

# Rum River - Therapist Workflow rev 1/3/22

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## Setting Up Your Schedule

### Showing Openings for New Clients

*Designate time on the schedule when provider is available to see clients. Please keep your schedule updated at all times. Show any availability for intakes 4-5 weeks out, if possible as we always have clients waiting to get in. IF you are “full” but are willing to see clients specifically requesting you, enter “By Referral Only” in the Appointment Name box*

#### Scheduler > Calendar View

1. Navigate to the appropriate day using the thumbnail calendar in the upper left
2. **Double-click** on the schedule at the relevant appointment start time to open the **New Appointment** window
3. Select the **Non-Patient appointment** radio button
4. Select the Intake Opening Category (Purple, Blue or Orange)
5. Update the **End** time to reflect the end of the available period
6. Update the **Appointment Name** to “Open” (or By Referral Only” if fully and only taking clients requesting you specifically.
7. Select the relevant **Facility**
8. Click **Save**

The following are the Intake Opening Categories:

Purple is for Teletherapy ONLY

Category  

Blue is for In Person OR Teletherapy

Category  

Orange is In Person ONLY

Category  

Please be careful in selecting the appropriate category when updating your schedule. Once scheduled, the registration team will indicate in the Appointment Note if the session will be In Person or Teletherapy:

Appointment Note	Teletherapy
Appointment Note	In Person

## New Intake – Ahead of Session

### Receive Intake Email

Admin staff will send an email to the provider when a new intake comes in. Please “REPLY ALL” to let us know that you received the info.

#### Intake Email Example

**Client Name-**

**Office-**

**Therapist-**

**Date & Time-**

**Insurance-**

**Reason for visit-**

**Additional info-**

**Paperwork-** emailed portal invite to [email address(es)]

**\*\*Send Regular Email about Appt-** Please send the client an EMAIL notifying them of the GoogleMeets invite that you send.

- Policies have been received & will soon be uploaded in the Patient Chart under Documents (cc auth is included, if non-MA).
- Portal invite has been sent & Measures have been sent to the client Portal.
- Measures (Clinical History, diagnostic screening forms), once complete, are located in Uninitialed Documents until AFTER the Mobile Note is started.  
(Before the Mobile Note is started, Measures can be viewed, but NOT initialed, or will not populate into the Mobile Note. Once the Mobile Note is started, the Measures move to the Patient Chart under Documents.)

#### **Once verified:**

- Insurance is active - In Patients, look for insurance info in Notes/Image. Copays will be shown on the Demographics page.
- Policies have been received & are uploaded in the Patient Chart under Documents (cc auth is included, if non-MA).
- Portal invite has been sent & Measures have been sent to the client Portal.

- Measures (Clinical History, diagnostic screening forms), once complete, are located in Uninitialed Documents until AFTER the Mobile Note is started.  
(Before the Mobile Note is started, Measures can be viewed, but NOT initialed, or will not populate into the Mobile Note. Once the Mobile Note is started, the Measures move to the Patient Chart under Documents.)

- Please be sure to select the billing code for the insurance written in UPPERCASE or lowercase

Please be sure you have all forms, intake paperwork, authorizations, and signatures that are required before seeing this client.

## Send Google Meet Invitation

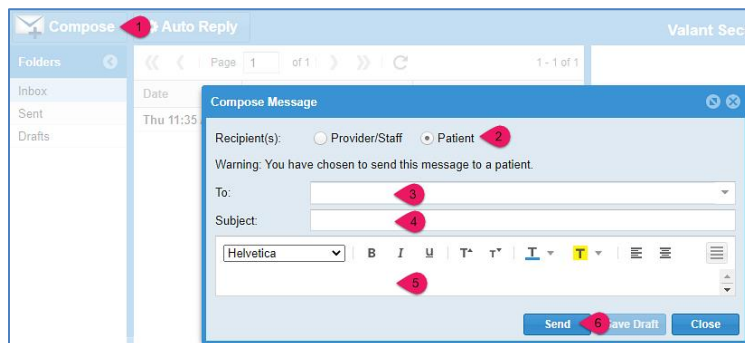
1. Send the Google Meet invitation to the client. Also, send a separate email to the client to let them you that you sent a Google Meet invite as some clients' emails send the invite to a spam folder or they miss it. See Addendum: Telemedicine via G Suite (Google Meets)

## Secure Messaging via the Client Portal: Initiate Outbound Message to Client

Provider sends a message to the client that the client can reply to in the future to contact the provider directly. Secure Messaging can also be used by the client to communicate with their provider about scheduling.

