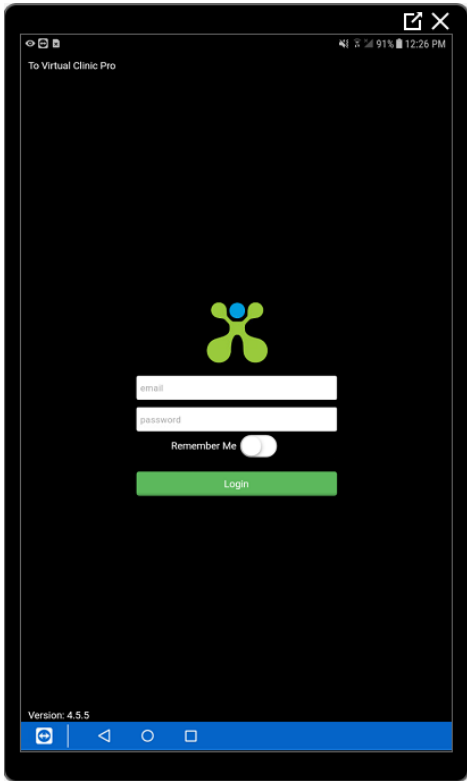




ABA Solutions is currently undergoing an upgrade to our tablets. New property sheets will need to be signed and we will swap out your existing tablet. If yours has cellular service, we will need to work with you for coordination. Once yours has been upgraded, it will look like this.



Please disregard this bar. It is not on the actual tablets.



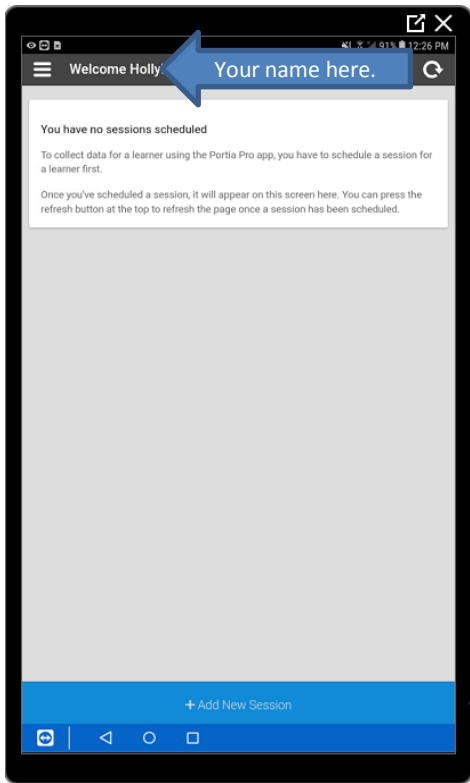
This is the top-most screen when you first start the Portia Pro App.

You will need to enter your Portia credentials in order to proceed.

Note: If you click the “Remember Me” button, your email (username) will be stored and will not need to be entered every time. You will still need to enter your password.

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Please disregard this bar. It is not on the actual tablets.



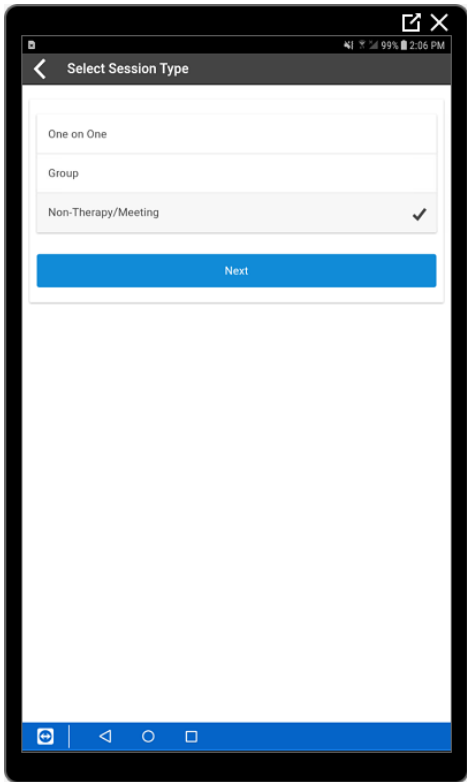
If you have been proactive and have pre-scheduled sessions, they will show up listed here. All you would have to do is select the one you are about to start and move forward. **\*\*\*We recommend proactively setting up sessions to eliminate any difficulties with scheduling the session during what should be the start time, and it allows you to set recurring sessions\*\*\***

This can be done via the web interface at:  
<https://app.portiapro.com> (Not from the tablet)

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If nothing has been scheduled, you will need to first schedule a session so that you can then start it. The next few pages will walk you through that process.

