



PortiaPro V5 Mobile App How To Guide

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Login Screen

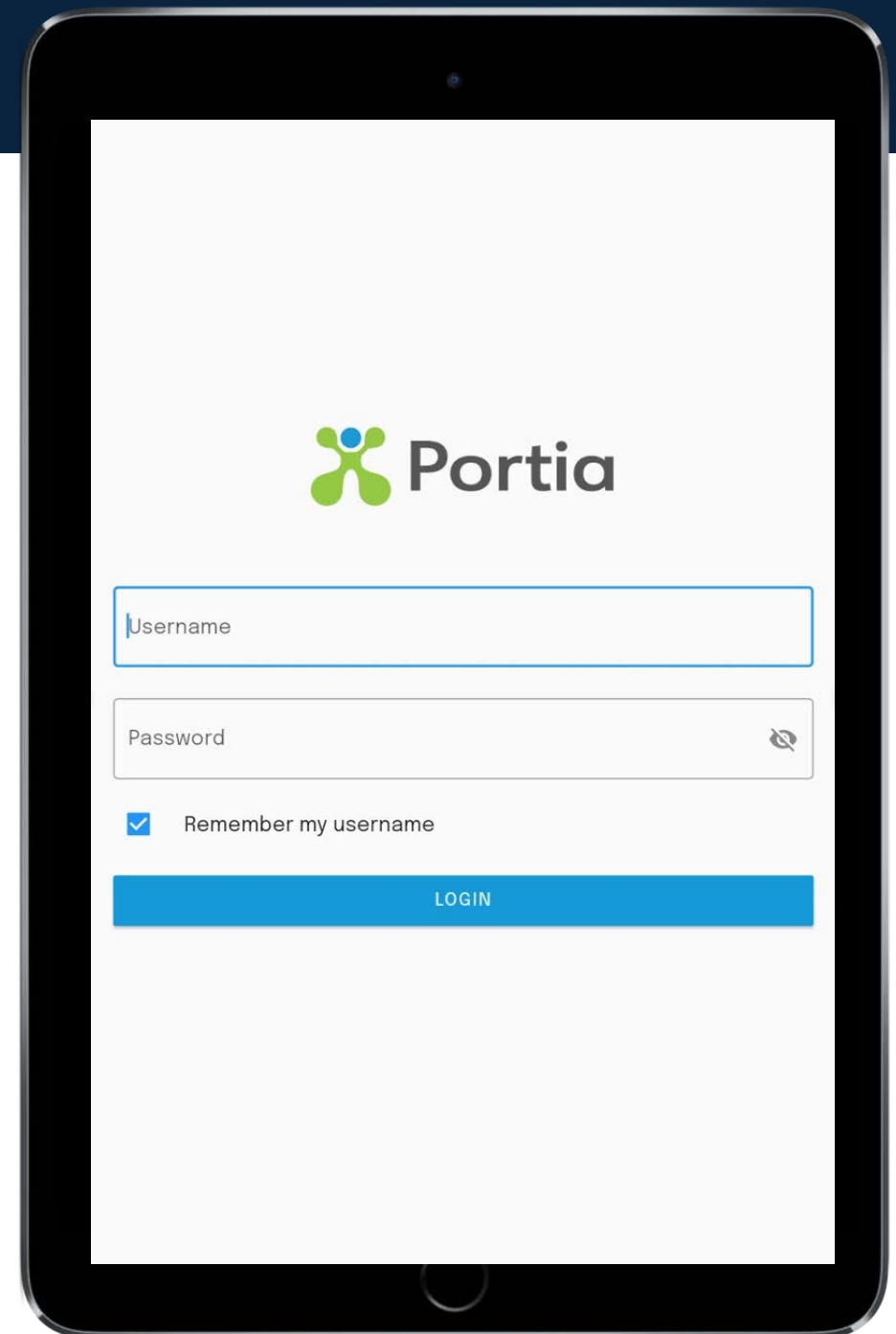
The PortiaPro mobile app is designed for Therapists to collect their session data on. Session types include: one to one, group and meetings

To access the mobile app:

The User must have a Portia account, this is completed via email and a desktop / laptop computer.

**** The web admin cannot be accessed via tablet or phone.***

The User's account must have already been set up by a Clinical Director or Behavior Analyst in the web admin, and the therapist must have agreed to the EULA (End User License Agreement).

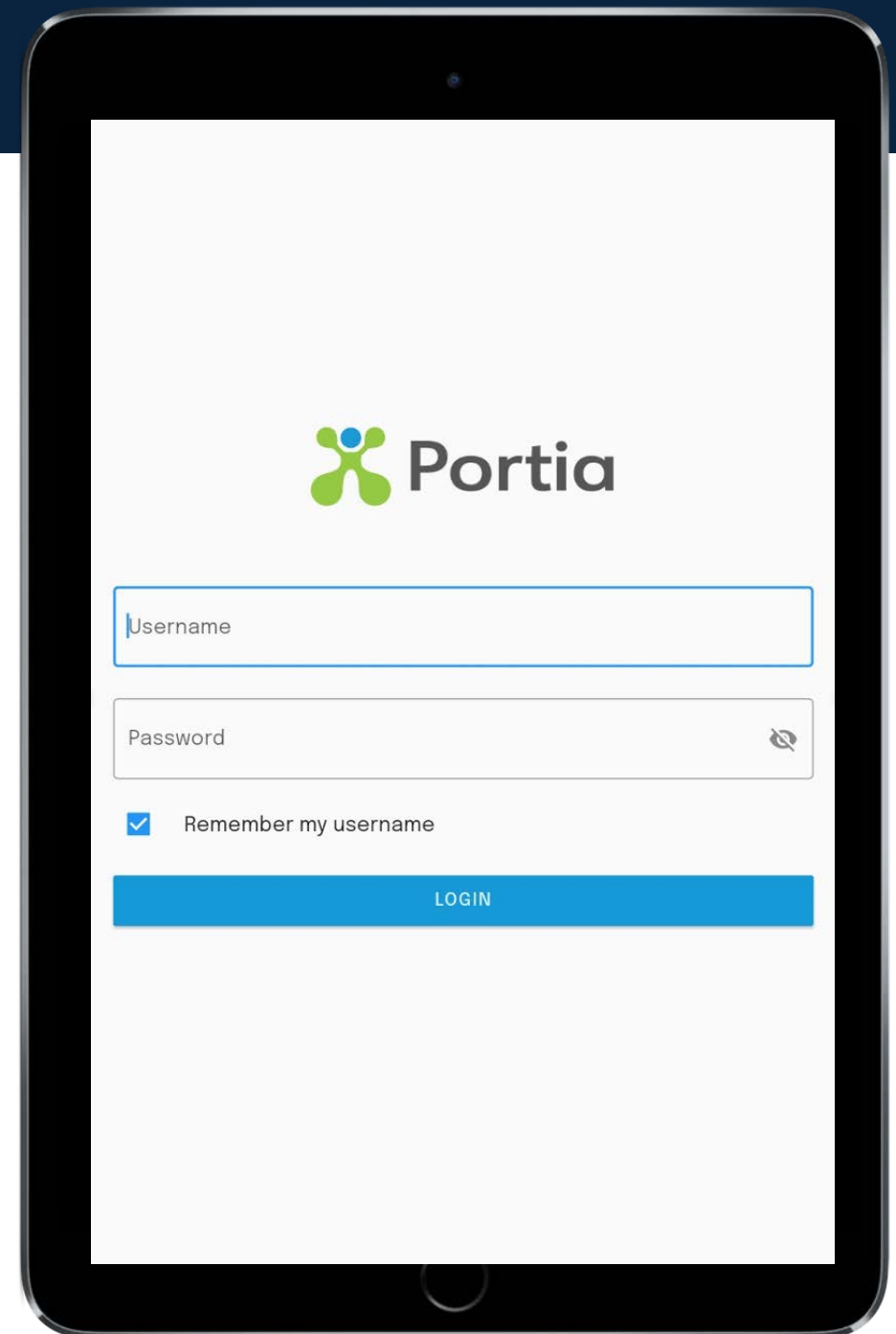


Login Screen - Password

To commence, the user will enter username and password, then select “Login”

If you forget your password, you can change your password by going to the web admin and select “Forgot my password”.

The password reset instructions will be emailed to you.



Home Screen

The Home Screen is where you will see all scheduled sessions and where you can schedule new sessions.

On the bottom of the screen there are three tabs:

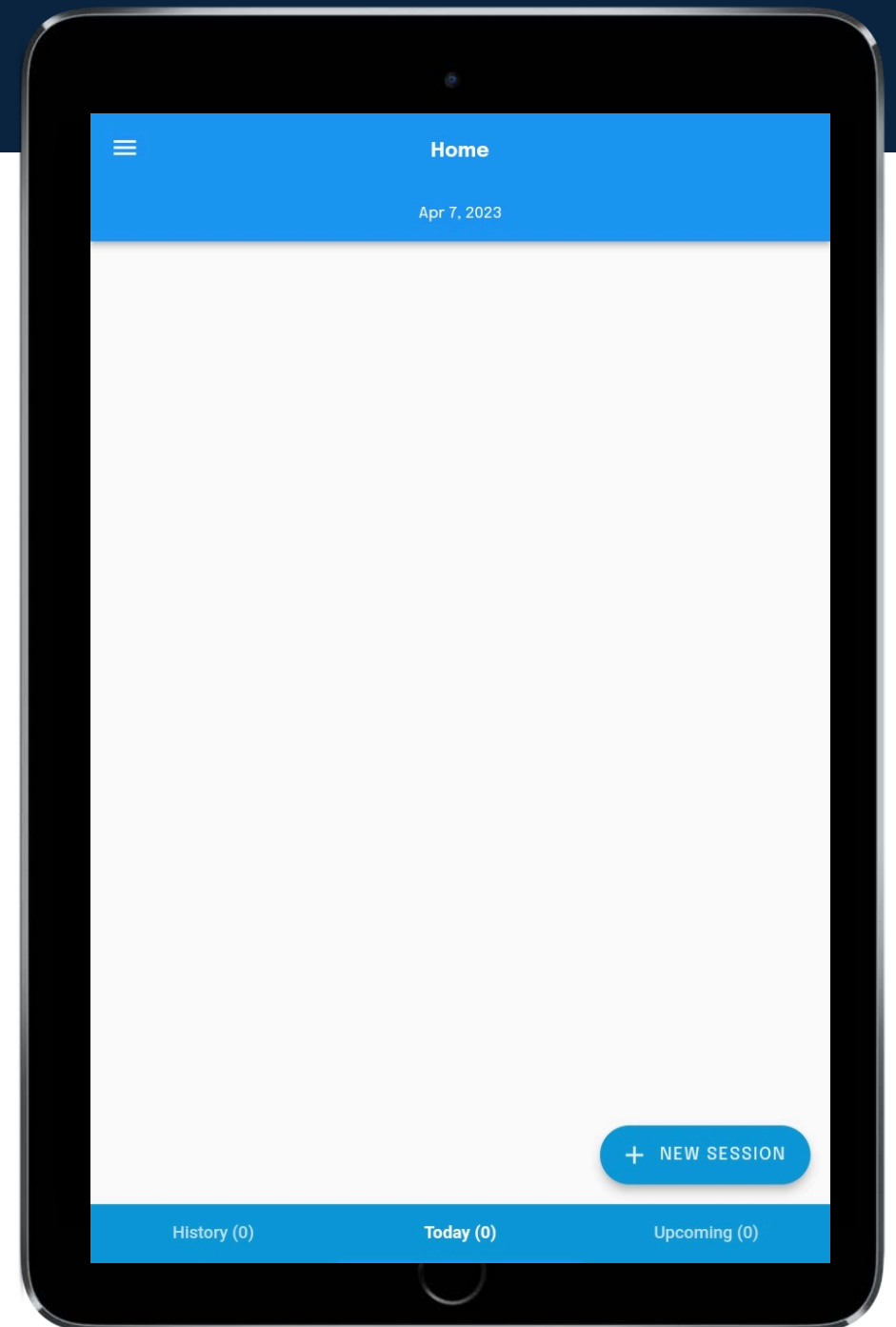
History - last ten sessions

Today - all sessions schedule for today

Upcoming - next ten sessions

If there are no sessions scheduled, press + NEW SESSION to schedule a session with your Learner

NOTE: Session History – will not show sessions completed on another device, this is a local history.



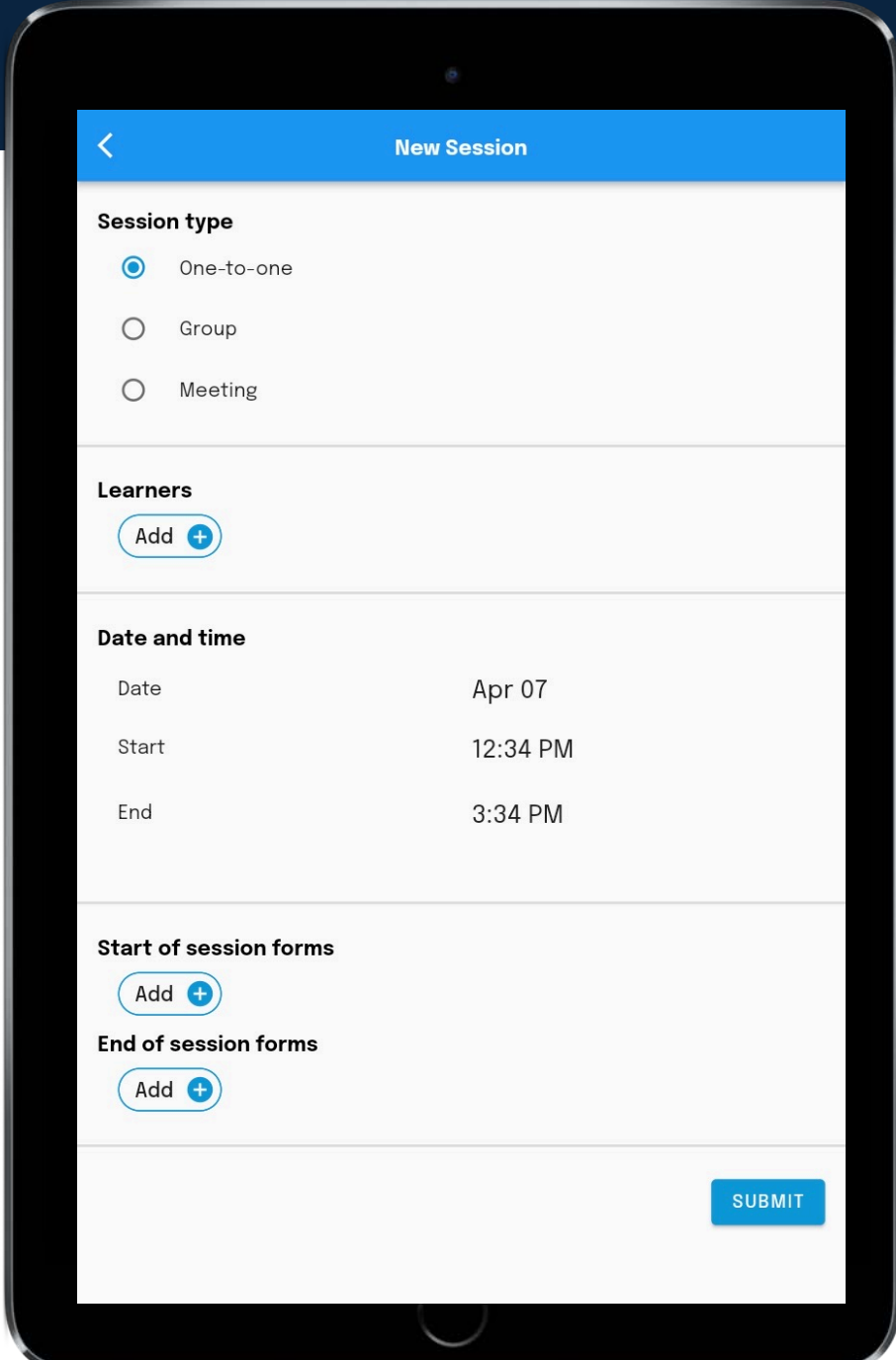
Scheduling a Session

Select your Session Type

1. Meeting Session
2. Therapy Sessions:
 - a. Group session (scheduling multiple Learners with one therapist)
 - b. One to one session

Select:

- One or more Learner(s)
- Bill through Portia (if applicable)
 - Type of Service (billing code if applicable)
 - Billable Location (Home, School, Office)
- Enter the Date,
- Enter the start and end time



The screenshot shows a mobile application interface for scheduling a session. The title bar at the top is blue with a back arrow on the left and the text "New Session" on the right. The form is divided into several sections:

- Session type:** Three radio button options: "One-to-one" (selected), "Group", and "Meeting".
- Learners:** A section with a blue "Add +" button.
- Date and time:** A section with three rows: "Date" (Apr 07), "Start" (12:34 PM), and "End" (3:34 PM).
- Start of session forms:** A section with a blue "Add +" button.
- End of session forms:** A section with a blue "Add +" button.

At the bottom right of the form is a blue "SUBMIT" button.

Scheduling a Session

Select your Session Type

1. Meeting Session
2. Therapy Sessions:
 - a. Group session (scheduling multiple Learners with one therapist)
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Select:

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The screenshot shows a mobile application interface for scheduling a session. The title bar at the top is blue with a back arrow on the left and the text "New Session" on the right. The form is divided into several sections: "Session type" with three radio button options: "One-to-one" (selected), "Group", and "Meeting"; "Learners" with a list showing "VS Valerie Simmons" and an "Add +" button; "Date and time" with three rows: "Date" set to "Apr 07", "Start" set to "12:30 PM", and "End" set to "3:30 PM"; "Start of session forms" with an "Add +" button; and "End of session forms" with an "Add +" button. A blue "SUBMIT" button is located at the bottom right of the form.

New Session	
Session type	
<input checked="" type="radio"/>	One-to-one
<input type="radio"/>	Group
<input type="radio"/>	Meeting
Learners	
VS Valerie Simmons	Add +
Date and time	
Date	Apr 07
Start	12:30 PM
End	3:30 PM
Start of session forms	
Add +	
End of session forms	
Add +	
SUBMIT	

Scheduling a Session

Select your Session Type

1. Meeting Session
2. Therapy Sessions:
 - a. Group session (scheduling multiple Learners with one therapist)
 - b. One to one session

Select:

- One or more Learner(s)
- Bill through Portia (if applicable)
 - Type of Service (billing code if applicable)
 - Billable Location (Home, School, Office)
- Enter the Date,
- Enter the start and end time

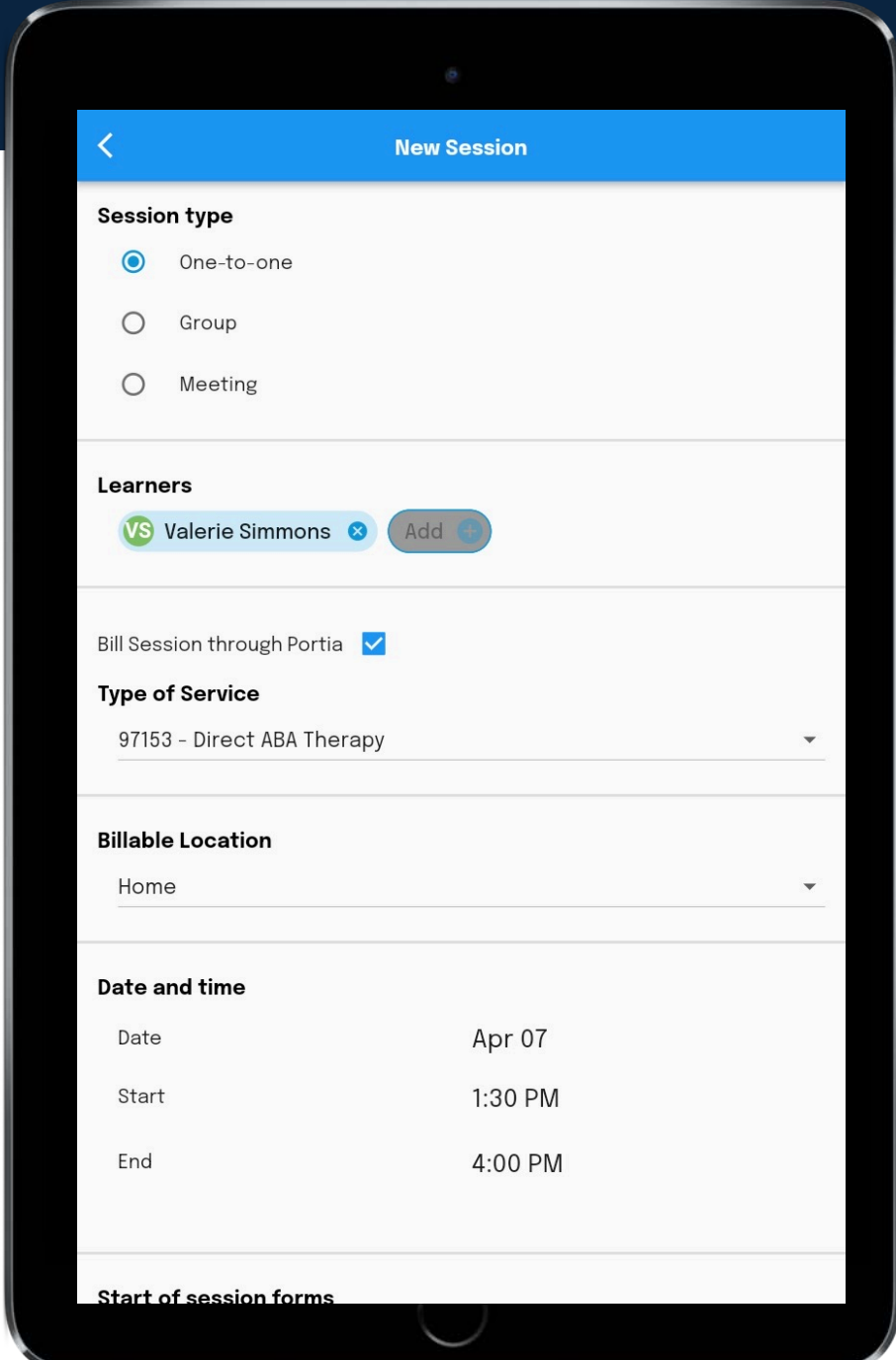
The screenshot shows a mobile application interface for scheduling a session. The title bar at the top is blue with a back arrow on the left and the text "New Session" on the right. Below the title bar, the form is organized into several sections:

- Session type:** Three radio button options are listed: "One-to-one" (selected), "Group", and "Meeting".
- Learners:** A list of learners is shown, with "VS Valerie Simmons" as the first entry. To the right of the list is a button labeled "Add" with a plus icon.
- Bill Session through Portia:** A checkbox is checked, indicated by a blue checkmark.
- Type of Service:** A dropdown menu is open, showing the selected option "97153 - Direct ABA Therapy".
- Billable Location:** A dropdown menu is open, showing the selected option "Home".
- Date and time:** This section contains three rows of information:
 - Date:** Apr 07
 - Start:** 1:30 PM
 - End:** 4:00 PM
- Start of session forms:** This section is partially visible at the bottom of the screen.

Scheduling a Session

Should the BCBA require you to fill out a start/end of session form, here is where you will find it. You may access all other required forms under the menu tab in the “forms” section.

- Press Submit



The image shows a tablet screen with a 'New Session' form. The form has a blue header with a back arrow and the title 'New Session'. Below the header, there are several sections: 'Session type' with radio buttons for 'One-to-one' (selected), 'Group', and 'Meeting'; 'Learners' with a list showing 'Valerie Simmons' and an 'Add' button; 'Bill Session through Portia' with a checked checkbox; 'Type of Service' with a dropdown menu showing '97153 - Direct ABA Therapy'; 'Billable Location' with a dropdown menu showing 'Home'; and 'Date and time' with fields for 'Date' (Apr 07), 'Start' (1:30 PM), and 'End' (4:00 PM). At the bottom, there is a section labeled 'Start of session forms'.

New Session

Session type

☒ One-to-one

☐ Group

☐ Meeting

Learners

VS Valerie Simmons x Add +

Bill Session through Portia ☒

Type of Service

97153 - Direct ABA Therapy

Billable Location

Home

Date and time

Date Apr 07

Start 1:30 PM

End 4:00 PM

Start of session forms

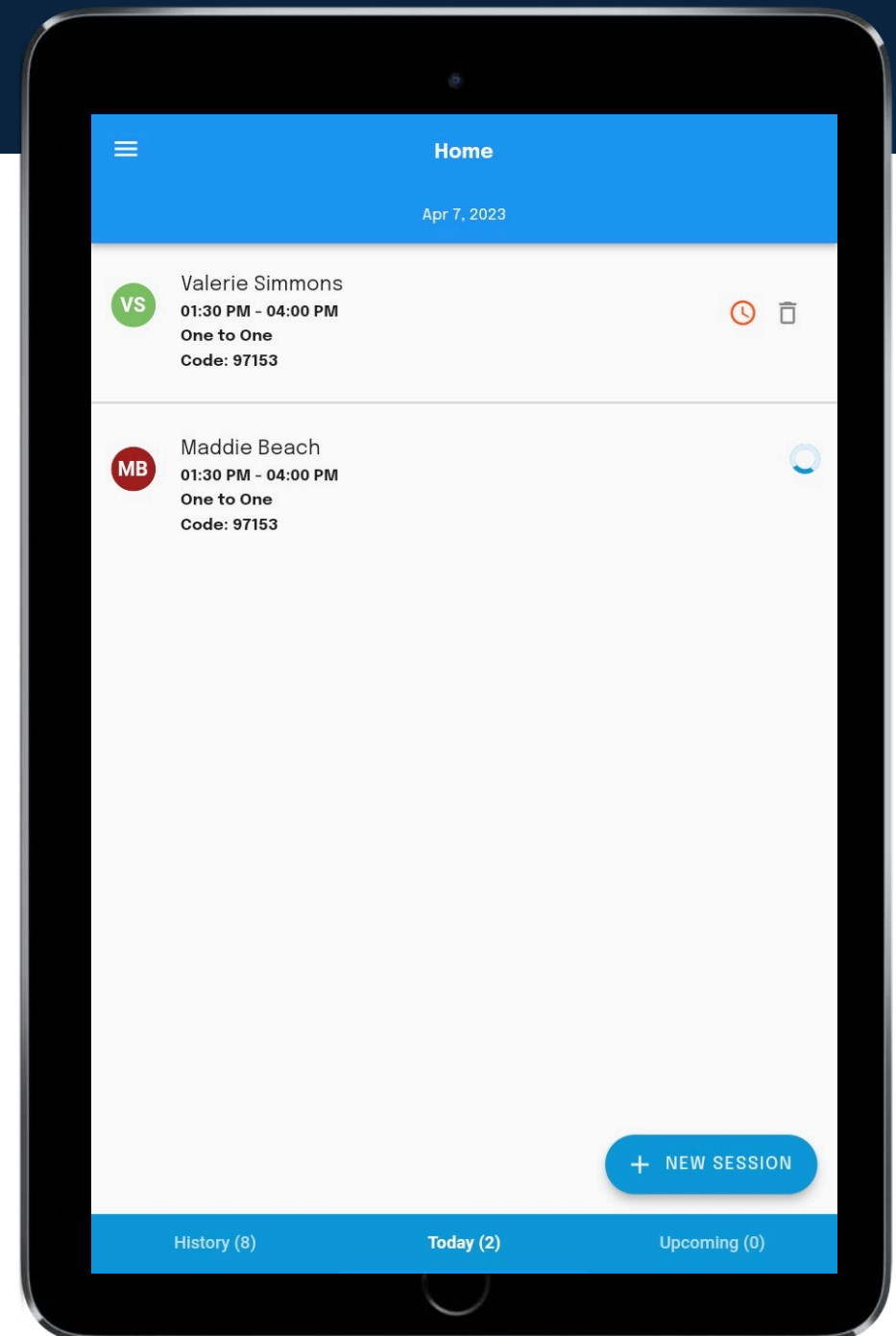
Scheduling a Session

Your schedule for the next ten days will be visible on the tablet. These sessions can be found under the Today or Upcoming tab.

TIP:

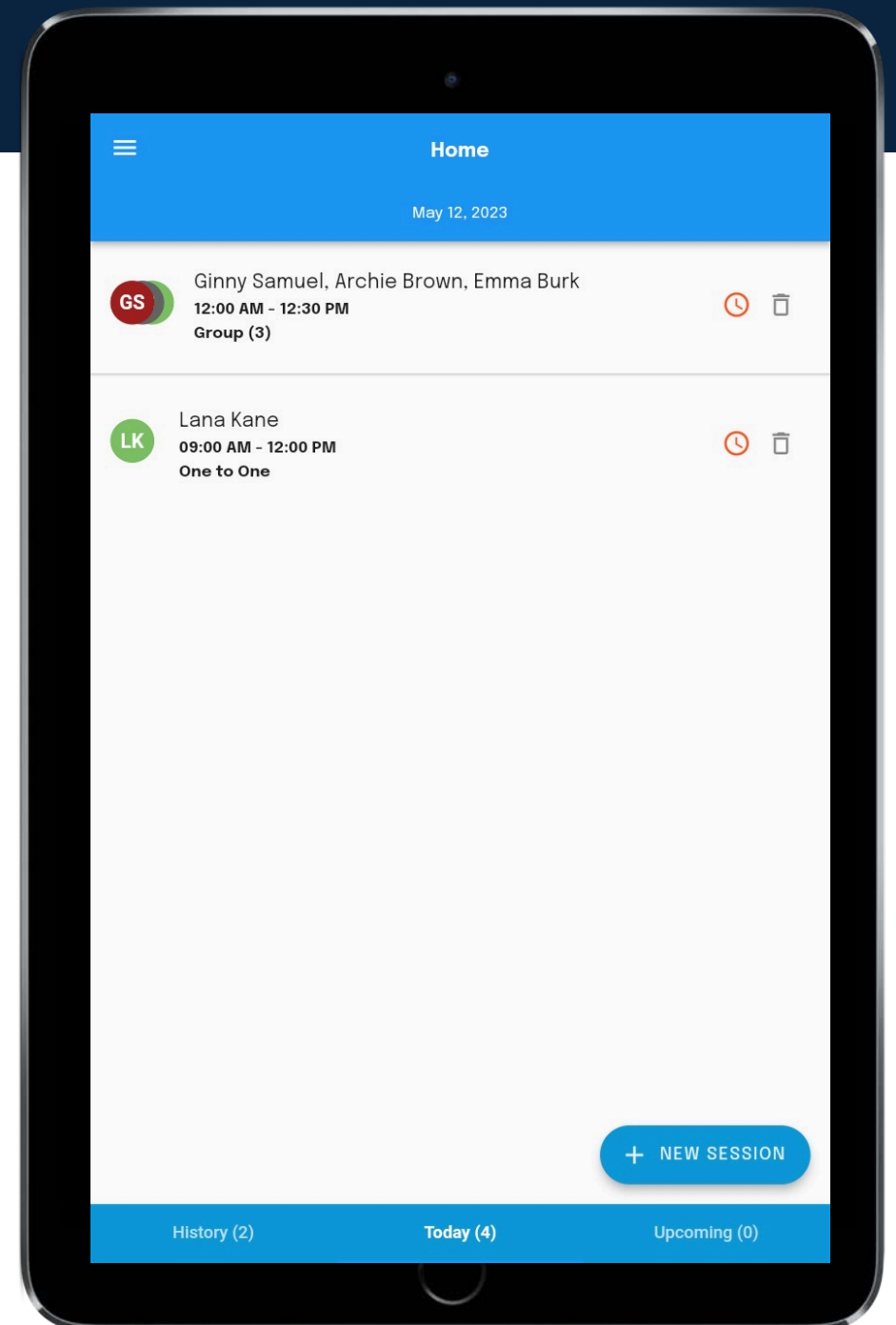
If you do not see the Learner's name in the Learner list, then you have not been added to the Learner's team. Reach out to your clinic supervisor to have you added.

