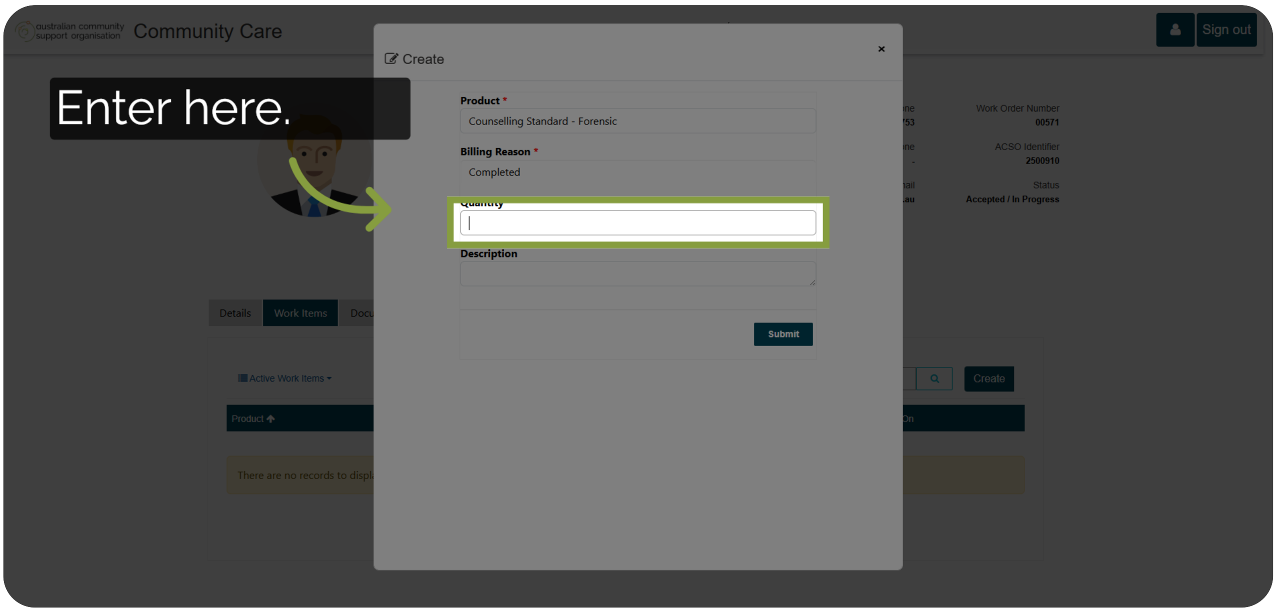
13 Select Session Status

Click "Select" to expand the list.



14 Enter Quantity of Sessions

Enter the quantity of attended sessions.



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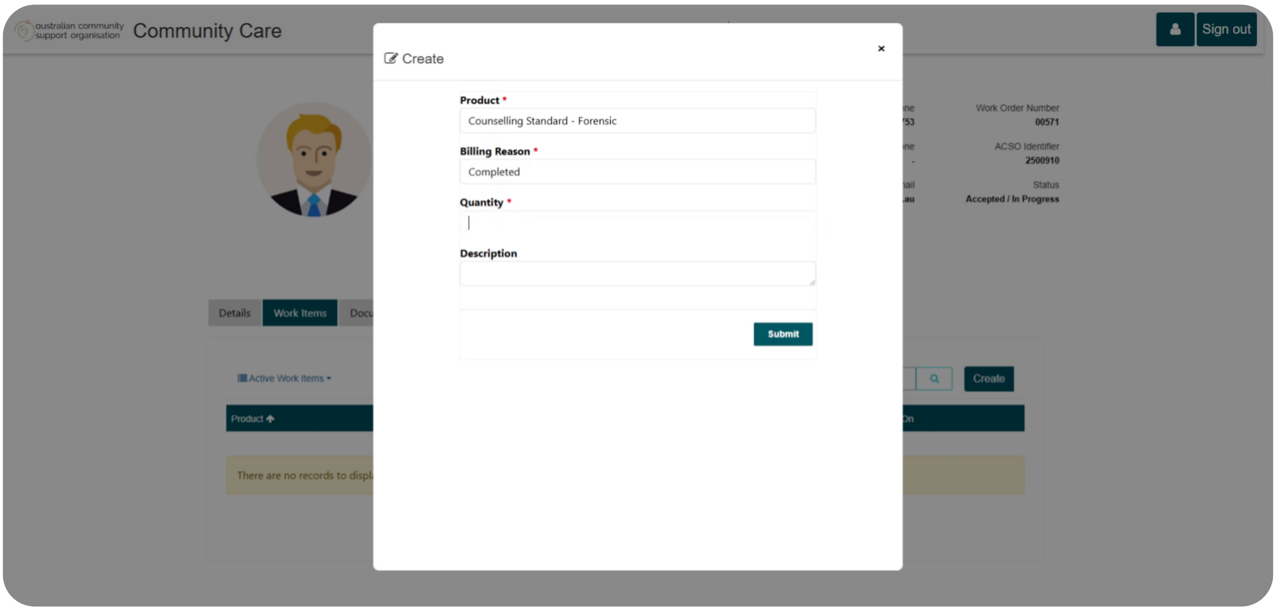
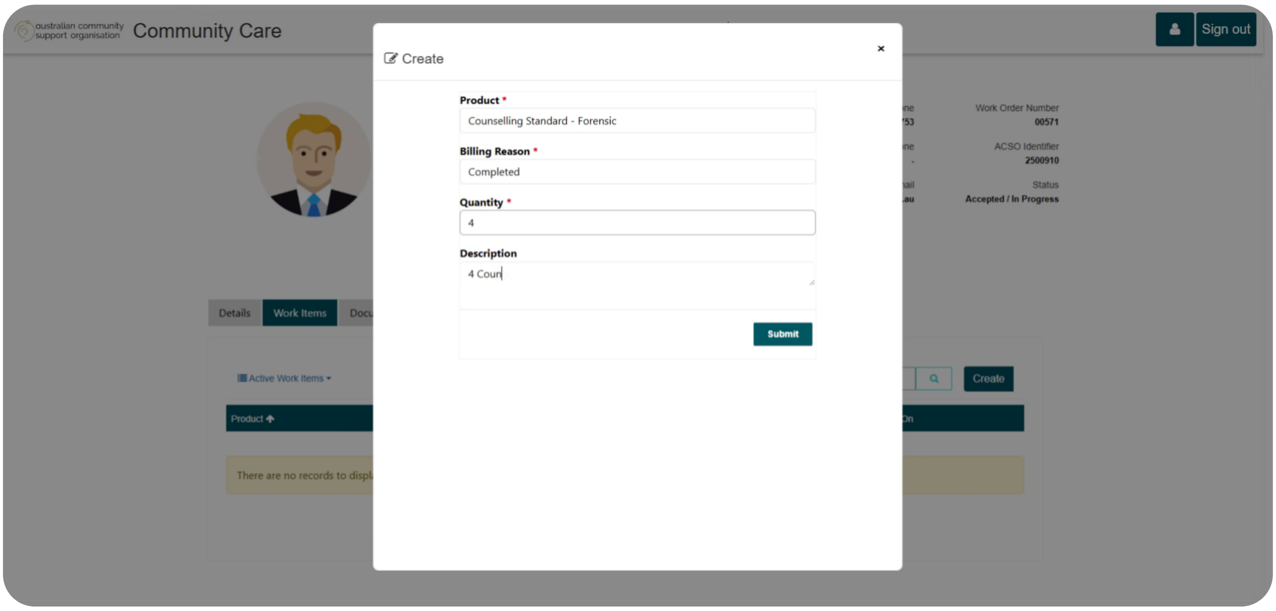
15 Record Session Description