### Tools > Secure Messaging

1. Click **Compose** to open the Compose Message window
2. Select the **Patient** radio button
3. Type at least 3 characters of the client's first or last name in the **To** field and select the client
4. Complete the **Subject** field
5. Complete the **Body** field
6. Click **Send**



7. Click on Unread Secure Messages to see the message

Dashboard	
Action Items	
Undocumented sessions	2
Unsigned documents	8
Uninitialed documents	2
Minimum unrecorded appointments	2
Patients with pending insurance claims	0
Patients missing demographic information	1
Demographic updates	1
Unread secure messages	7
Portal accounts needing verification	4
Unsigned/Overdue eSignature Requests	19 / 1

## Review Insurance Info Ahead of Session

*Confirm the client's responsibility due at session*

### Persons & Institutions > Patients

1. Use the **Search** field to find the client in question, then click on their record
2. The copay will be shown on the **Demographics** page
3. Click on the **Notes** tab towards the top of the screen
4. Review the insurance notes that have been entered by the Verification team to confirm how much needs to be collected from the client

## Review the Counseling Policies/Consents, Measures (Clinical History and Screening Forms)

*The Counseling Policies are completed PRIOR to registering or scheduling an appointment. The Measures are sent once the appointment is scheduled and are located in the Client Portal for the client to complete.*

Counseling Policies (includes the Credit Card Authorization for non MA/pmap clients).

1. Using **Easy Nav** in the upper right, **Open Patient Chart**
2. Click on **Documents** from the left-hand menu
3. On the **Documents** screen, you can review the Counseling Policies (including the CC auth for non MA/pmap clients) saved to the chart by simply clicking on the **Document Name** (text highlighted in blue)
4. Enter the CC info into the Card Manager in **Patients** on the **Balances** page.

Card Manager

+ New Card Entry

Card Entry	Card Number	Expiration	Name	Address 1	Address 2	City	State	Zip	Actions
------------	-------------	------------	------	-----------	-----------	------	-------	-----	---------

## Saving a Credit Card on File

When saving a cc on file, you go to **Patients** and click on your patient then go to their **Balances** tab where you will find the **Card Manager**. The credit card info is found in the Counseling Policies located in the **Patient Chart** in **Documents**.

To create a "nickname" for the credit card, such as "Mom's HSA" or "Primary Card" for example, you can enter that in the Card Entry box. Be sure that you look at the CC auth carefully to determine which card should be charged as the primary card and label accordingly.

**New Card Manager Entry**

**Card Details**

Card Entry: Visa

Card Number: 4000-0000-0000-0184

Expiration Date: 06 - Jun 2026

CVV: 343

**Billing Information**

☒ Patient: Use Patient's Billing Information  
☐ New: Type Billing Information  
☐ Guarantor: Use Guarantor's Billing Information  
☐ Card Manager: Card Manager Entry

First Name: Klara Last Name: Sparks

Address 1: 123 Main St

Address 2:

City: Seattle State: WA Zip: 98109

Email for Receipt: test@valant.com

OK Cancel

*Measures (clinical questionnaires) that the client has completed online via the Client Portal can also be reviewed ahead of session. These will be viewable during session within the Mobile Notes tool as well.*

### Dashboard > Action Items > Uninitialed Documents

1. To preview a document in the queue, click **Action > Preview** on the right-hand side or double click on the PDF of the document to open and view the completed form.
2. Note: **DO NOT INITIAL** (Never "Initial" Measures!!)
  - a. **Initialing measures in this queue prevents them from automatically populating as narrative into your note. This cannot be undone.**

## Confirm Appointment Reminder Preferences

Review the Policies in **Patient Chart - Documents** to see if the client marked “yes” regarding appointment reminders. If they mark Yes, then you will find their preferences in the Appointment Reminders consent at the end of the Policies.

Are you interested in automated appointment reminders?

☒ Yes ☐ No

## Appointment Reminders

The appointment reminders can be a combination of email reminders to both a listed Home AND Work email address as well as one of the following 1) automated phone call reminder OR 2) an SMS text message sent to the patient.

### Scheduler > Calendar View

1. **Right-click** on the client's appointment
2. Go to **Easy Nav > Patients**
3. In the Patient record, navigate to the **Contacts** tab at the top.
4. Look at the Appointment Reminders consent in the Policies and make sure that the Home Email on the **Contacts** tab and the Main Phone on the **Demo** tab match the client's preferences.
5. To add multiple reminder types, hold Ctrl when selecting.
6. Save

Demo	Guardians	Appts	Ins	Contacts	Balances	Auths	Other	Notes	Misc.	School	Elig	Portal	History
Phone 2				Ext	Type		Referral Source						
( ) _ - _					None								
Phone 3				Ext	Type		Primary Care Provider						
( ) _ - _					None								
Phone 4				Ext	Type		Other Provider						
( ) _ - _					None								
Home Email							Pharmacy						
Work Email							Pharmacy Phone						
							( ) _ - _						
Emergency Contact							Appointment Reminders						
							Select...						
Emergency Contact Phone													
( ) _ - _													
Emergency Contact Note													

## New Intake – At the Time of Session

### Review Insurance Info at the Time of Session

*Confirm the client's responsibility due*

#### Scheduler > Calendar View

1. **Double-click** on the client's appointment
2. On the **Edit Appointment** screen, click on the **Patient** tab
3. You will see the **Copay**
4. Scroll down to the **Notes** field to see any notes from the Notes/Images tab regarding **Deductible** or **Out of Pocket Max (MOOP)**.
5. Be sure to read any **Patient Notifications** that pop up with important instructions.