* Only team members can be scheduled to work with Learners



Scheduling a Session

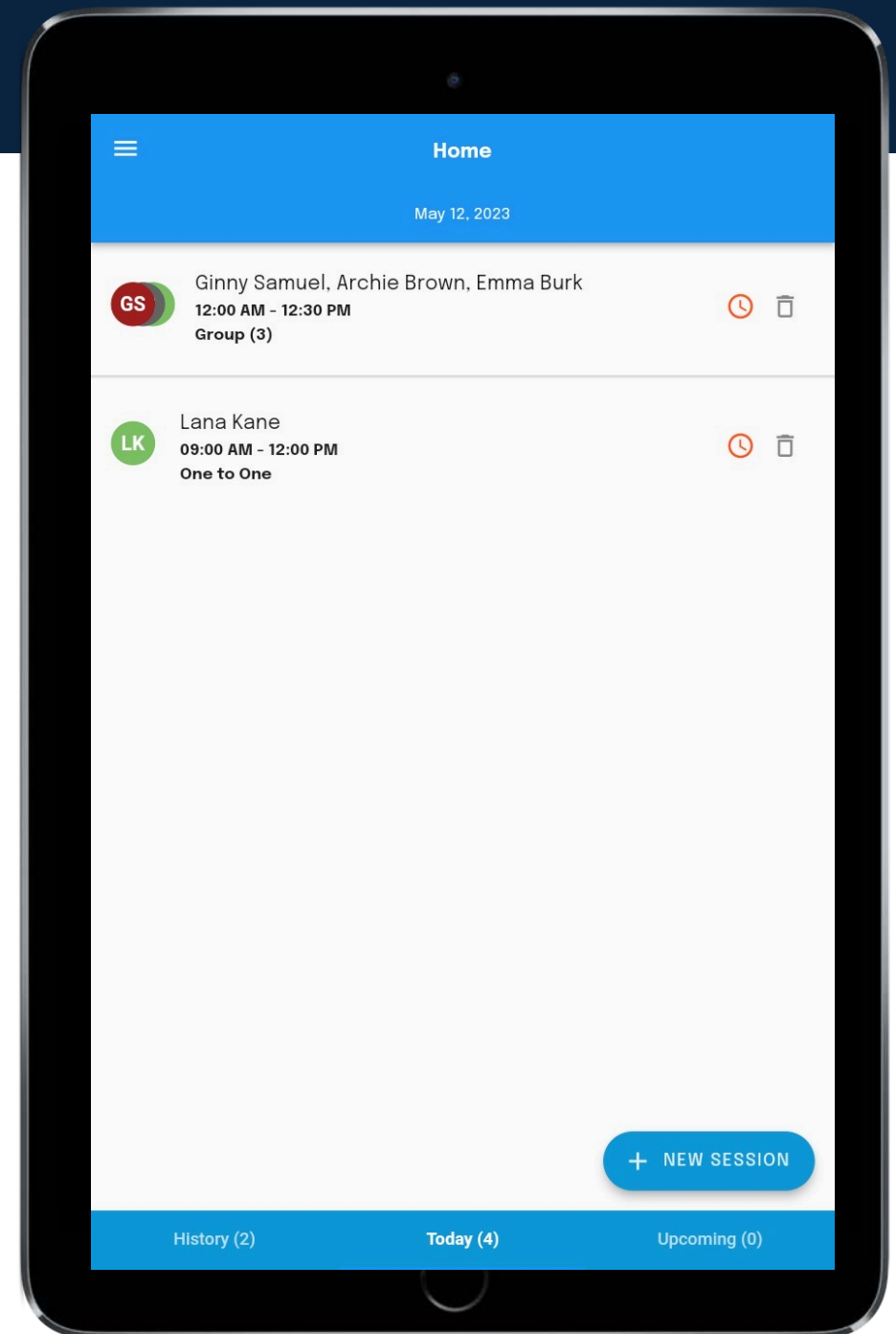
Group Sessions appear as a cascading list of icons with the Learner's names.



Home Screen and App Use

As soon as the session is scheduled and the PortiaPro app is opened, the session will populate on the device. Should you turn off / have no access to WIFI or cellular service after this time, you can still collect data – it will work in "offline mode".

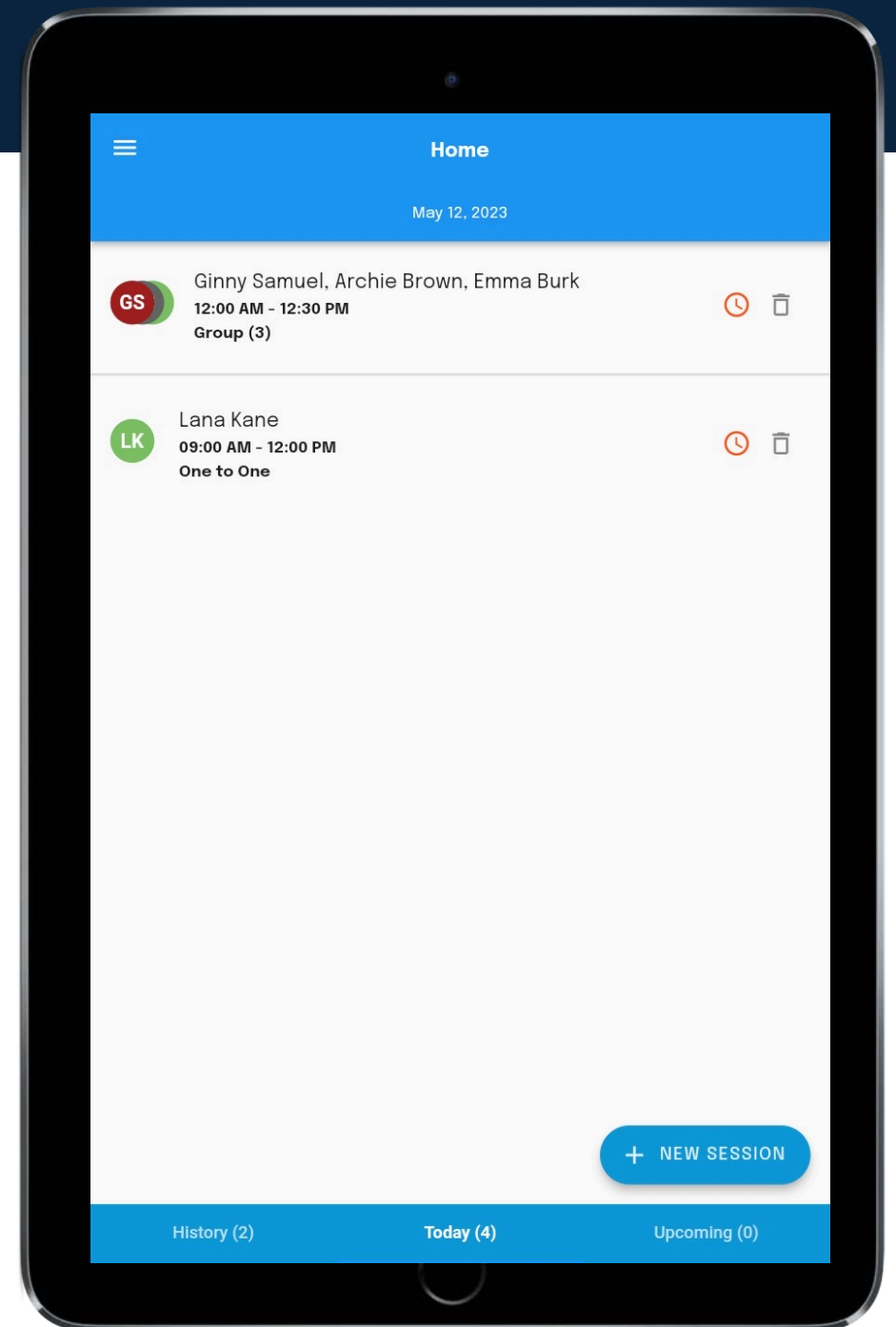
Once you have WIFI or cellular service, open the PortiaPro app and the data will sync with the servers.



Home Screen and App Use

You can enter the session prior to it's Start Time.

Meaning, you can enter the Session, review the Learner's program, review Forms and Notes prior to the scheduled start time.



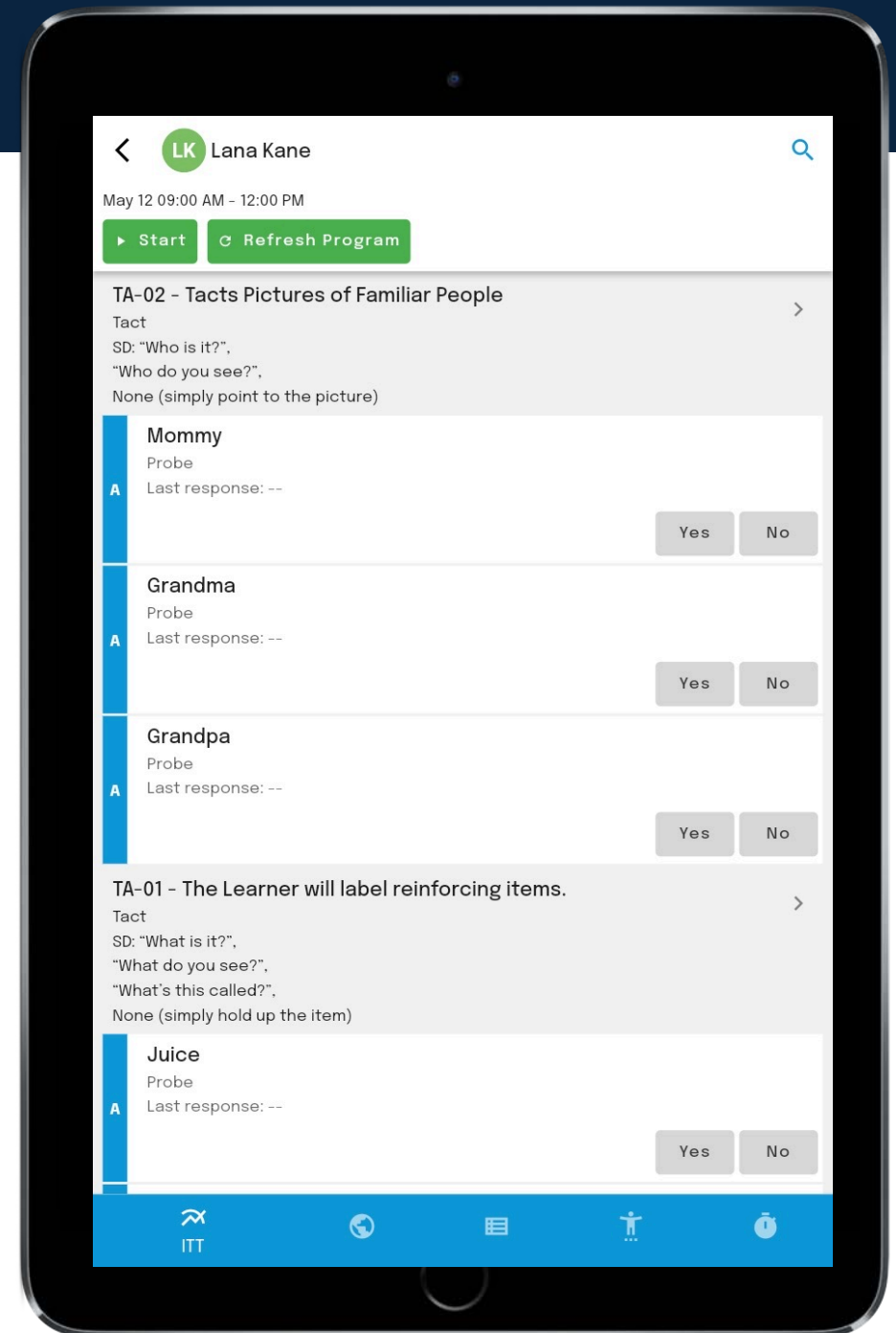
Home Screen and App Use

You can enter the session prior to it's Start Time.

Meaning, you can enter the Session, review the Learner's program, review Forms and Notes prior to the scheduled start time.

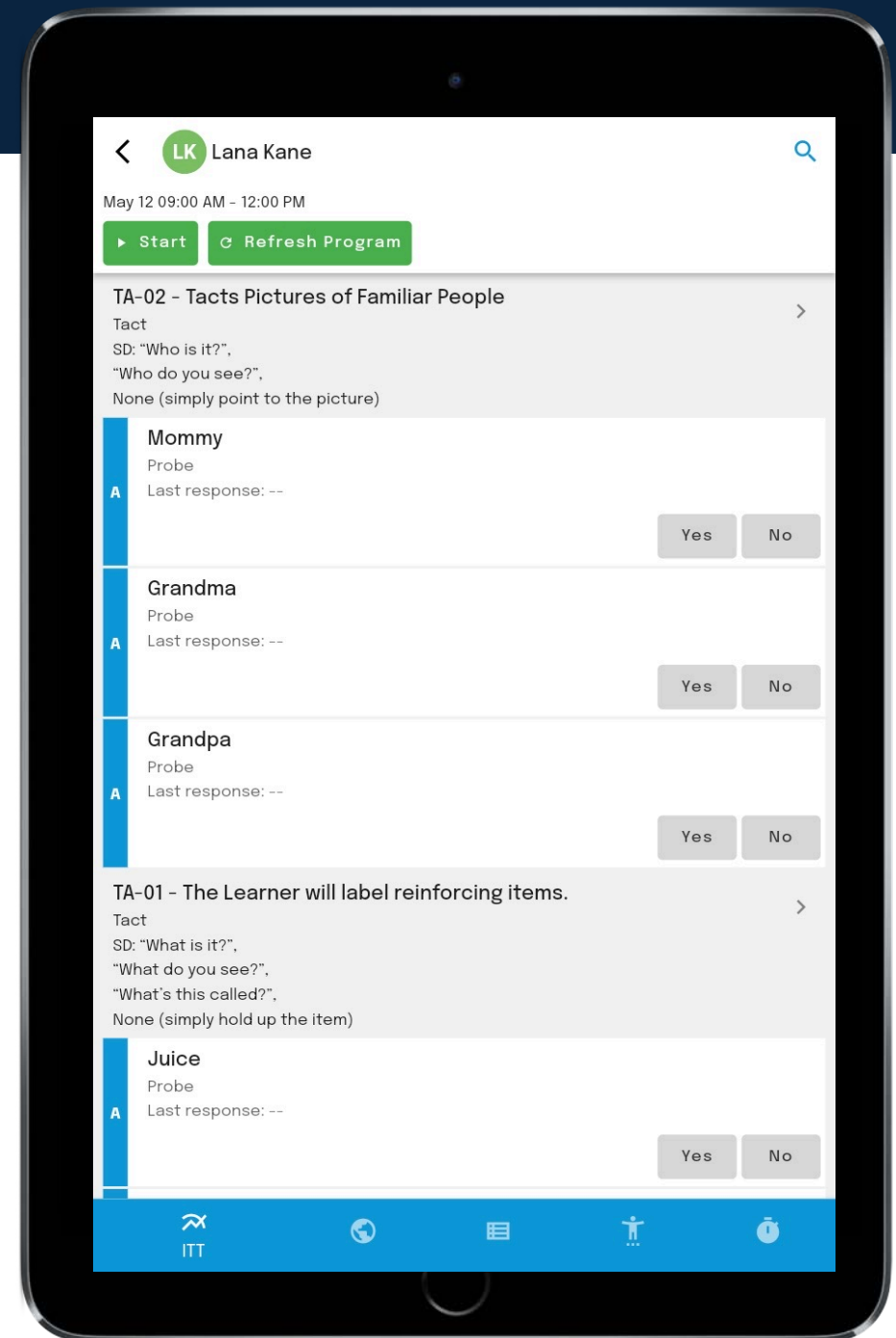
NOTE: You will not be able to record any Data until the Learner is checked in. When you are in the review mode, you will notice the targets are greyed out.

If you see that something needs to be changed in this session PRIOR to pressing **Start**, any new Tasks and Targets can be added to this screen AFTER the changes have been made to the web admin. Press **Refresh Program** to show the changes on the Mobile App



Home Screen and App Use

If you see that something needs to be changed in this session PRIOR to pressing Start, any new Tasks and Targets can be added to this screen AFTER the changes have been made to the web admin. Press Refresh Program to show the changes on the Mobile App



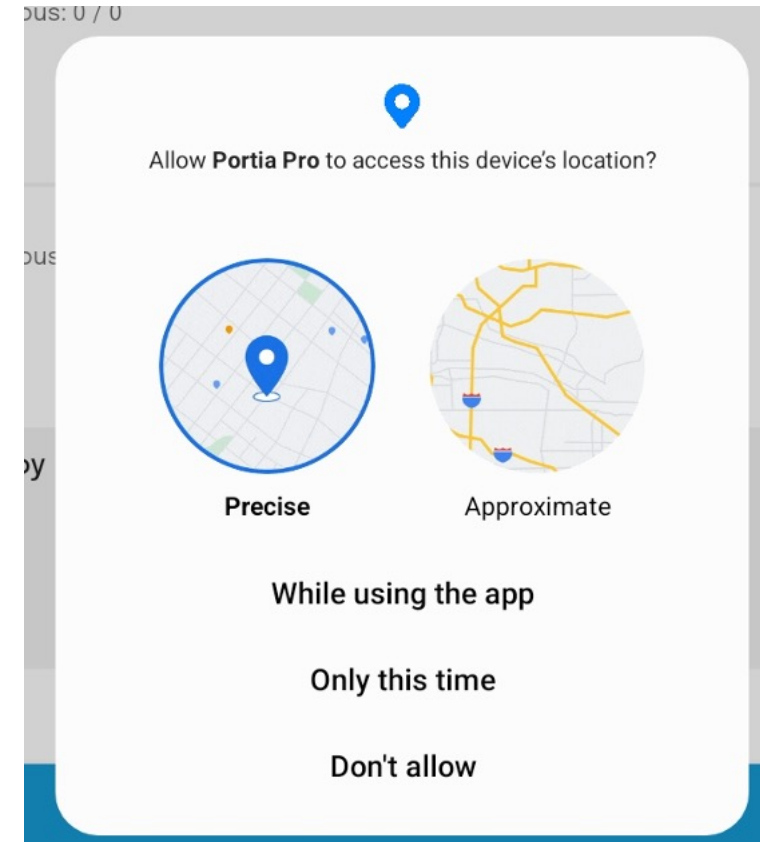
Entering a Session

To commence the Session, you will Check yourself and the Learner(s) in by selecting the Start icon on the top left-hand side.

You will be prompted on the first time of use to Allow Location Services,

You must select Allow While using the app and Precise Location.

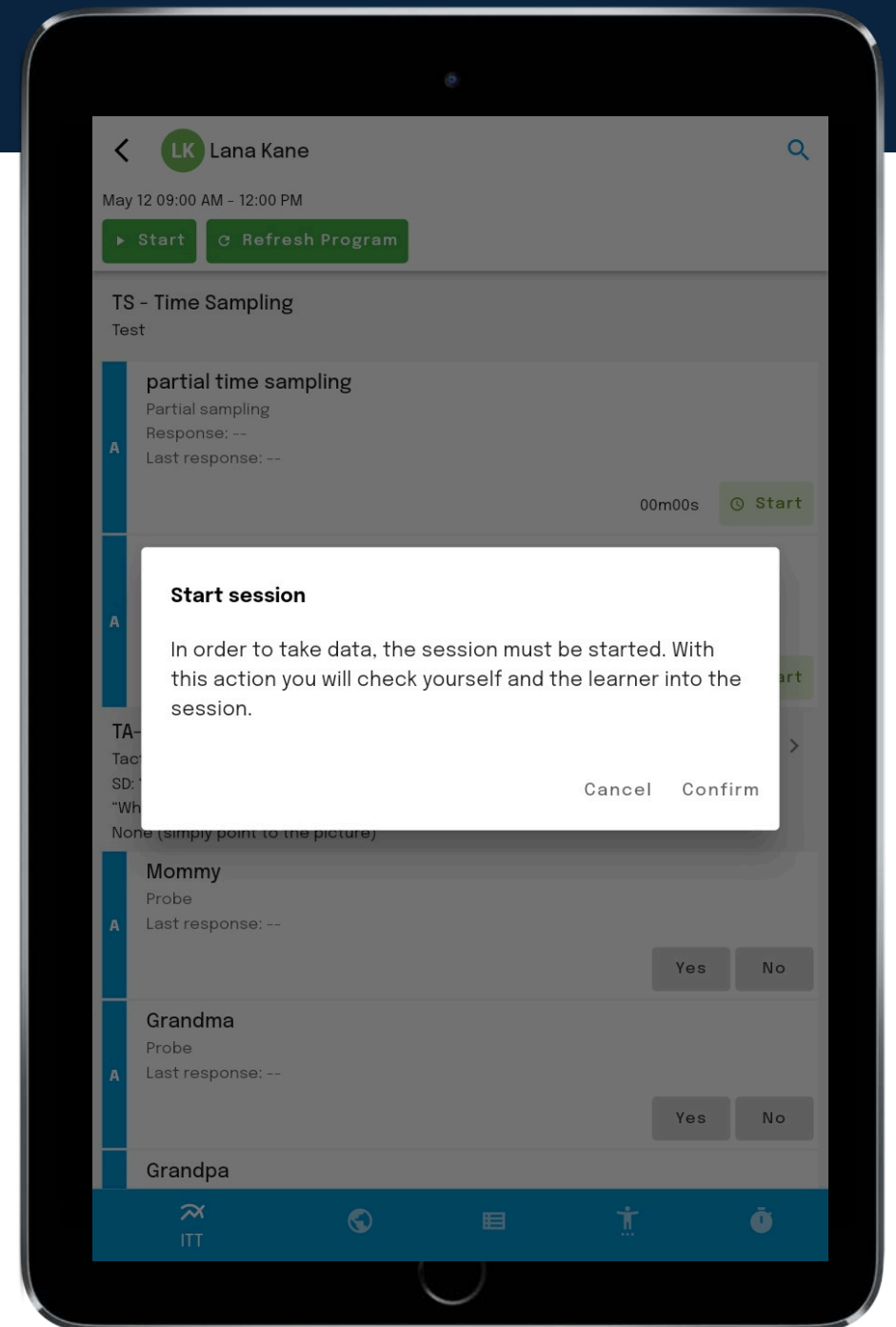
The GPS location(s) will be transmitted to the web admin and recorded in the Session Report.



Entering a Session

To commence the Session, you will Check yourself and the Learner(s) in by selecting the Start icon on the top left hand side.

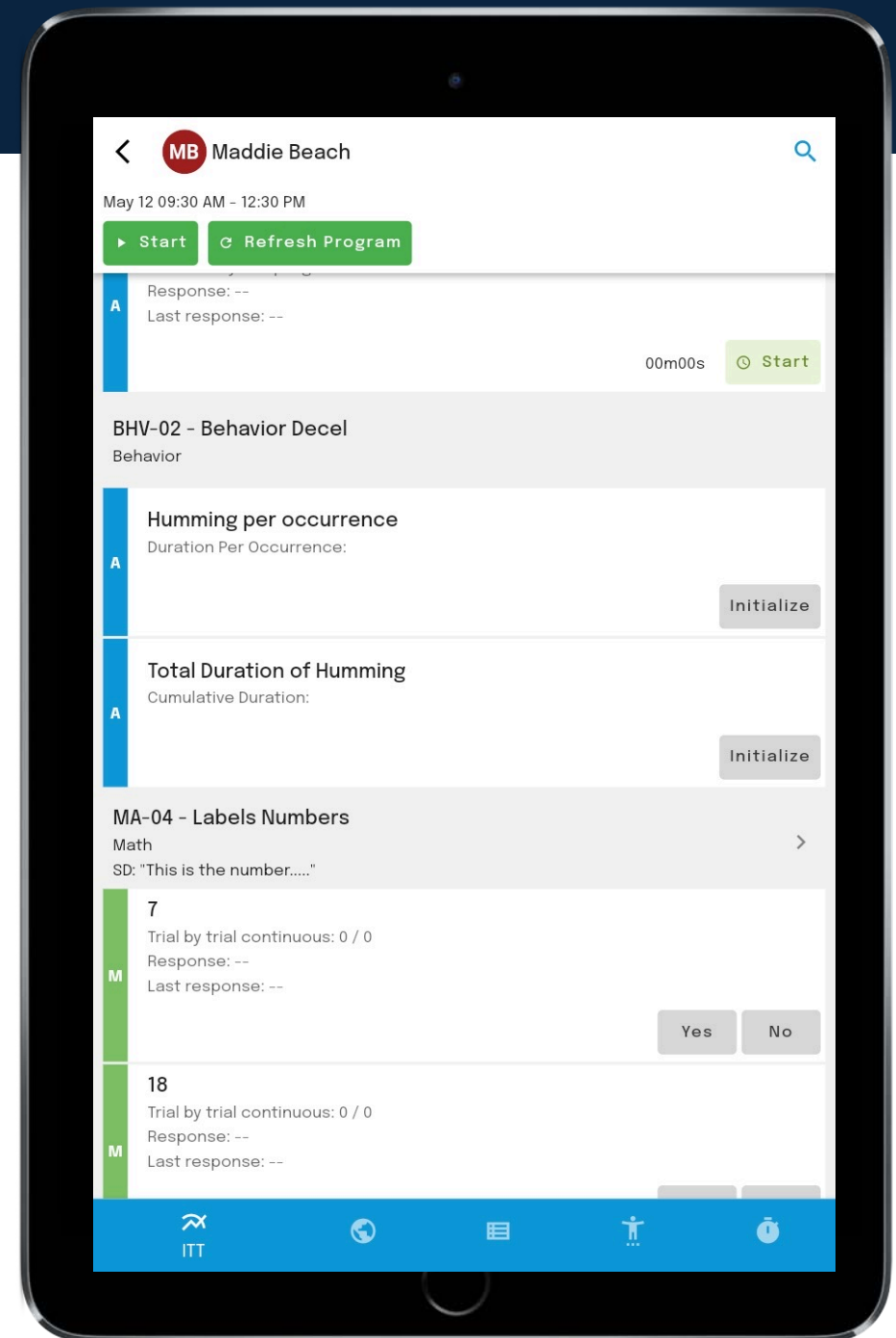
NOTE after this step, the targets will no longer be greyed out



Entering a Session

You can Initialize your Duration Targets before Starting the session.

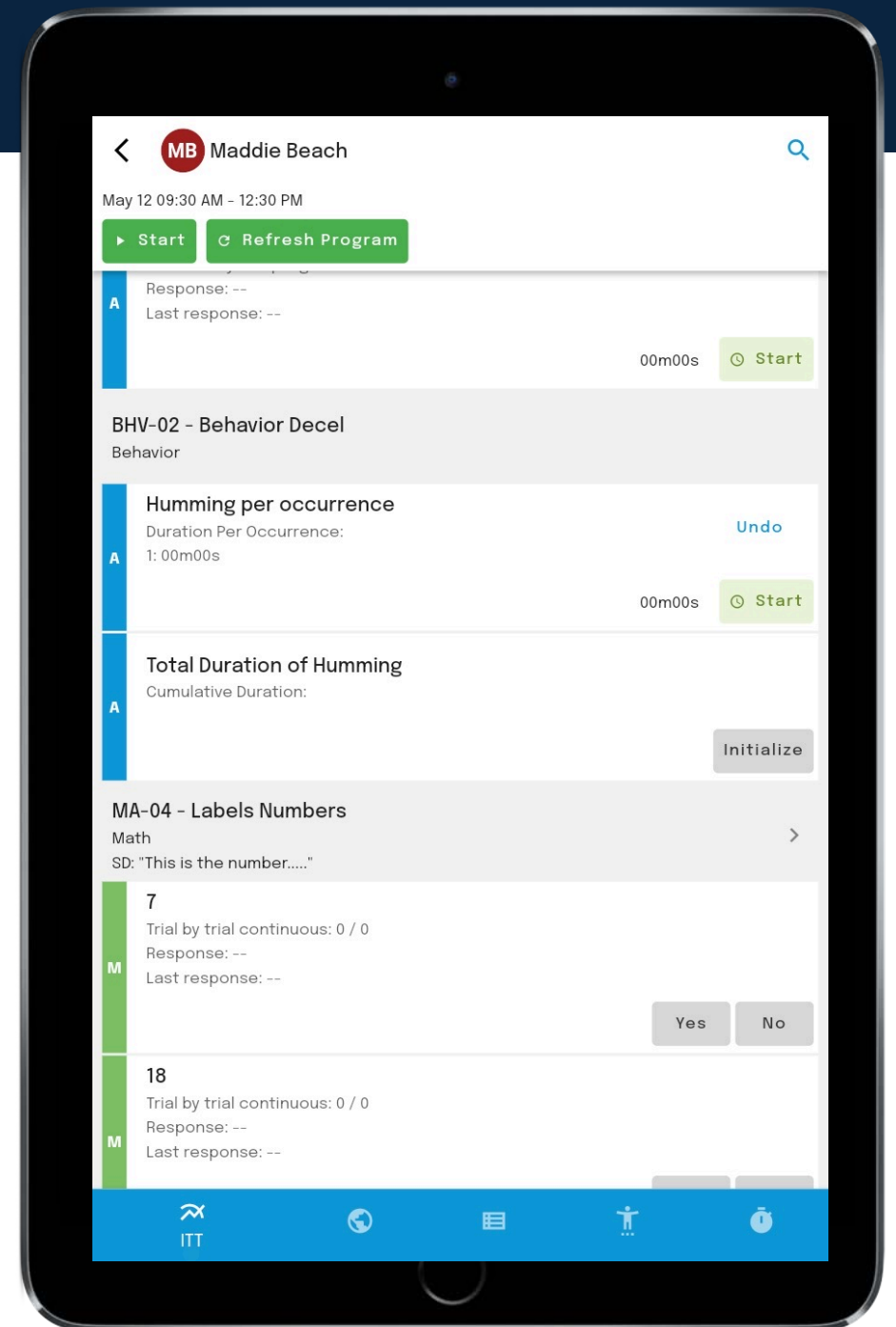
This will set your targets to 0.



Entering a Session

You can Initialize your Duration Targets before Starting the session.