Record a description of the sessions attended.



16 Submit Attended Session Details

Click "Submit" to complete the capture.



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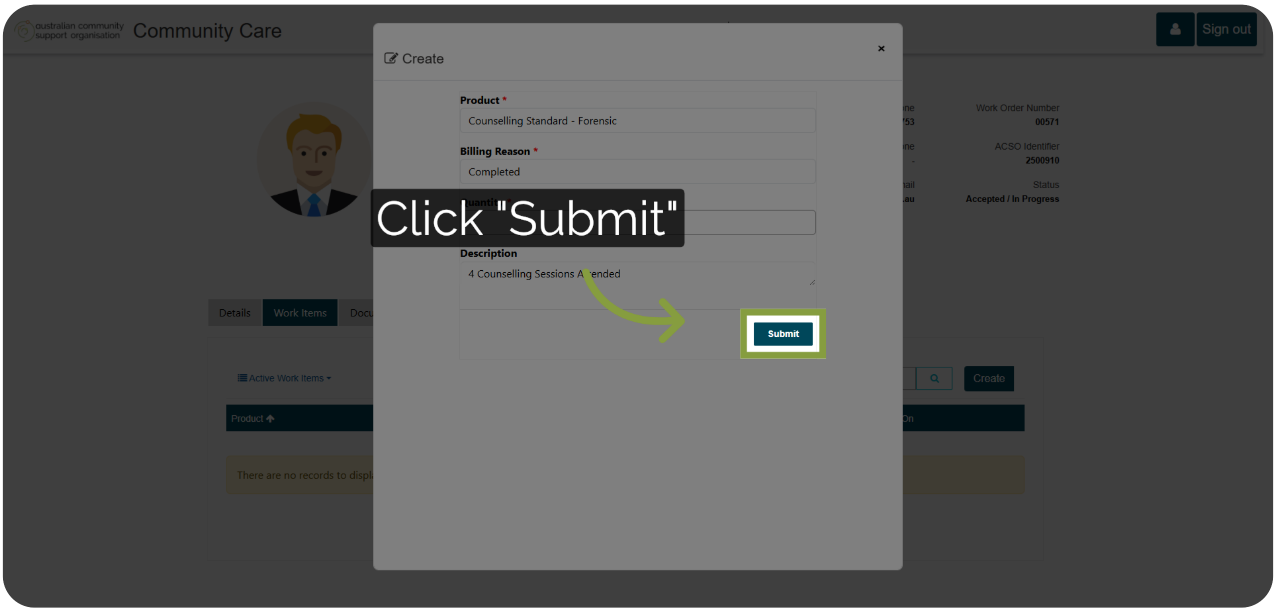
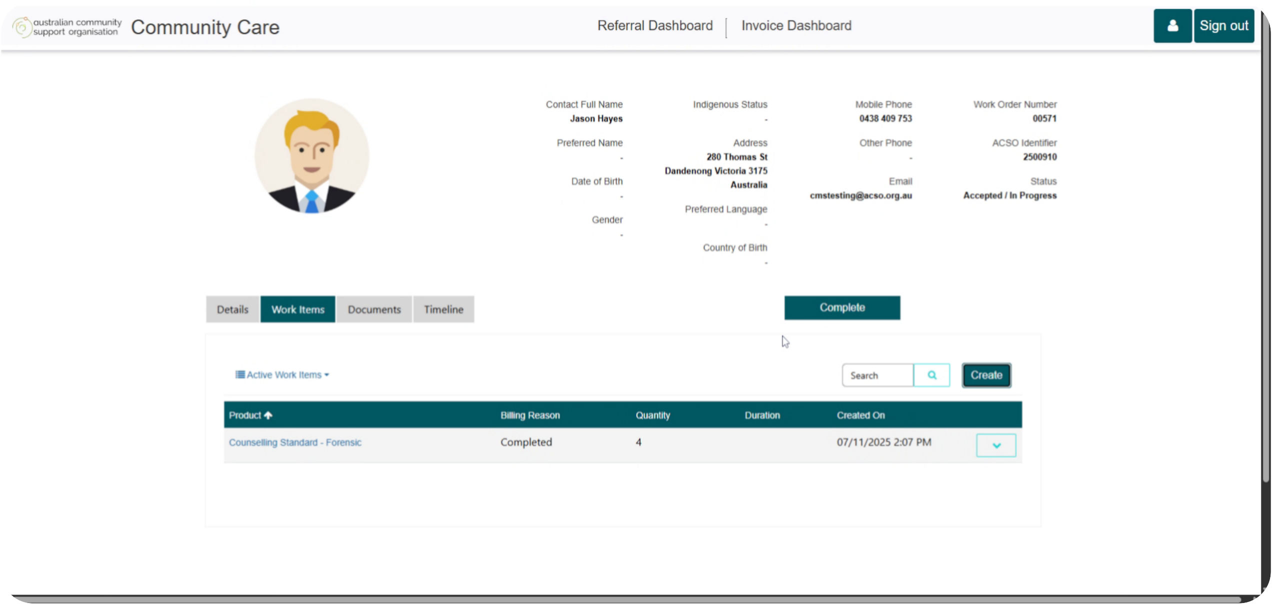
17 Start Non-Attended Session Capture