## Billing Telemedicine

6. **Double-click** on the client's appointment
7. On the **Edit Appointment** screen, click on the **Patient** tab

- You will look to see if **Insurance 1** is written in UPPERCASE or lowercase and select the corresponding billing **Primary Code** that is listed as UPPERCASE or lowercase on the **Appointment** tab.
- By selecting the UPPERCASE or lowercase billing **Primary Code**, you are ensuring that the correct location code and modifiers are populated for your client's particular insurance company's telemedicine billing requirements.
- It is important that you check the **Patient** tab each and every time you bill a session, as teletherapy location codes and modifiers are constantly changing.

The left screenshot shows the 'Edit Appointment' window with the 'Patient' tab selected. It displays patient information, insurance details, and a list of insurance plans. The right screenshot shows the 'Edit Appointment' window with the 'Appointment' tab selected. It displays a list of codes, a selected primary code, and a list of add-on codes.

## Collect Payment/Record the Visit

A right-click context menu for an appointment. The menu options are: Appointment, Check Eligibility, Document Session, Easy Nav, Add One-Time Measures, Check in patient, Calculate Total Copay, Accept Payment, Accept Prepayment, View/Edit, Delete, View Appointments, Record, and Change Category. The 'Record' option is highlighted.

## Record the session (no payment due)

### Scheduler > Calendar View

- Right-click on the client's appointment > **Appointment** > **Record**

## Accept Payment (copay, self-pay or missed appt fee due) No need to Record

### Scheduler > Calendar View



1. **Right-click** on the client's appointment > **Appointment** > **Accept Payment**
2. Enter the **Total Payment** you are collecting from the client right now
3. Select Payment Type **Auto Payment CC**
4. Click **Save and Print Receipt**
5. The cc processing screen pops up: Select the cc on file you want to charge and click Submit. A receipt is emailed to the client and a receipt is saved in the Patient Chart.

### **Accept Prepayment (coinsurance, deductible, or other balance due)**

#### **Scheduler > Calendar View**

1. **Right-click** on the client's appointment > **Appointment** > **Accept Prepayment**
2. Enter the **Total Payment** you are collecting from the client right now
3. Select Payment Type **Auto Payment CC** (another Prepayment screen pops up – enter the **Total Payment** and select **Auto Payment CC** for Payment Type again)
4. Click **Save and Print Receipt**
5. The cc processing screen pops up: Select the cc on file you want to charge and click Submit. A receipt is emailed to the client and a receipt is saved in the Patient Chart.
6. **Right-click** on the client's appointment > **Appointment** > **Record**

**If you enter a payment prior to completing the Clinical Documentation, you must be sure to Add a Diagnosis**

Adding a diagnosis using the **Diagnoses** tab:

1. Open the desired patient chart and click on the **Diagnoses** from the navigation menu

Diagnoses: Ashley Alcazar (ALCASH)	
<input type="checkbox"/> Show Inactive/Resolved Diagnoses	
DSM-5 Diagnoses	
ICD-9	DESCRIPTION
291.89	Alcohol-induced anxiety disorder

2. Click on the **+ New** button in the upper right corner of the browser window. The Add New Diagnosis Window will appear. Be sure to add the Billing Order: all patients whose services are billed to a payer require a billing order of 1 be attached to a diagnosis.
3. You can also enter the Diagnosis on the Mobile Note Intake Note in the **Assessment-Diagnosis** tab (see below).

## Clinical Documentation

### Scheduler > Calendar View

1. **Right-click** on the client's appointment > **Document Session** > **Use Mobile Notes**
2. In the new browser tab that opens, **Select** the relevant intake note template for today's session. *Once you start your Intake Note (without Measures), Marriage & Family Therapy Intake Note (for couples) or Child Intake Note, the data from the Measures assigned pre-intake to the patient (via Patient Portal) will pre-populate the appropriate sections.* For a list of Measures: [https://help.valant.com/80948-documentation-tools/pps-and-io-list-of-mobile-notes-measures?from\\_search=51077333](https://help.valant.com/80948-documentation-tools/pps-and-io-list-of-mobile-notes-measures?from_search=51077333)  
Child Symptom Screener: <https://help.valant.com/80948-documentation-tools/child-symptom-screener>  
Adult Symptom Screener: <https://help.valant.com/80948-documentation-tools/adult-symptom-screener>  
Clinical History Forms: <https://help.valant.com/80948-documentation-tools/pps-and-io-mobile-notes-clinical-questionnaires>
3. On the next screen:
  - a. Confirm that the **Included Measures** section lists any Measures you plan to complete during today's session
  - b. If applicable, add a supervisor to your note by clicking **Select Supervisor**
  - c. When you have confirmed the information on this screen is correct, click **Start New Document**