This will set your targets to 0.



Navigating the App

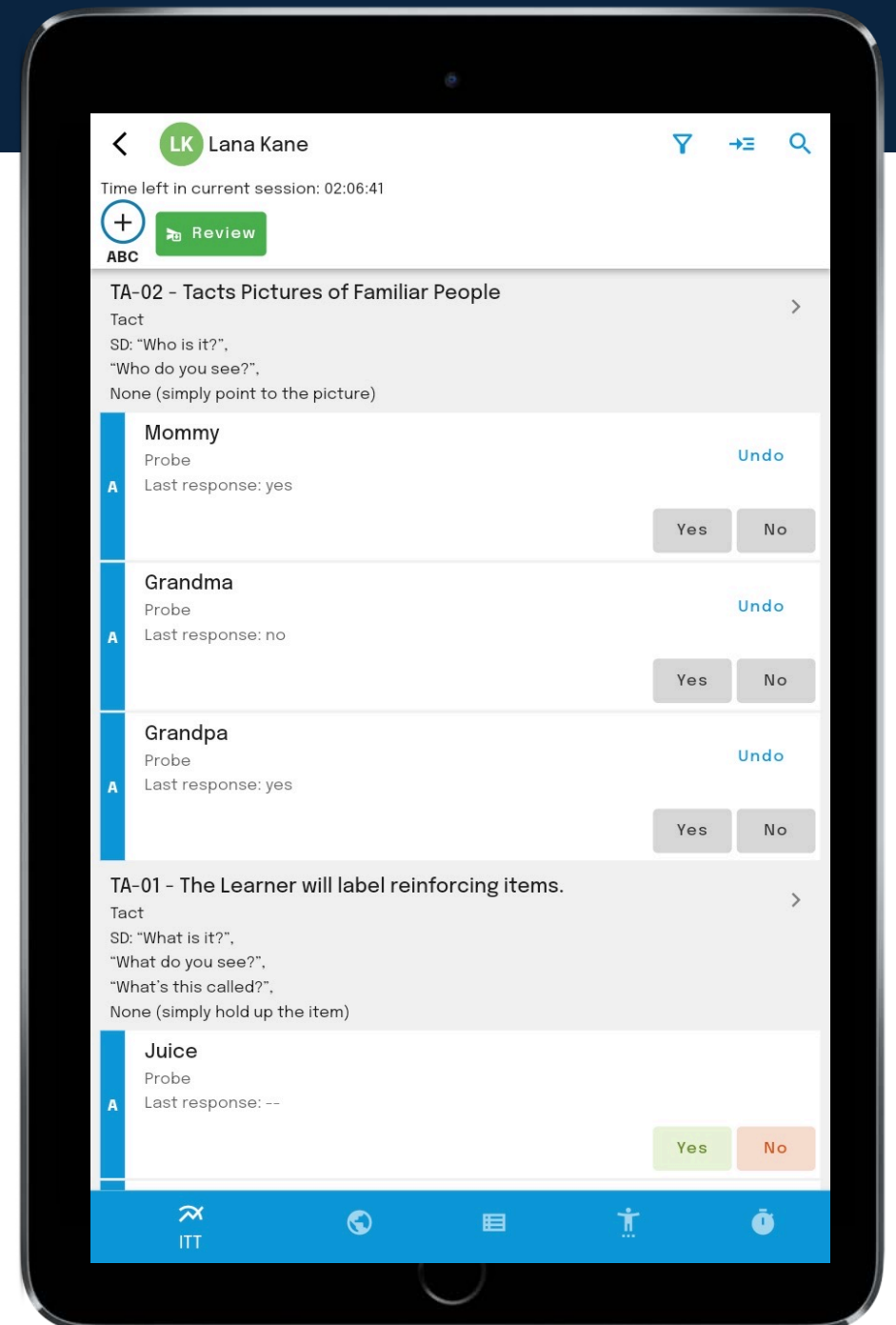
Targets

Each target has a color indicating which status it is in:

- Baseline
- Acquisition
- Maintenance
- Generalization

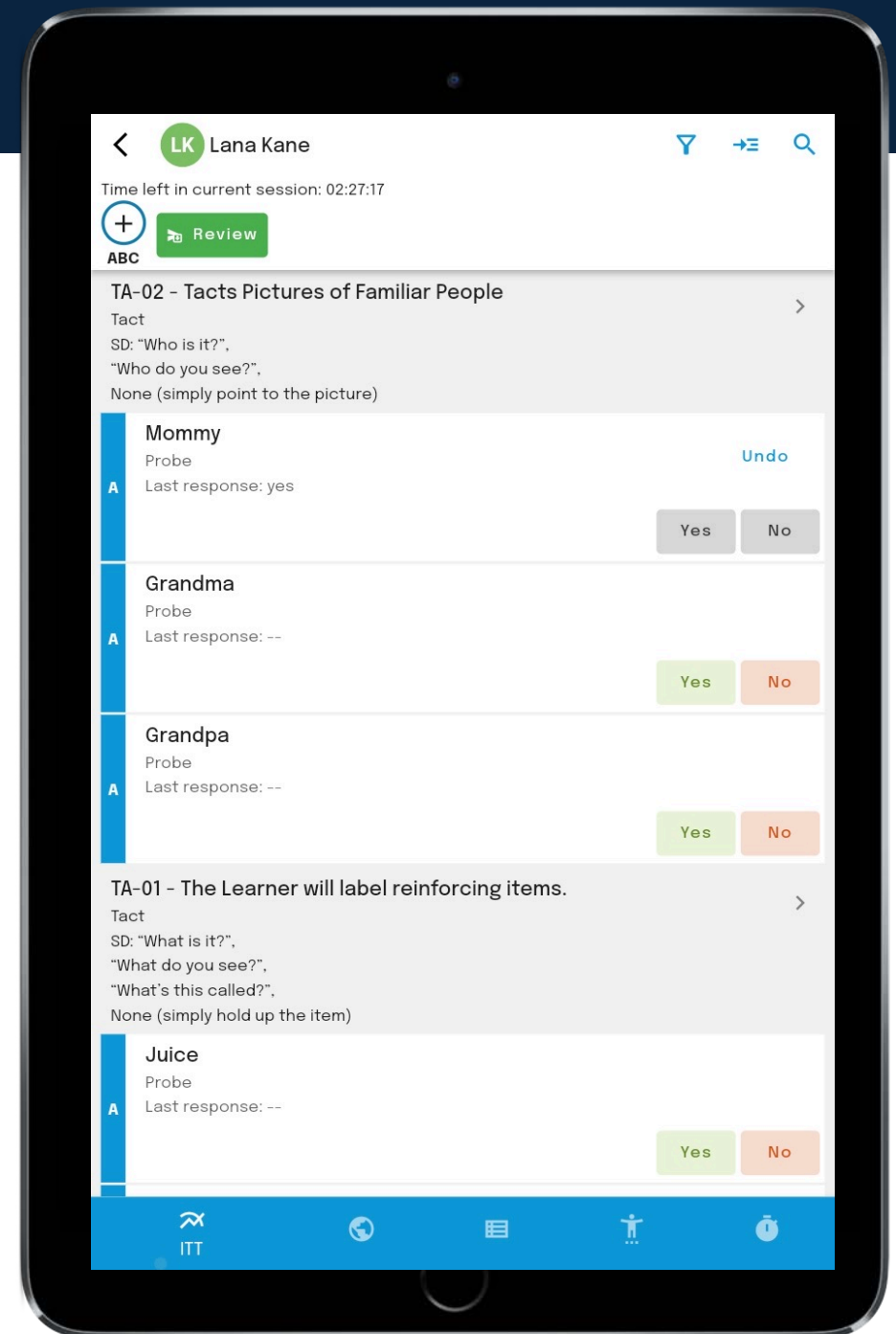
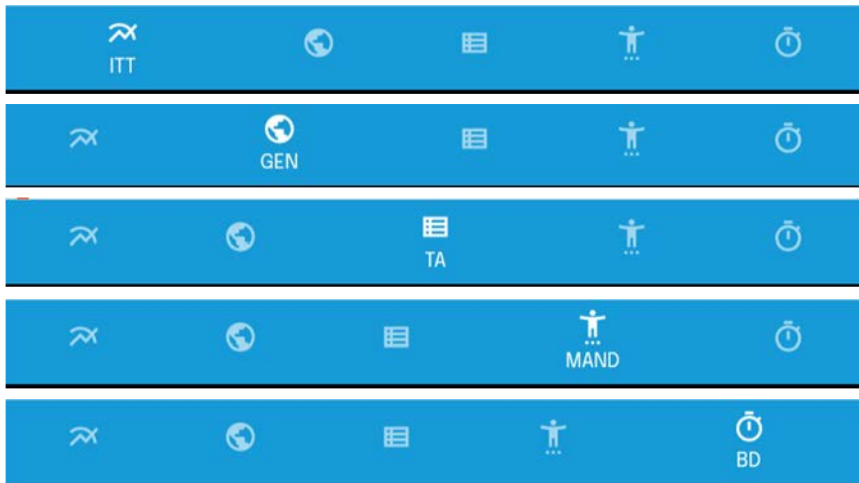
Skill Acquisition Targets are presented on the ITT and GEN screens.

Only Targets which are in the Generalization stage of the target's lifecycle will be presented on the GEN screen.



Navigating the App

When you first enter the Session, you will be brought to the ITT Screen. For Data Collection Screens, see the Bottom Menu to access:
GEN (Generalization),
TA (Task Analysis),
MAND (Mand Frequency,
BD (Behavior Deceleration)

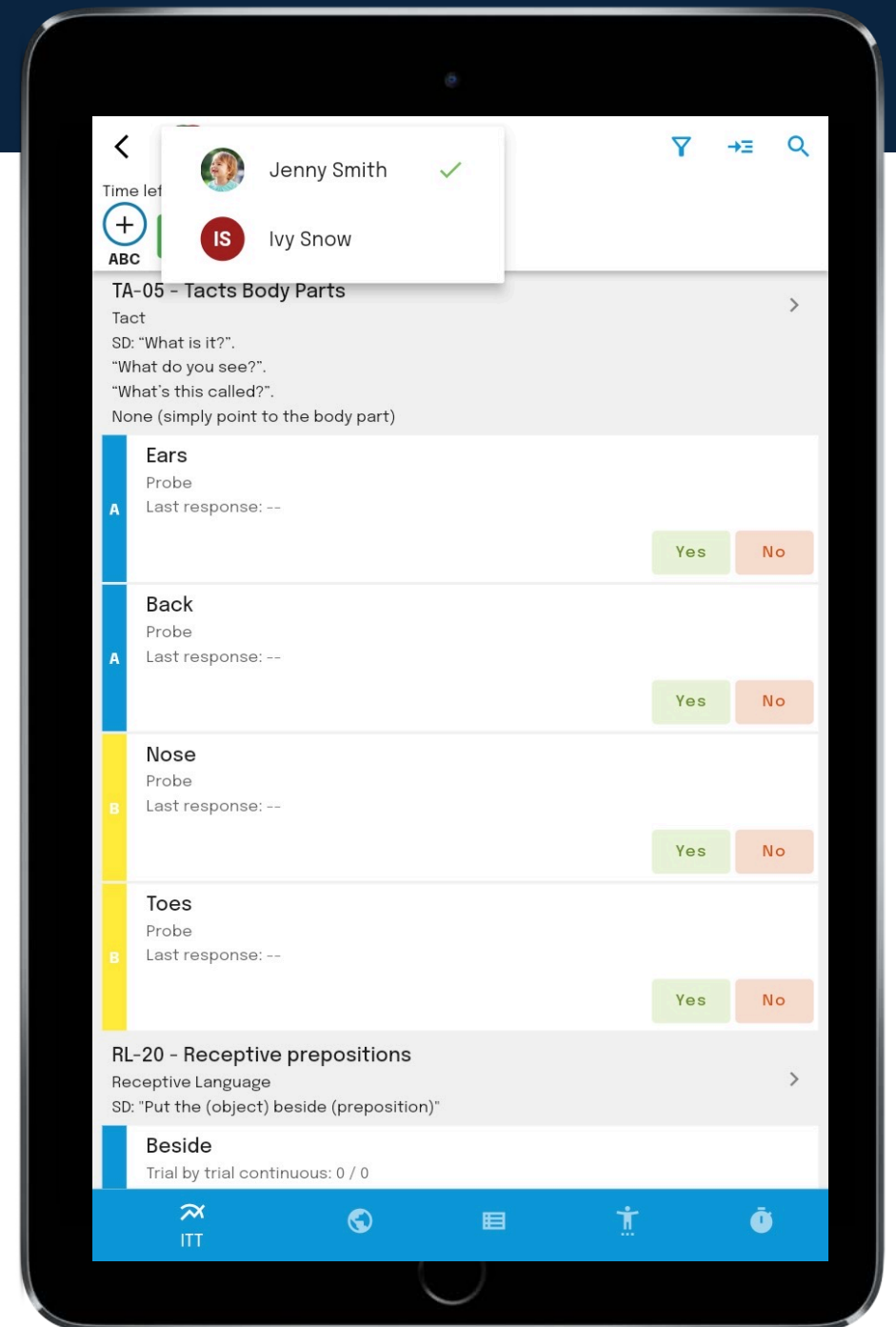


Navigating the App

Group Sessions

Pressing the Avatar for the Learner will open the Selection Box for the Learners.

Press on the Learner you wish to record data for



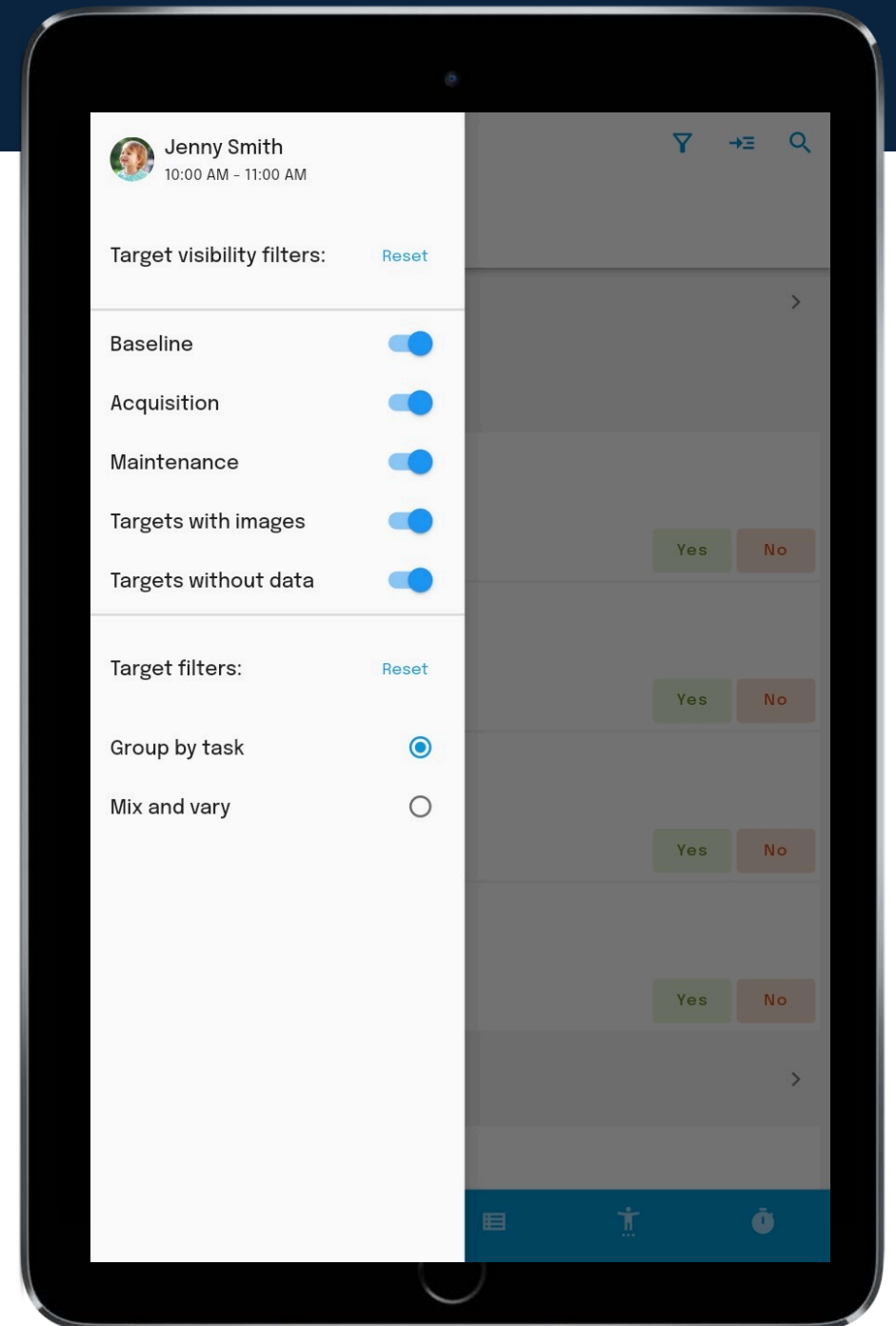
Navigating the App

Filters

The PortiaPro mobile app has two views for Tasks and Targets: Task View and Target View

To change between views, go to Filters on the top menu and on Target Filters, select Group by Task or select Mix and Vary (for Target View).

The default view is Task View



Navigating the App

Filters

To use Mix and Vary press on the toggle next to it and your options will become visible.

Other Filters:

Baseline

Acquisition

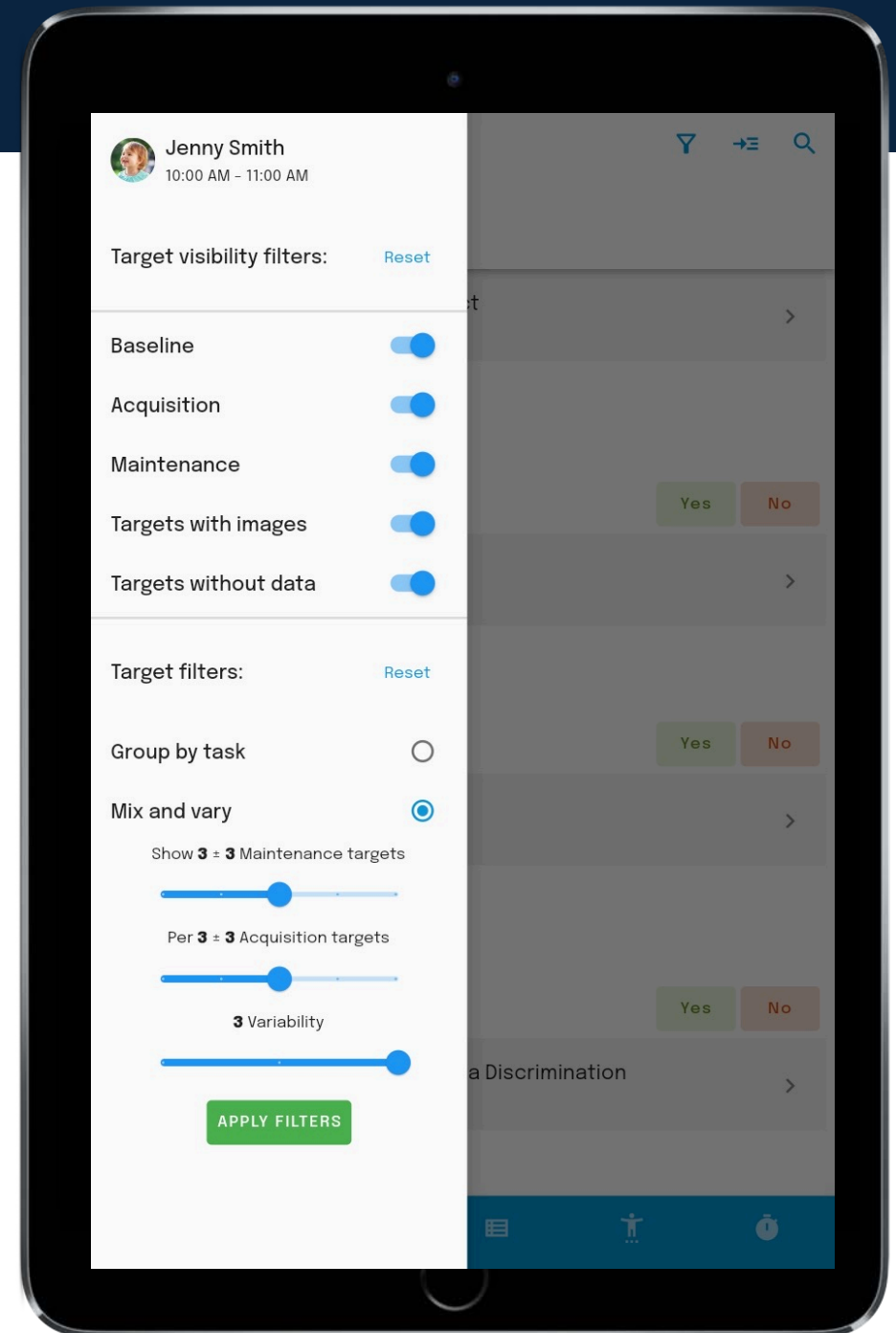
Maintenance

Targets with images

Targets with no data

You can manually re-order the Targets by pressing on the grey bar and move it to where you would like it to go.

You can reset the filters at anytime.

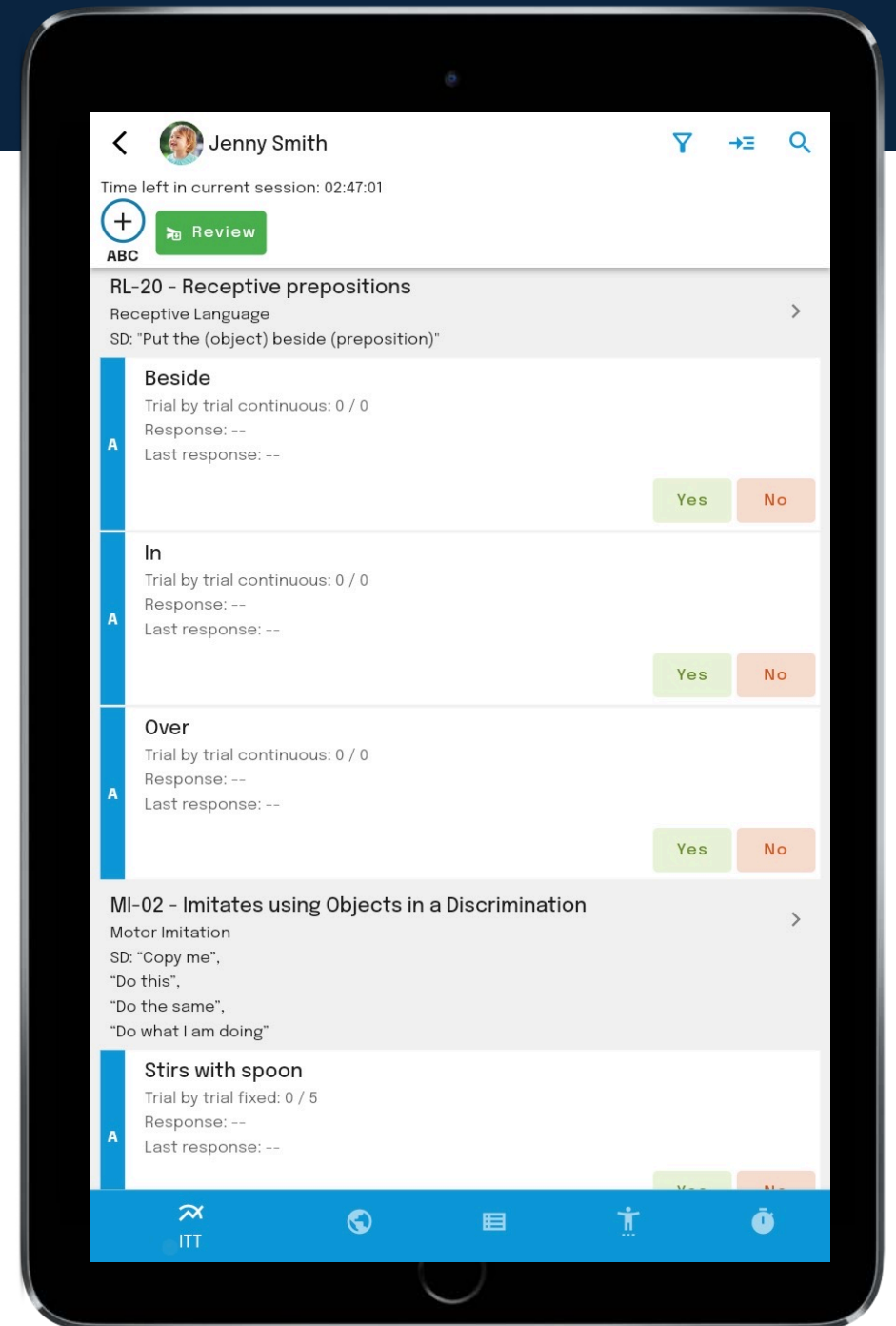


Navigating the App

Task View

Tasks are listed in the order they are presented on the web admin. All targets are listed below the Task.

On the task View the SD is shown on the data collection screen. To access the Full Teaching Instructions press on the > next to the Task Name



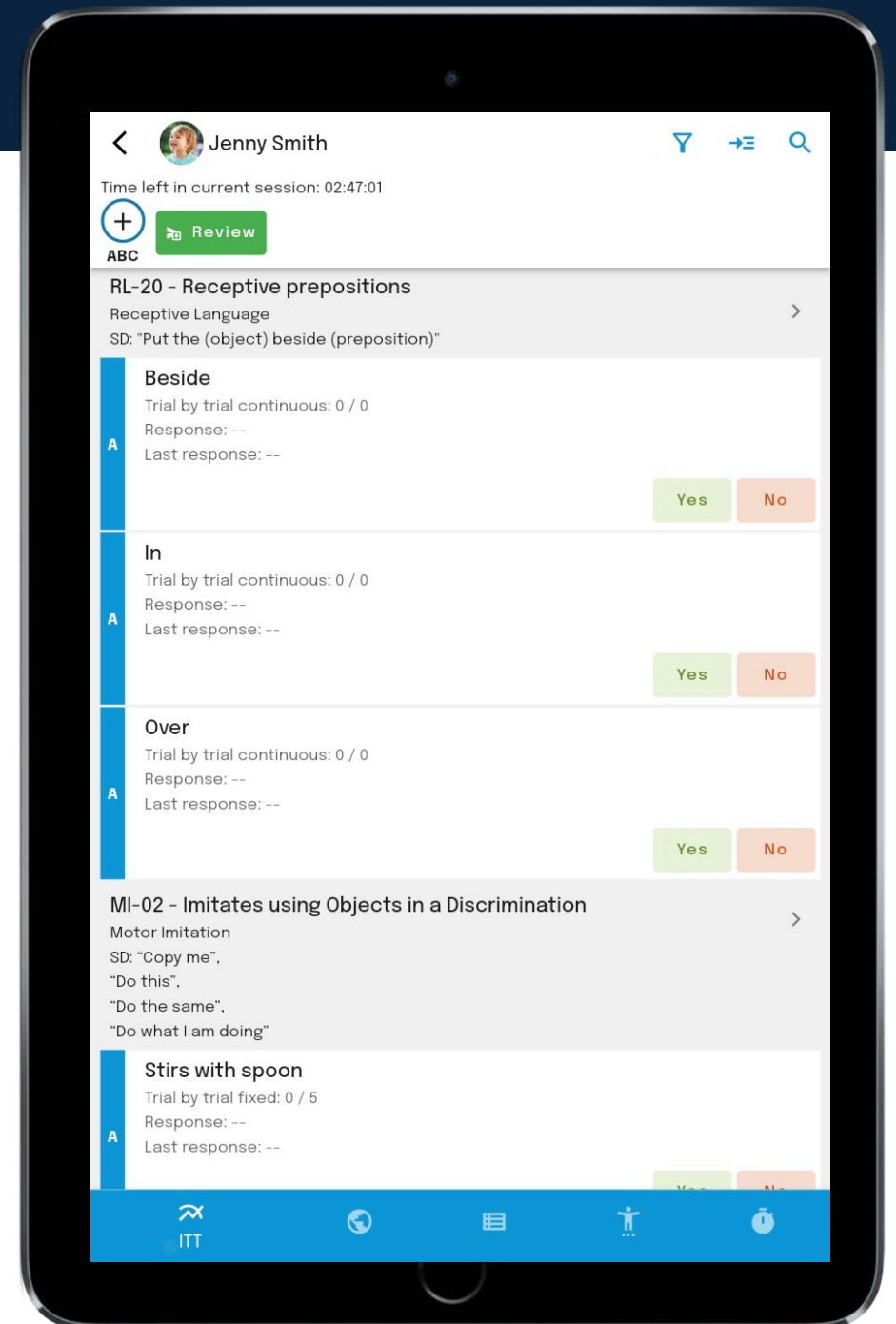
Navigating the App

Target View

All targets are listed individually with the Task Name and Teaching Procedures

*This view will allow you to use the Mix and Vary Filter option.

To change the View, go to Filters on the top left navigation menu.