To complete the capture, click "Submit".



18 Capture Non-Attended Sessions

To commence the capture of treatment sessions, non-attended, create a new work item record.



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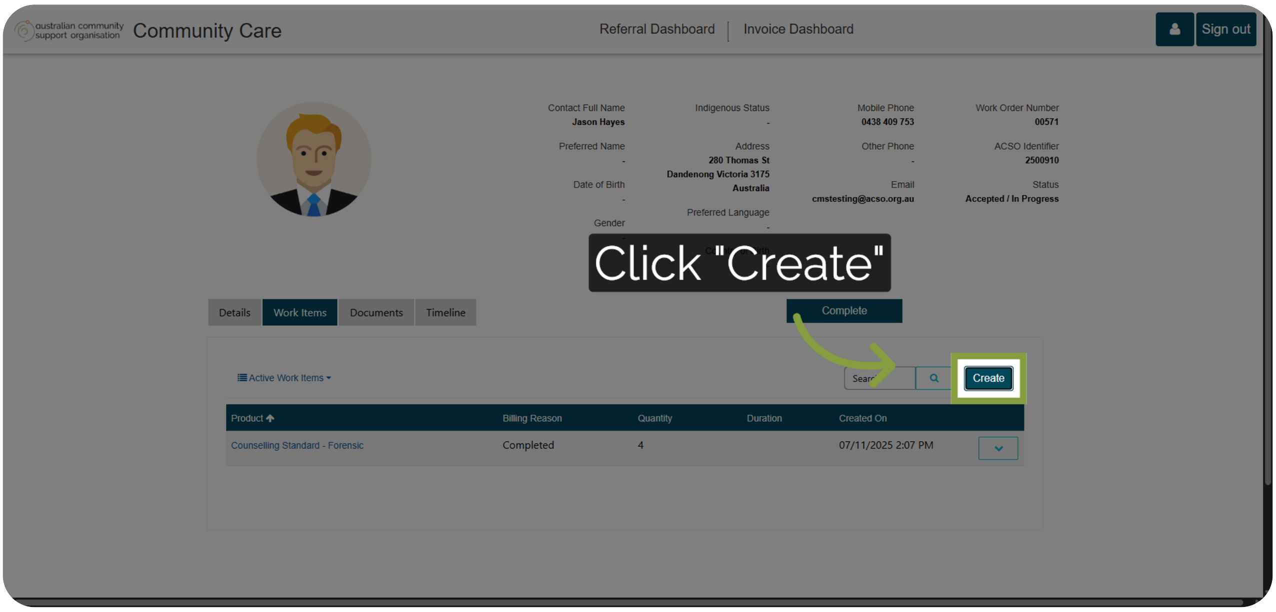
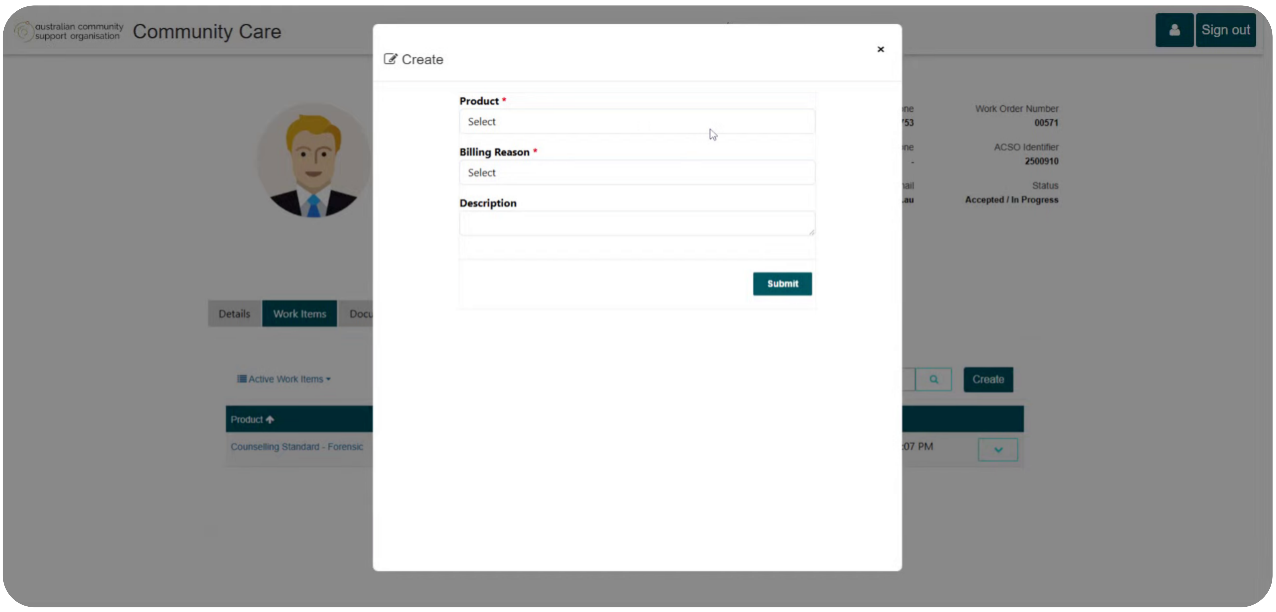
19 Create