**Mobile Notes** New Intake Note Details

**Included Measures**  
The new document will include these measures for review:  
• GAD-7 **a**  
[More Details](#)

**Participants**  
• Daniel Doctor, M.D. (Owner)  
[Select Supervisor](#) **b**

[← Back](#) **c** [Start New Document](#)

4. On the Mobile Note screen:
  - a. Complete the sections relevant to the intake note
  - b. On the Header tab, confirm the appointment information, including the procedure code(s) and modifiers. Update, if applicable. PLEASE indicate exact start/end time of appointment.**

- c. On the **Assessment-Diagnosis** tab, you can enter the Diagnosis there. Be sure to select Billing order 1 for primary diagnosis (and if you enter a secondary diagnosis, it would be Billing order 2.)
- d. On the **Review** tab, click **Preview** to confirm your note is complete prior to signing.
- e. Click **Sign & Close** to send the completed note to the chart

## Schedule Follow-up Session(s)

### Scheduler > Calendar View

1. Navigate to the appropriate day using the thumbnail calendar in the upper left
2. **Double-click** on the schedule at the necessary appointment start time to open the **New Appointment** window
3. Enter the **Patient**, **Facility**, and **Primary Code**
  - a. Modifiers, if necessary, should automatically populate
4. Optional: If this will be a recurring appointment, use the **Recurrence** tab to enter the appointment series details
5. Click **Save**

## Set Up Ongoing Measures

List of all Measures: <https://help.valant.com/80948-documentation-tools/pps-and-io-list-of-mobile-notes-measures>

### Scheduler > Calendar View

1. **Right-click** on the client's appointment
2. Go to **Easy Nav > Open Patient Chart**
3. Click on the **Measures** tab on the left-hand side
4. Select either **Scheduled Measures** or **One Time Measures**
  - a. **Scheduled Measures**
    - i. Published to the Patient Portal 2 days ahead of every appointment on the schedule going forward.
    - ii. For clients without a Patient Portal, the measures will be available in all notes for the client going forward and can be completed by the provider in Mobile Notes.
  - b. **One Time Measures**
    - i. Published to the Patient Portal once and is available for the client to complete in the Patient Portal immediately.

- ii. Only used for clients who have Patient Portal setup. If a client does not have Patient Portal setup, use Scheduled Measures
5. Click **Change Scheduled Measures** or **Add One-Time Measure**, depending on which option you chose in step 4
6. In the measure selection window, select a measure from the left-hand list, then click the **right arrow** to move it to the right-hand list of selected measures
7. Click **OK**

## Current Client – Ahead of Session

### Review Balances

*Confirm the client's outstanding account balance due*

#### Persons & Institutions > Patients

1. Use the **Search** field to find the client in question, then click on their record
2. Click on the **Balances** tab towards the top of the screen

#### Billing > View/Edit Charges

1. Use the **Search** field to find the client in question, then click on their record
2. Click on the **Balances** tab towards the top of the screen

The screenshot shows the Valant software interface. The top header includes the Valant logo and the text 'Rum River Counseling Inc'. The left sidebar has a search bar labeled 'Open Chart' and navigation buttons for 'NEW', 'DASHBOARD', and 'BILLING'. The main content area is titled 'View/Edit Charges'. It features a 'Patients' dropdown menu, a 'Date Range' selector, and a summary of charges: 'Patient: \$0.00', 'Prepay: \$0.00', 'Insurance: \$0.00', and 'Total: \$0.00'. Below this summary is a table with columns: 'BUNDLED?', 'PRIM. ID', 'BILL ID', 'DATE', 'PROVIDER ...', 'TRANSACT...', 'CHARGES', 'PAYMENTS', 'PAT. PAY', and 'IN'.

### Review Measures

*Measures and clinical questionnaires that the client has completed online via the Patient Portal can be reviewed ahead of session. These will be viewable during session within the Mobile Notes tool as well.*

#### Dashboard > Action Items > Uninitialed Documents

1. To preview a document in the queue, click **Action > Preview** on the right-hand side
2. Note: **DO NOT INITIAL**
  - a. Initialing measures in this queue prevents them from automatically populating into your note. This cannot be undone.