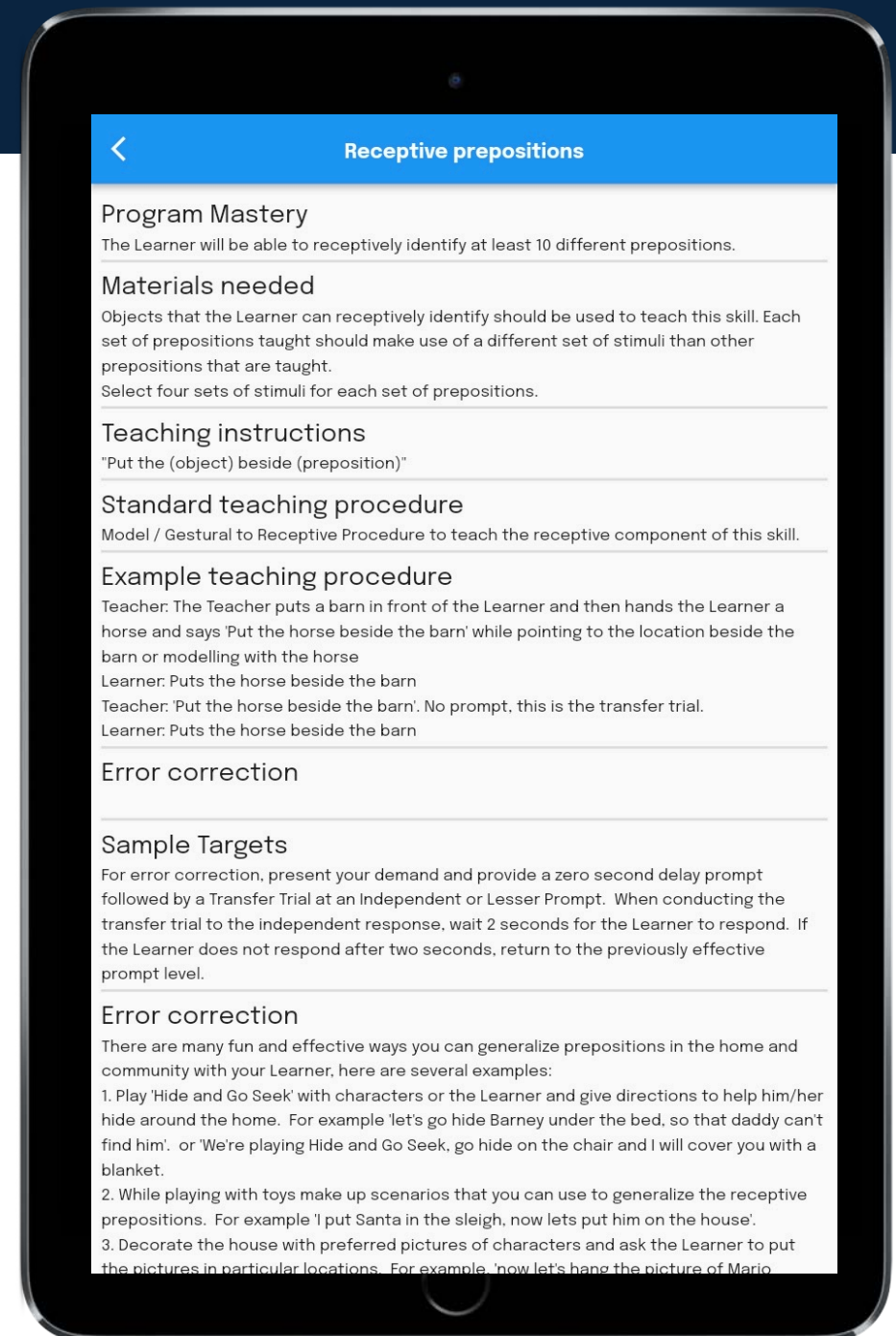


Teaching Instructions

Press on the > next to the Task Name to open the Full Teaching Instructions

Scroll down to view the entire procedure.

For Behavior Deceleration Tasks, the Behavior Reduction Plan will be shown.



Recording Data

Probe Data (1 of 2)

Enter Yes or No as appropriate.

Jenny Smith

Time left in current session: 02:40:49

Review

TA-05 - Tacts Body Parts

Tact

SD: "What is it?".
"What do you see?".
"What's this called?".
None (simply point to the body part)

Ears

Probe

Last response: --

Yes **No**

Back

Probe

Last response: --

Yes **No**

Nose

Probe

Last response: --

Yes **No**

Toes

Probe

Last response: --

Yes **No**

RL-20 - Receptive prepositions

Receptive Language

SD: "Put the (object) beside (preposition)"

Beside

Trial by trial continuous: 1 / 1

Undo

ITT

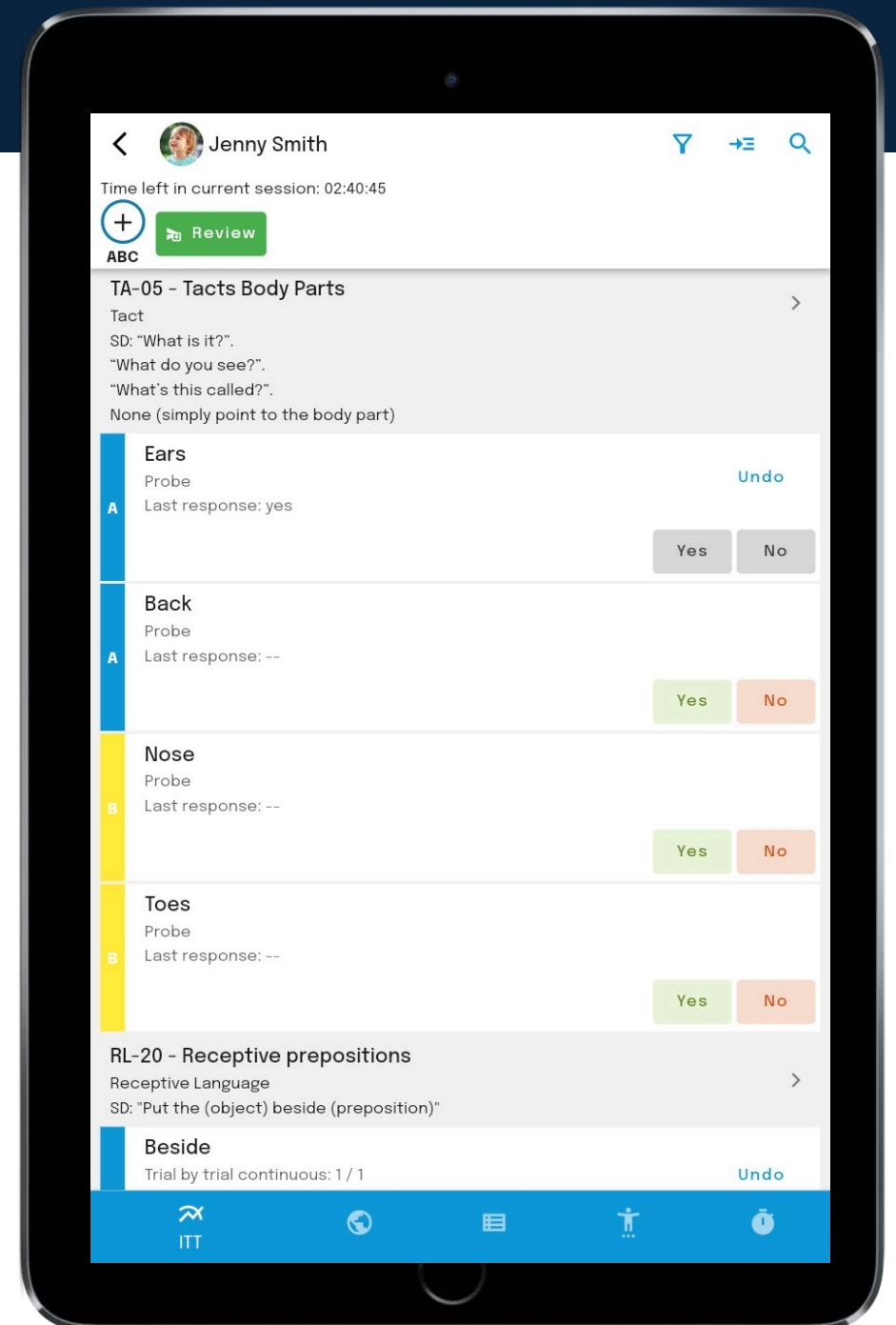
Recording Data

Probe Data (2 of 2)

The Yes and No buttons are now grey.
Last Response shows whether it was a Yes or No

The Undo Button Undo
will undo the last button action taken.

* The undo button will be **present for the remainder of the session.**



Recording Data

Trial by Trial Continuous

Enter Yes or No when appropriate.

The screenshot shows a tablet interface for a data recording application. At the top, the user's name "Jenny Smith" is displayed next to a profile picture. Below the name, a timer indicates "Time left in current session: 02:39:06". A green "Review" button is visible. The main content area lists several trials, each with a status indicator (a blue circle with a plus sign) and a "Review" button. The trials are:

- RL-20 - Receptive prepositions**
 - Receptive Language
 - SD: "Put the (object) beside (preposition)"
 - Beside**
 - Trial by trial continuous: 0 / 0
 - Response: --
 - Last response: --
 - Yes No
 - In**
 - Trial by trial continuous: 0 / 0
 - Response: --
 - Last response: --
 - Yes No
 - Over**
 - Trial by trial continuous: 0 / 0
 - Response: --
 - Last response: --
 - Yes No
- MI-02 - Imitates using Objects in a Discrimination**
 - Motor Imitation
 - SD: "Copy me", "Do this", "Do the same", "Do what I am doing"
 - Stirs with spoon**
 - Trial by trial fixed: 0 / 5
 - Response: --
 - Last response: --
 - Yes No

The bottom of the screen features a blue navigation bar with five icons: a person, a globe, a list, a person with a plus sign, and a clock.

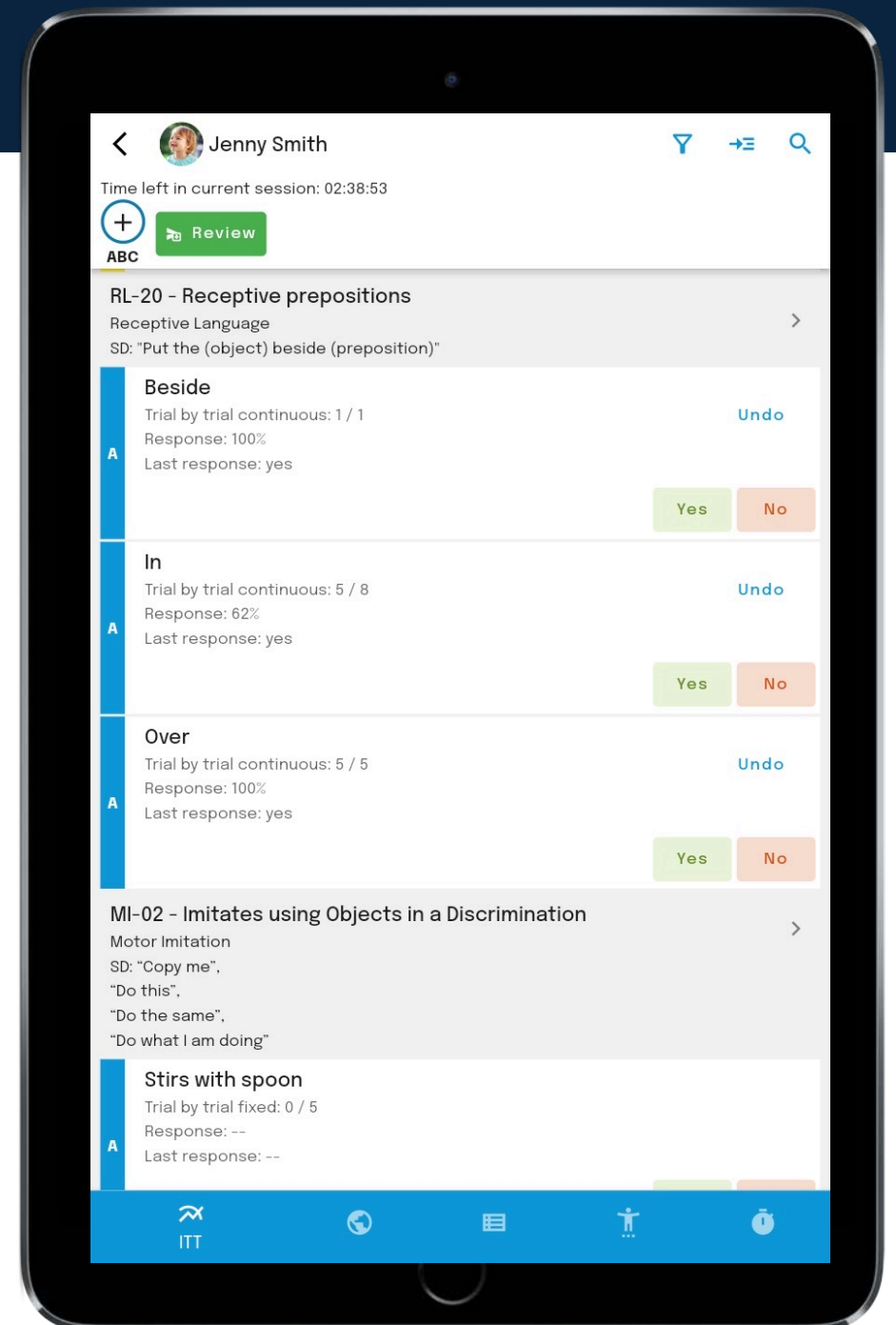
Recording Data

Trial by Trial Continuous

Upon the first data entry for the target, the Undo button will be presented.

The Response percentage and last response will update with each entry.

Next to Trial by Trial Continuous you will see the number of Yes / Number of trials Completed i.e., in this image it is 4 Yes / 5 Total

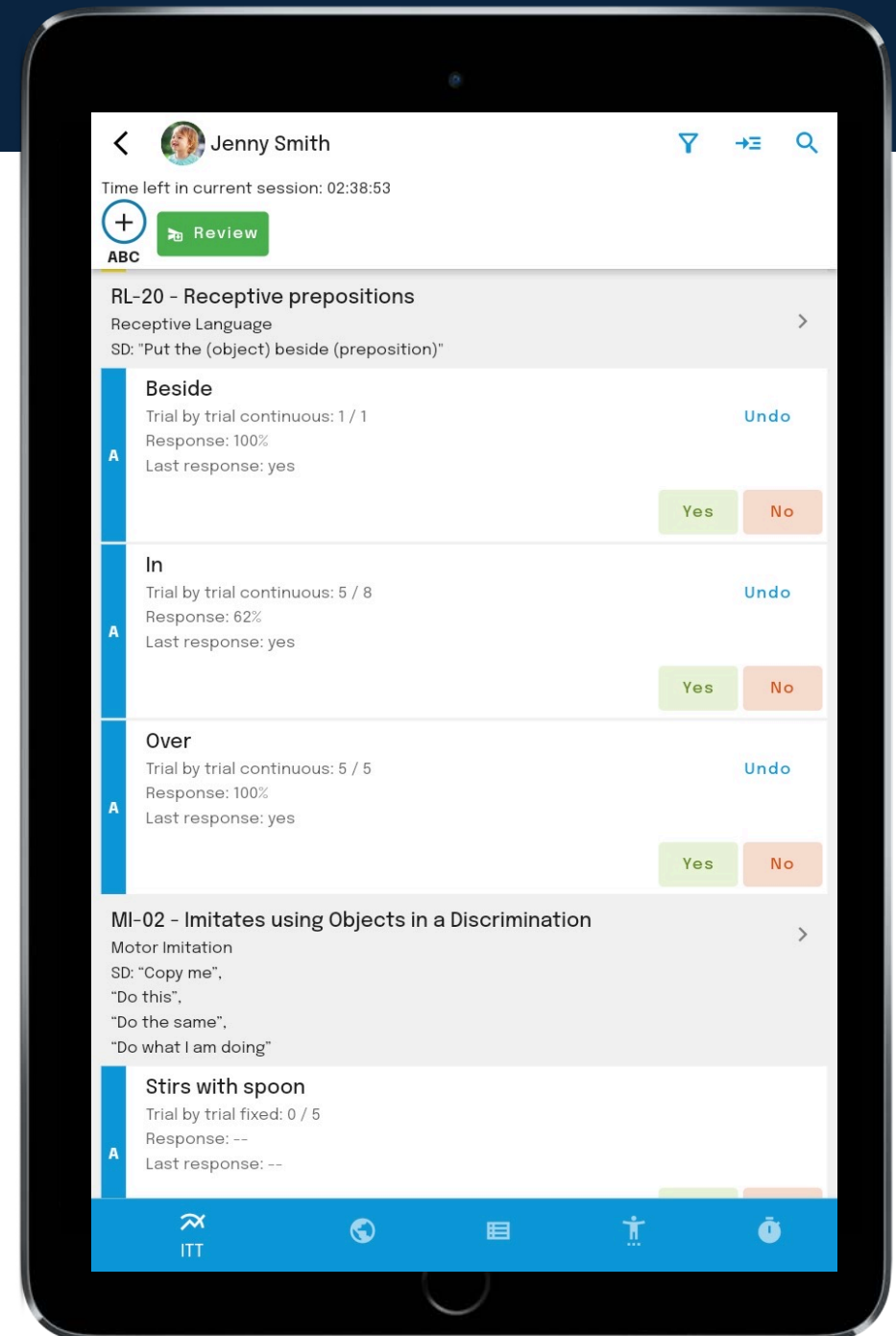


Recording Data

UNDO BUTTON

The number of times you can press the Undo Button is set on the Web Admin by the Clinical Director for the clinic.

i.e., you can press it once to undo the last entry OR unlimited. There is also a set limit to the amount of time the Undo Button will be visible.

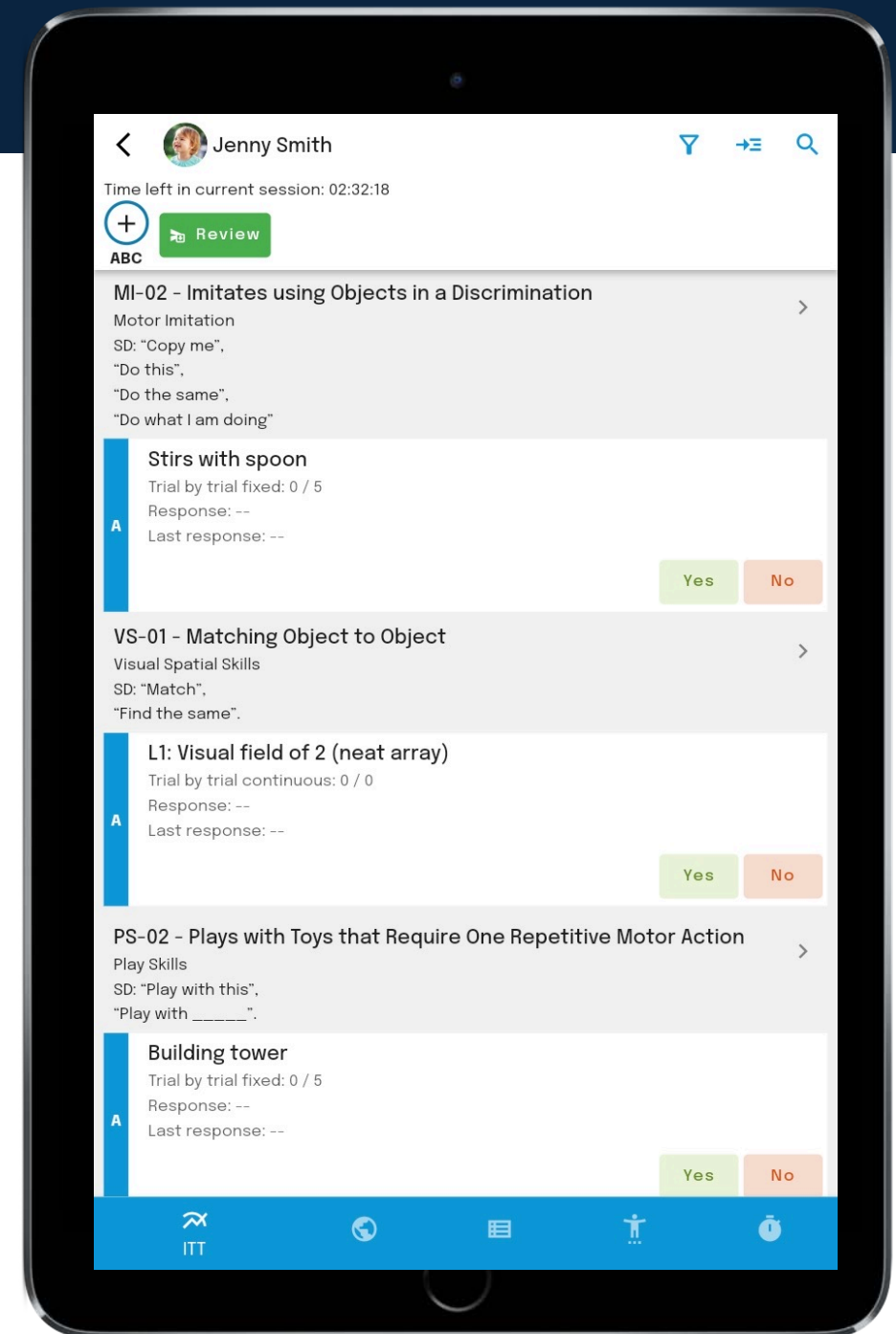


Recording Data

Trial by Trial Fixed (1 of 3)

Please note: Trial by Trial Fixed.
You must do the specified number of trials, or the target will fail for that session.

In this example, the target is
Trial by Trial Fixed of 5.



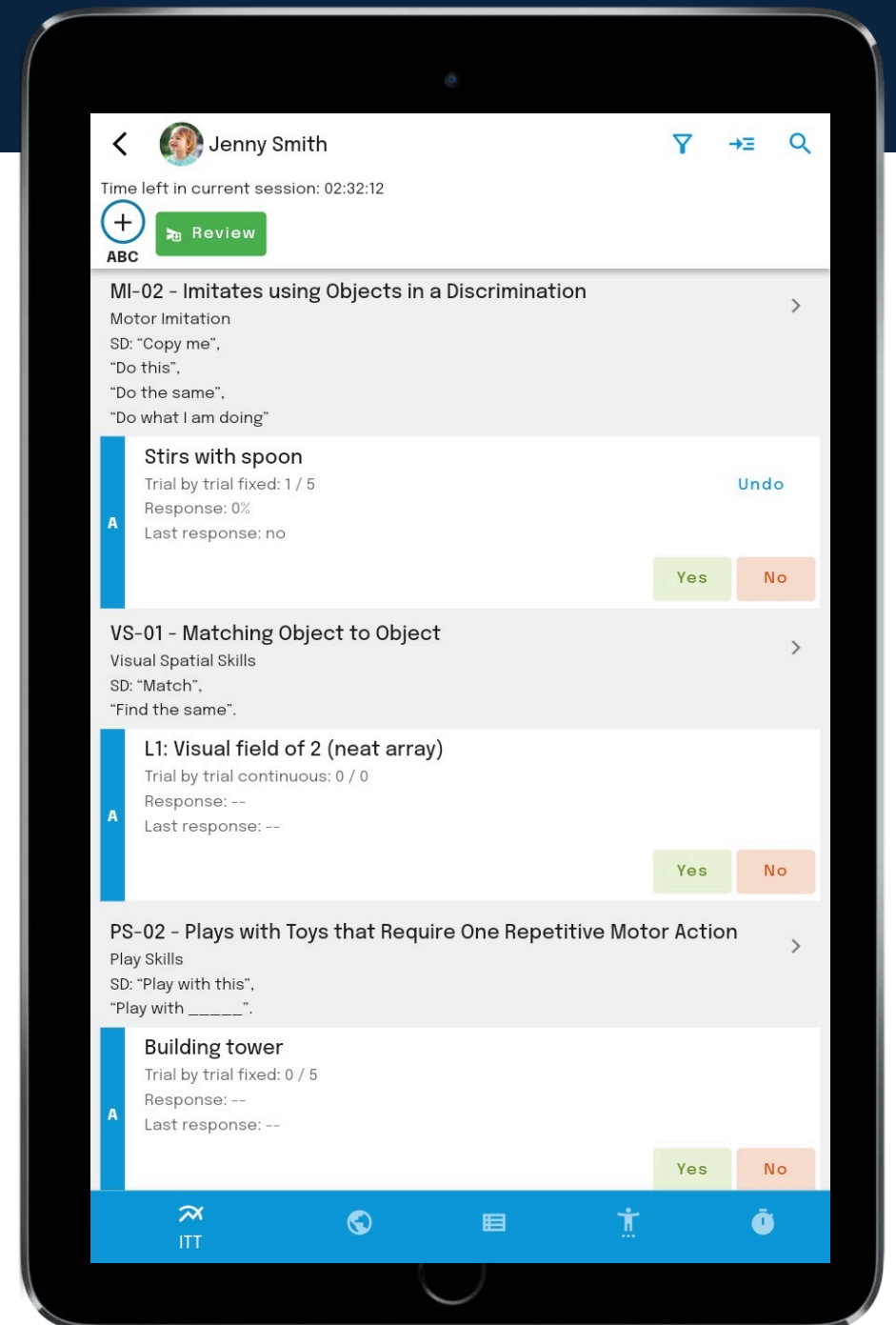
Recording Data

Trial by Trial Fixed (2 of 3)

In this example, 1 trials out of 5 have been recorded.

Four more trial must be completed before the end of the session or the target will fail.

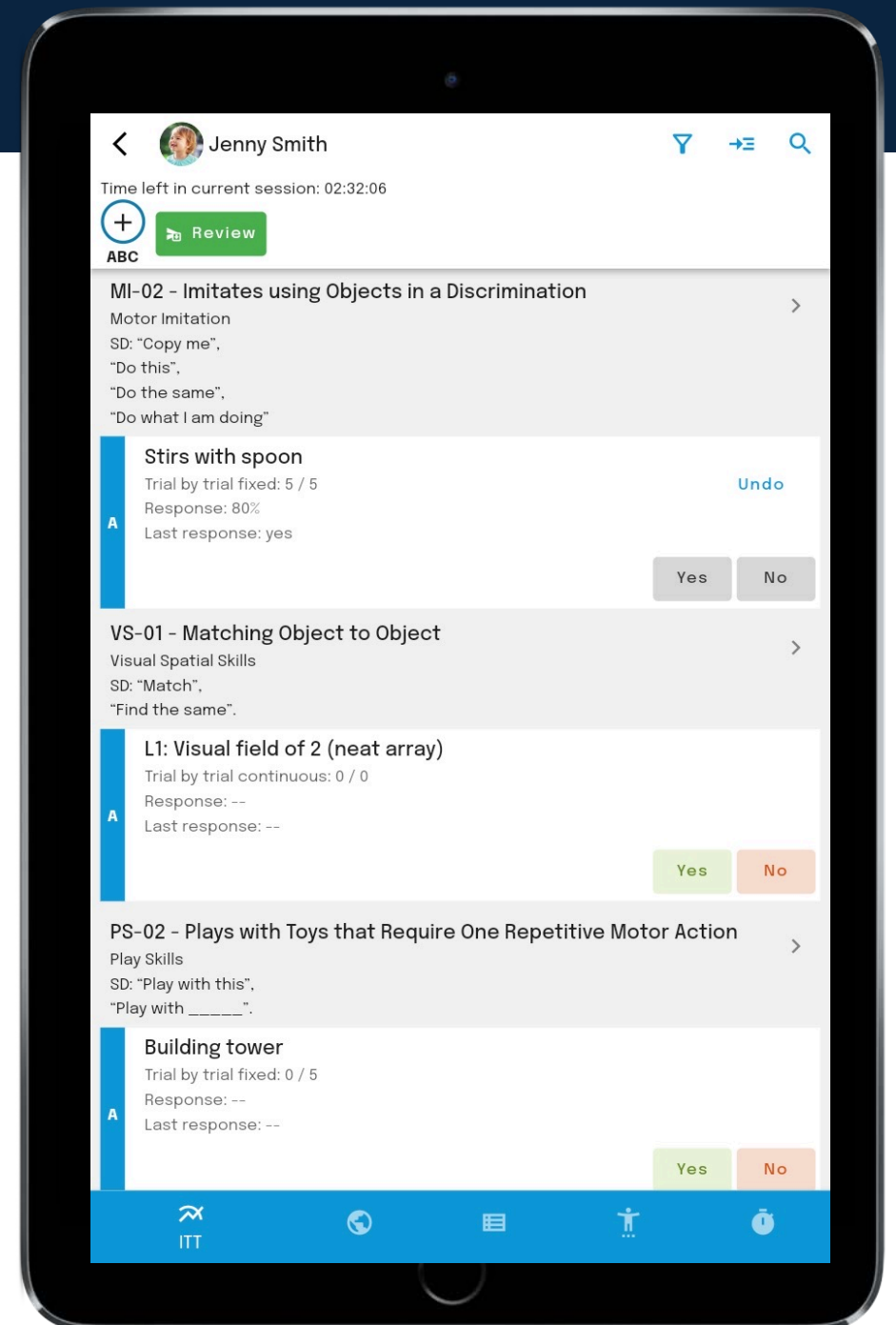
Meaning, if the Trial by Trial Fixed targets, the targets must have all of the data collected for them during the session.



Recording Data

Trial by Trial Fixed (3 of 3)

Once all trials have been recorded the Yes and No buttons will be greyed out.



Recording Data

Trial by Trial with Prompt (1 of 3)

Independent is the only **yes** response.

The other prompt levels are set by the Clinical Director in the Clinic Settings.

The screenshot shows a tablet displaying a clinical trial recording interface. At the top, a header bar includes a back arrow, a green circle with 'JS', the name 'Jenny Smith', and icons for filters, list view, and search. Below the header, a status bar shows 'Time left in current session: 02:58:26'. A green '+ Review' button is visible. The main content area is divided into sections. The first section is 'AC-01 - Painting', with a right arrow icon. It lists 'Arts and Crafts' and 'SD: "Paint the picture", "Paint this", "It's your turn to paint"'. Below this, a blue bar with a white 'A' is followed by a list of response options: 'Independent' (highlighted in green), 'Visual', 'Full Physical', 'No response', 'faded gestural', 'Verbal Prompt', and 'Gestural'. The second section is 'TA-05 - Tacts Body Parts', also with a right arrow icon. It lists 'Tact' and 'SD: "What is it?", "What do you see?", "What's this called?", None (simply point to the body part)'. Below this, a blue bar with a white 'A' is followed by a list of response options: 'Ears', 'Probe', 'Last response: --', 'Yes' (highlighted in green), and 'No'. The third section is 'Back', with a blue bar and a white 'A' followed by 'Probe', 'Last response: --', 'Yes' (highlighted in green), and 'No'. The fourth section is 'Nose', with a yellow bar and a white 'B' followed by 'Probe', 'Last response: --', 'Yes' (highlighted in green), and 'No'. At the bottom, a blue navigation bar contains icons for 'ITT', a globe, a list, a person, and a clock.