Schedule a new session here



Select “Non-Therapy/Meeting” and press next



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The screenshot shows a mobile application interface for adding a new meeting. The title bar at the top reads "Add New Meeting" with a back arrow on the left and a close icon on the right. The status bar above the title bar shows signal strength, Wi-Fi, 99% battery, and 2:03 PM. The form is organized into three sections:

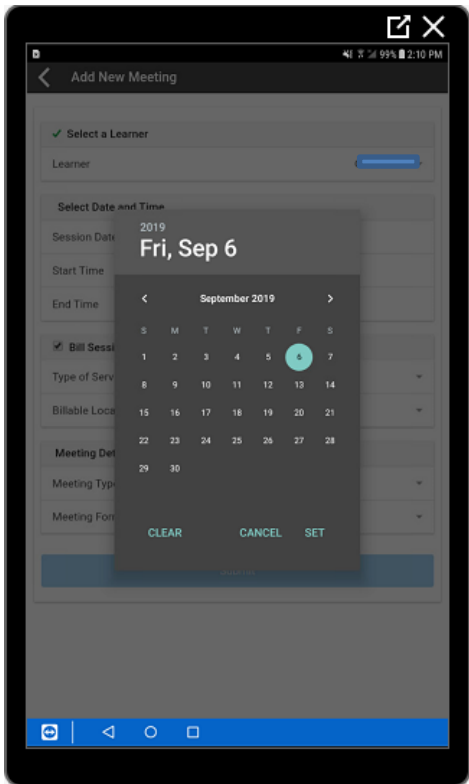
- Select a Learner:** A dropdown menu labeled "Learner" with a downward arrow.
- Select Date and Time:** Three input fields labeled "Session Date", "Start Time", and "End Time".
- Meeting Details:** Two dropdown menus labeled "Meeting Type" and "Meeting Form", both with downward arrows.

A blue "Submit" button is located at the bottom of the form. The bottom of the screen shows the Android navigation bar with icons for home, back, and recent apps.

Step 1- You will need to select the learner you will be working with.



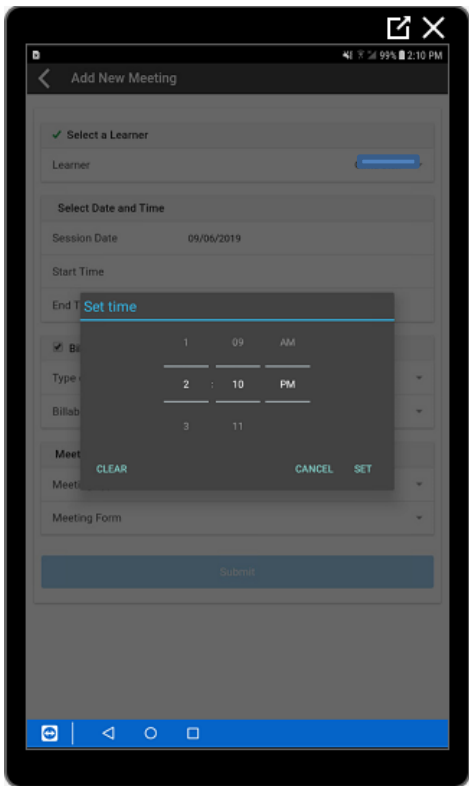
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Step 2- Select the session date