Click "Create"



20 Choose Non-Attended Status

To record attended sessions, select the treatment session type from the Product list.



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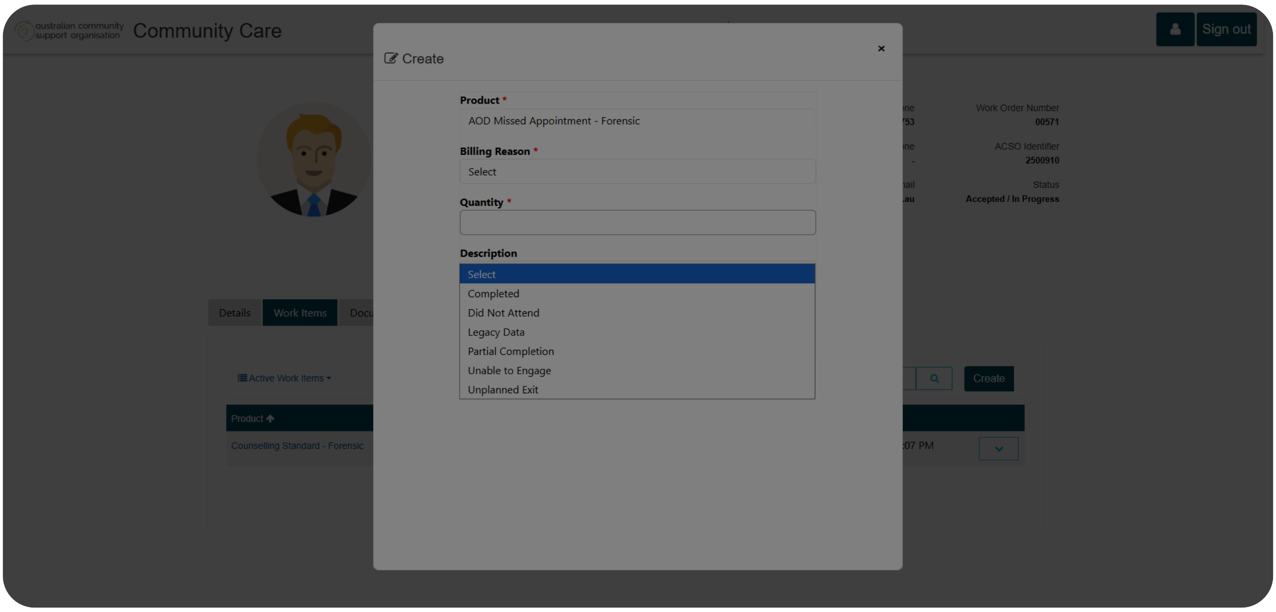
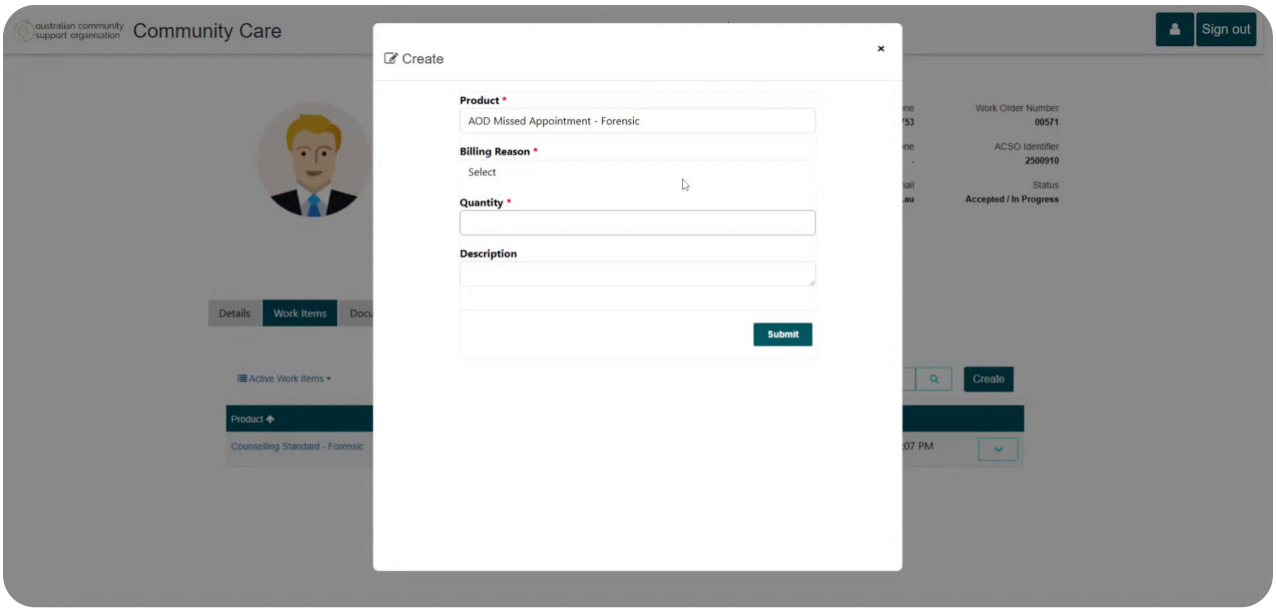
21 Capture Billing Reason for Non-Attended