JS Jenny Smith

Time left in current session: 02:58:26

+ Review

ABC

AC-01 - Painting

Arts and Crafts

SD: "Paint the picture",
"Paint this",
"It's your turn to paint"

L1. Paints at easel, 25% of picture

Trial by trial continuous with prompt: 0

Response: --

Last response: --

A

Independent Visual Full Physical No response faded gestural

Verbal Prompt Gestural

TA-05 - Tacts Body Parts

Tact

SD: "What is it?",
"What do you see?",
"What's this called?",
None (simply point to the body part)

Ears

Probe

A Last response: --

Yes No

Back

Probe

A Last response: --

Yes No

Nose

Probe

B Last response: --

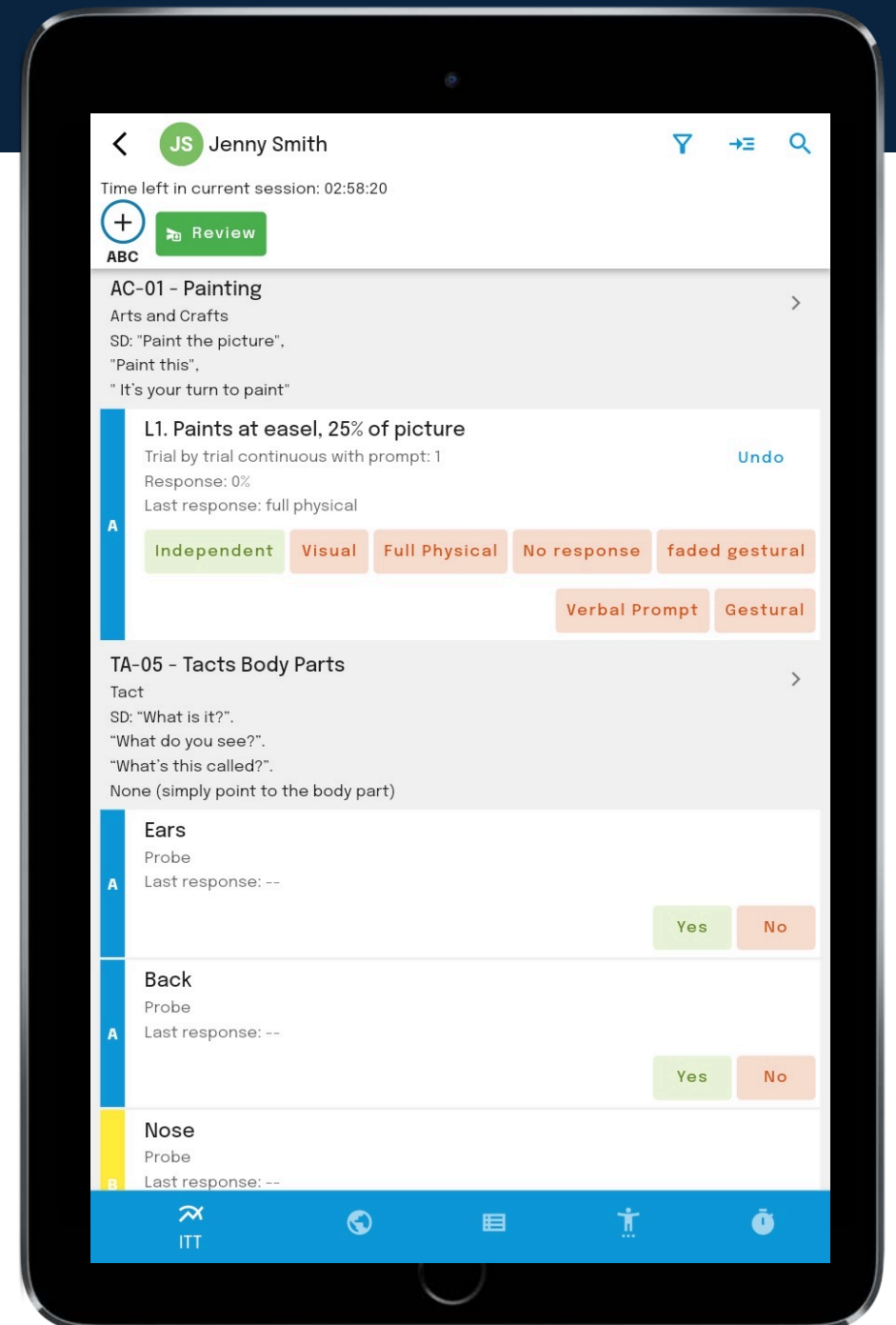
Yes No

ITT

Recording Data

Trial by Trial with Prompt (2 of 3)

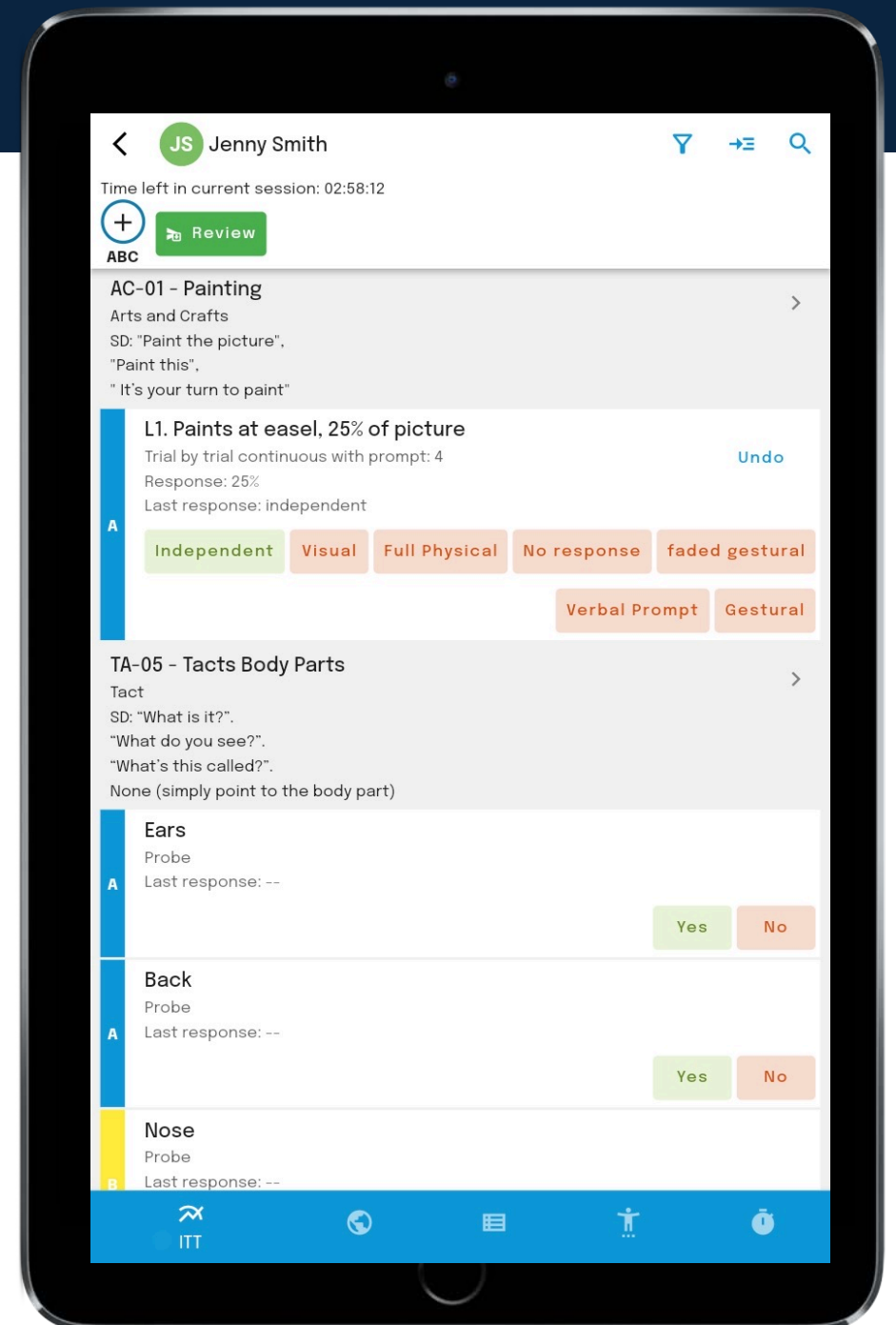
With each response the number of responses is shown as well as the last response



Recording Data

Trial by Trial with Prompt (3 of 3)

Independent was last selected.



Recording Data

Count

Count targets start at “- -”, meaning the target has not been tried. After the first touch, the count will go to zero. This allows us to show that a target had been attempted however no success on the target was attained, leaving a meaningful 0 (zero) as the data point.

i.e., not occurring (0) versus not attempted (--).

A	Biting Count: 0	Undo	Count
A	Biting Count: 1	Undo	Count

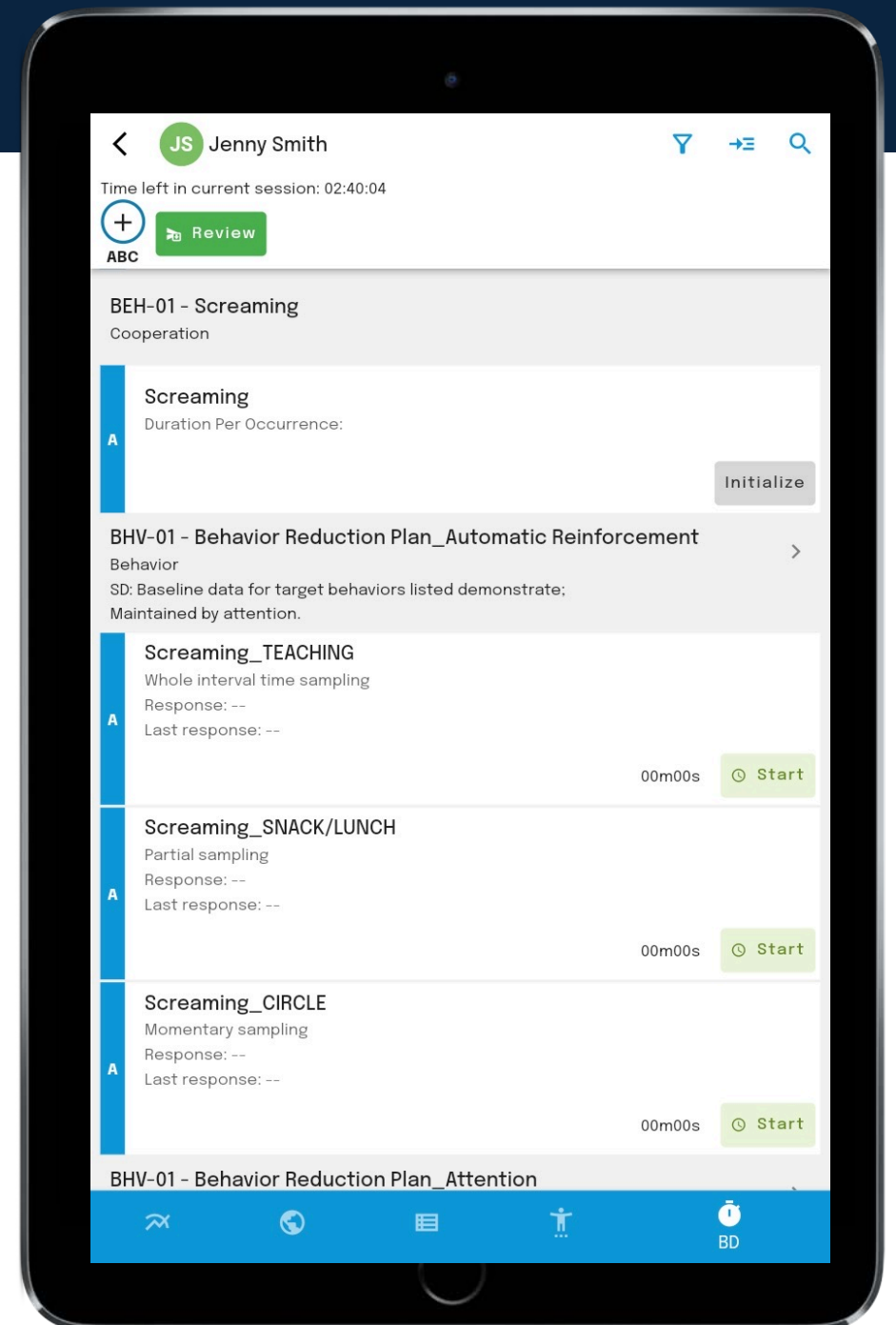
The screenshot shows a tablet screen with a data recording application. At the top, it says "JS Jenny Smith" and "Time left in current session: 02:50:03". Below this is a navigation bar with a back arrow, a plus icon, and a "Review" button. The main content area is divided into sections for different behaviors. The first section is "BH - Deceleration of biting" with a sub-section "Biting" showing "Count: --" and a "Count" button. The second section is "BEH-01 - Screaming" with a sub-section "Screaming" showing "Duration Per Occurrence:" and an "Initialize" button. The third section is "BHV-01 - Behavior Reduction Plan_Automatic Reinforcement" with a sub-section "Screaming_TEACHING" showing "Whole interval time sampling", "Response: --", "Last response: --", and a "Start" button. The bottom section is "Screaming_SNACK/LUNCH" showing "Partial sampling", "Response: --", "Last response: --", and a "Start" button. The bottom of the screen has a blue navigation bar with icons for a list, a person, and a clock labeled "BD".

Recording Data

Duration

Portia has cumulative duration and duration per occurrence targets.

Press Initialize



Recording Data

Duration (Continued)

Press Start to begin recording

Press Stop to stop recording

The timer will show you how long the target has been running for.

A	Screaming		Undo
	Duration Per Occurrence:		
	00m02s		
	1: 00m00s	00m02s	Stop

The tablet screen shows a user interface for a behavioral data recording application. At the top, it displays the user's initials 'JS' and name 'Jenny Smith'. Below this, it shows the 'Time left in current session: 02:40:01'. A navigation bar includes a back arrow, a plus icon, and a 'Review' button. The main content area is divided into sections for different behaviors. The first section is 'BEH-01 - Screaming' with a sub-header 'Cooperation'. It shows a 'Screaming' entry with a 'Duration Per Occurrence' of '1: 00m00s' and a timer at '00m00s'. A green 'Start' button is visible. The second section is 'BHV-01 - Behavior Reduction Plan_Automatic Reinforcement' with a sub-header 'Behavior'. It lists three behaviors: 'Screaming_TEACHING' (Whole interval time sampling), 'Screaming_SNACK/LUNCH' (Partial sampling), and 'Screaming_CIRCLE' (Momentary sampling). Each behavior entry shows a timer at '00m00s' and a green 'Start' button. The bottom of the screen features a blue navigation bar with icons for a waveform, a globe, a list, a person, and a clock labeled 'BD'.

<	JS Jenny Smith	Filter	Export	Search
Time left in current session: 02:40:01				
+	Review			
ABC				
BEH-01 - Screaming				
Cooperation				
A	Screaming	Duration Per Occurrence:	1: 00m00s	Undo
			00m00s	Start
BHV-01 - Behavior Reduction Plan_Automatic Reinforcement				
Behavior				
SD: Baseline data for target behaviors listed demonstrate; Maintained by attention.				
A	Screaming_TEACHING	Whole interval time sampling	Response: --	Last response: --
			00m00s	Start
A	Screaming_SNACK/LUNCH	Partial sampling	Response: --	Last response: --
			00m00s	Start
A	Screaming_CIRCLE	Momentary sampling	Response: --	Last response: --
			00m00s	Start
BHV-01 - Behavior Reduction Plan_Attention				
BD				

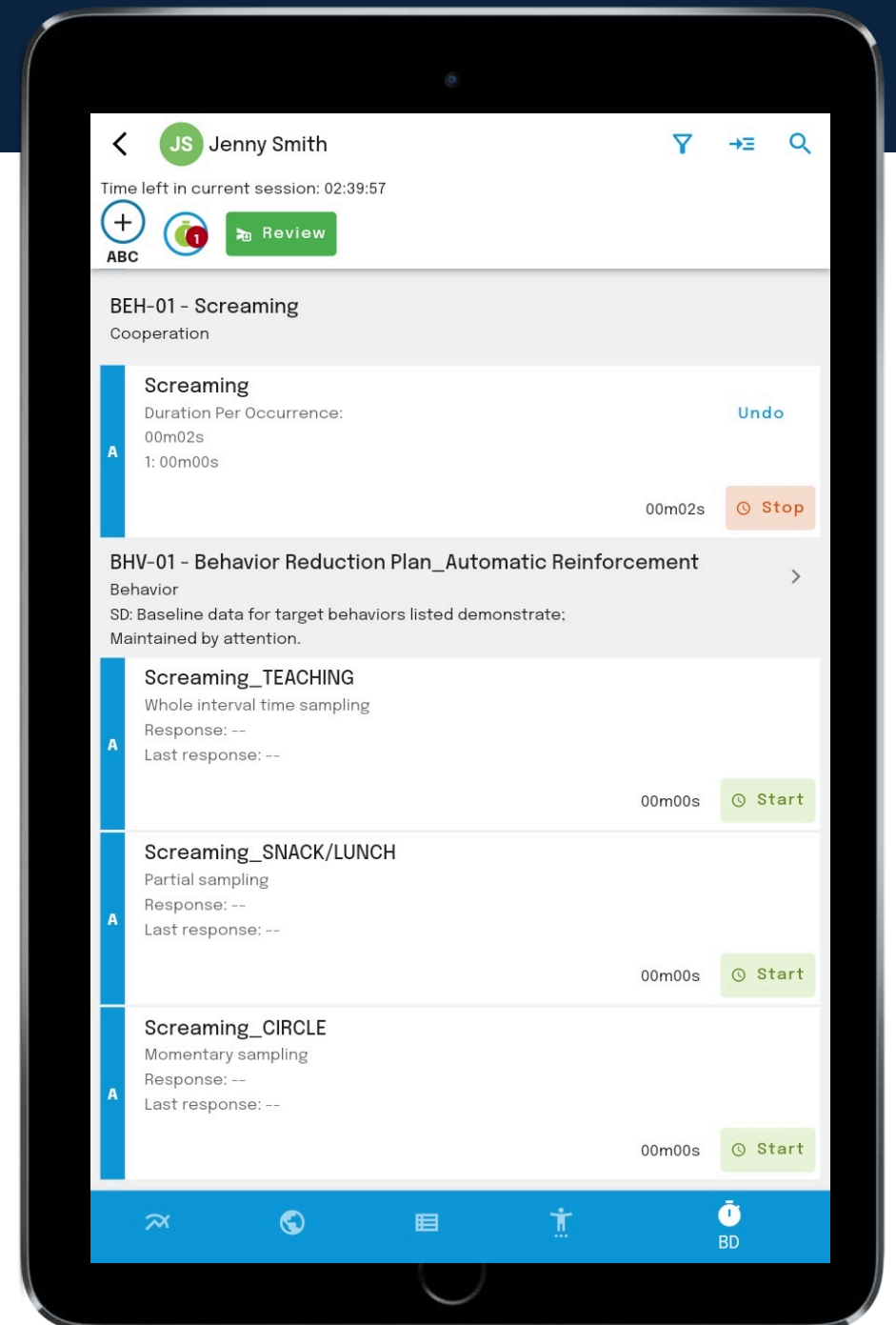
Recording Data

Duration

You can have a Duration and Time Sampling Target(s) running while you record other data.

You can press this icon  and any targets with a Timer (Duration and Time Sampling Targets will be shown as a list.

You can press the  button to stop the Timer.



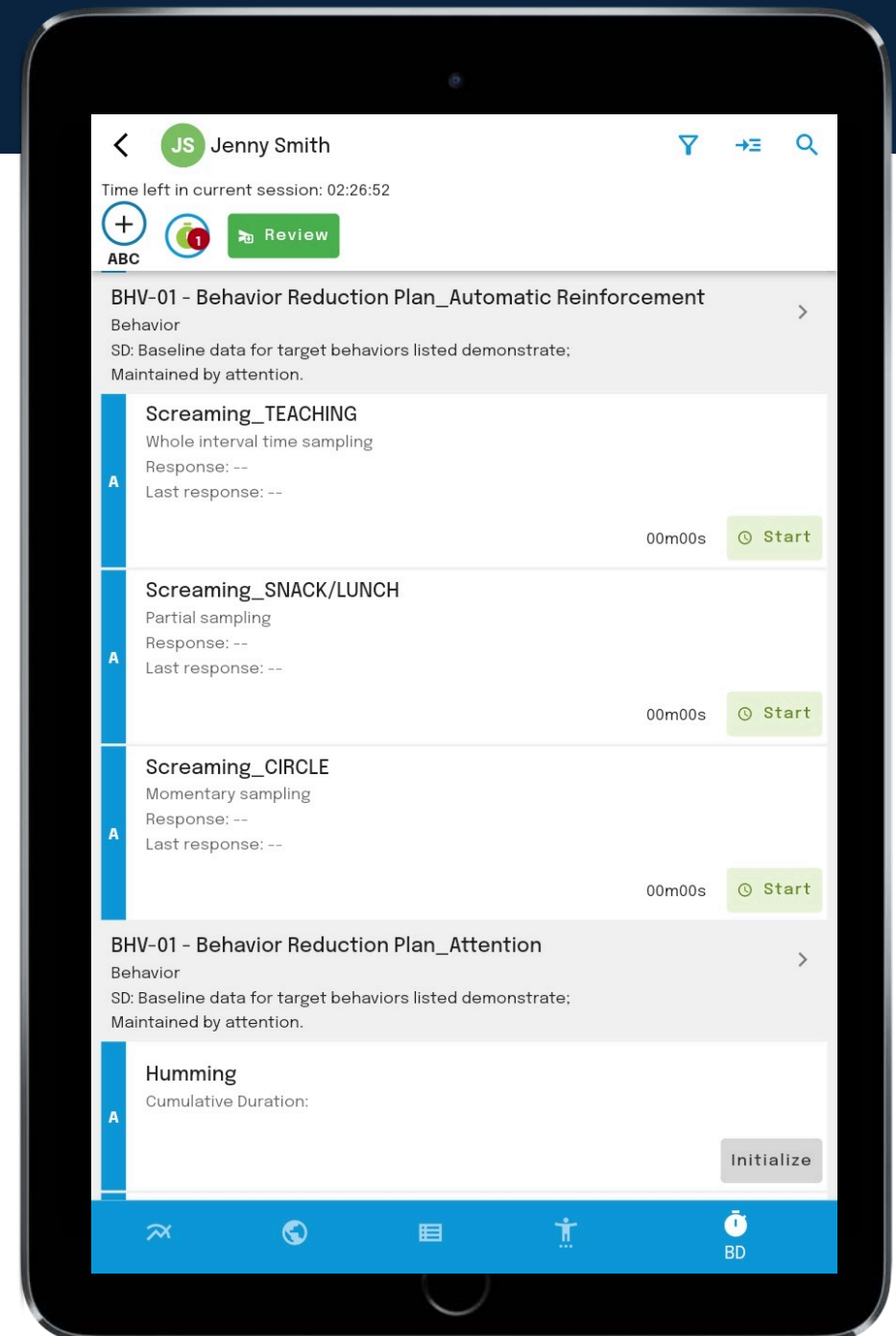
Recording Data

Time Sampling (1 of 2)

You can record data on other targets and record ABC data when the time sampling target is active.

Press Start to begin the Time Sampling Target
Press Stop to end it.

You will be prompted on other screens, including other Learner's screens (when in a Group Session) to record the response.



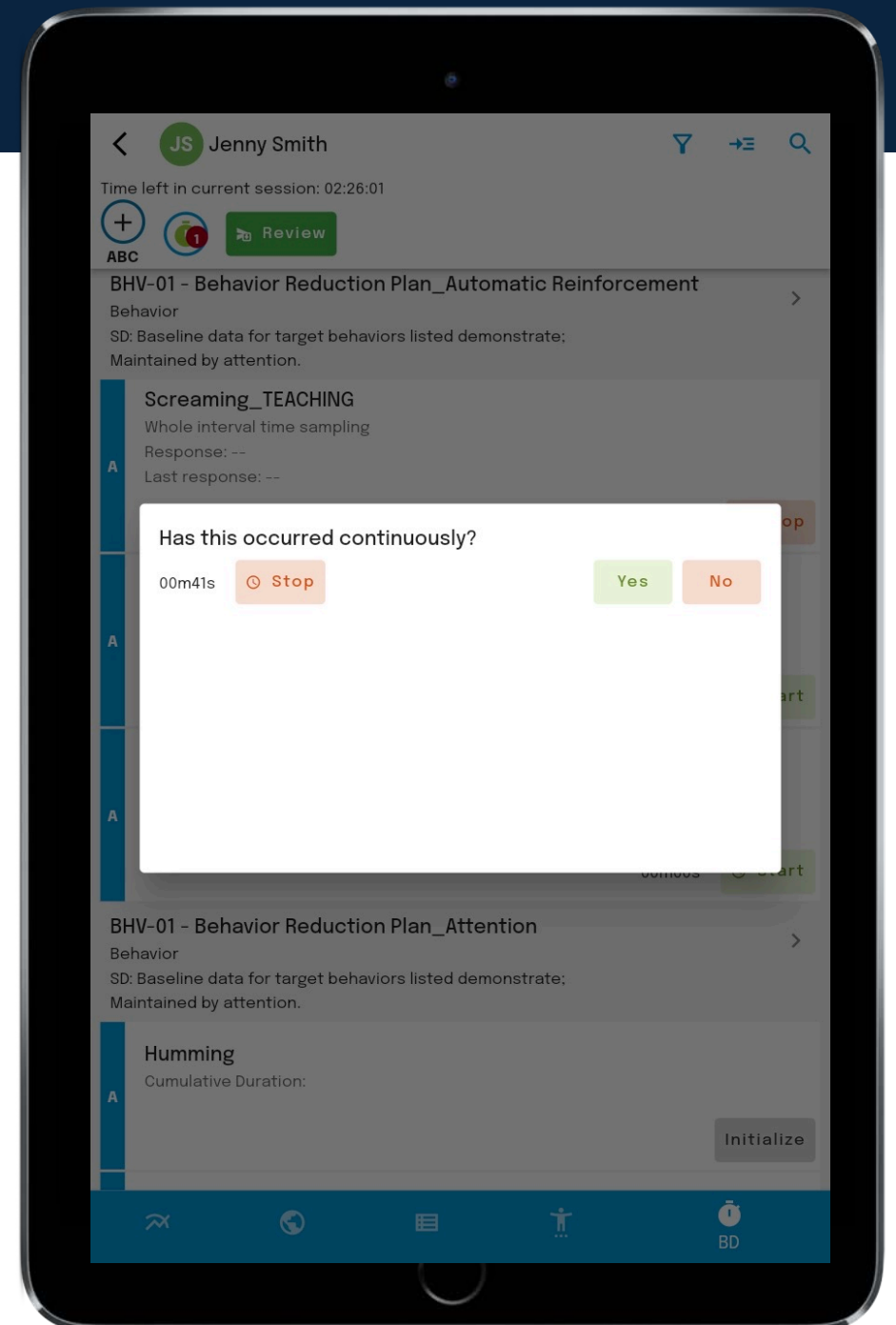
Recording Data

Time Sampling (2 of 2)

Pop up

Select Yes, No, OR Stop to end recording data on this target

The timer will be presented to show you the amount of time of each interval.

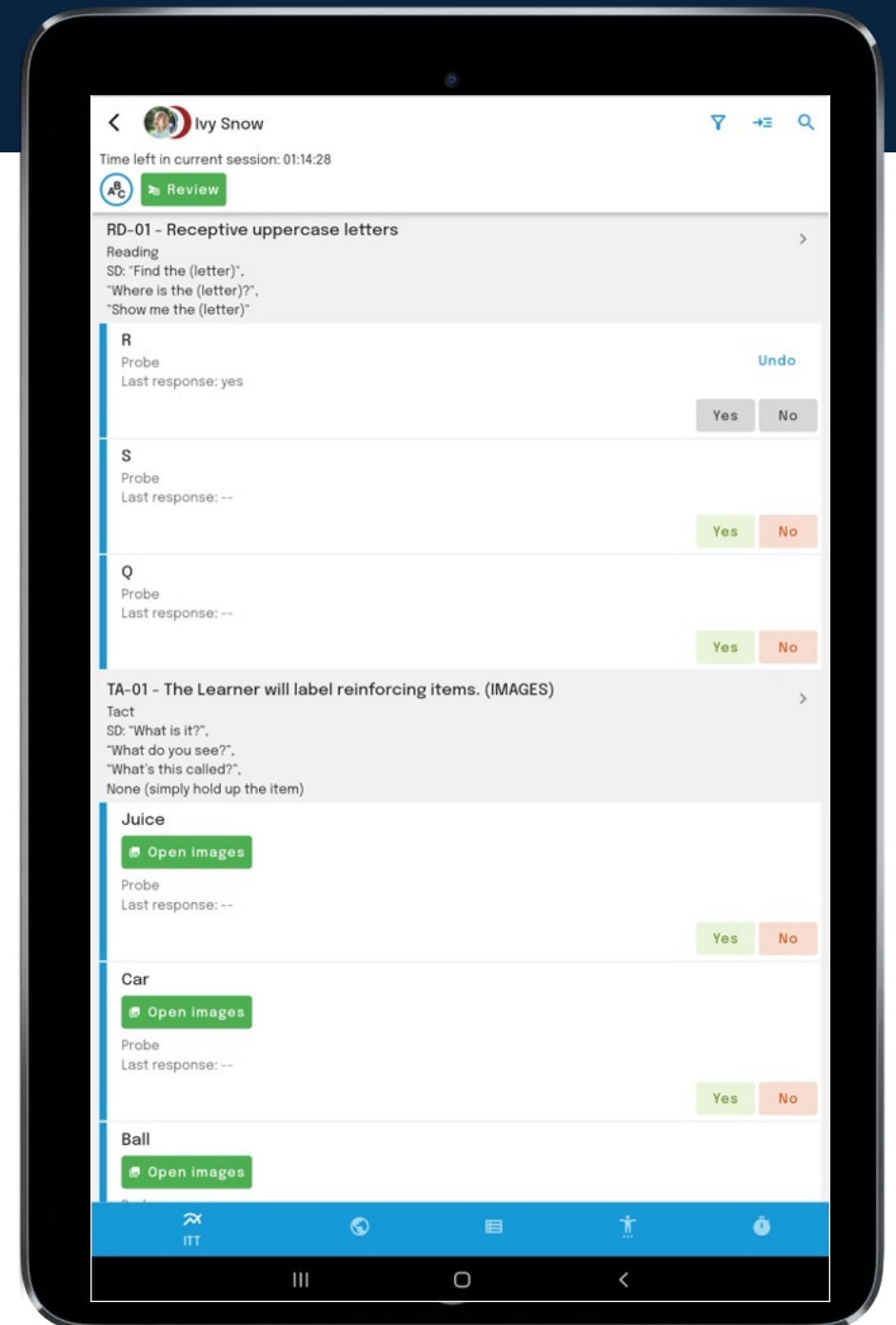


Images

Images


When the Behavior Analyst has assigned images to the target, you can access the images by pressing the Open images button

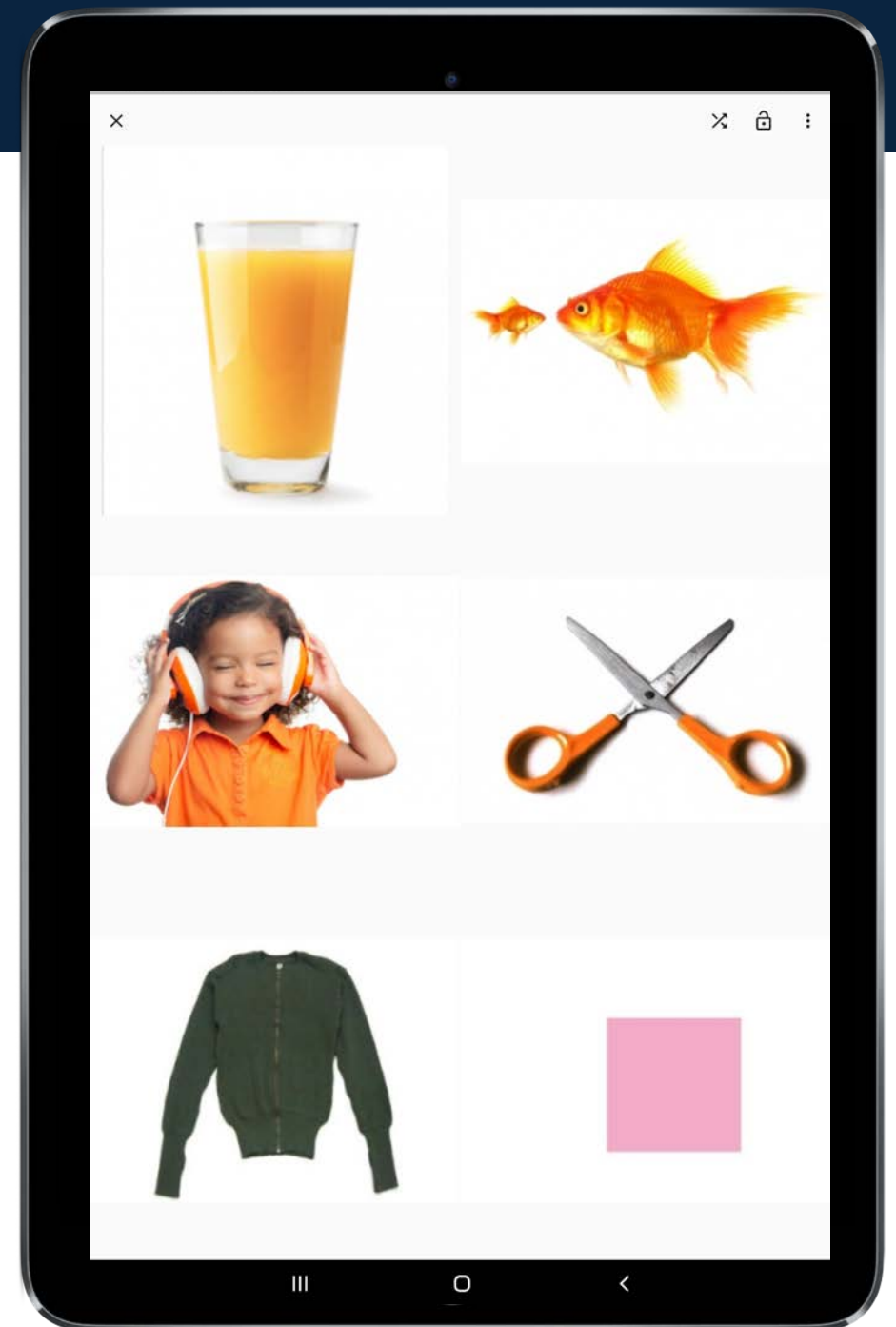
If this button is not visible, there are no images assigned to this target.




