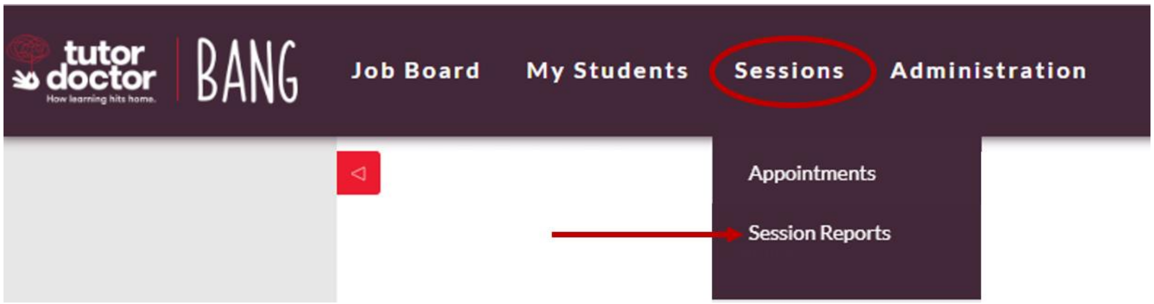
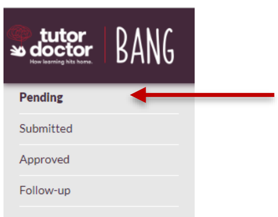
CREATING SESSION REPORTS

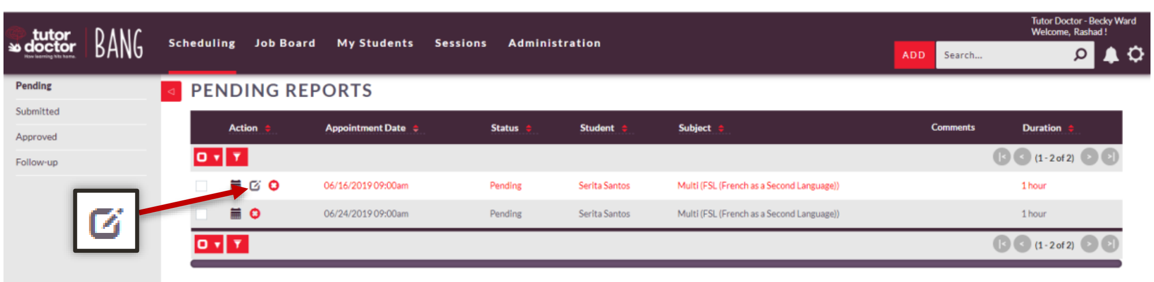
1. Hover over the **Sessions** tab on the top menu to display the Session dropdown. Click **Session Reports.**



2. You will be taken to the **Submitted Reports** page. Click **Pending** on the left-hand menu.



3. You will be taken to the **Pending Reports** page. Here you will find all of the session appointments for which a session report has not been submitted. Appointments in red have overdue session reports. Click on the **Add Session Report** icon.



