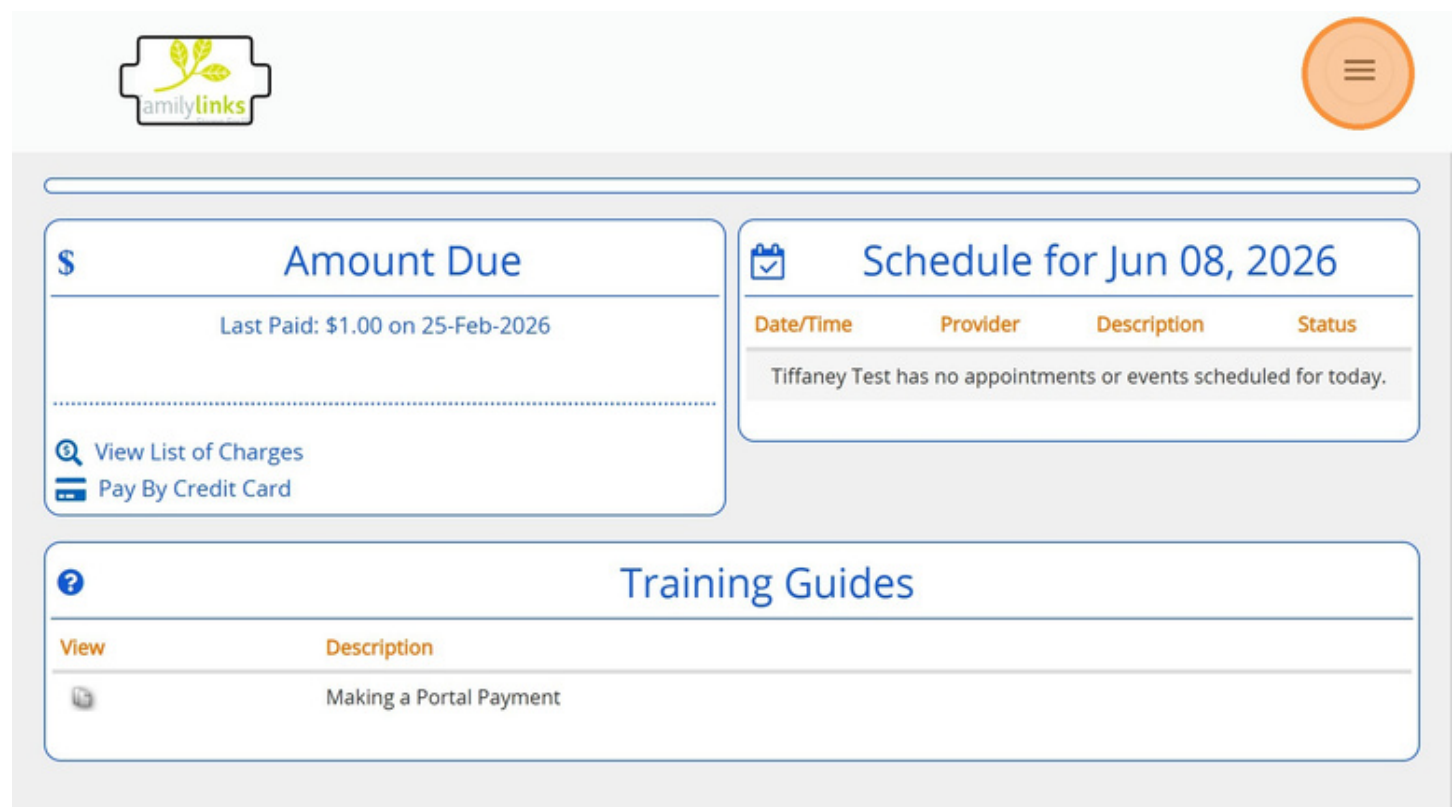


Welligent How To:

Viewing Completed Documents in the Portal

Step 1:

Open the menu and navigate to "Completed Documents" under the Documents section.