Images

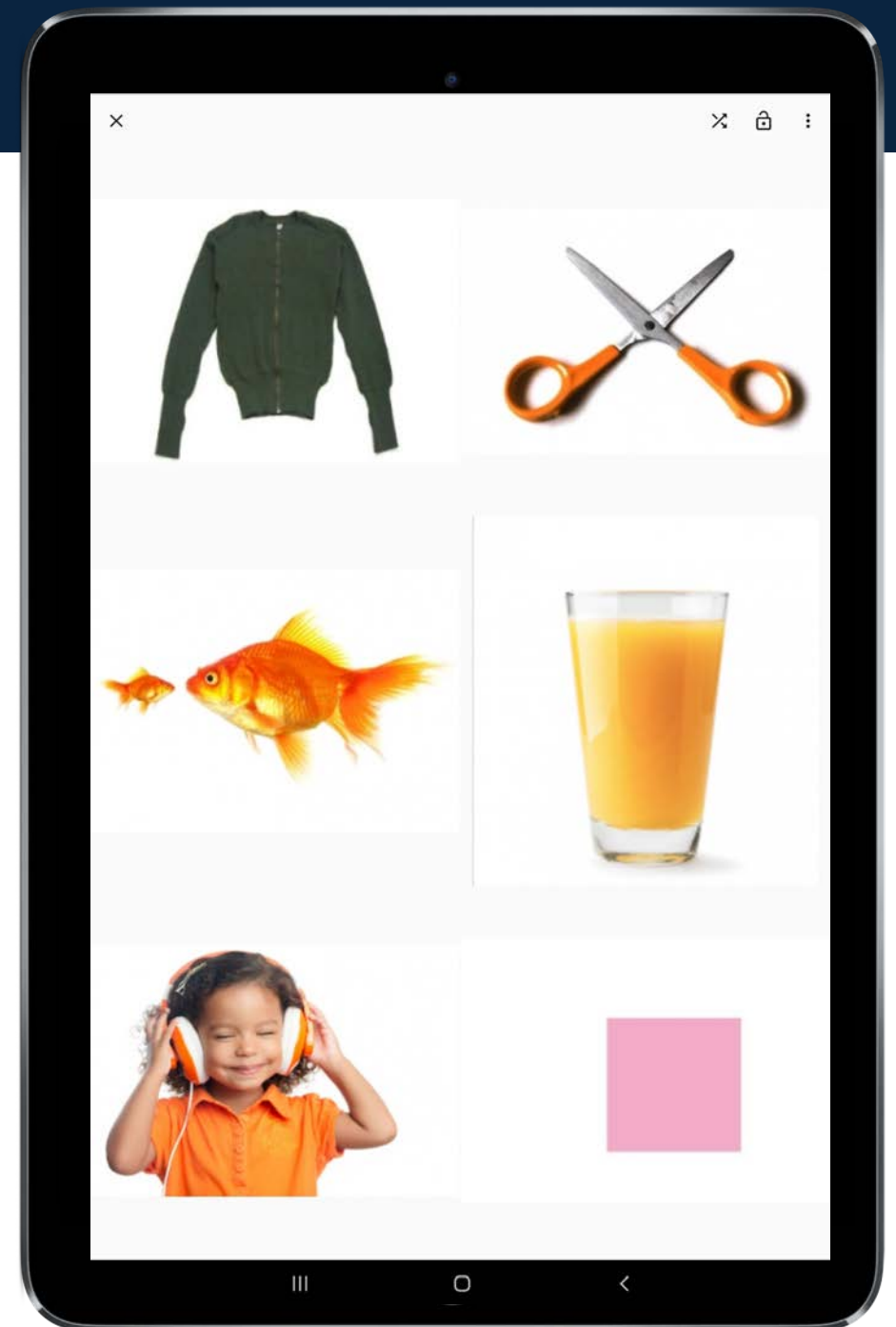
Press  to unlock the images

Press  to edit the Visual Field and change the array from Neat to Messy



Images

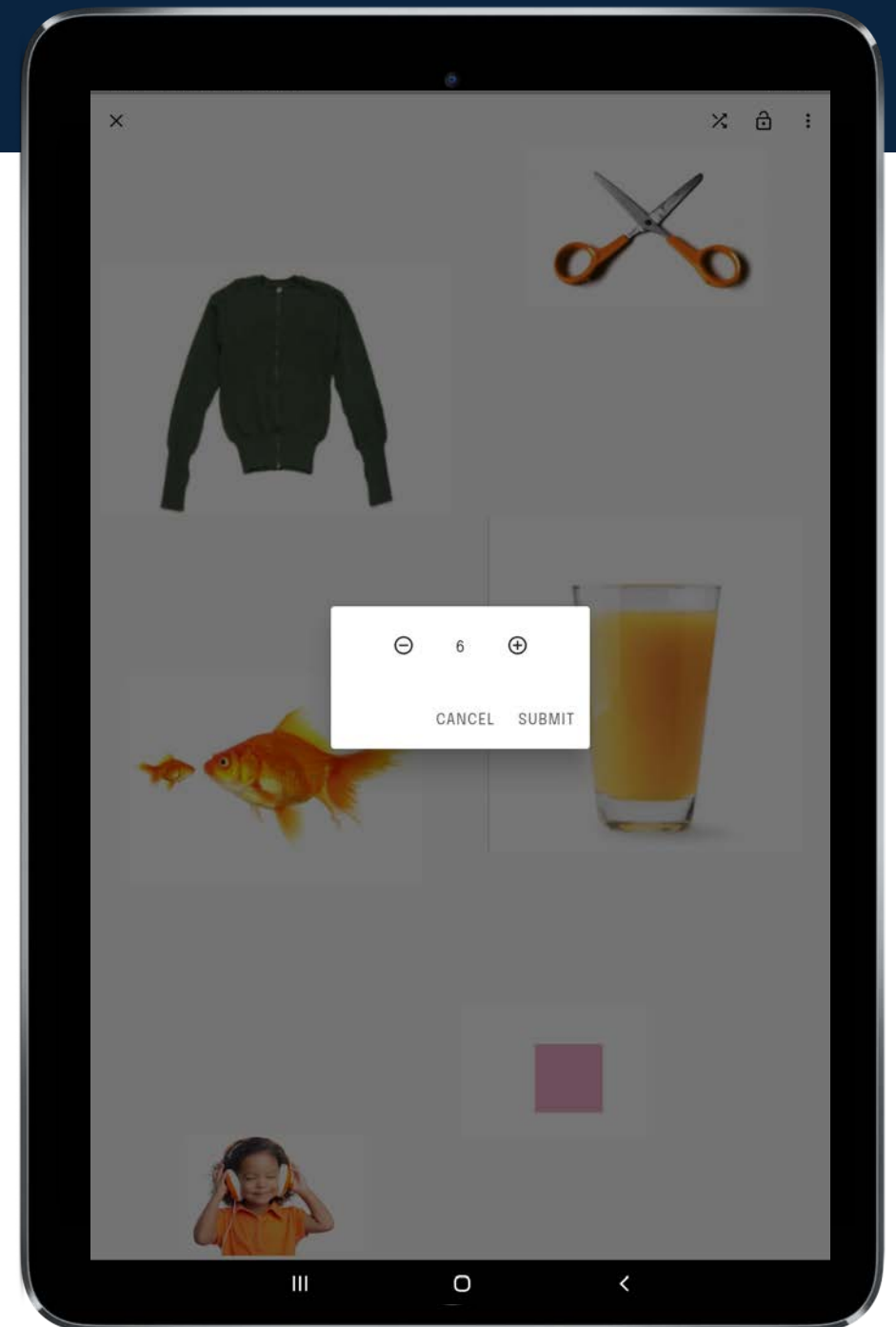
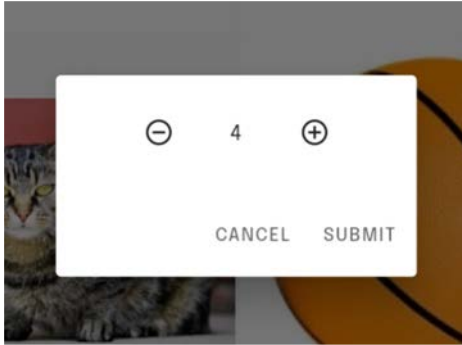
After you have unlocked the images, you can then shuffle them by pressing 



Images

Editing Visual Field

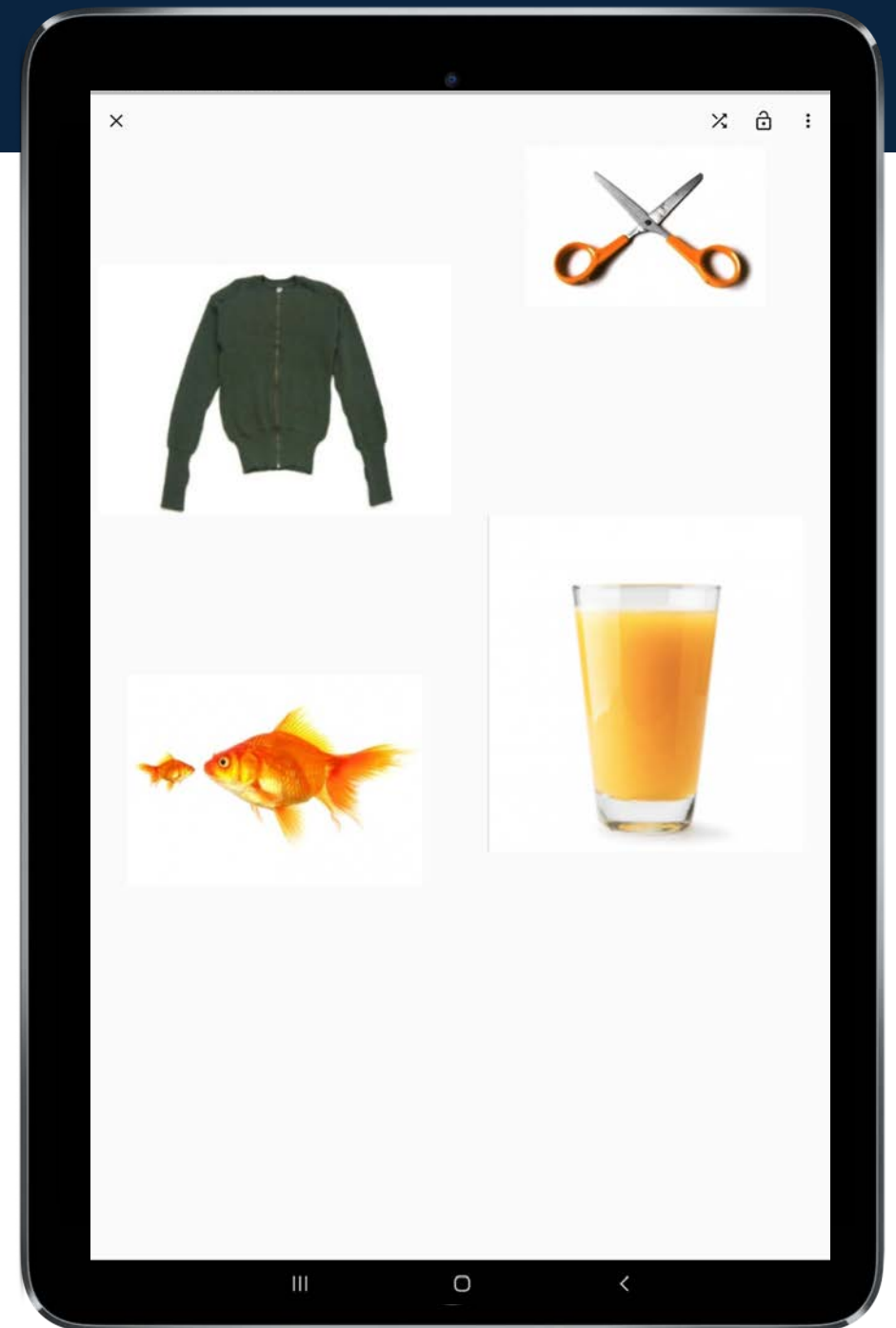
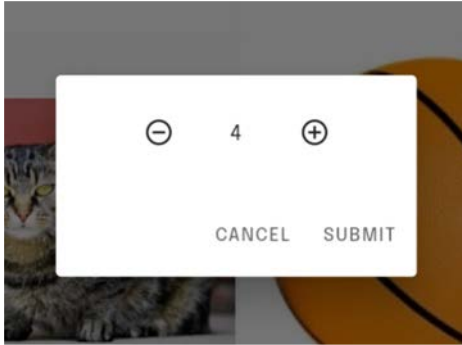
Reduce the visual field down to 1 Target Image



Images

Editing Visual Field

Reduce the visual field down to 1 Target Image

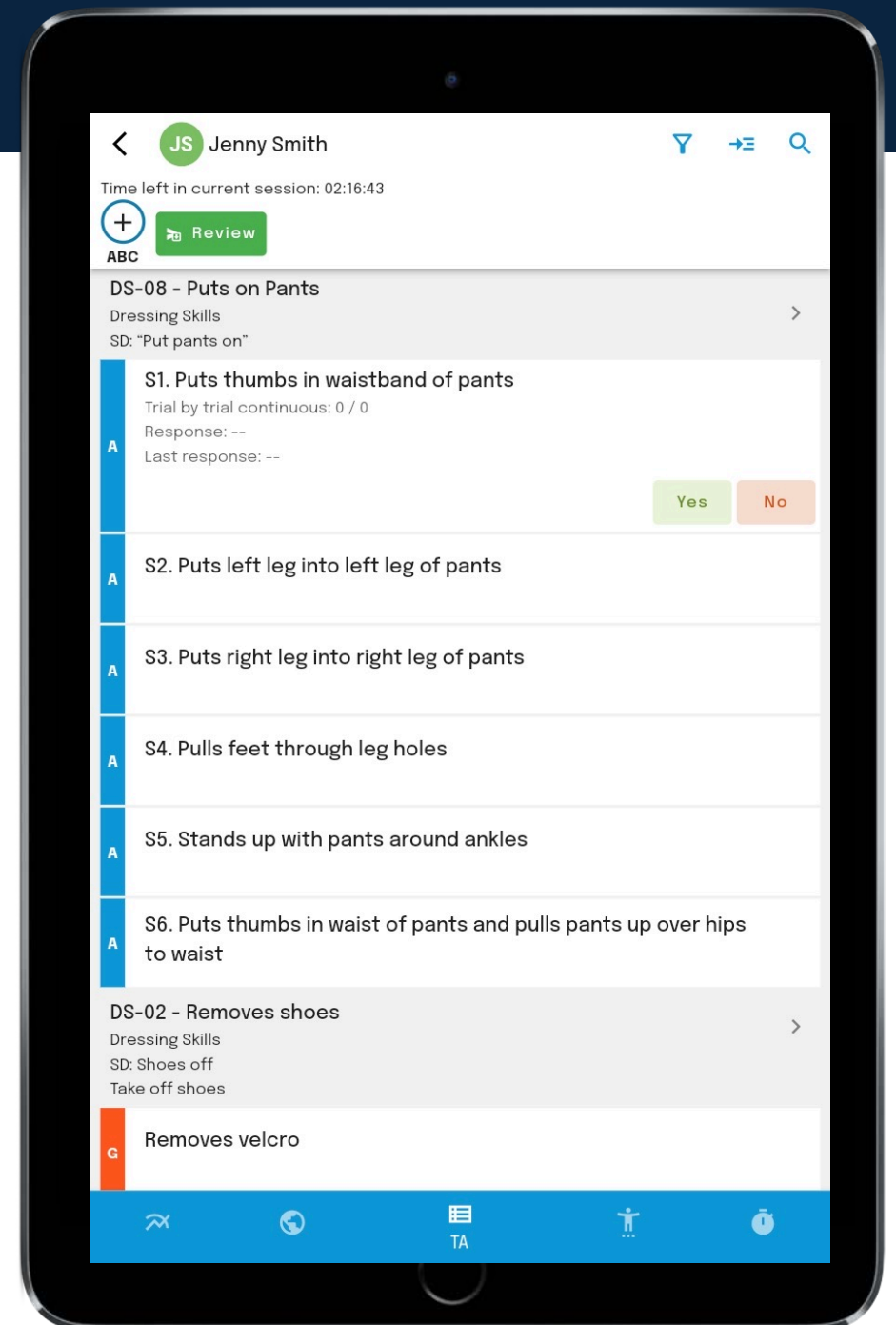


Task Analysis

Task Analysis

You can quickly and easily record the data for all of the targets in each task.

PortiaPro records:
Total Task Presentation,
Forward Chaining
and Backward Chaining.

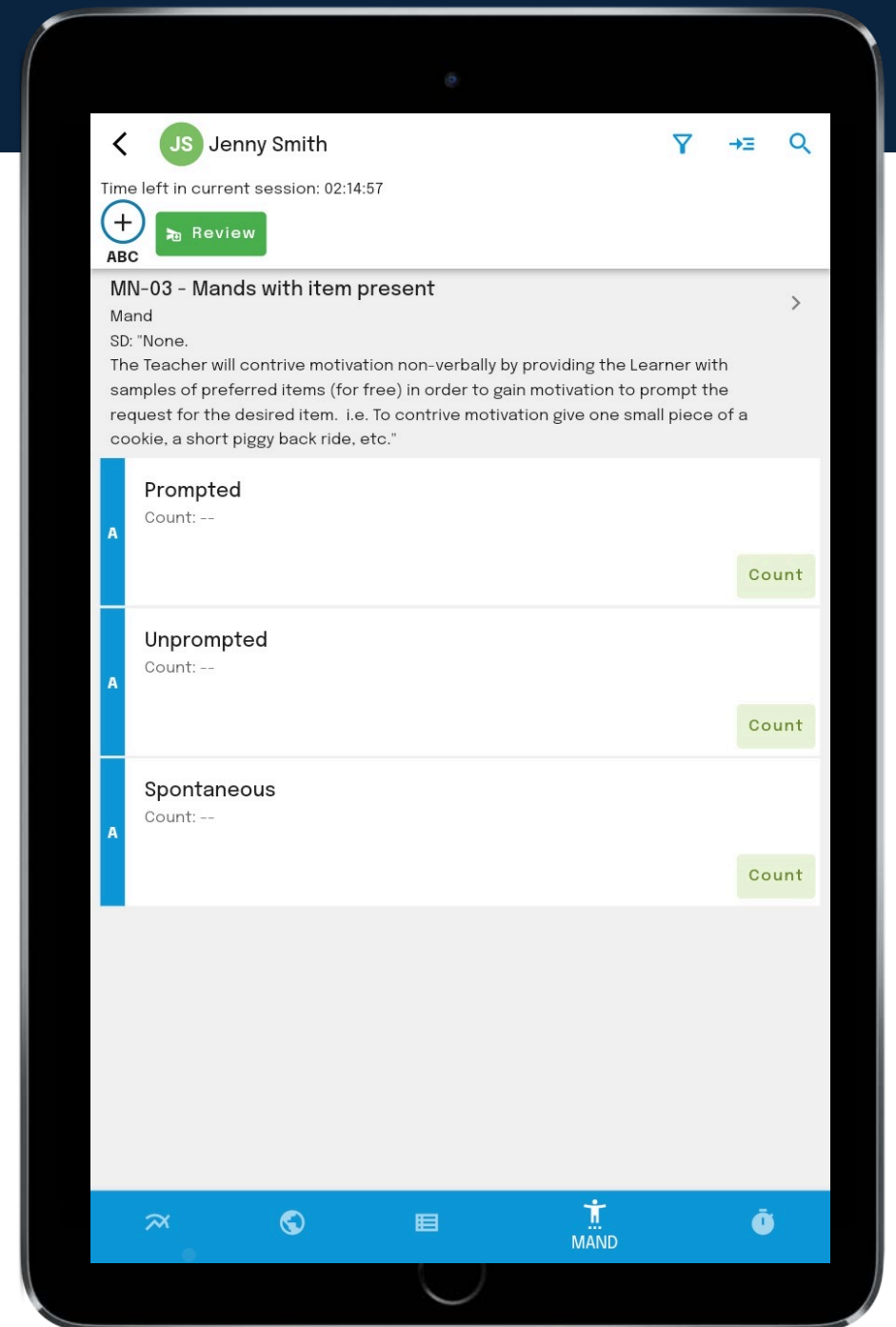


Mand Frequency

Mand Frequency

Mand Frequency are presented on the Task View only.

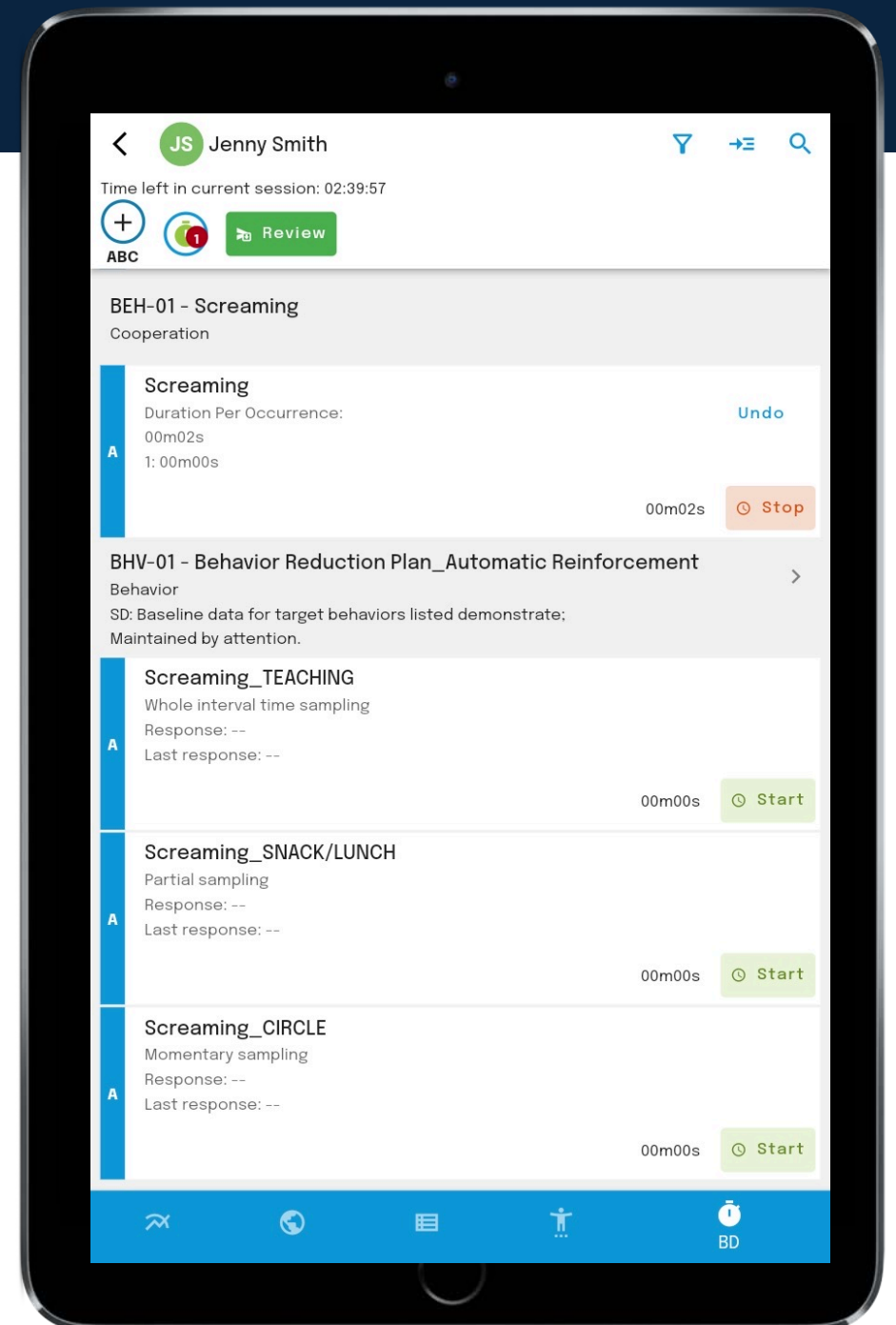
You can quickly record data for prompted, unprompted and spontaneous targets.



Behavior Deceleration

Behavior Deceleration


The Behavior Deceleration Tasks are located in their own tab for quick access.



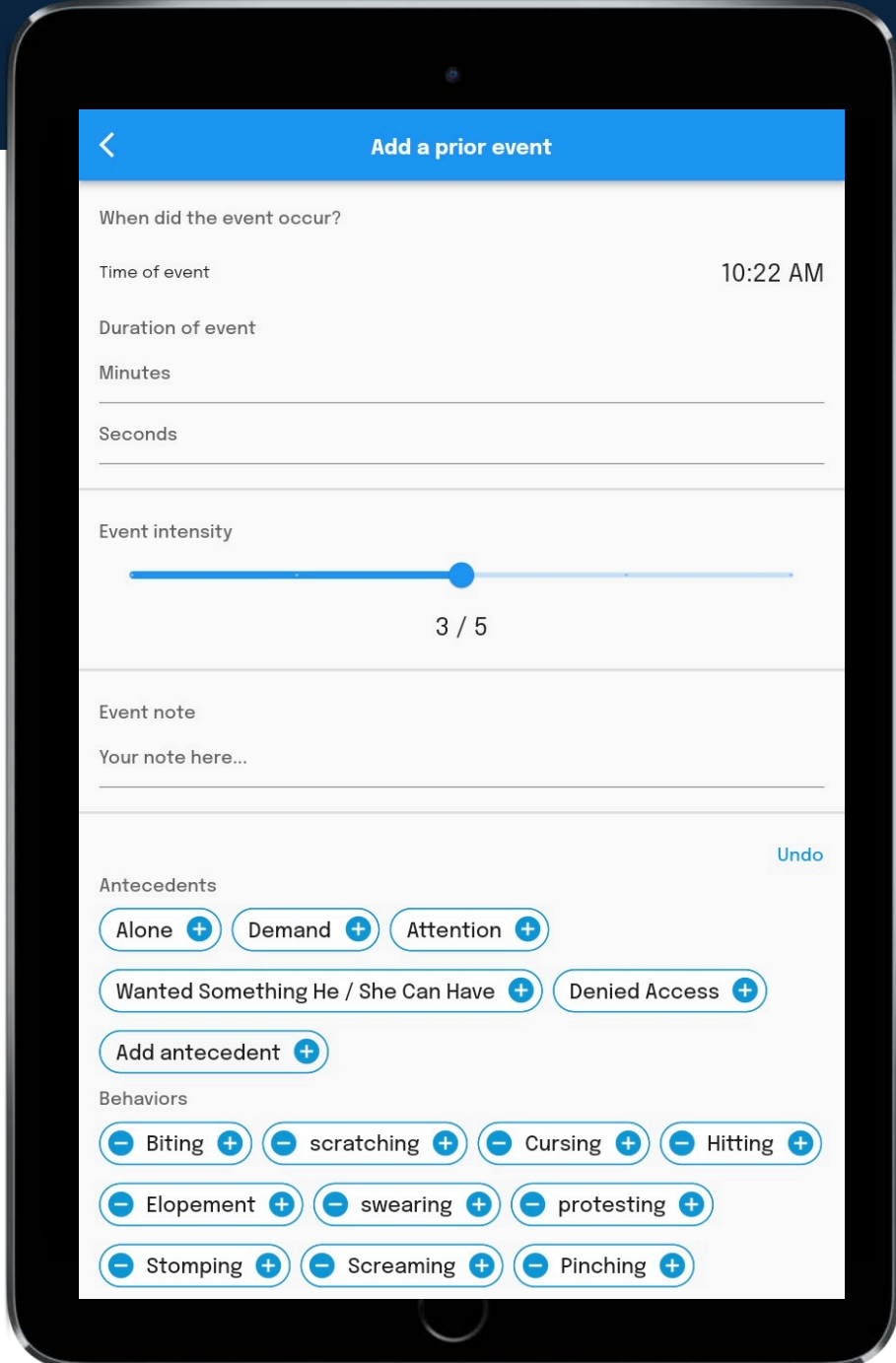
ABC Data

ABC Data

You can Record an ABC event in real time or after it has already passed.

To record an event in Real time, press the ABC button on the top menu bar. 

If you are in a Group Session, the Learner you are currently on will be the Learner for whom the event is recorded.



Add a prior event

When did the event occur?

Time of event 10:22 AM

Duration of event

Minutes

Seconds

Event intensity

3 / 5

Event note

Your note here...

Undo

Antecedents

Alone + Demand + Attention +

Wanted Something He / She Can Have + Denied Access +

Add antecedent +

Behaviors

- Biting + - scratching + - Cursing + - Hitting +

- Elopement + - swearing + - protesting +

- Stomping + - Screaming + - Pinching +

ABC Data

ABC Data

The time will automatically commence.

Record the Intensity of the event.

Event Note - record a note if required.

Scroll down to record Antecedents, Behaviors and Consequences.

Realtime ABC event

Time elapsed

00:00:16

Event intensity

2 / 5

Event note

Your note here...