To record the session outcome, select the outcome from the Billing Reason list.



22 Enter Quantity for Non-Attended Sessions

Enter the Quantity of a sessions not attended.



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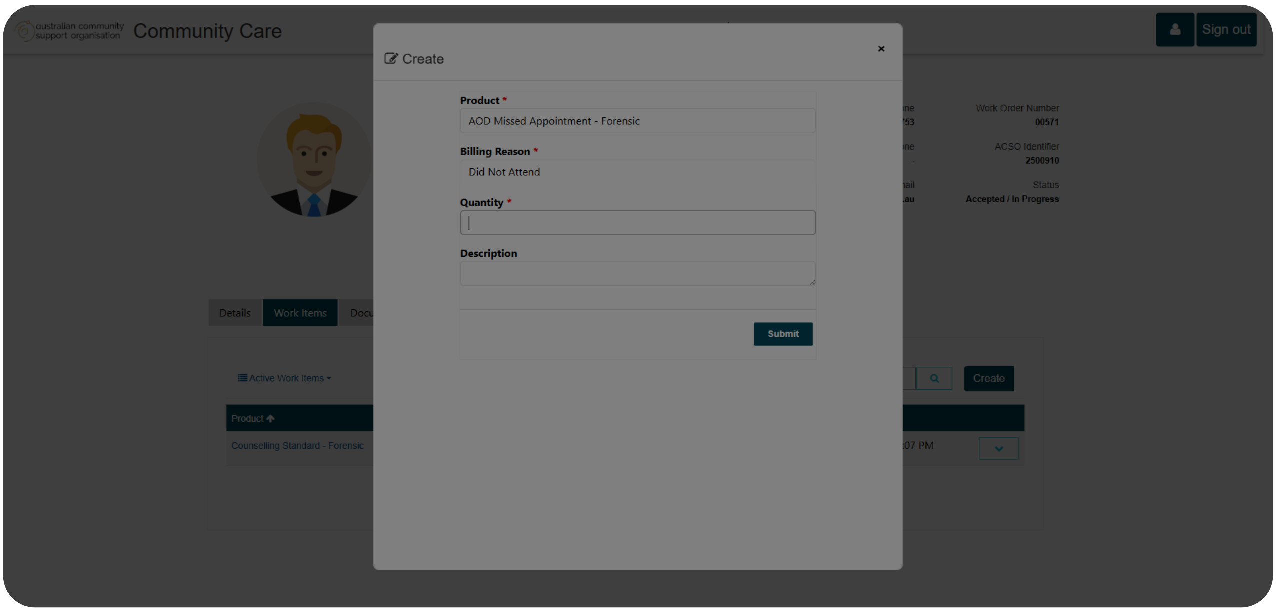
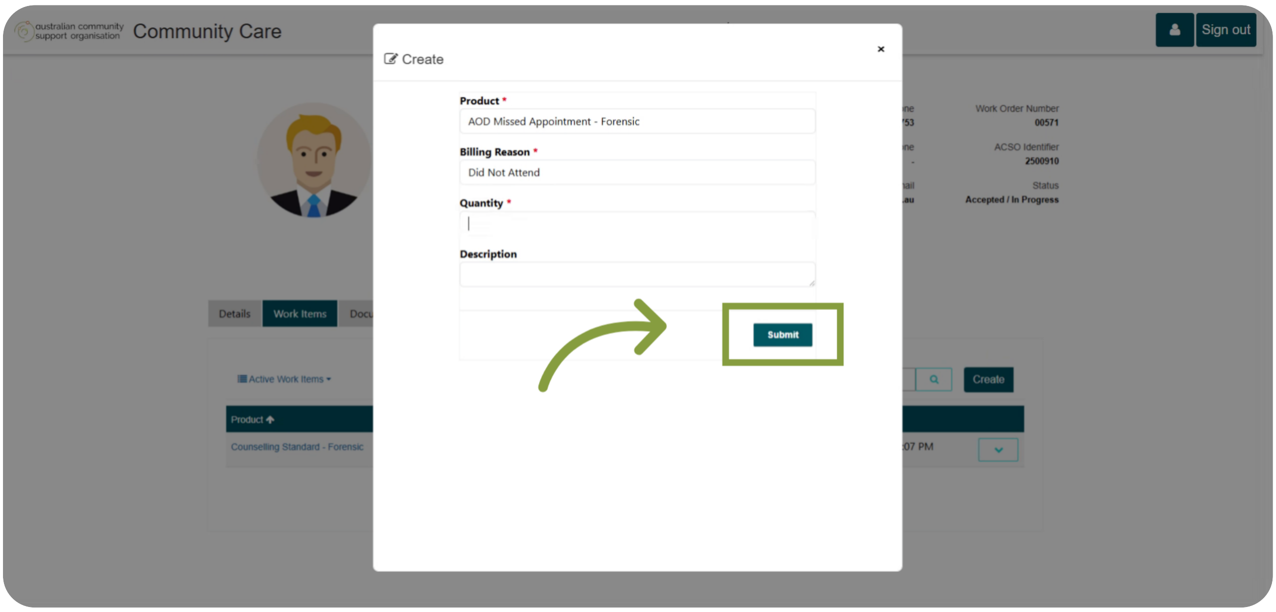
23 Fill Non-Attended Session Description

Enter the Description of the sessions not attended.