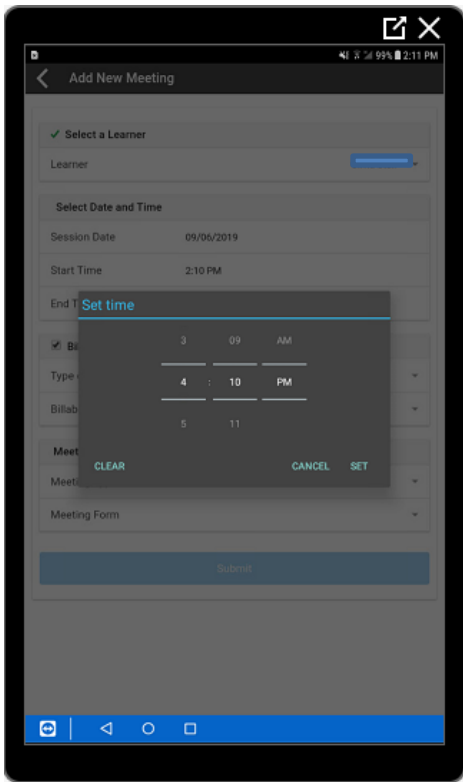
ABA Solutions, LLC



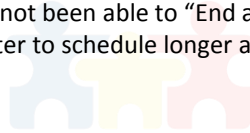
Step 3- Select the start time



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Step 4- Select the end time. We recommend adding a minimum of 30 minutes extra time in order to add the additional required data at the end. The session will “force close” at the end of the scheduled session. The process for ending a session does not take this long, however if for any reason, you have not been able to “End and Sync”, it creates an issue. It is better to schedule longer and just end appropriately.



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**Add New Meeting**

✓ Select a Learner

Learner

✓ Select Date and Time

Session Date 09/06/2019

Start Time 2:10 PM

End Time 4:10 PM

Bill Session Through Portia

Type of Service

Billable Locations

**Meeting Details**

Meeting Type

Meeting Form

H2012 - Treatment Planning

97151 - Assessment

97153 - Direct ABA Therapy

97155 - Supervision - BCBA

97156 - Parent Training (with or w/o child)

Step 5- Select “97151 – Assessment” for the type of service.



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**Add New Meeting**

✓ Select a Learner

Learner

✓ Select Date and Time

Session Date 09/06/2019

Start Time 2:10 PM

End Time 4:10 PM

Bill Session Through Portia

Type of Service 97151 - Assessment

Billable Locations

**Meeting Details**

Meeting Type Home

Meeting Form Office

School

Other

Submit

Step 6- Select the location. This will likely be in the patients home.



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**Add New Meeting**

✓ Select a Learner

Learner

✓ Select Date and Time

Session Date 09/06/2019

Start Time 2:10 PM

End Time 4:10 PM

✓ Bill Session Through Portia

Type of Service 97151 - Assessment

Billable Locations Home

✓ Meeting Details

Meeting Type meeting

Meeting Form

Submit

- Assessment
- Parent/caregiver training form
- Treatment Planning
- Supervision form

Step 7- Select “Meeting type” as “meeting”, and “Meeting Form” as “Assessment”



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**Add New Meeting**

✓ **Select a Learner**

Learner

✓ **Select Date and Time**

Session Date 09/06/2019

Start Time 2:10 PM

End Time 4:10 PM

✓ **Bill Session Through Portia**

Type of Service 97151 - Assessment

Billable Locations Home

✓ **Meeting Details**

Meeting Type meeting

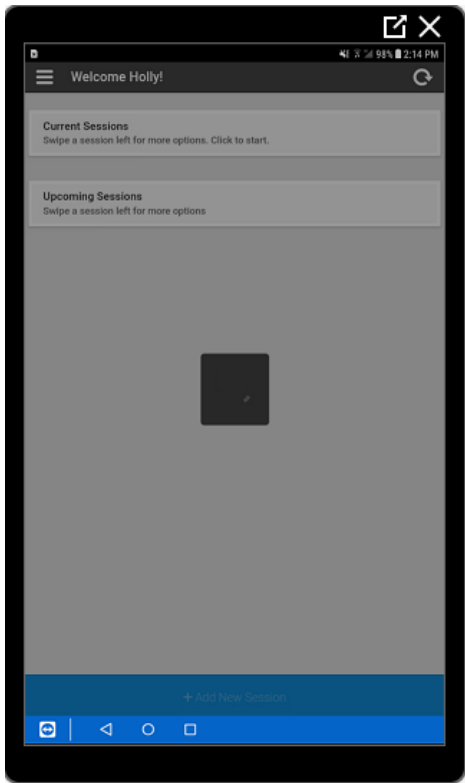
Meeting Form Assessment

**Submit**

This is an example with the required data entered.  
Step 9- Click “Submit”