## Current Client – At the Time of Session

### Collect Payment/Record the Visit

*Accept payment for today's session*

#### Scheduler > Calendar View

1. **Right-click** on the client's appointment > **Appointment** > **Accept Payment**
2. Enter the **Total Payment** you are collecting from the client for today's session
  - a. **Note: If the client is making a payment towards a prior session, see below.**
3. Select the relevant Payment Type **Auto Payment CC**
4. Click **Save and Print Receipt**

### Collect Payment for Prior Sessions/Outstanding Balance

*Accept Prepayment for the client's outstanding balance, if applicable*

#### Scheduler > Calendar View

1. **Right-click** on the client's appointment > **Easy Nav** > **Apply Patient Payment**
2. Enter the **Amount** you are collecting from the client to be applied towards their outstanding balance for prior sessions
3. Select the relevant Payment Type **Autopayment CC**
4. Click **Accept Prepayment** and the funds will be applied by admin.

The screenshot displays the Valant software interface for applying a patient payment. On the left, a sidebar menu includes 'NEW', 'DASHBOARD', 'BILLING' (with 'Apply Patient Payment' selected), and 'BILLER TOOLS', 'DOCUMENTS', 'SCHEDULER'. The main content area is a form with the following fields: 'Patient' (redacted), 'Payment Date' (10/26/2020), 'Amount' (\$45.00), 'Payment Type' (Auto Payment CC), and 'Check or Reference Number'. Below these fields, it shows 'Prepayment Credit: \$0.00' and an 'Accept Prepayment' button. At the bottom right, there are 'Clear' and 'Get Unpaid Transactions' buttons.

## Clinical Documentation

### Scheduler > Calendar View

1. **Right-click** on the client's appointment > **Document Session** > **Use Mobile Notes**
2. In the new browser tab that opens, **Select** the relevant note template for today's session
3. On the next screen:
  - a. Confirm that the **Included Measures** section lists any Measures you plan to complete during today's session
  - b. If applicable, add a supervisor to your note by clicking **Select Supervisor**
  - c. When you have confirmed the information on this screen is correct, click **Start New Document**

**Mobile Notes** New Intake Note Details

chart into the new document.

**Included Measures**  
The new document will include these measures for review:

- GAD-7 **a**

[More Details](#)

**Clinical Questionnaires**  
The patient does not have any outstanding Clinical Questionnaires.

**Participants**

- Daniel Doctor, M.D. (Owner)

[Select Supervisor](#) **b**

[← Back](#) **c** [Start New Document](#)

4. On the Mobile Note screen:
  - a. Complete the sections relevant to the intake note
  - b. On the **Header** tab, confirm the appointment information, including the procedure code(s) and modifiers. Update, if applicable.
  - c. On the **Review** tab, click **Preview** to confirm your note is complete prior to signing.
  - d. Click **Sign & Close** to send the completed note to the chart

## Complete Treatment Plan

### Primary Providers – Valant Treatment Plan Tool

*Primary providers can access the Treatment Plan Tool either from within Mobile Notes during session or from the left-hand menu at any time. Primary providers are defined as the provider listed in the Patients record as the Assigned Provider.*

### Access within the Mobile Note

1. Select the **Valant Treatment Plan** tab in the Mobile Notes window
2. Click **Create/View/Update Treatment Plan**
3. The Treatment Plan screen will open in a new browser tab
4. The client should be the only person listed on this screen. Click **Create New Treatment Plan** or **view active**, as applicable

### Access Out of Session

1. **Tools > Treatment Plan Tool**
2. The Treatment Plan screen will open in a new browser tab
3. Use the **Search** box at the top of the screen to find the client in question
4. Click **Create New Treatment Plan** or **view active**, as applicable

For detailed instructions on how to use the Valant Treatment Plan Tool, please reference Knowledge Base article: <http://help.valant.com/80948-documentation-tools/pps-treatment-plan>. This article includes a 20-minute video and a 7-page downloadable guide.

### Other (Secondary) Providers – Word Treatment Plan

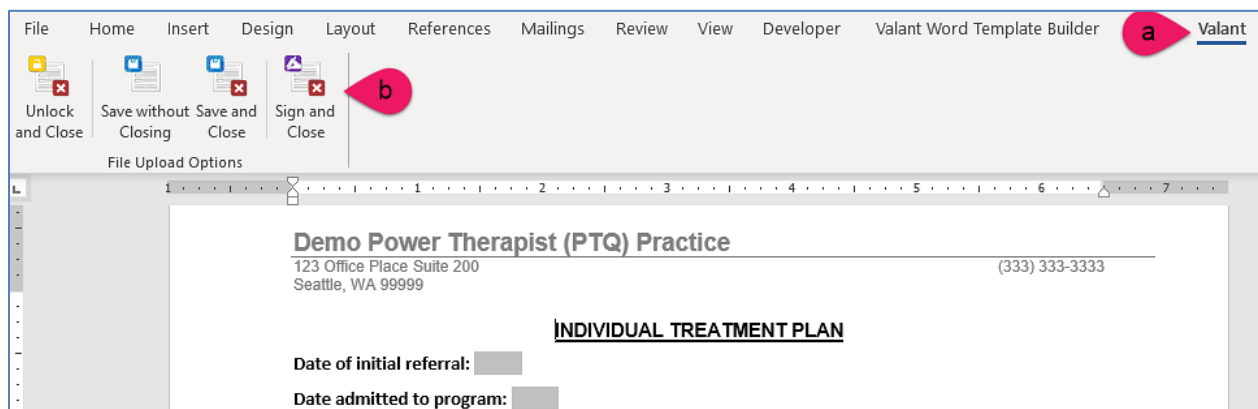
*Providers other than the primary provider who are treating the client can use Word templates to create and update their treatment plans.*