Undo

Antecedents

Alone + Demand (1) - Attention +

Wanted Something He / She Can Have + Denied Access +

Add antecedent +

Behaviors

- Biting + - scratching + - Cursing (1) +

- Hitting + - Elopement (1) + - swearing +

- protesting + - Stomping + - Screaming +

- Pinching + - Hitting Self (1) + - Grabbing +

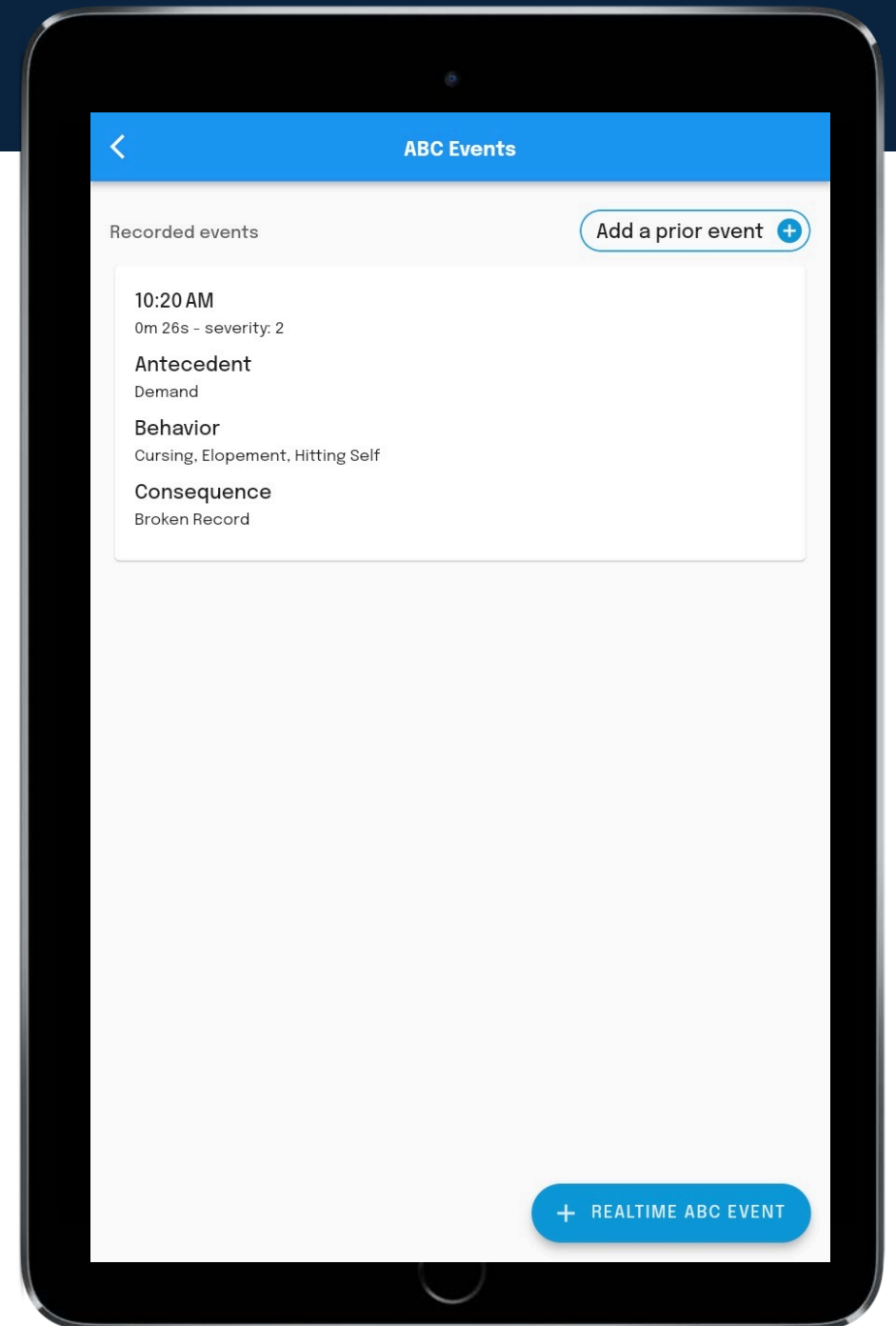
Add behavior +

Consequences

ABC Data

ABC Data

To view the ABC events and to record a prior event, click on the top right menu bar and select ABCs.

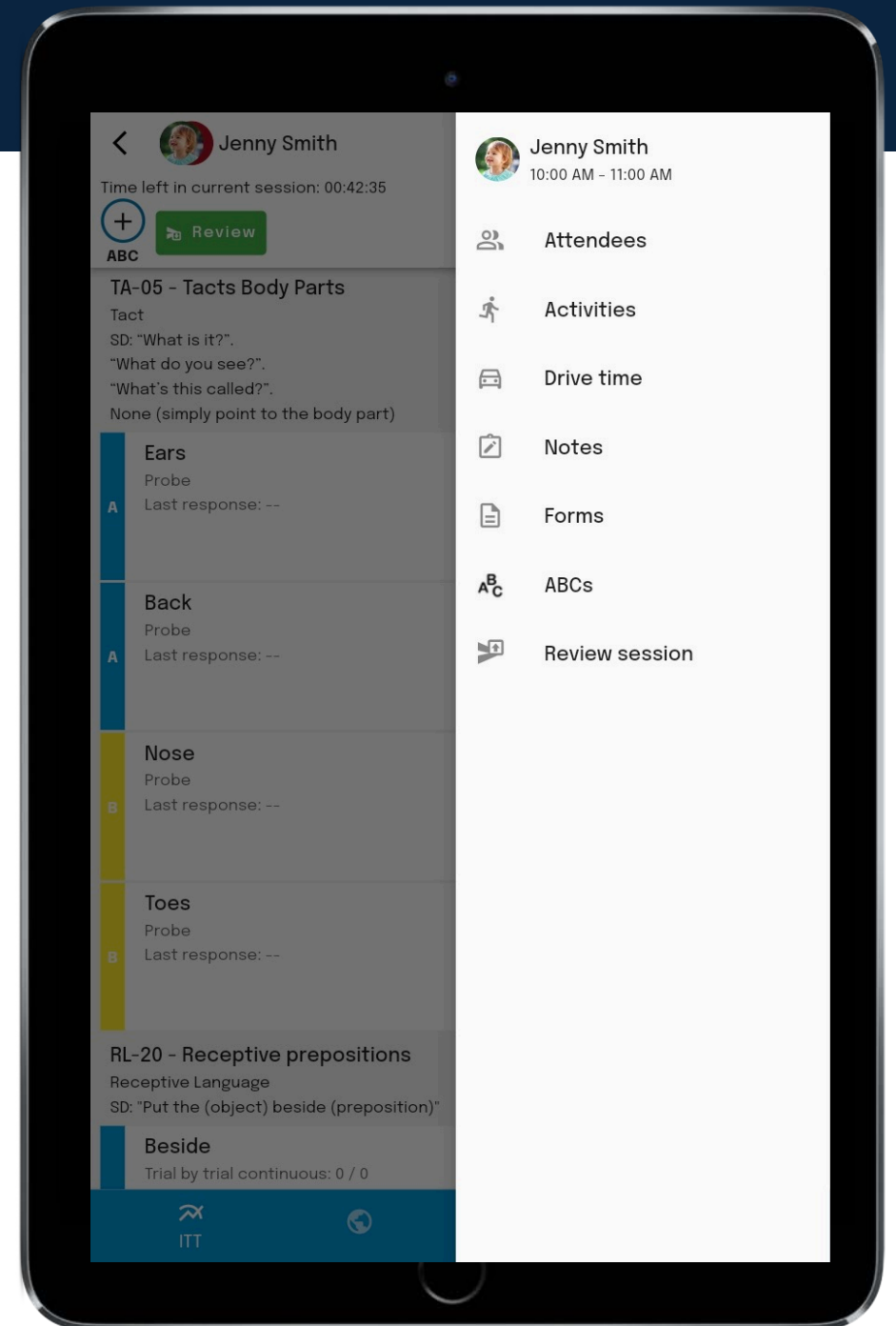


Navigating the App

Pressing on the Top right Menu button is where you will access

- Attendees
- Activities
- Notes
- Forms
- ABCs

It is also where you will Review the Session and then Submit it.



Attendees

Check into the Session when you are starting (billable time).

Check the Learner in when they arrive.

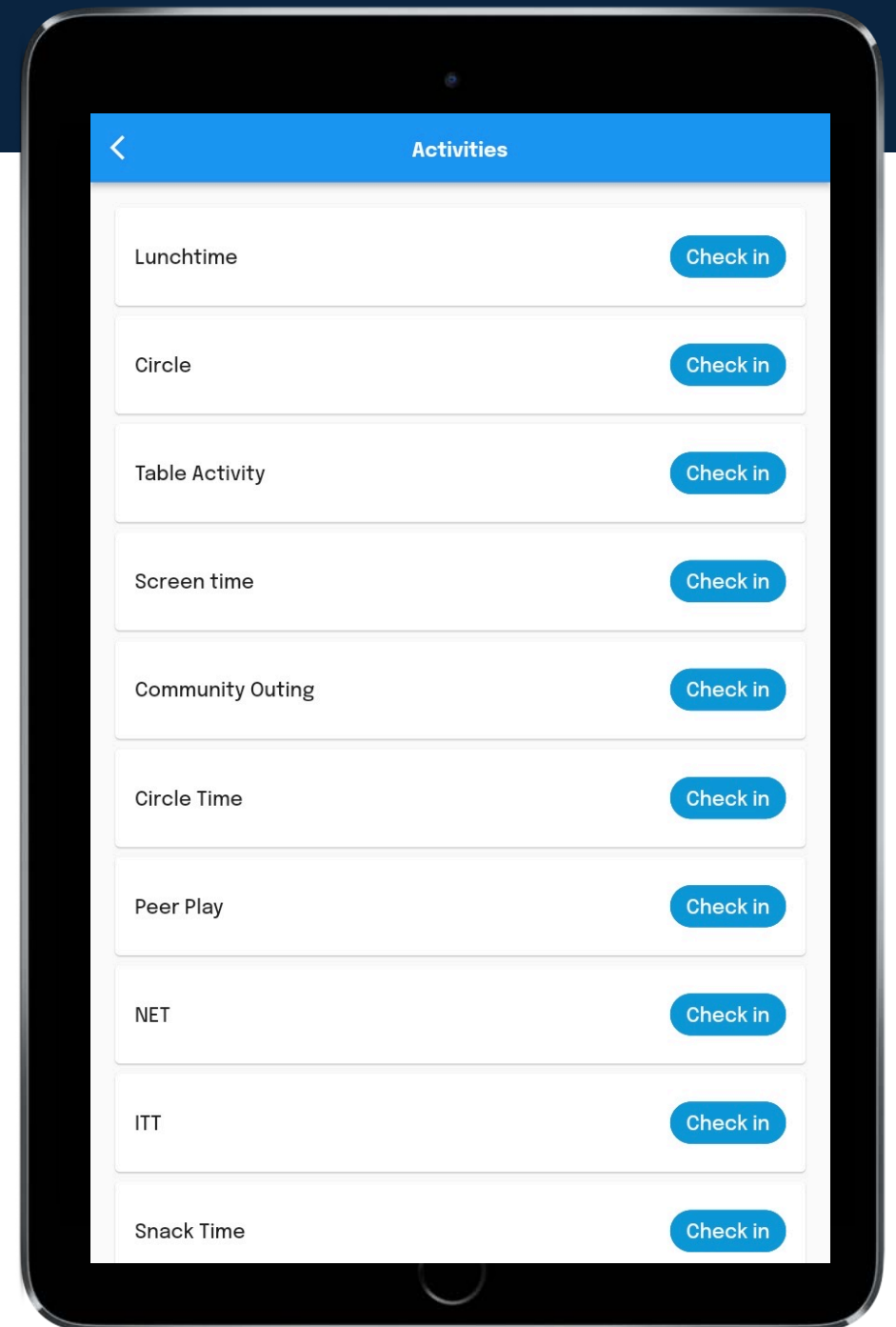
If you did not go to Attendees to check in your Learner, you will be prompted to check in the Learner as soon as you attempt to record data.

Your learner will be checked out upon completion of your session. They will be time stamped when your session data syncs.

Circle Time

In: 11:55:55 AM

Check out

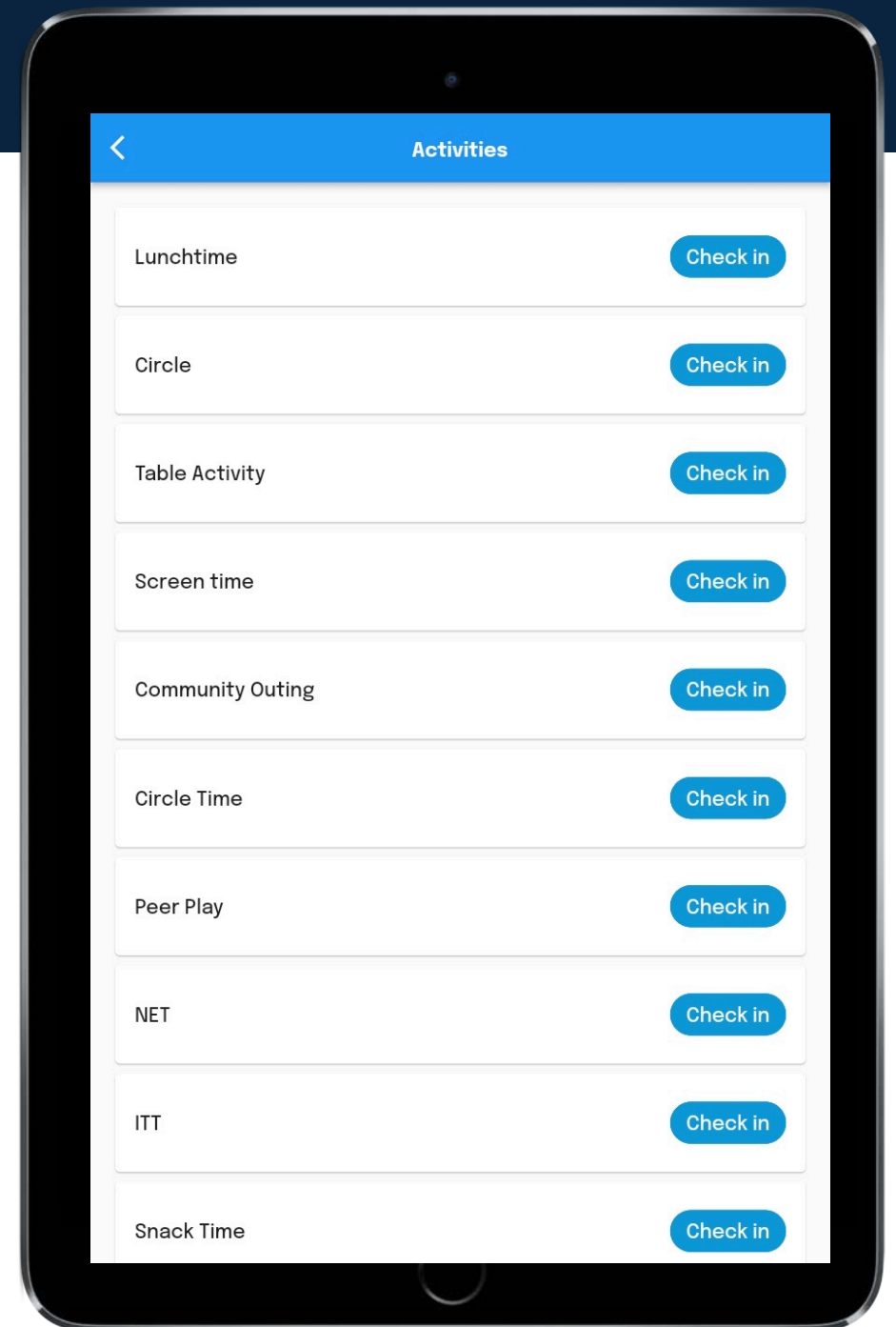


Activities

If your Supervisor wishes you to track activities, they must be set up ahead of time in the web portal.

Making use of the Activities can provide additional insight into the Learner's progress.

Simply select the activity you are currently doing, and track the start and end of the activity. i.e., circle time, toileting, snack, etc.



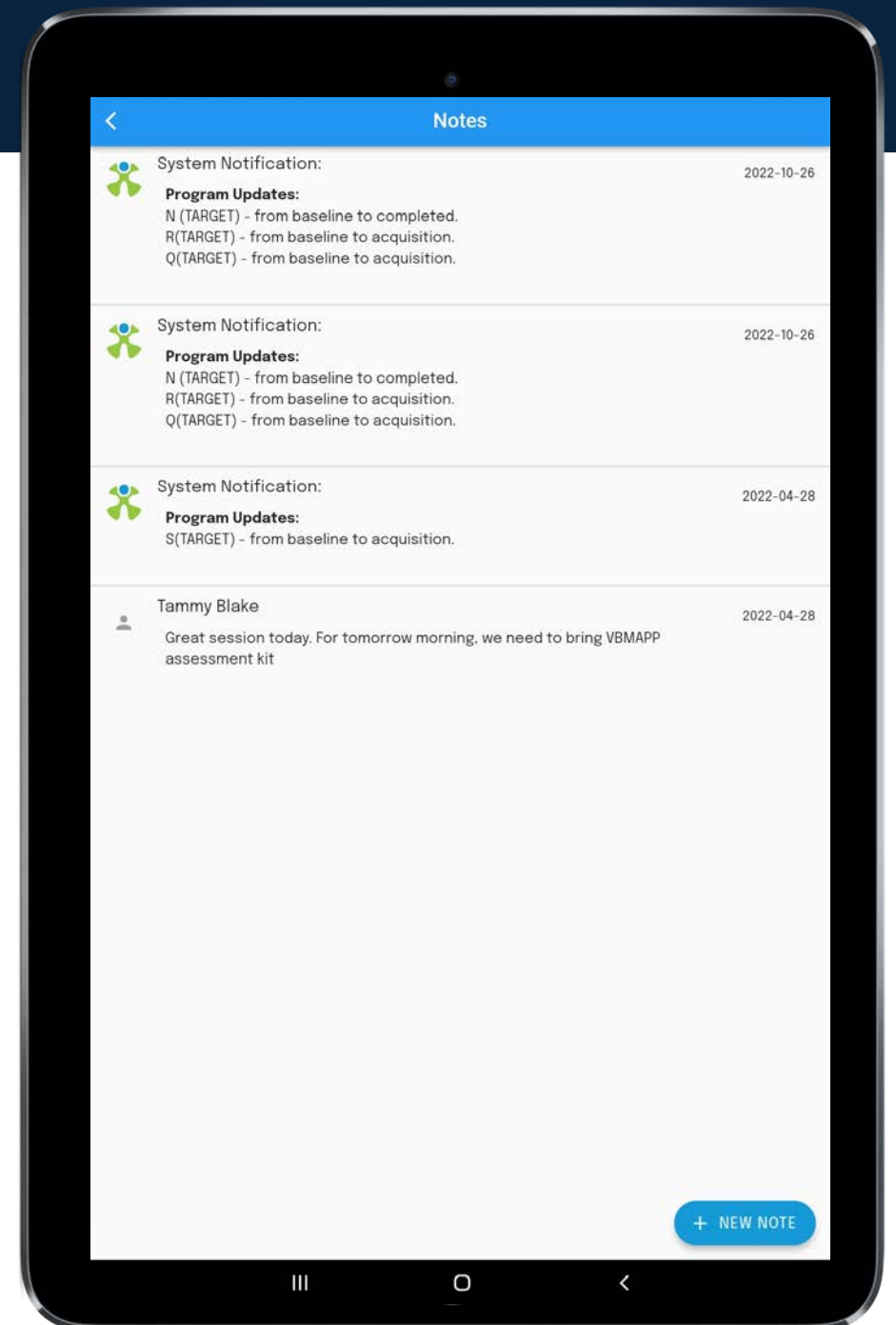
Notes

When setting up a session, or within a session, the therapist can add notes and view previously recorded notes.

These notes will include notes from another team member and notes automatically created from Portia. Notes created are visible to the entire team and the device will store up to ten notes at a time.

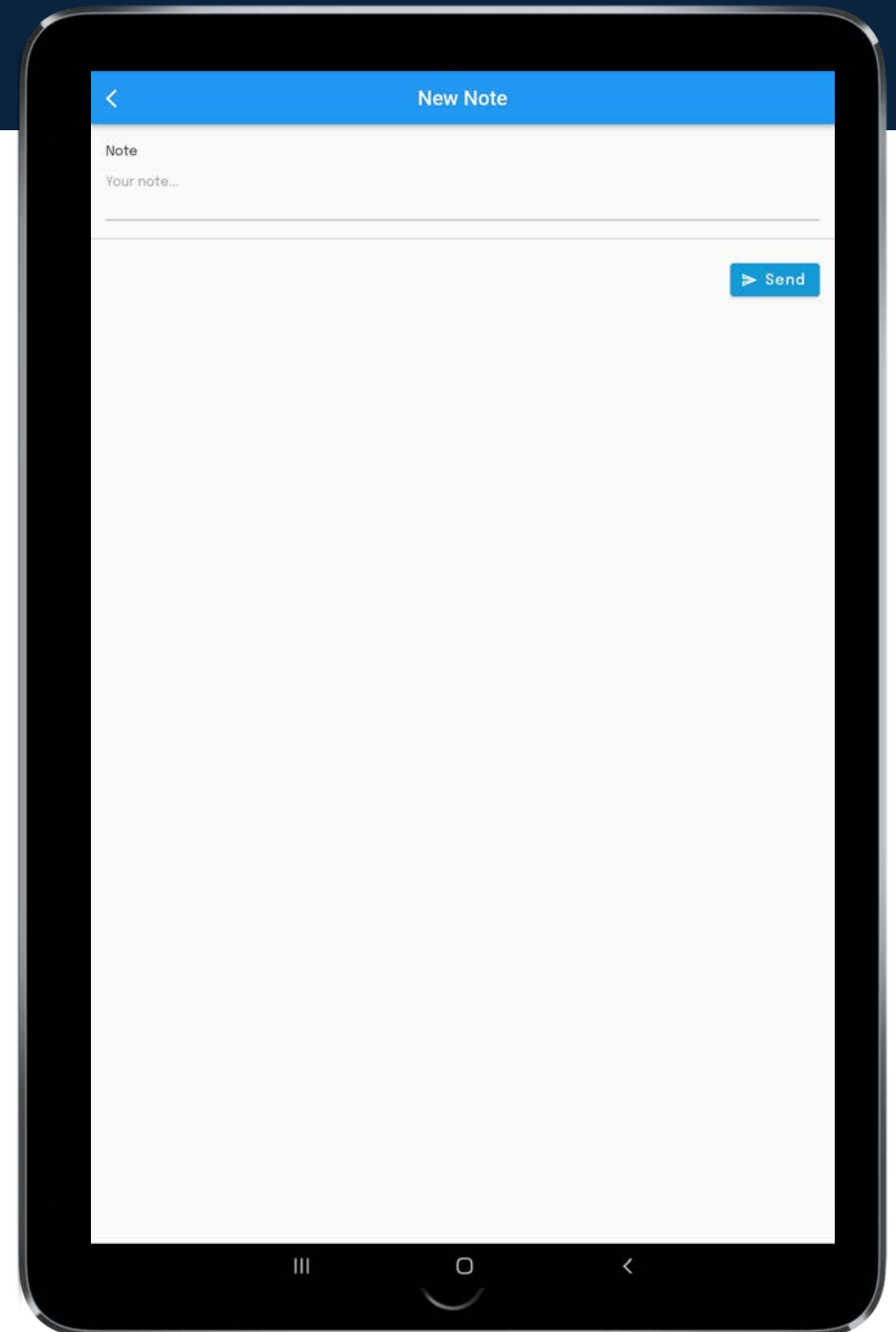
When a Target status changes, a note will be generated and appear at the beginning of the session.

If you are in a Group Session, the Notes shown will be solely for the Learner you are currently viewing.



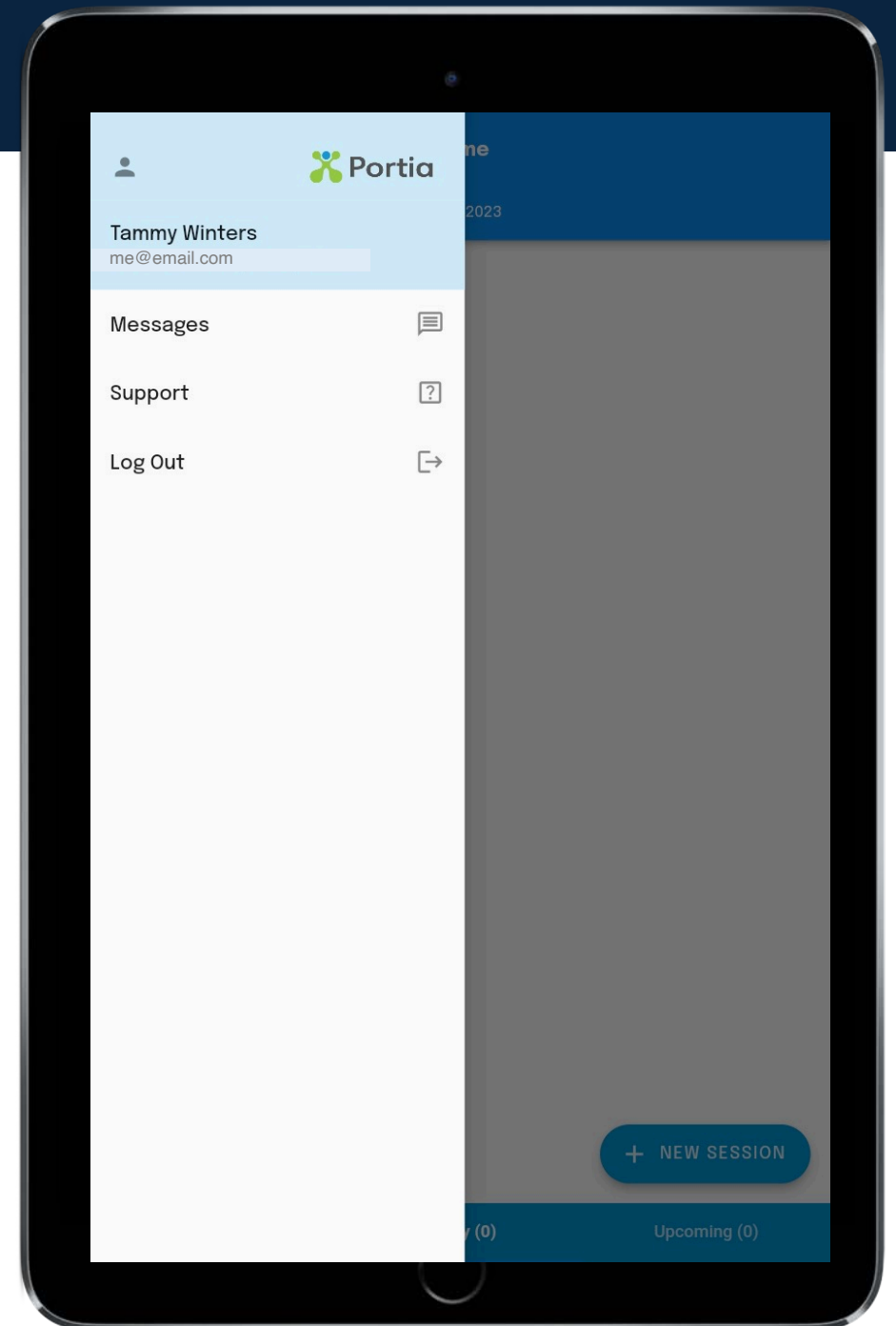
Notes

Add the note and press Submit.



Main Menu

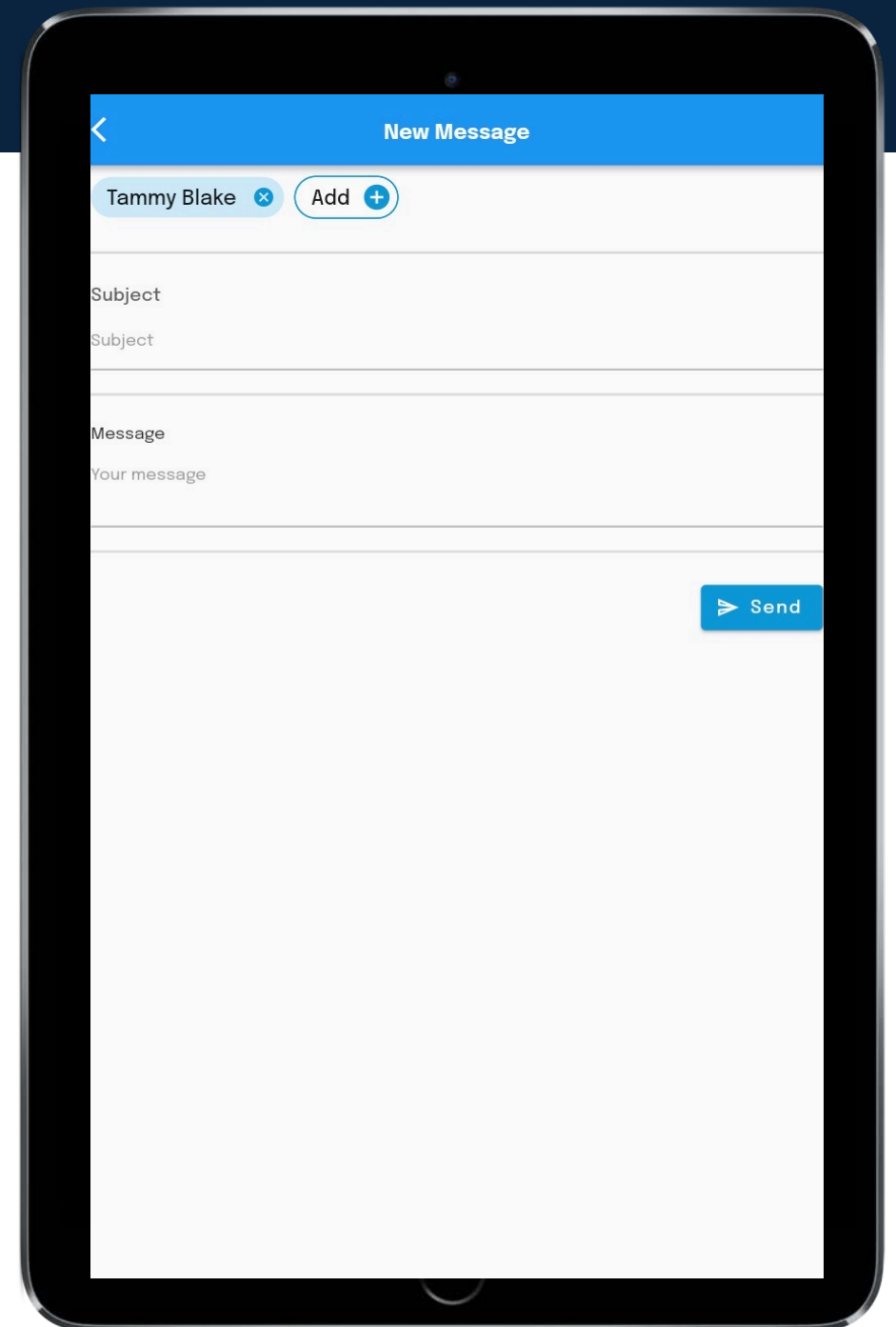
The Main menu is where you can view and send Messages, Support Tickets to your in-house Portia expert and where you will log out of the app.