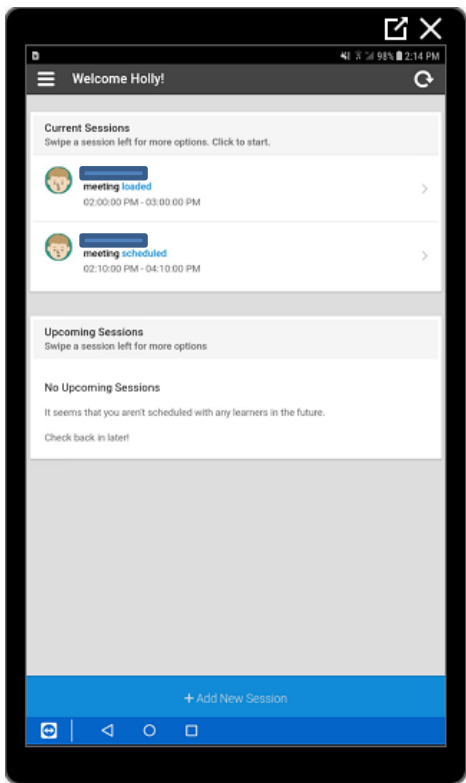
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The tablet is loading pertinent data.



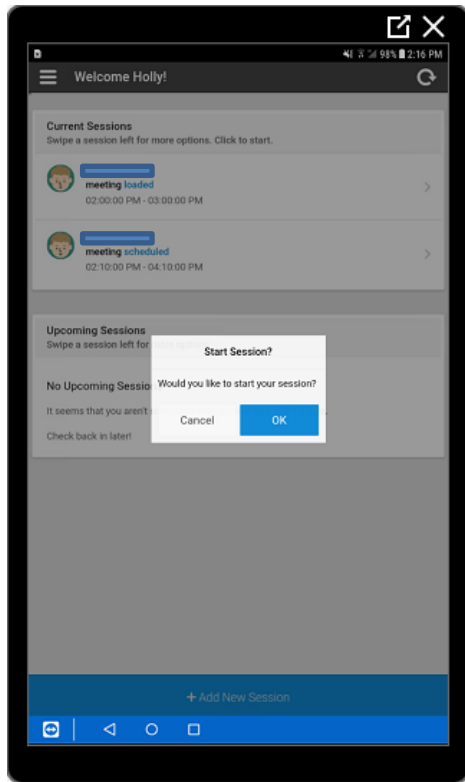
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Here is a scheduled session for us to begin The previous session was from a previous demo.



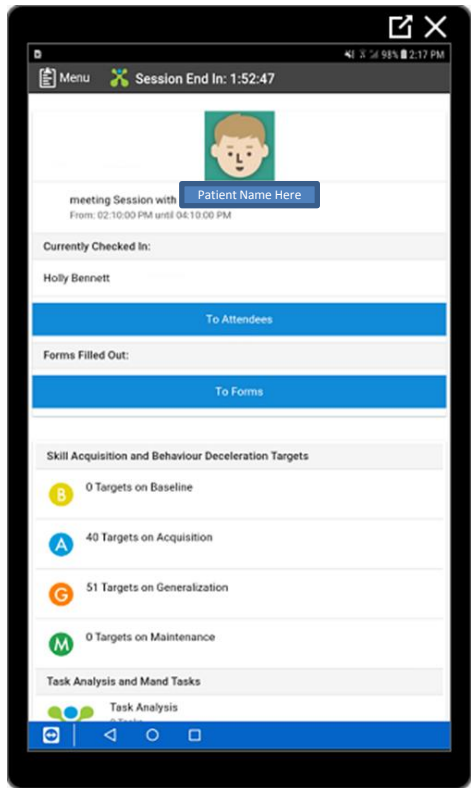
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Once you choose a current session, you will be asked if you would like to start. Click OK.