24 Submit Non-Attended Session Details

Click "Submit" to complete the capture.



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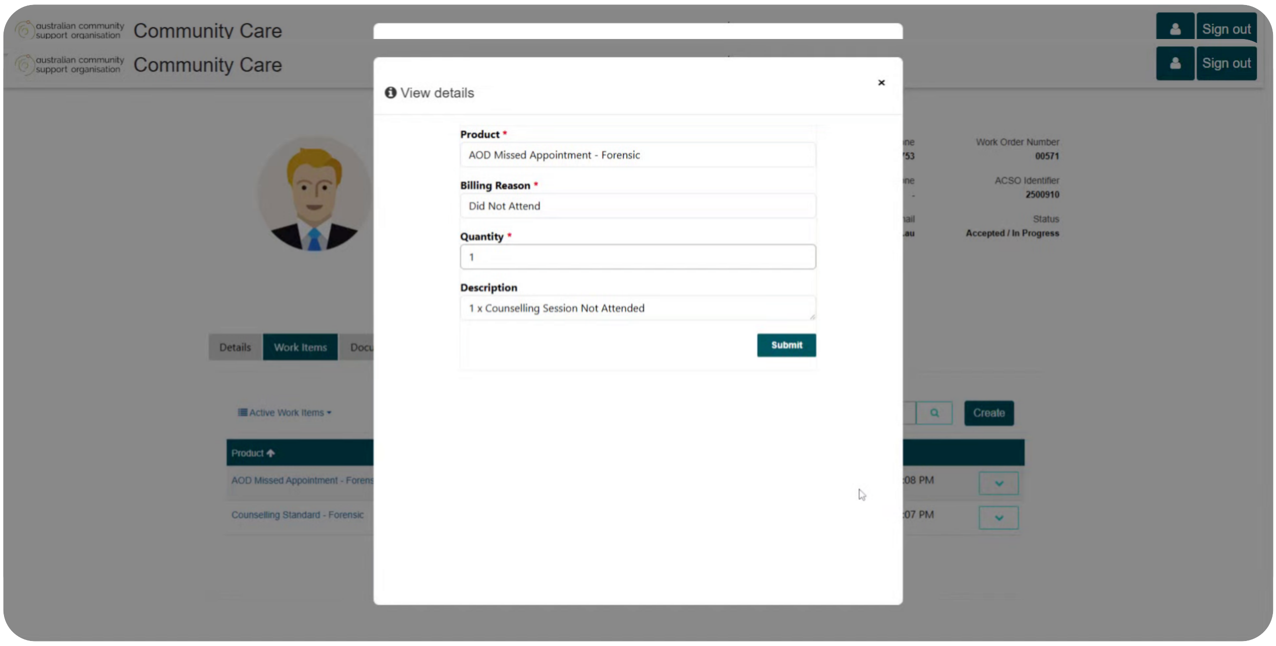
28 Update Details and Save

Confirm Capture Completion

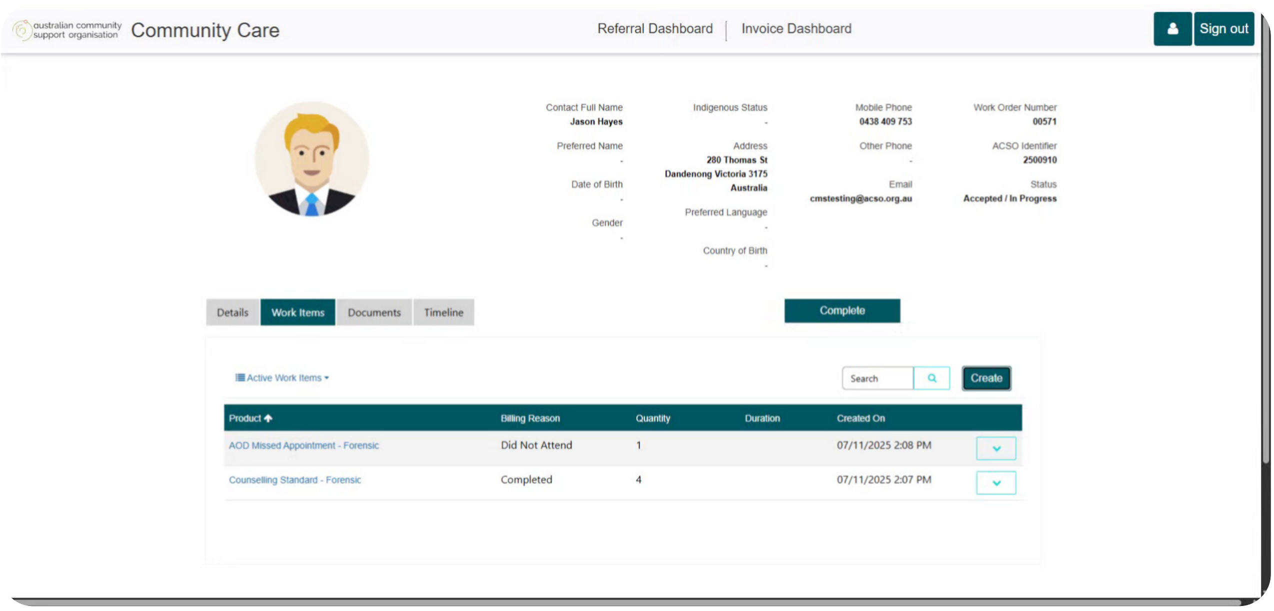
Update Product; Billing Reason; and Quantity, if necessary. If any updates are made; be sure the description is updated to match.

