



ORIENTATION & TRAINING

SAVING DOCS TO YOUR COMPUTER

You must download a copy of certain documents:

- If you are a non-licensed person doing an intake, you must save the assessment and send it to the LE person so that he/she can do the LE.
- If you are a licensed person doing the entire intake for someone, you must save the assessment and send it to the assigned counselor after its done.
- If you are a therapist, you should save all treatment plans and treatment plan reviews, so that you have that information for when you are ready to do the next one.
- If you are a case manager, you should save all service plans, so that you have that information for when you are ready to do the next one.



How to Save Them

When you press SUBMIT, **save a copy of the file in the confirmation page**

Most of the time you click on the file, and it downloads to your computer.

In the confirmation page, if you scroll down, you will see a Word or PDF file.

You can:

- click on the file and it downloads, or
- right-click it, and save (**not the link**) the file - if you have this option.



Look for the downloaded file in your computer (where files usually download to).

Your Progress Note was successfully submitted.

Individual Therapy

Press to Download it



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