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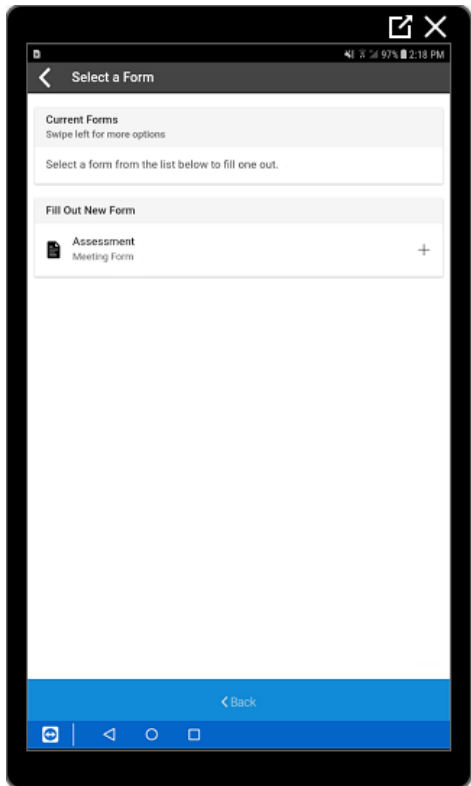


Here is what the loaded session should look like. From here, we can jump right in to the form, by pressing “To Forms”.



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This will bring you to this screen, ready for you to select the desired form. In this case, there is only one.



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The screenshot shows a mobile application interface for an assessment form. At the top, there is a status bar with a signal strength icon, a Wi-Fi icon, a 97% battery icon, and a 2:22 PM time display. Below the status bar is a dark header with the text 'Fill a Form' and a close button (X). The main title of the form is 'Assessment' with a document icon. The form is divided into two sections. The first section is titled 'Attendees: Copy\*' and contains five checkboxes: 'Patient', 'Assessor', 'Parent/Caregiver', 'Clinical Director', and 'Other'. The second section is titled 'List assessment activities conducted: \*' and contains seven checkboxes: 'Identified deficient adaptive or maladaptive behavior', 'Developed a plan of care', 'Conducted an observation', 'Obtained history of patient and past behavioral functioning', 'Conducted interviews with parents/caregivers', and 'Administered standardized/non-standardized tests'. At the bottom of the form is a green bar with a 'Save' button. The entire form is displayed on a black tablet-like device with a blue Android navigation bar at the very bottom.

Here you would fill in the attendees and data elements, as you have seen in previous Trainings.



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The screenshot shows a mobile application interface with a black border. At the top, there are navigation icons (a square with an arrow and an 'X') and a status bar showing signal strength, Wi-Fi, 97% battery, and 2:23 PM. The title bar is dark grey with the text 'Fill a Form'. Below the title bar, the form is divided into two sections. The first section is titled 'List assessment activities conducted.\*' and contains a list of 11 items, each with an unchecked checkbox: 'Identified deficient adaptive or maladaptive behavior', 'Developed a plan of care', 'Conducted an observation', 'Obtained history of patient and past behavioral functioning', 'Conducted interviews with parents/caregivers', 'Administered standardized/non-standardized tests', 'Interpreted results of test', 'designed a follow up assessment', 'Discussed findings/recommendations', and 'prepared assessment report, treatment plan, and/or behavior interven...'. The second section is titled 'List records reviewed (if any):\*' and contains two items with unchecked checkboxes: 'Diagnostic report' and 'Medical evaluation report'. At the bottom of the form is a green bar with a white 'Save' button. Below the form is a blue Android navigation bar with icons for home, back, and recent apps.

Fill a Form

List assessment activities conducted.\*

- Identified deficient adaptive or maladaptive behavior
- Developed a plan of care
- Conducted an observation
- Obtained history of patient and past behavioral functioning
- Conducted interviews with parents/caregivers
- Administered standardized/non-standardized tests
- Interpreted results of test
- designed a follow up assessment
- Discussed findings/recommendations
- prepared assessment report, treatment plan, and/or behavior interven...

List records reviewed (if any):\*

- Diagnostic report
- Medical evaluation report

Save

The next few slides are screenshots of exactly what you will see in the Assessment Form. Familiarize yourself with these questions to minimize time spent here, while providing thorough answers.



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The screenshot shows a mobile application interface with a black border. At the top, there are icons for a share function and a close function. Below that, the status bar shows signal strength, Wi-Fi, 97% battery, and 2:23 PM. The main title is "Fill a Form".