You have now captured attended and non-attended sessions for this



26 Update session details

If you need to update any of the treatment session details, you can open and edit the record details.



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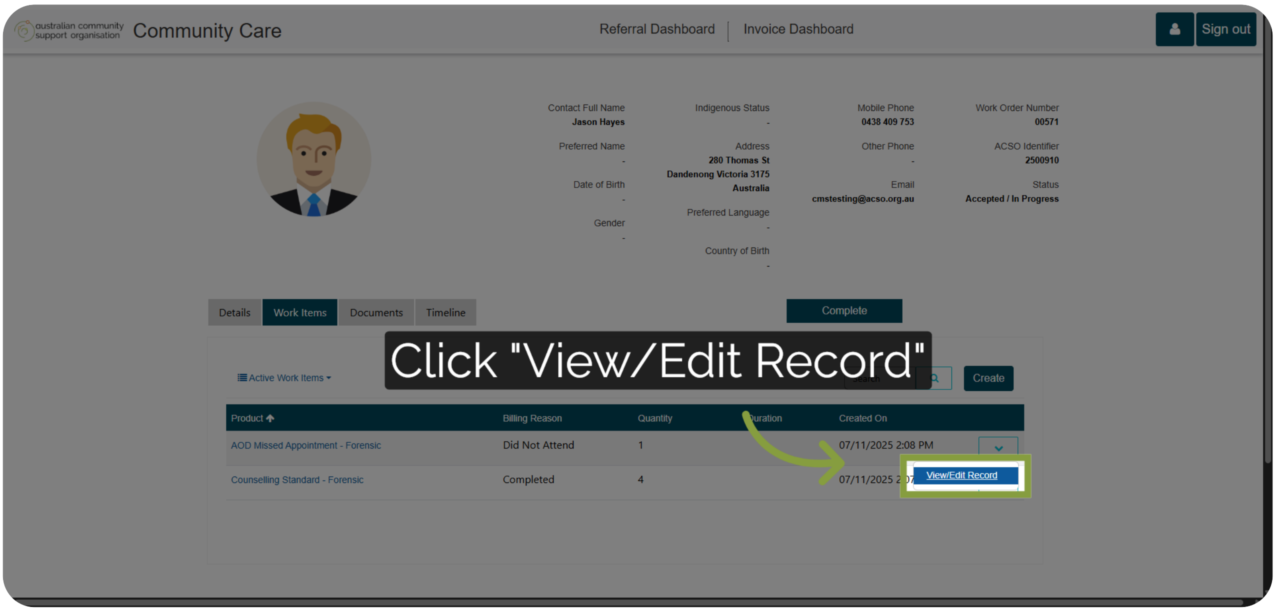
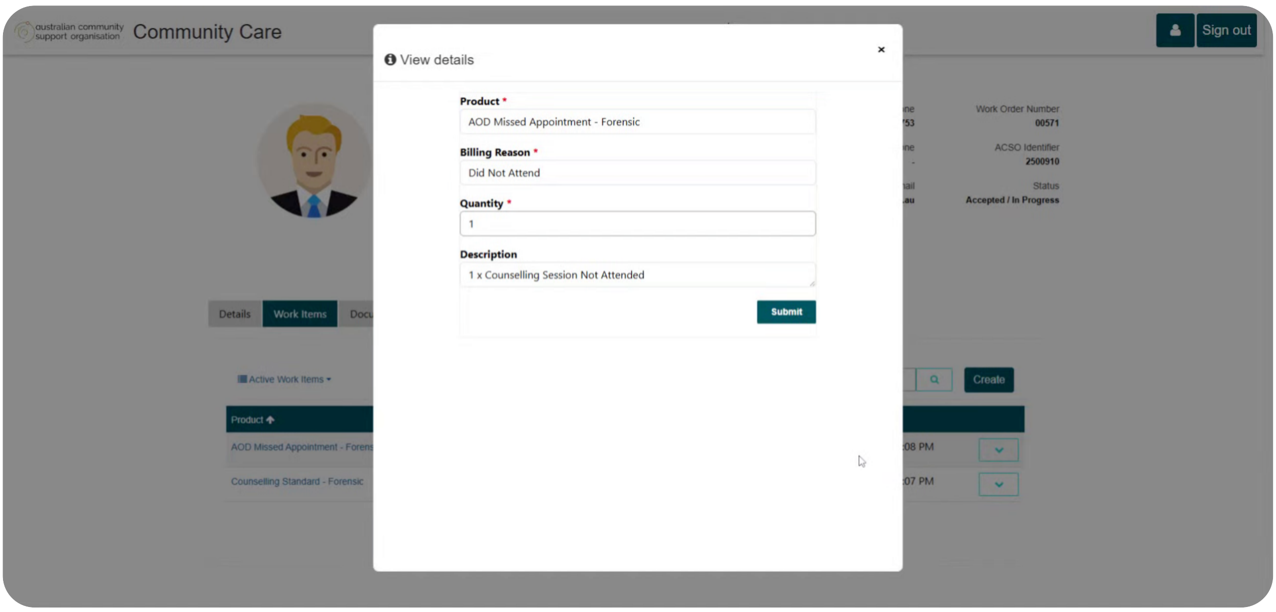
27 Open Session Record

Click "View/Edit Record



28 Update Details and Save

Update Product; Billing Reason; and Quantity, if necessary. If any updates are made; be sure the description is updated to match.