The screenshot shows the familylinks portal interface. At the top left is the familylinks logo, and at the top right is a hamburger menu icon. Below the header, there are three main sections:

- Amount Due:** Displays a dollar sign icon, the text "Amount Due", and "Last Paid: \$1.00 on 25-Feb-2026". Below this, there are links for "View List of Charges" and "Pay By Credit Card".
- Schedule for Jun 08, 2026:** Features a calendar icon and a table with columns: Date/Time, Provider, Description, and Status. The table content states: "Tiffany Test has no appointments or events scheduled for today."
- Training Guides:** Includes a question mark icon and a table with columns: View and Description. The table content shows a document icon and the text "Making a Portal Payment".

Step 2:

Mouse over "Documents".



 To Do List

 Documents

 Client Info

 Profile

 Mail

→

→

→

→

→

▶ Completed Documents

▶ Files/Attachments

 Training Guides

View	Description
	Making a Portal Payment

Step 3:

Click on “Completed Documents”.



 To Do List

 Documents

 Client Info

 Profile

 Mail

→

→

→

→

→

▶ Completed Documents

▶ Files/Attachments

 Training Guides

View	Description
	Making a Portal Payment

Step 4:

Double-click "Date Completed" to sort the documents by date. This will put the most recent documents at the top of the list.



	Program	Date Completed
Handbook	ABA Services	19-May-2026
to Treat	Not Specified	27-Jun-2025
to Treat	Not Specified	21-Apr-2026
lan	ABA Services	19-May-2026
ent	Family Based	31-Mar-2023
ROI	Not Specified	09-Oct-2023
ROI	Outpatient Therapy	10-Oct-2025

Step 5:

Click the document icon next to completed document you wish to view/print.




Click to view	Document Name	Program	Date Completed
	FBMH Treatment Plan	Family Based	15-Jun-2026
	FBMH - Family Choice Notification Form	Family Based	08-Jun-2026
	BH Crisis/Safety Plan	Family Based	05-Jun-2026
	BH Crisis/Safety Plan	Family Based	01-Jun-2026
	BH Consent to Treat	Not Specified	27-May-2026
	BH Consent to Treat	Not Specified	27-May-2026
	BH Consent to Treat	Outpatient Therapy	27-May-2026
	BH Consent to Treat	Not Specified	27-May-2026
	BH Crisis/Safety Plan	Family Based	27-May-2026
	BH Crisis/Safety Plan	Family Based	27-May-2026

Step 6:

To print, click on the "Print Button" or click the print icon in the upper right corner of the document. To review, scroll to the bottom of the page. The full, completed document will render on your screen.

Signature Queue

Sign Document

Close



FAMILYLINKS

PA

Print

Show Only Active Items

Client Name: TEST, TIFFANEY

Client ID: 8220594/County ID:ABC123456

Client DOB: 04-Jul-2013

Gender (for Billing):FEMALE

Ethnicity:NOT HISPANIC / LATINO

Address:123 sesame Street Washington 15301 Apt# 23

Phone:

Program: Family Based

Program Admit Date: 19-May-2023

Lead Clinician: Tiffaney Hobson/Supervisor: James Needles

Additional Provider:

Service Site: Familylinks - Shady

Location Code: 556-3

Prepared by: Tiffaney Hobson

Date Prepared: 08-Jun-2023

Implementation Date: 15-Jun-2026

Effective Until: 04-Dec-2023

Client was offered a copy?☐ Accepted ☐ Declined ☐ Pending

Prefer a Language Other than English: No

Plan was Interpreted: N

Step 7:

When complete, click "Close".

Sign Document

Close



FAMILYLINKS

PA

Print

Show Only Active Items

Client ID: 8220594/County ID:ABC123456

Client DOB: 04-Jul-2013

Ethnicity:NOT HISPANIC / LATINO