Messages

Messages are private amongst a group, or individuals.

Messages are not tied to a Learner.



Support

Support – this is where you can submit a ticket to your Portia trained, in-house Portia expert.

Tickets can be “I have a question” and “I found a bug”

Your in-house expert will answer your question OR they can expedite the ticket to Portia’s Support Team.

Support Screen is where you will submit tickets and read the responses to your tickets.

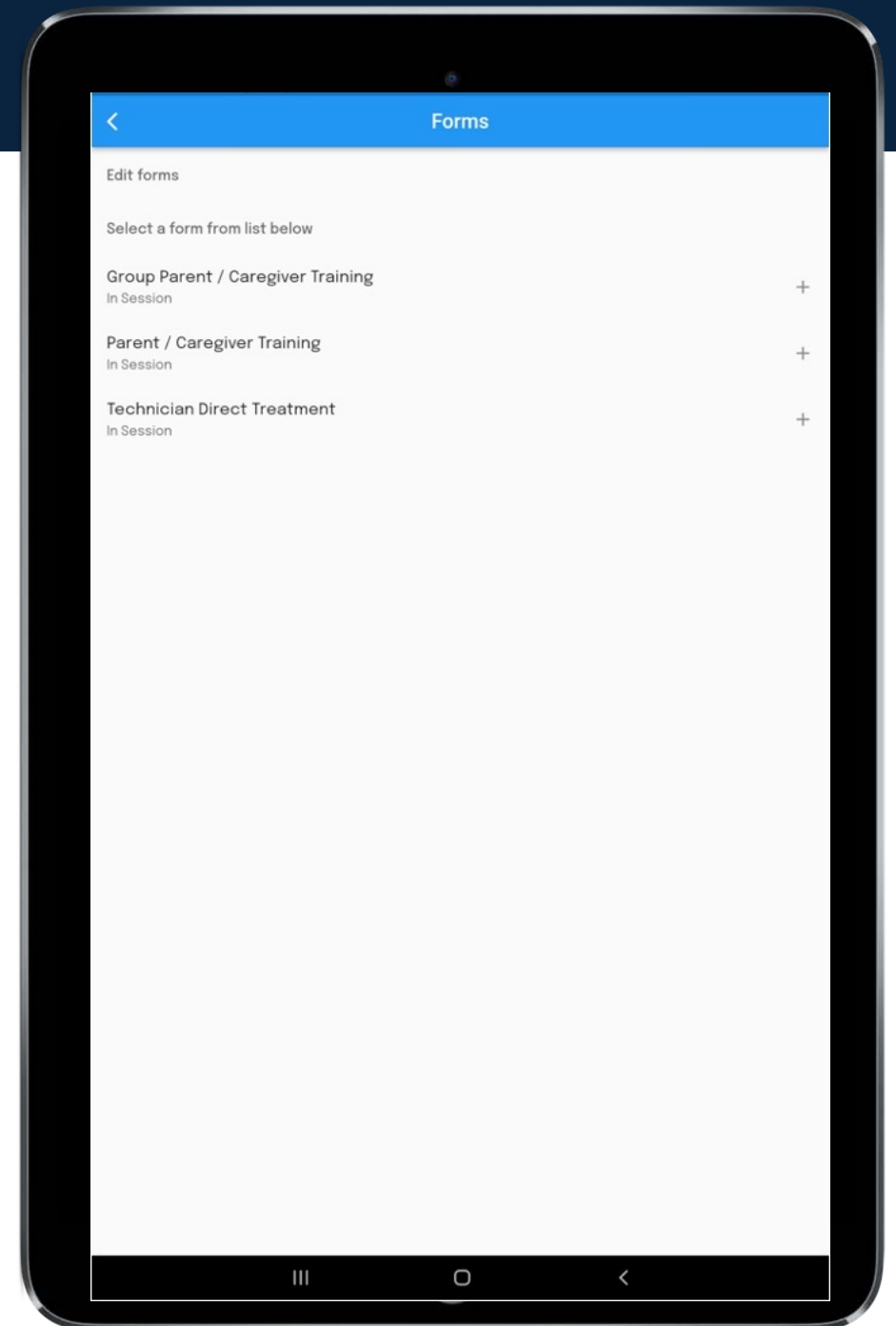
The image shows a tablet screen with a 'Create ticket' form. The form is titled 'Create ticket' in a blue header bar. Below the header, there is a 'Summary' section with a text input field. The next section is 'What type of issue are you having?' with two buttons: 'I have a question' and 'I found a bug'. Below this is a 'Severity' section with a slider ranging from 1 to 5. The slider is currently set to 1, and the text below it reads 'I have a question or something is not working but it has no impact on my work'. The next section is 'Describe your issue' with a text input field. The final section is 'Where would you like to send it?' with a dropdown menu. At the bottom right of the form is a blue 'SUBMIT' button. The tablet has a black bezel and a home button at the bottom.

Forms

To complete a form, click on “Forms” in the Menu.

All of the Forms which can / must be completed in a therapy session will be visible.

Please speak to your Supervisor in regard to what forms must be filled out in your sessions.



Forms

Complete the Form and press save.

Items with a * red star are a required field. If you leave these areas incomplete the Form will automatically be saved as a Draft.

You should complete the form prior to the end of the session.

← Technician Direct Treatment

Attendees *

☐ Patient ☐ Technician ☐ Supervisor ☐ Parent/ Caregiver

☐ Clinical Director/ Administrative Supervisor ☐ Other

Select all that apply.

Describe any changes to the patient's biopsychosocial information (if any):

Describe any notable events, emergency, or crisis situations encountered (if any):

Describe motivators/reinforcers used: *

Extending a Session

Sometimes sessions need to be extended past the scheduled end time.

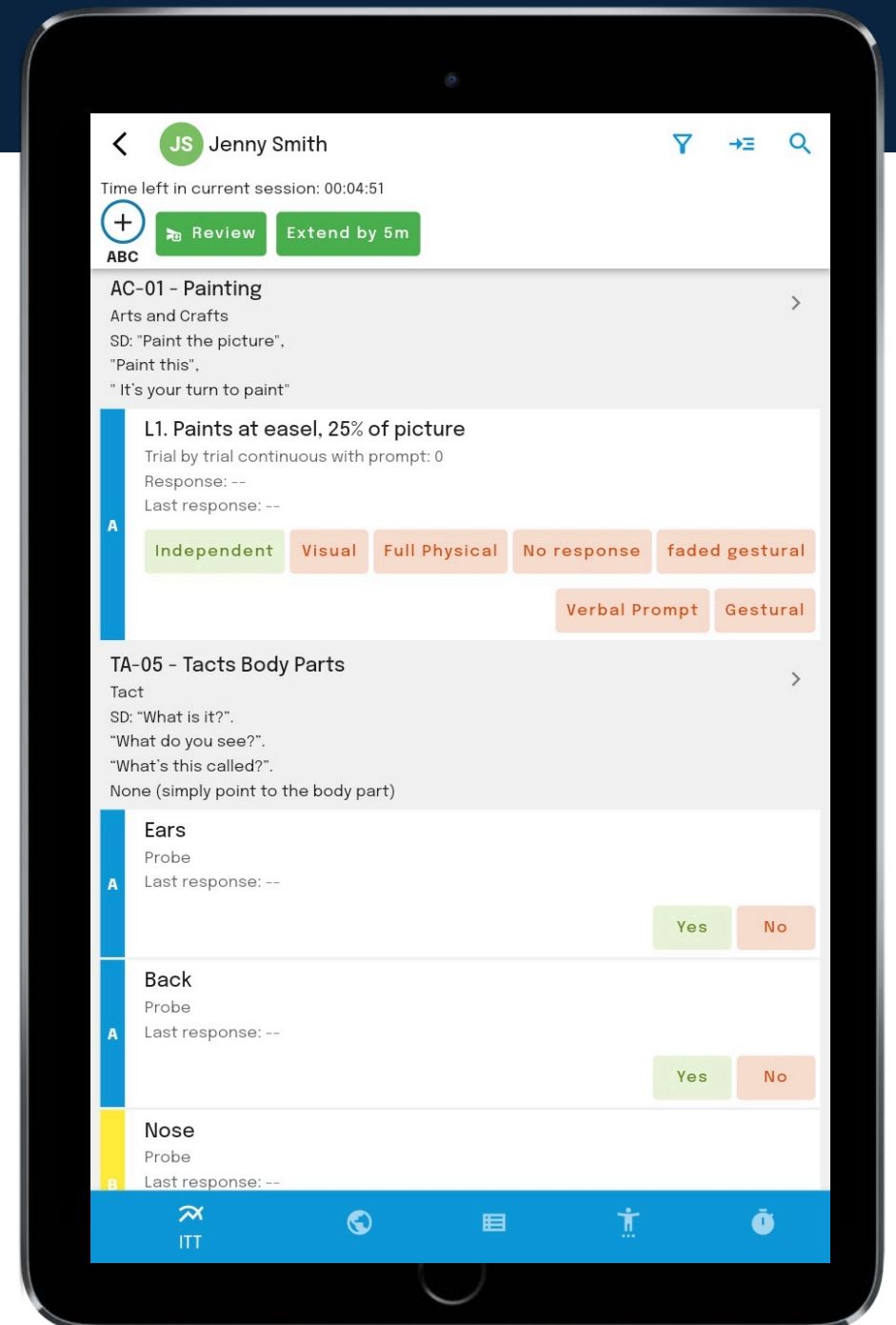
No Problem – simply click on the Extend by 5 minute button

Time left in current session: 00:02:58



Review

Extend by 5m



Session Review & Submit

To end your session, go to Session Review on the Top Right menu OR you can click on the Review Button on the Top Bar.

Time left in current session: 00:02:58



Review

Extend by 5m

You must complete your session within 5 minutes after the scheduled end time.

A tablet displaying the 'Session review' screen. The screen has a blue header with a back arrow and the title 'Session review'. Below the header, there are sections for 'Date & time', 'Attendees', 'Activities', and 'Signature'.

Session review

Date & time

Monday, May 15, 2023

Start time: 8:00 AM

End time: 8:32 AM

Attendees

Tammy Winters	Check out
In: 8:19:49 AM	
Jenny Smith	Check out
In: 8:19:49 AM	


Activities

Targets performed	0
Notes created	0
ABCs recorded	0

Signature

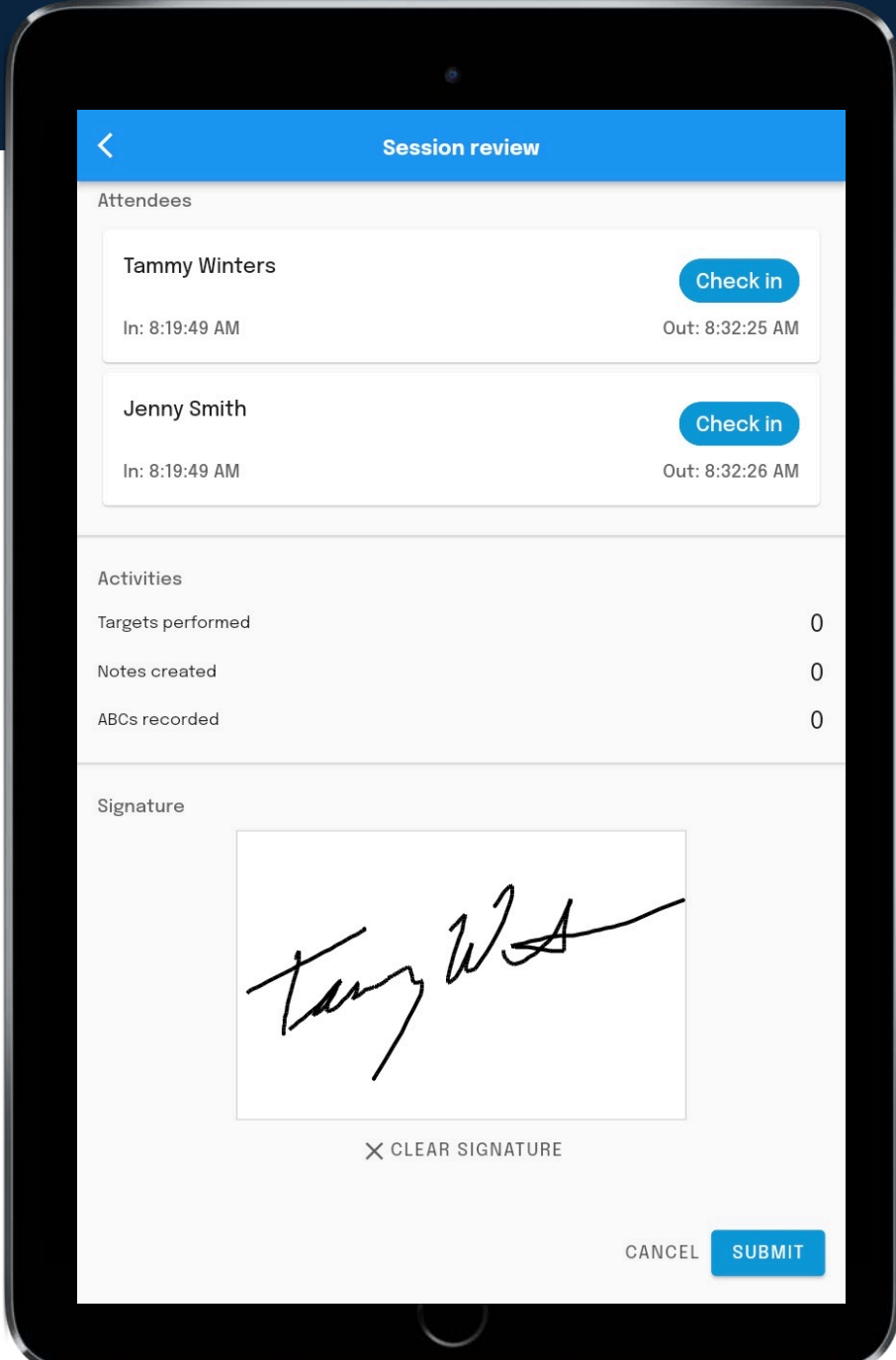
Session Review & Submit

To end your session review the Session Summary, complete any incomplete forms and sign the form.

Here you can edit the Start and End Times of the Session... press the  button to edit the time.

Sign and Press Submit

You must complete your session before the scheduled end time. Failure to do so will automatically synch your data 5 minutes after your scheduled end time.



The screenshot shows a tablet displaying the 'Session review' app interface. The app has a blue header with a back arrow and the title 'Session review'. Below the header, there are three main sections: 'Attendees', 'Activities', and 'Signature'.

Attendees: This section lists two attendees. Each entry includes a name, an 'In' time, an 'Out' time, and a 'Check in' button.

Name	In	Out	Action
Tammy Winters	8:19:49 AM	8:32:25 AM	Check in
Jenny Smith	8:19:49 AM	8:32:26 AM	Check in

Activities: This section shows a list of activities with their respective counts.

Activity	Count
Targets performed	0
Notes created	0
ABCs recorded	0

Signature: This section contains a signature field with a handwritten signature 'Tamy Winters'. Below the signature field is a 'CLEAR SIGNATURE' button.

At the bottom right of the screen are two buttons: 'CANCEL' and 'SUBMIT'.

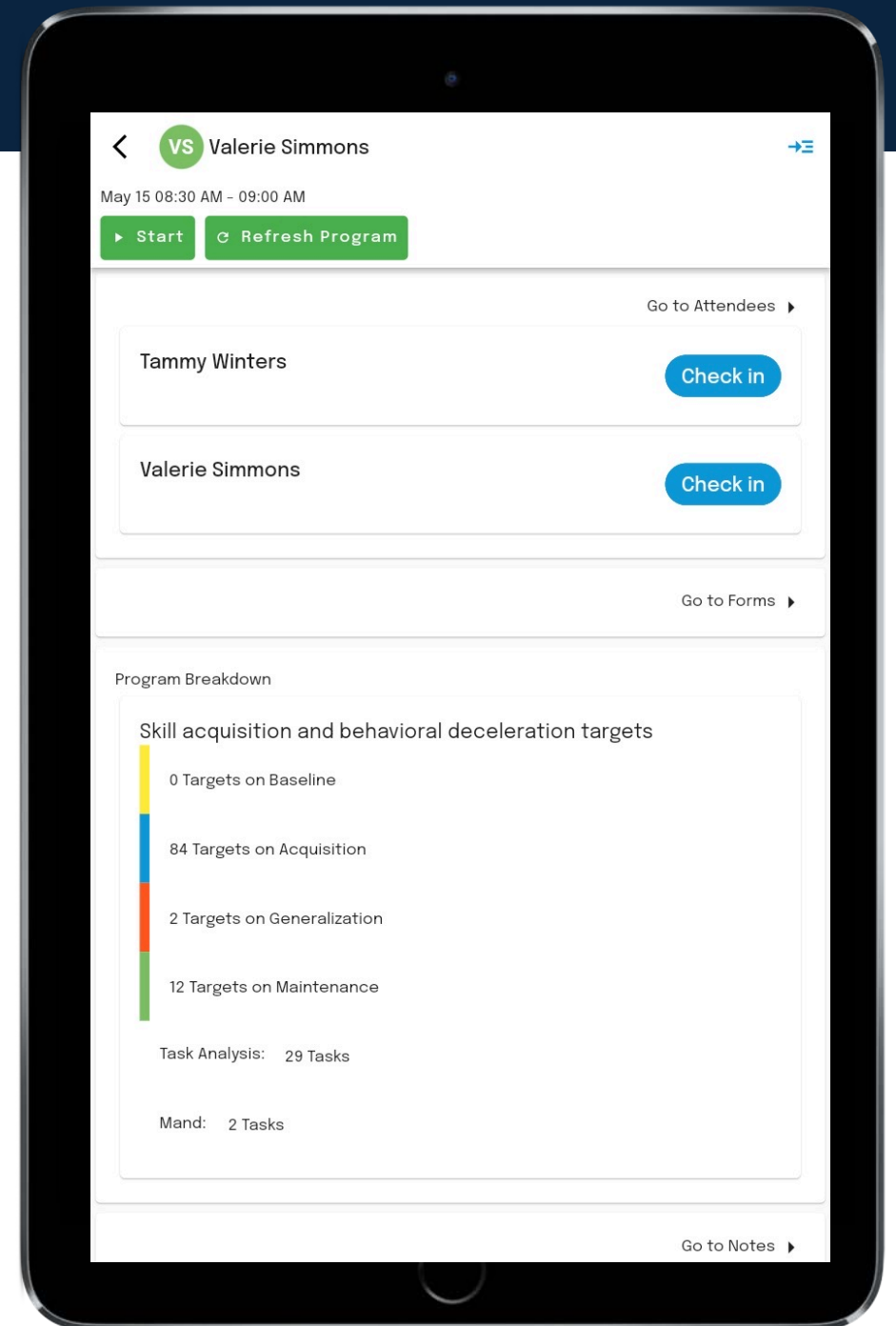
Meeting Session

To create a meeting, select “meeting” under session schedule.

Here you will see an overview of the Learner’s program.

Scroll down to

- check in attendees
- assign an activity to the meeting
- complete forms



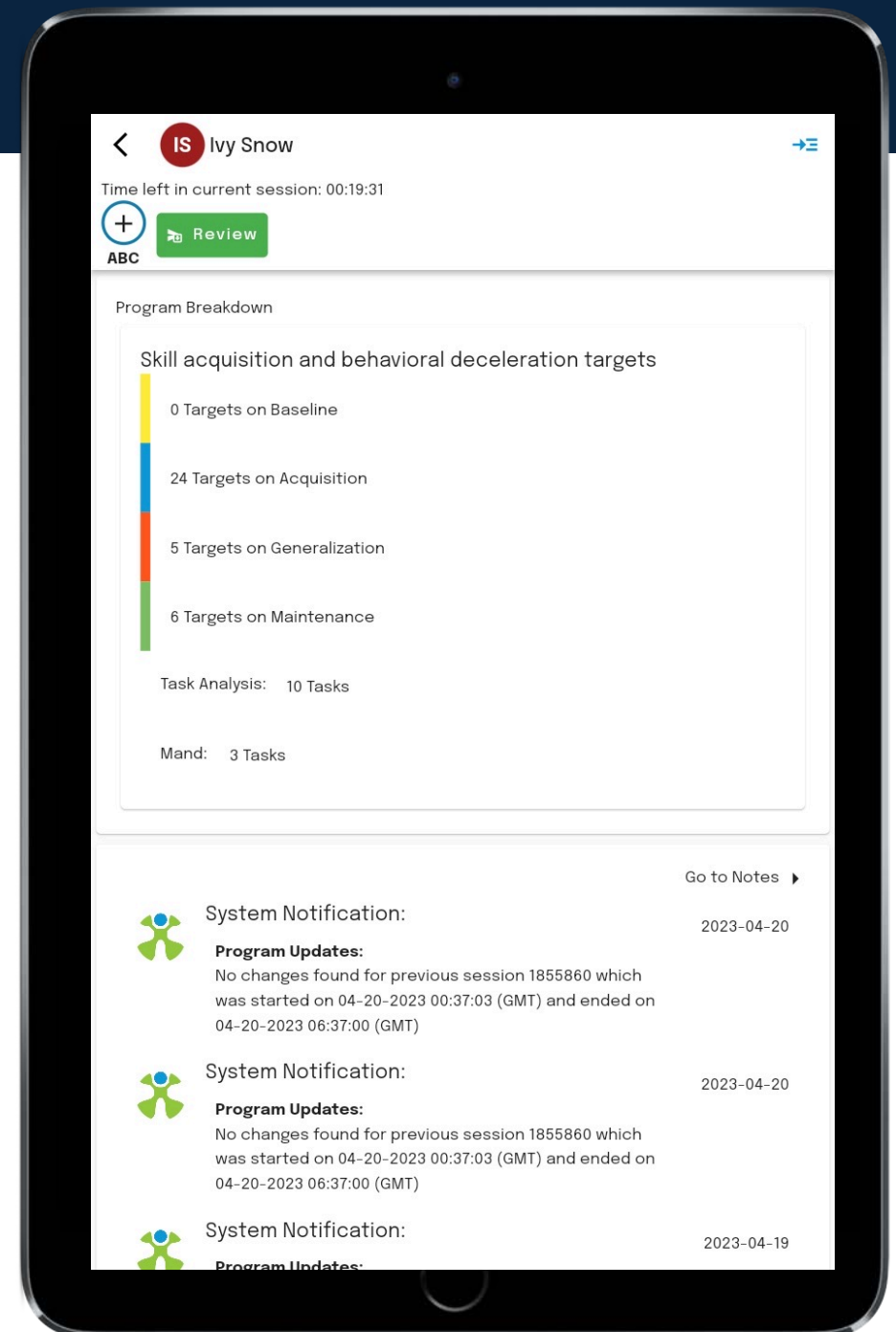
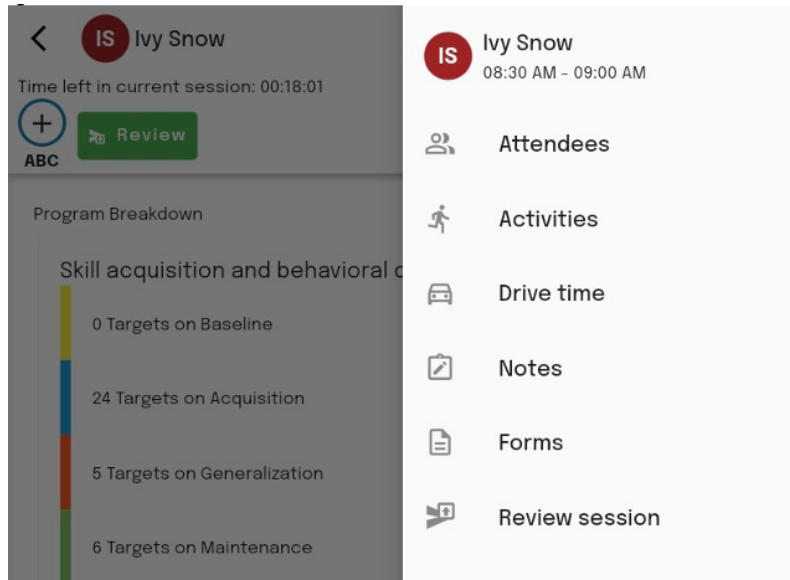
Meeting Session

Meeting Sessions have a brief overview of the Learner's program.

On this page you can quickly

- Check in / out scheduled attendees
- Forms
- Notes

The Top Right Menu has the regular menu for Navigating the app.



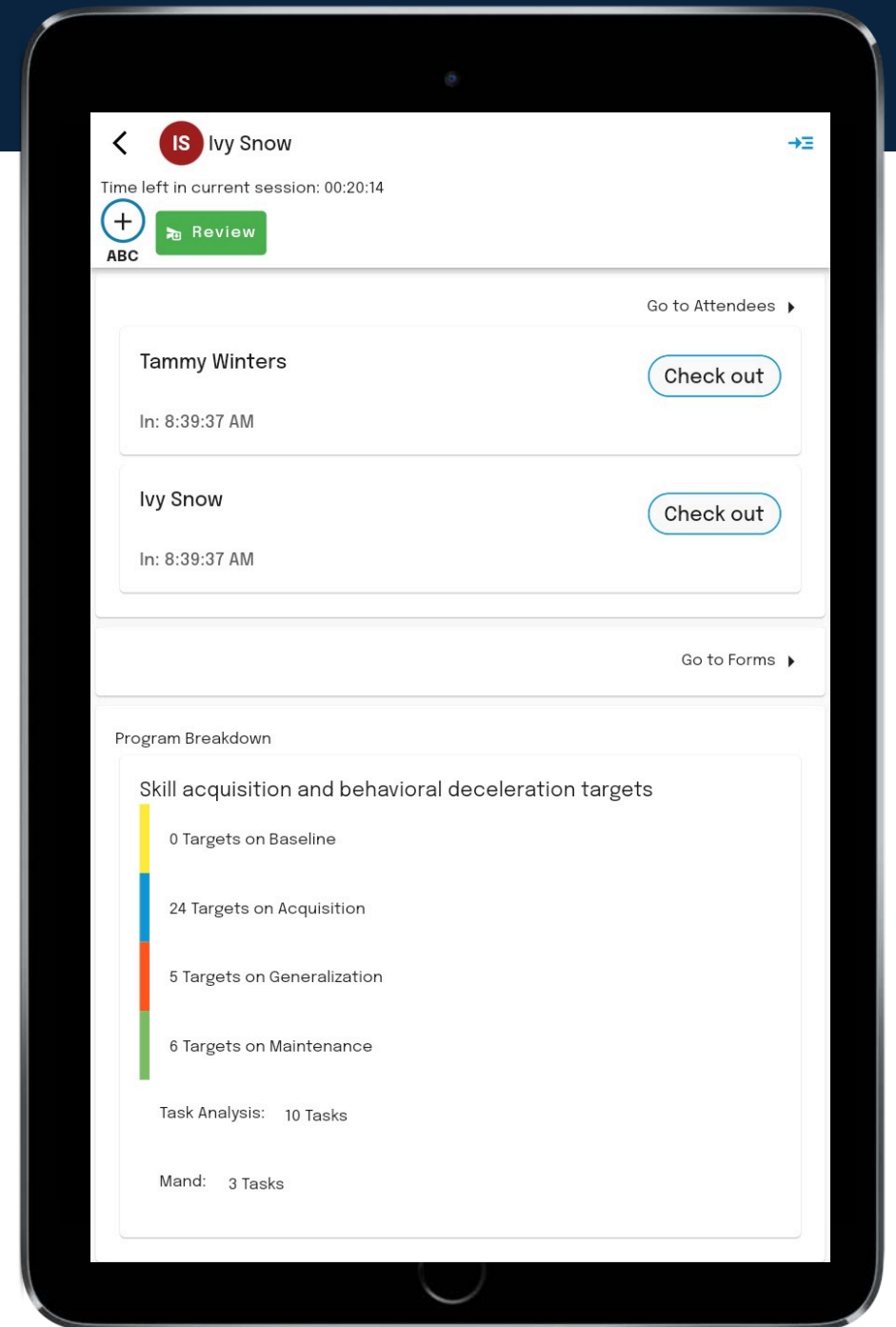
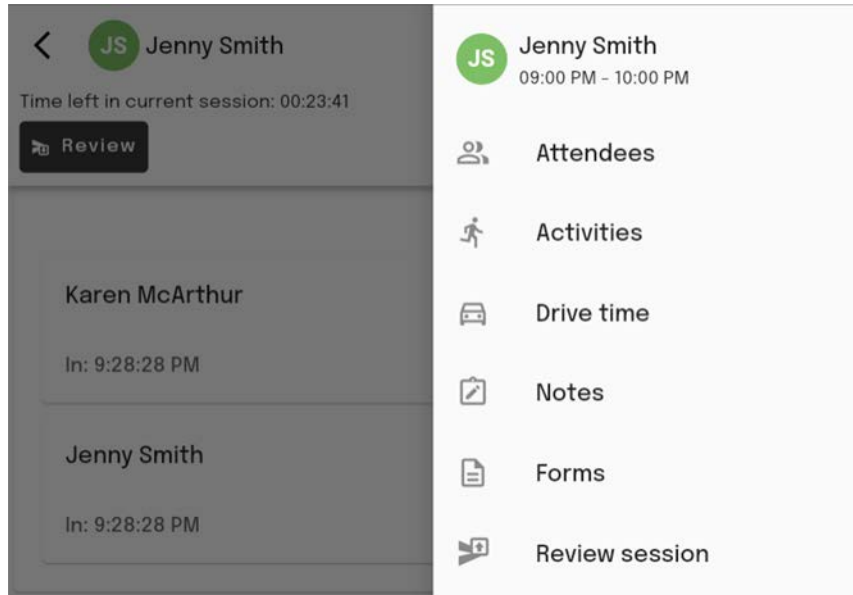
Meeting Session

You will end your Meeting Session the same way as a One to one Session and a Group Session

Press Review

OR

Go To Top menu and press Review Session



FYI – for Supervisors

Ending a session early

Portia will not process the session until the scheduled end time, this will be delayed **ONLY** when the user presses Extend by 5 minutes.

If the user ends the session early, the session is sent to Portia, however, the session will **NOT** show as completed on the schedule until the session has processed (8 minutes after the scheduled end time).

FYI – for Supervisors

Not ending the session on time

The user will have five minutes to finish up their session before the mobile app will close the session and sync it. During this time the user can enter target data, activities, attendees, notes and forms.

* They do have the option to extend their session.