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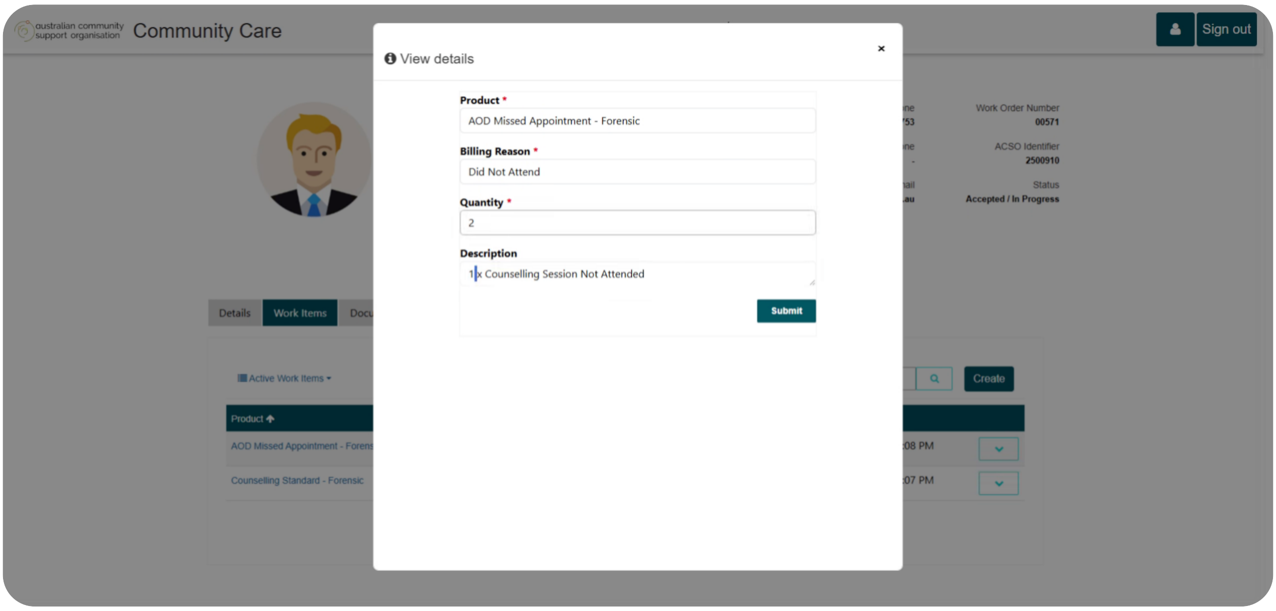
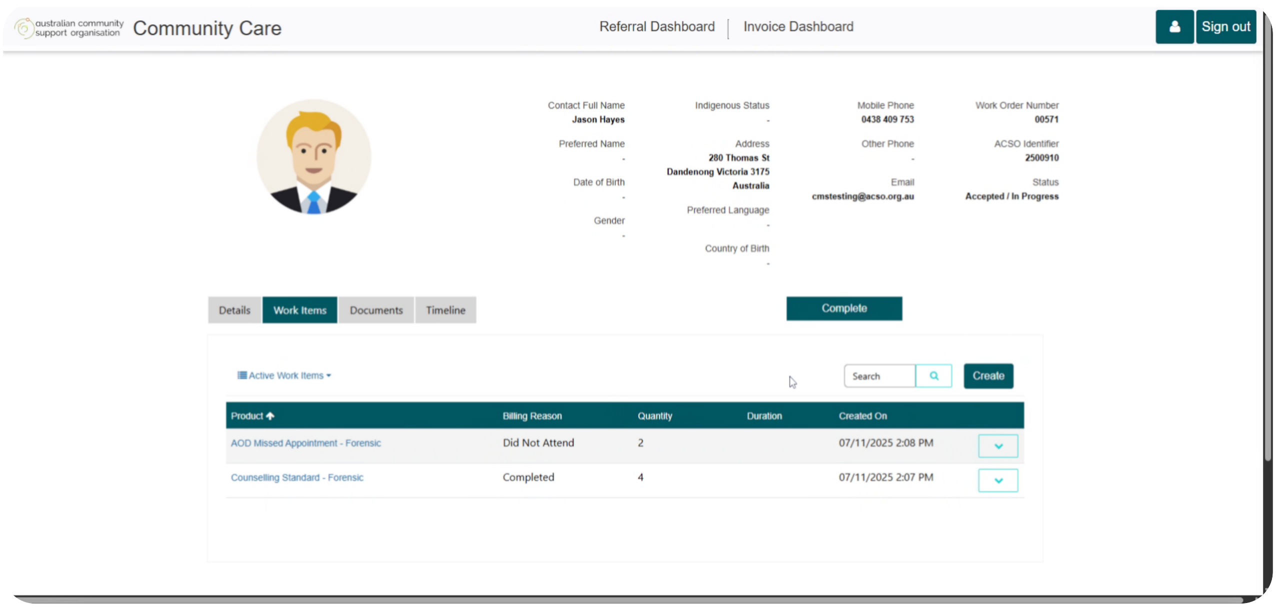
29 Review and Confirm Data Accuracy

Click Submit to save your changes.



30 Completed

The treatment session entries are now visible in the Work Items tab.



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