**New > New Templated Clinical Note** – New blank Treatment Plan

OR

**New > New Templated Clinical Note from Last** – Update an existing Treatment Plan










1. In the New Document window, complete the **Patient**, **Date/Time**, and **Primary Code** fields
  - a. *Specific primary code they want to use for TPs*
  - b. *Add supervisors to TPs*
2. For **Document Template**, select **Individual Treatment Plan**
  - a. Note: Do NOT select an Undocumented Session. Leave this drop-down blank.
3. Click **OK**
4. The document will open in Microsoft Word on your computer. Complete the relevant text boxes and checkboxes.
5. Click the **Valant** add-in tab in the upper-right, then click **Sign and Close** to complete the Treatment Plan



Note: If you do not have the Valant Word Add-in installed on your computer, it can be downloaded from the Knowledge Base: <http://help.valant.com/79965-basics/installing-the-valant-word-add-in-on-a-pc>

## Other Items:

### Appointment Icons on the Calendar

-  Documentation has not been started
-  Documentation has been started but not signed
-  Documentation has been signed and saved to the Patient Chart
-  Red bar indicates that no charge has been created for this session yet
-  The patient has a copay (hover over appointment for amount)
-  An appointment note has been attached (hover over for details)
-  Recurring appointment
-  Recurring appointment where this occurrence has been edited
-  Patient has been checked in

## Cancellations

If it was an appointment that was cancelled with adequate notice, you can:

- Delete it
- Delete it and re-enter it as a non-patient appointment so you have record of it
- Select that it was a cancellation (not a late cancel/no show), then go to appointment and click Record



If it was a late cancel/no show and you are waiving all or part of the fee, you can add a billing comment for me and I will adjust it. You would still click Record if waiving all of the fee.

Appointment Note

Billing Comment

Delete Actions Accept Payment Save Cancel

If charging all or part of the fee, then you would do Accept Payment and select Auto Payment CC to run the cc in Valant. If waiving part of the fee (our no show fee is \$100, but say you are charging \$50, you would click the box on the accept payment screen to "Write-off remainder as courtesy discount."

## Completing a Discharge Summary

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.

Once the Discharge Summary is complete, add a Patient Notification so Jenny knows to review for deactivation.

### Persons & Institutions > Patients

1. Use the **Search** field to find the client in question, then click on their record
2. The **Patient Notifications** will be shown on the **Demographics** page
3. Click on Edit and a window will pop up with Patient Notifications.
4. Select add the Patient Notification "Therapist Closed - Ready for Review" and if there is a credit on the account, also add Patient Notification "Has credit to use"

Patients + New

Demographics Custom Insurance 1 Contacts Balances Authorizations Other Details Notes/Image Misc. School Appt. Reminder Eligibility Portal More

Patient ID: PRASAM

Guarantor: Sams Mom

Assigned Provider: J.Holdredge; Jennifer Holdredge, Dr. / MA PsyD, LMFT

Assigned Facility: Andover

Patient Type: Verified

Documentation ID

First: Sam MI: Last: Practice Client Suffix:

Preferred Name:

Address 1: 1875 Station Pkwy NW

Address 2:

Edit Notifications

Notifications:

- Has credit to use
- Therapist Closed - Ready for Review
- Has credit to use

Add Remove OK Cancel

The Discharge Summary NOT associated with a client appointment:

If you are completing a Discharge Summary that is NOT not associated with a closing session, select the Primary Code Dischg: Discharge Summary.