**List records reviewed (if any).\***

- Diagnostic report
- Medical evaluation report
- IEP
- 504
- BIP
- Psychiatric evaluation reports
- Psychological evaluation reports

**List preference assessment conducted (if any).\***

- Parent interview
- Free-operant
- Trial by trial preference assessment
- Survey
- Multiple stimulus with or without reinforcement

At the bottom of the form is a green bar with a white "Save" button and a small icon. Below the form is a blue Android navigation bar with icons for home, back, and recent apps.

Here are additional points for your consumption.



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The screenshot shows a mobile application interface with a black border. At the top, there are navigation icons (back, home, recent apps) and a status bar showing signal strength, Wi-Fi, 97% battery, and 2:24 PM. The title bar is dark grey with the text "Fill a Form".

The form content is as follows:

**List preference assessment conducted (if any):\***

- Parent interview
- Free-operant
- Trial by trial preference assessment
- Survey
- Multiple stimulus with or without replacement
- Other

**List skills assessment conducted (if any):\***

- VB-MAPP
- ABLLS-R
- AFLS
- Essentials for Living
- Social Skills Checklist
- Skillstreaming

At the bottom of the form is a green bar with a white "Save" button and an upward arrow icon. Below the form is a blue Android navigation bar with back, home, and recent apps icons.

Here is the form continued.



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The screenshot shows a mobile application interface for a form titled "Fill a Form". At the top, there are navigation icons for back, home, and search, along with a status bar showing 97% battery and 2:24 PM. The form content includes:

- List skills assessment conducted (if any): \***
  - VB-MAPP
  - ABLLS-R
  - AFLS
  - Essentials for Living
  - Social Skills Checklist
  - Skillstreaming
  - Inventory of Good learner Repertoires
  - PEAK relational training system
  - Vineland
- Describe client problem areas based on parent/caregiver feedback: \***
- Assessor Name: \***

At the bottom of the form is a green bar with a "Save" button. The device's home indicator bar is visible at the very bottom.

We are nearing the bottom of the form, where signatures will need to be captured for insurance billing purposes.



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The screenshot shows a mobile application interface for a form titled "Fill a Form". The form is displayed on a smartphone screen with a black border. At the top, there are standard Android navigation icons (back, home, recent apps) and a status bar showing signal strength, Wi-Fi, 95% battery, and 2:34 PM. The form itself is white with a dark grey header. It contains several input fields and a signature area. The first field is for "Describe client problem areas based on parent/caregiver feedback: \*". Below it is a field for "Assessor Name: \*". The next section is for "Assessor Signature: \*" and features a large dashed blue rectangular box for the signature, with a blue "Clear" button below it. At the bottom of the form are fields for "Parent/Caregiver name (if present)" and "Parent/Caregiver signature (if present)". A green bar at the very bottom of the form contains a white "Save" button with a small icon. The phone's bottom navigation bar is visible at the bottom of the screen.

Here is where you attest to the accuracy of your assessment. Click “Save” after you have signed.

You are **not** finished yet.



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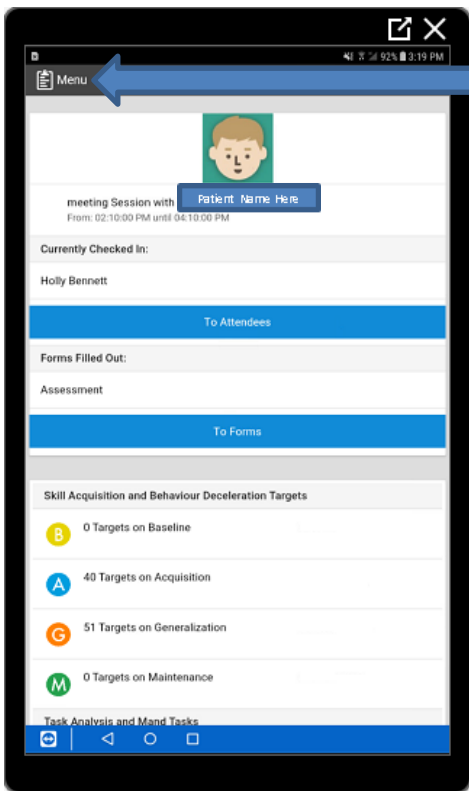


Once you have signed, you will be brought back to the “Forms” screen.