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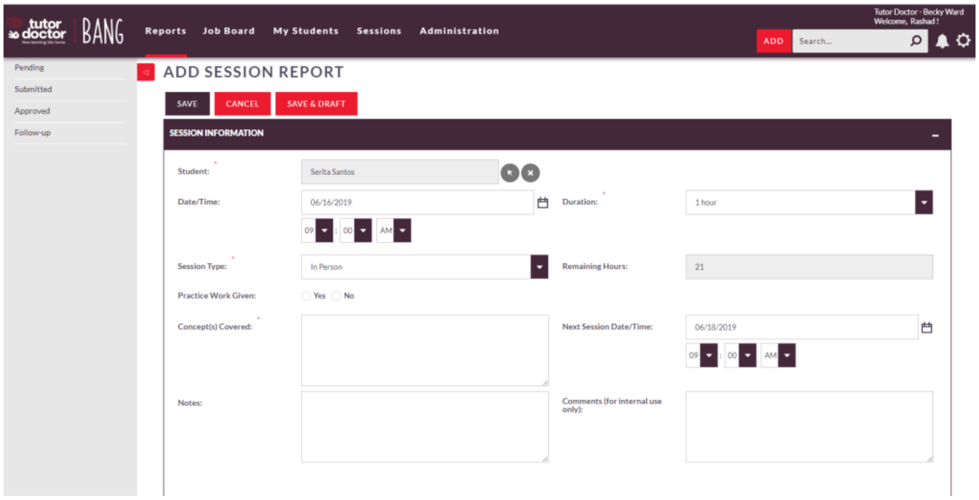
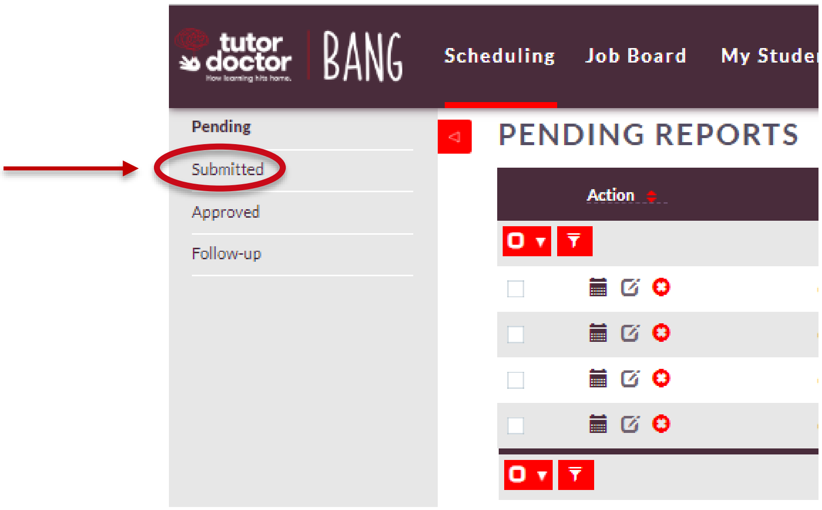
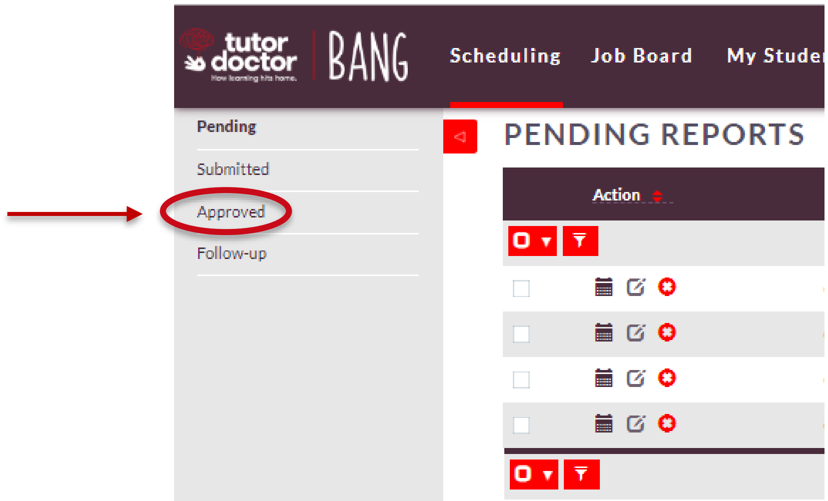
4. You will be taken to the **Add Session Report Page.** Confirm the prepopulated information is correct and complete the **Practice Work Given**, **Concept(s) Covered**, **Notes**, and **Next Session Date/Time** fields. Then click **Save.**



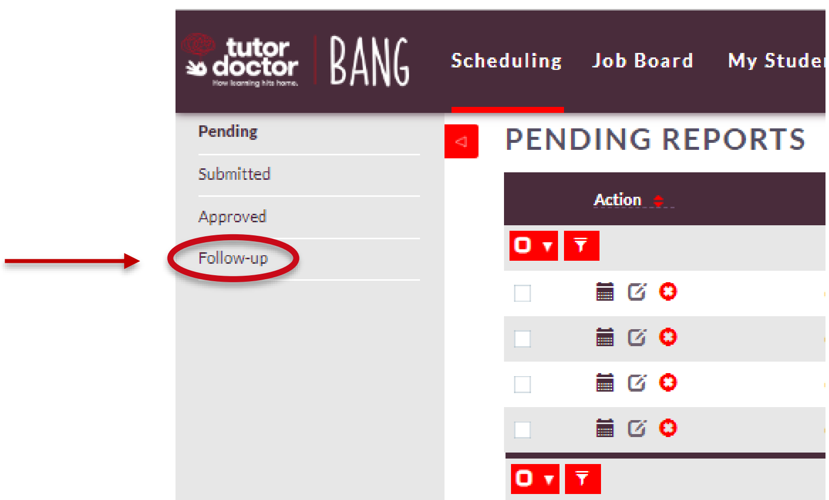
5. To review session reports that have been submitted, click **Submitted** on the left-hand menu.



6. To review session reports that have been approved, click **Approved** on the left-hand menu.

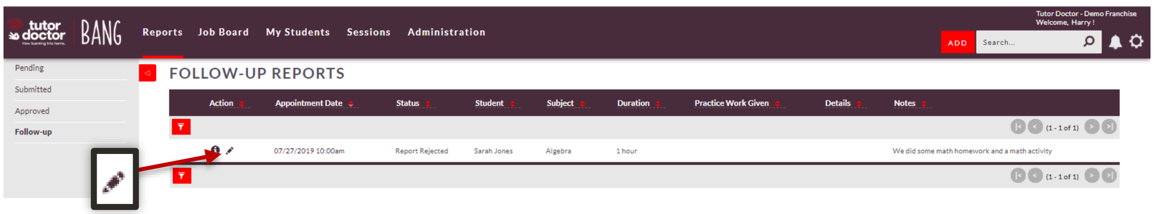


7. To edit session reports that have not been approved, **click Follow-up** on the left-hand menu.



CREATING SESSION REPORTS

8. You will be taken to a list of session reports that the local office has not approved. Click on the pencil icon next to a session report to read the comments from the local office and edit the report.



9. Make any necessary changes and click **Save**.