

# Completing a Discharge Summary in Valant

There are 2 ways to complete a Discharge Summary in Valant:

1. The Discharge Summary is NOT associated with a client appointment.
2. The Discharge Summary IS the documentation for the final closing session.

## 1. Discharge Summary NOT associated with a client appointment:

Go to the Schedule and create a Patient appointment (close to when you last saw the client). Without selecting a Primary Code, you can click on Actions – Document – Use Mobile Notes. Once the note is saved/signed then you can go back to your schedule and delete the appointment you created.

## 2. Discharge Summary IS the documentation for the final closing session:

If your session is the last visit, you may use the Discharge Summary Mobile Note as your note for that last visit. In that case, you would bill the session normally using the regular billing codes (90834, 90847, 90837, etc.) as the Primary Code and then select the Discharge Summary Mobile Note.

For both types of Discharges in Valant, select Discharge Summary from Other:

The screenshot displays a grid of note selection options. The 'Other' category is highlighted with a yellow box and contains the following items:

- Missed Appointment (More Details) [Select]
- Suicide Risk Assessment (More Details) [Select]
- Discharge Summary (New) (Discharge Summary) (More Details) [Select]

Other categories include:

- Progress Notes:** Free Form (No Meds & Allergies tab) [Last Signed] (More Details) [Select], Free Form Note (meds and allergies must be in patient chart) (Free Form Note (you must have completed the Meds and Allergies section of the Patient Chart to use this one)) (More Details) [Select], Therapy Progress Note (More Details) [Select], Group Therapy Note (More Details) [Select].
- Intake Notes:** Intake Note (with assigned measures) (New) (Only "assigned" measures appear in this note) (More Details) [Select], Child Intake Note - Comprehensive (Comprehensive template for child and adolescent initial assessment) (More Details) [Select], Marriage and Family Therapy Intake Note (More Details) [Select].
- Telephone Notes:** Telephone Note (Brief) (More Details) [Select], Telephone Note (Comprehensive) (More Details) [Select].

You will also need to close any treatment plans in the treatment plan tool.

Go to Tools – Treatment Plan Tool – view active – Update – then scroll to the top and click Close Plan (see screenshot below).

Continue/Close Section (Within Update Treatment Plan)

· Close Plan Button – Opens the Close Plan Window. To initiate the closing of the plan, enter a closing date, select a reason for closing the plan from the drop-down, and click the Yes, Close Plan Button. The plan will need to be signed by all required parties before it closes. Closed plans can be viewed and printed, but they cannot be updated, reviewed or re-opened.

The screenshot shows the 'Update Treatment Plan' interface. A yellow circle highlights the 'Continue/Close' section, which includes the text 'Currently: Continuing' and a 'Close Plan' button. Below this section, patient information is displayed:

**Patient**

Patient: Test Client (CLITES)  
DOB: 10/01/1977  
Sex: M

Address: 1875 Station Pkwy NW, Andover, MN 55304  
Phone: (952) 270-1073  
Age: 43