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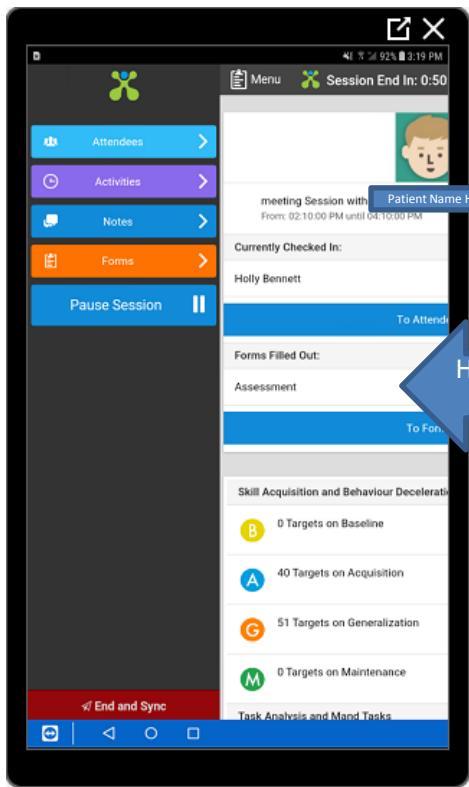


Menu

Pressing the “< Back” button will bring you back up one level, to the Session screen. Press the Menu button.



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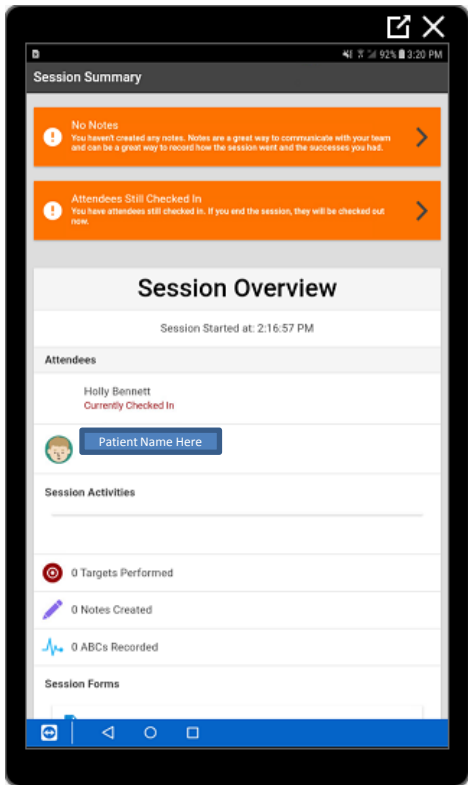
The menu button opens the side taskbar.

Here you can see that the Assessment form has been recorded.

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Press the red “End and Sync” button at the bottom of the taskbar.

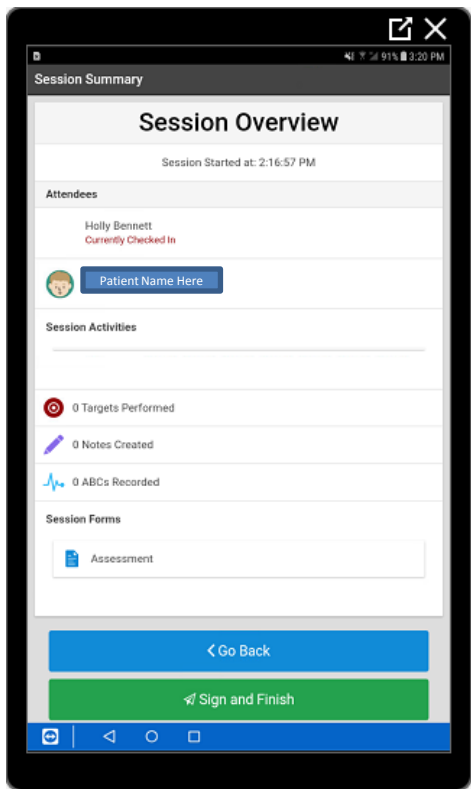
You are **not** finished yet.



The “Session Overview” will open, again showing the any data recorded, and the recorded form(s) as you scroll down.