New Appointment

Appointment Recurrence Other Details Patient Past/Future Appts Conflicts (0) History

Category

Start 10/12/2020, 11:00 AM End 10/12/2020, 11:15 AM

Patient appointment Non-Patient appointment

Patient Sam Practice Client (PRASAM)

Provider J.Holdredge: Jennifer Holdredge, Dr. / MA PsyD, LMFT

Facility Rum River Counseling Inc (Andover)

Primary Code Dischg: Discharge Summary Charge \$0.00

Add-on Code 1 Charge

Add-on Code 2 Charge

Units 1 Modifiers (1-4)

Service Units (per unit) 1

Appointment Note

Billing Comment

Delete Actions Accept Payment Save Cancel

The 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. 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:

Other

Missed Appointment Select More Details

Suicide Risk Assessment Select More Details

Discharge Summary Select More Details

Discharge Summary Mobile Note Select More Details

Progress Notes

Free Form (No Meds & Allergies tab) Last Signed Select More Details

Free Form Note (meds and allergies must be in patient chart) Select More Details

Therapy Progress Note Select More Details

Group Therapy Note Select More Details

Intake Notes

Intake Note (with assigned measures) New Only "assigned" measures appear in this note Select More Details

Child Intake Note - Comprehensive Comprehensive template for child and adolescent initial assessment Select More Details

Marriage and Family Therapy Intake Note Select More Details

Telephone Notes

Telephone Note (Brief) Select More Details

Telephone Note (Comprehensive) Select More Details

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.

Update Treatment Plan

Continue/Close  
Currently: Continuing  
Close Plan

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

## Returning Clients

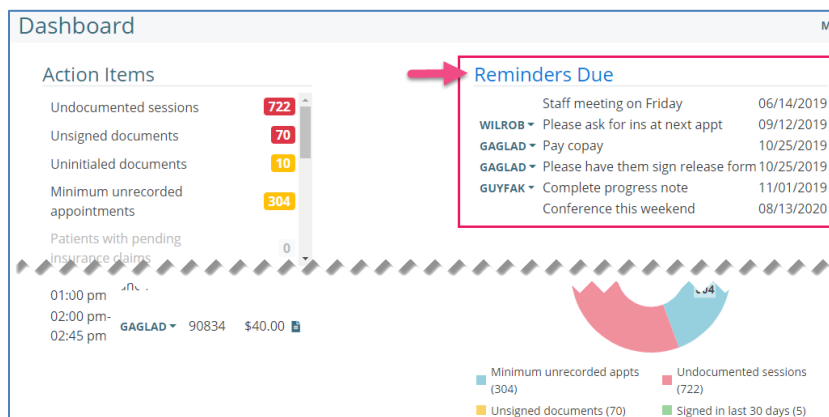
Direct your client to our website to complete a Registration Update form so we can ensure that we have all of the current information and can verify current coverage.- Alert the Registration team by emailing [Registration@rumrivercounseling.com](mailto:Registration@rumrivercounseling.com) and/or emailing reply all to the original intake email - making sure that the Registration email is included.

Closing a client is a clinical step, not necessarily administrative. Any time a client is not actively scheduled, it is important to close them. When a client returns after inactivity, it is best to follow our returning client process.

## Reminders

### Dashboard > Reminders Due

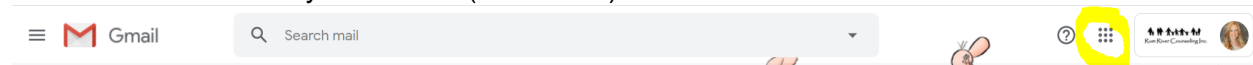
5. Click the **Reminders Due** heading in blue to open the Reminders tab
6. Select the reminder you want to review/edit/delete



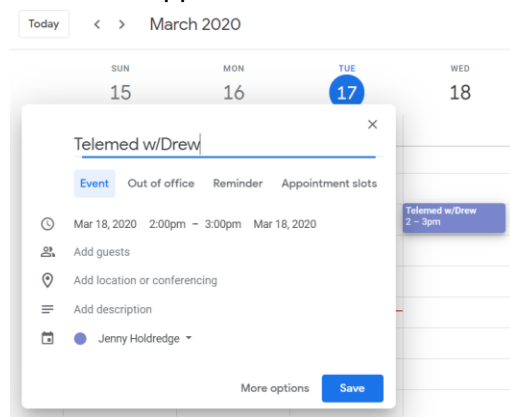
## Telemedicine via G Suite (Google Meet)

Note: This guide provides an overview and, depending on how your rumrivercounseling.com email account is set up, you may notice some differences from what I am showing here.

