Overview of Documents in Valant

We used to have paper Policies and Personal History forms that were sent out to clients when we saw them in person. The admin team sent out the forms to clients and it was the responsibility of the client to complete and the therapist to check to ensure that everything was completed fully (then, it was scanned & uploaded into CS). If clients did not complete a personal history, we required that they complete this in the waiting room during the appointment time.

Since switching to electronic intake forms, our process has evolved from registering & scheduling first, and then sending out the forms to requiring that the Counseling Policies are fully completed PRIOR to registering & scheduling an appointment. This is for 2 reasons:

1) It reduces scheduling with people who are not committed to attend therapy and thus reduces the no show rate for intakes and,
2) 2) You can be assured that the most important legal document – the Counseling Policies – is fully completed and signed.

After receiving the Counseling Policies, we then register (and, if possible, schedule) the client in Valant. This process includes sending the Client Portal Invite and sending the Measures (Personal History & Screening Forms) to the Client Portal so that once the portal is activated, the client can complete the Measures.

Q. Where do I find the completed Measures?

A. Once completed, the Measures are temporarily “stored” or held in the “Uninitialed Documents” tab on the main menu (or on the Dashboard) where you can open the PDF to look at the raw data in the Measures. Please do **NOT** “initial” the Measures.

Measures are stored/held in the Uninitialed Documents tab until you complete your Mobile Note. The raw data in the Measures will populate into a narrative within your Mobile Intake Note.

Q. How do I know which Intake Note to use?

A. For the Intake Note, be sure to select the Mobile Note that corresponds with the type of History form completed. There are 3 types of History Forms (Comprehensive Child, Clinical History & MFT History) and 3 types of Intake Notes (Child Intake Note, Adult Intake Note (with assigned Measures) & MFT Intake Note).

Q. Where do the Measures go after I complete & sign the Intake Note (or any Mobile Note)?

A. Once the Mobile Note is completed, then the Measures are automatically transferred to the Documents section of the Patient Chart. This is how it works for all Measures, whether they are intake measures or they are measures you send as one time or recurring measures. Therapists are also able to schedule measures to be completed on a recurring basis between appointments and/or to send one time measures to the Client Portal to screen for changes in diagnosis, reviewing treatment, assessing progress, etc.

Q. What if I have an intake coming up soon and do not see that the Measures are in the Uninitialed Documents tab?

A. You can send your client an email to remind them to activate the Client Portal and to complete the Measures. If the Client Portal is not activated, then they are not able to complete the Measures.

Q. What to do if the client fails to complete the Measures at all or does not complete them fully?

A. You can still see the client, but bill that first visit as a regular appointment (90834, 90832, 90837, 90847) and complete a regular Progress Note for the Mobile Note instead of the Intake Note. Let them know that the Measures MUST be completed fully prior to the next appointment. Once the completed Measures are received, you would bill that subsequent appointment as the 90791 as it will have the info necessary for you to complete the Intake Note. Let them know how important it is to have the History and Screening forms completed. If they fail to complete those by the next session, consequently, I would recommend spending the session reviewing the info in the Worksheets of the Intake Note (click the options on the Worksheet so that it generates the narrative). If your client completes the Measures, but not fully, you can go to the Patient Chart – Measures and send another one time measure of the measure that was not completed fully.

Q. What if the client's credit card does not work or is expired?

A. We MUST have a signed CC Authorization on file for the new card. Direct clients to our website – Current Clients tab – where they can complete the Credit Card Updates link, as this is required for all non-MA insured clients, even if a ded or MOOP has been met. *This needs to be completed prior to scheduling follow up sessions.*

Q. What is required for me to see a client in person?

A. We are currently not seeing clients in person, as a company. On a case by case basis, we have made exceptions to allow for some clients to be seen in person due to medical necessity. Prior to seeing a client in person, the therapist must review & sign the RRC Return to Office Procedure form. This outlines our procedures for reducing risk regarding COVID-19 exposure and must be followed carefully. Clients must review & sign the RRC COVID Informed Consent and complete a COVID19 Screening form electronically prior to each in person session. These are sent electronically thru the Valant Client Portal as Esignature Requests and are to be managed by the therapist. Please see the document titled: *In Person Sessions Info RE: COVID19 Consent and Screening Forms* for more information.

For in person COVID19 Consent & Screening Forms <u>Signed ESignature Requests:</u>
You can find the **completed** Signed ESignature Request in the Documents section of the Patient Chart. If you do not see the Signed ESignature Request in the Documents section of the Patient Chart, then they have NOT yet been completed and this will be located in the **Unsigned eSignature Requests** tab under Documents on the main menu. To send a reminder to a client to complete, go to the Unsigned eSignature Request and click "Action" - "Send Reminder."

Q. What is the difference between Patients (under Persons & Institutions) and the Patient Chart?

A. **Patients** (under the Persons & Institutions tab) is where you will find the demographic and insurance information for the client. Important notes about the insurance coverage is located in the **Notes/Images** tab in Patients. Under **Balances** in Patients is where you will enter the credit card into the Card Manager for storing the card on file. You can adjust or update information for **Appointment Reminders** as well as send an Esignature Request under the **Portal** tab of Patients.

The **Patient Chart** in Valant is virtually similar to the manilla file folder we would use for the client's "paper" chart.

- ✓ The "**Overview**" is similar to a Service Record or face sheet. There, you can find the current diagnosis, previous/upcoming appointments, as well as copies of your most recent Notes.
- ✓ If you want to edit the Diagnosis, you can do that under **Diagnosis**.
- ✓ The **Measures** tab is where you would set up a one time measure or a recurring measure to be sent out between appointments.
- ✓ The **Documents** is where you would find all client documents such as completed Counseling Policies, updated CC auths, all of your completed Mobile notes, signed eSignature Requests, uploaded documents, receipts, statement, and the Measures *AFTER you complete the Mobile Notes.*