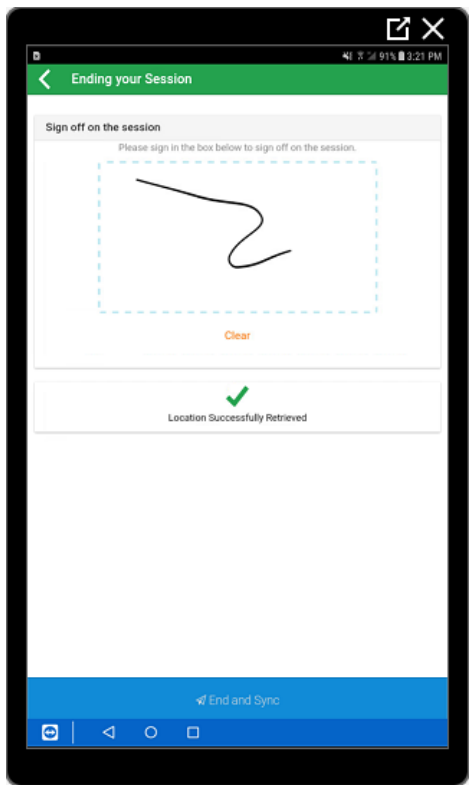
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After you have visual confirmation, press “Sign and Finish” to attest to the session data.



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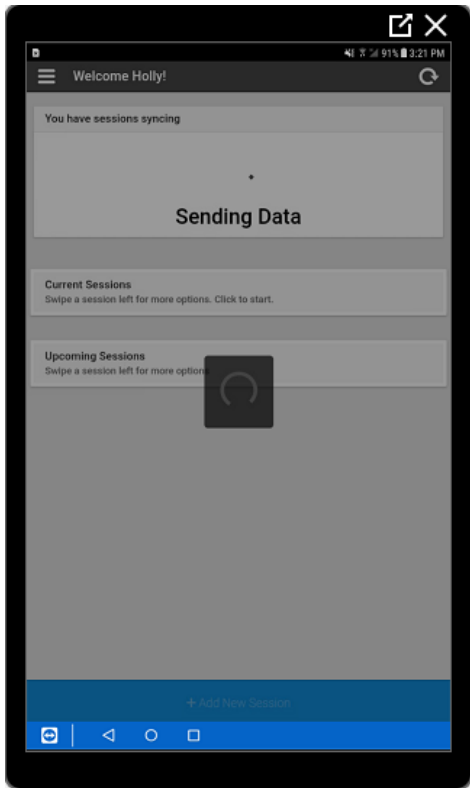


This is where you are attesting that the information you have provided is accurate for the session.

You are **not** finished yet.



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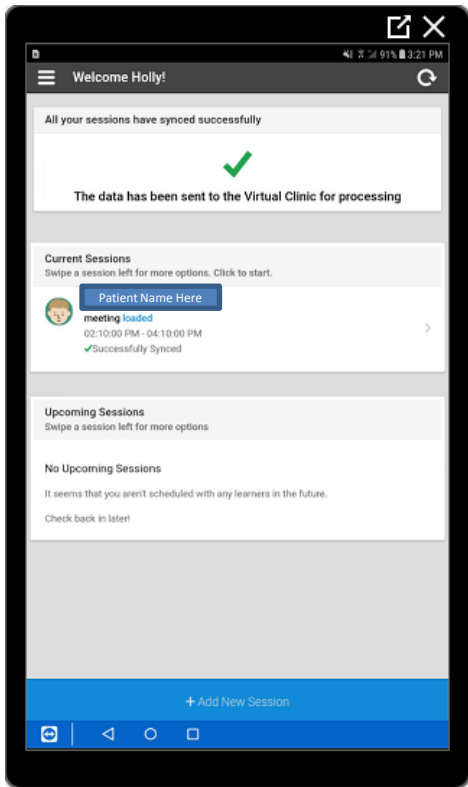


The tablet now pushes all data back to the server for collection.

You are **not** finished yet.



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Now you have successfully finished a session.

If your session does not sync or wifi is down, please fill out a paper form and get parents signatures. This is the **exception**. This needs to be done and sent to [tech4abasolutions@gmail.com](mailto:tech4abasolutions@gmail.com) **within 24 hours** or it will not be back billed and you will not be paid. Please let us know if you have any questions about this.

**\*\*\*If your tablet is consistently not working, you need to reach out to [tablets.abasolutions@gmail.com](mailto:tablets.abasolutions@gmail.com) right away so we can fix the issue.\*\*\***