1. Login to your RRC Email account as usual and click on Google Apps in the upper right hand corner of your screen (see below):



2. Click on the Calendar to create an appointment.
3. Create an appointment.



4. Select the date and time to create the telemedicine (TM) appointment. Then click **More Options** and an appointment box will pop up so you can do the following:

- **Edit in Calendar**, on this screen you can manually adjust the minutes.
- Title the appointment (for example: “Telemed w/Drew”
- Click **Add Conferencing** then select **Hangouts Meet**
- Under **Guests** put in the email address of the recipient you are doing the TM with
- A reminder will also be sent 10 minutes prior to the appointment to the client. Be sure that **Invite Others or Invite external guests** is checked, as this will allow the client to be invited.
- It will then ask if you want to send an invitation to guests, click on **Send**

## Missed Appointments: Cancellations, Late Cancels & No Shows

Regarding missed appointments, we will want to be sure to indicate if the appointment was:

Cancellation (not late cancel or no show), Late Cancel or No Show

Cancellation: NOT a NO Show/Late Cancel

DELETED: Appt deleted or is duplicate

Dischg: Discharge Summary

Documentation: Not for a visit

Group Sup: Group Supervision

Individual Sup: Individual Supervision

Intensive: Intensive Therapy (Self Pay)

Interest Chg: Interest Due on Past Due Balance

Late Cancel: Late Cancel Missed Appointment

No Show: No Show Missed Appointment

And, if cancellation (as in provided over 24 hours notice) but NOT a late cancel or no show, you can record it, you can delete it from your schedule or you can change it to a non-patient appt so you have some record of it.

For Late Cancels or No Shows, you would select the appropriate code and if you are running a charge that is less than our fee for those, then you would use Accept Payment and then click the box to write off remainder as a courtesy discount (for example, if you only charged \$50 for a late cancel rather than our fee of \$75).

Accept Payment

Charges and payments

Charges	Payments
Total Charge \$75.00	Copay \$0.00
Primary \$75.00	Total Payment \$50.00
Add-on 1 \$0.00	Primary (Late Cancel) \$50.00
Add-on 2 \$0.00	Add-on 1 \$0.00
	Add-on 2 \$0.00

Payment details

Payment Type  
Auto Payment CC

Reference Number

Write-off remainder as courtesy discount ☒

If you want the full amount written off, then you can add a Billing Comment and I will write it off when I do the billing.

Edit Appointment

Appointment

Recurrence

Other Details

Patient

Past/Future Appts

Conflicts (0)

History

Start

5/19/2021, 8:00 AM

End

5/19/2021, 9:00 AM

Category

☒ Patient appointment
 ☐ Non-Patient appointment

Patient

Sam Practice Client (PRASAM)

Provider

J.Holdredge: Jennifer Holdredge, Dr. / MA ...

Facility

Rum River Counseling Inc (Andover)

Primary Code

Late Cancel: Late Cancel Missed Appointment

Charge

\$75.00

Units

1

Service Units

1

Modifiers (1-4)

Add-on Code 1

Charge

\$0.00

Add-on Code 2

Charge

\$0.00

Appointment Note


Billing Comment

please write off the late cancel (client has pmap)

## Add-on Code Fields

### Scheduler

To better organize the appointment window the top of the page has been reorganized. The “Start” , “End” and “Category” field are on the same row. The “Provider” and “Facility” fields are now on the same row. As well as the new primary code, and add-on code fields. The above

 valant

23 | Page

screenshot is from the scheduler.

**New Appointment**

**Appointment** | Recurrence | Other Details | Patient | Past/Future Appts | Conflicts (0) | History

Start: 5/4/2021, 6:15 PM | End: 5/4/2021, 7:00 PM | Category: Cornflower Blue

☒ Patient appointment | ☐ Non-Patient appointment

Patient: Bella Cordry (CORBEL)

Provider: W7P1: Franklin Donahue | Facility: Get Well Clinic

✓ Primary Code: 90792: Psychiatric Diagnostic Eval. w/ Med Svcs | Charge: \$395.00

Units: 1 | Service Units: 1 | Modifiers (1-4): QW | — | — | —

Courtesy Discount: \$0.00 | Discount Note:

✓ Add-on Code 1: 90785: Interactive Complexity | Charge: \$75.00

Units: 1 | Service Units: 0 | Modifiers (1-4): TC | — | — | —

Courtesy Discount: \$0.00 | Discount Note:

✓ Add-on Code 2: 90785: Interactive Complexity | Charge: \$75.00

Units: 1 | Service Units: 0 | Modifiers (1-4): QY | — | — | —

Courtesy Discount: \$0.00 | Discount Note:

Appointment Note:

Delete | Actions | Accept Payment | Save | Cancel

## Record Appointments

The Primary Code and Add-on code drop-down fields have also been added to the Edit Appointments window that can be found when editing an appointment on the Record Appointments page. Users can access the Record Appointments page by clicking **Scheduler | Record Appointments** or clicking the **Record Appointments** button from the Scheduler



Edit Appointment

Patient: ANDJAN

▼

Primary Code

90805: Individual Psych with E/M - 30 Minutes

×

▼

Charge

\$90.00

Units

1

Service Units

15

Modifiers (1-4)

—

—

—

—

▼

Add-on Code 1

90785: Interactive Complexity

×

▼

Charge

\$75.00

Units

1

Service Units

0

Modifiers (1-4)

—

—

—

—

>

Add-on Code 2

▼

Charge

\$0.00

Billing Comment

Save

Close