

# Setting Up & Understanding Your Schedule in Valant

## Preferences & Preset Views

**System | Preferences | Appointments** informs users view of the calendar and can be configured to set system preferences. We recommend setting the appointment duration to 60 min and the appointment calendar time interval to 15 min.

### Preferences

User Preferences Appointments

Appointment Duration

40

Appointment Calendar Time Interval

60 minutes ▼

Office Hours Start

8

Office Hours End

19

Scheduler Hours Start

8

Scheduler Hours End

19

First Day of Week

Sunday ▼

Patient Name Format:

☒ ID (LASFIR)

☐ Full Name (First A. 'Firsty' Last)

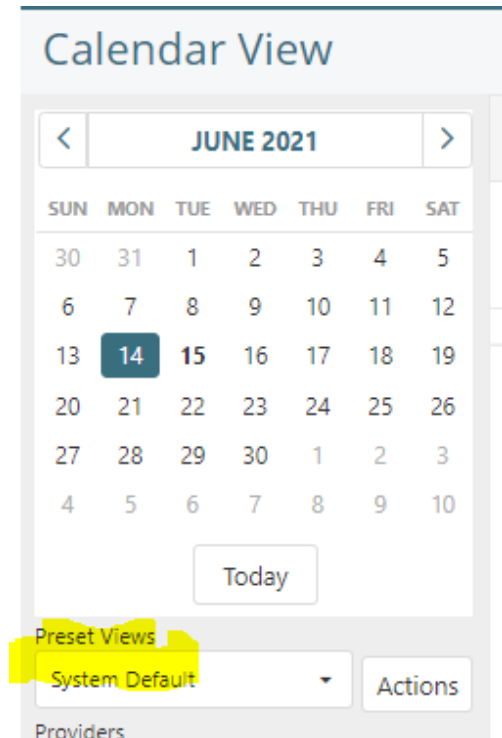
☐ Full Name, Last Name First (Last, First A. 'Firsty')

☐ First Initial, Last Name (F. Last)

☐ First Name, Last Initial (First L.)

☐ First or Preferred Name, Last Initial ('Firsty' L.)

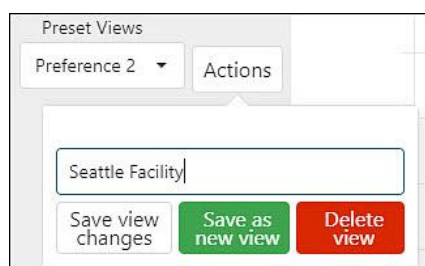
**Preset Views** allow users to save calendar configurations to easily access different views, saving users from having to manually configure the scheduler each time they need to find specific information. This feature is most useful for practices with multiple providers and/or facilities. Preset Views can be configured from the Calendar View menu.



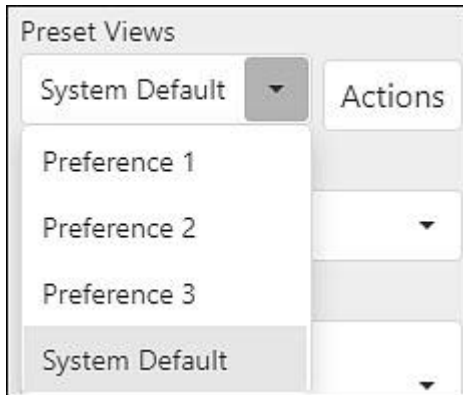
The System Default view is the default view for users. Providers will always see the Work Week view, with all active facilities. Staff users will always see the first 10 active providers and all active facilities in the Day view.

To configure a Preset View, users should set the desired configuration on the calendar. Include providers, facilities, interval, and view. Once the calendar has the desired configuration, complete the following:

1. Click the Actions Button.
2. This will show a dialogue box with three options.
  - Save View Changes: To save changes to an existing preset view.
  - Save as new view: To save the current view. This option also requires a new name to be entered.
  - Delete View: Removes the view from the list.

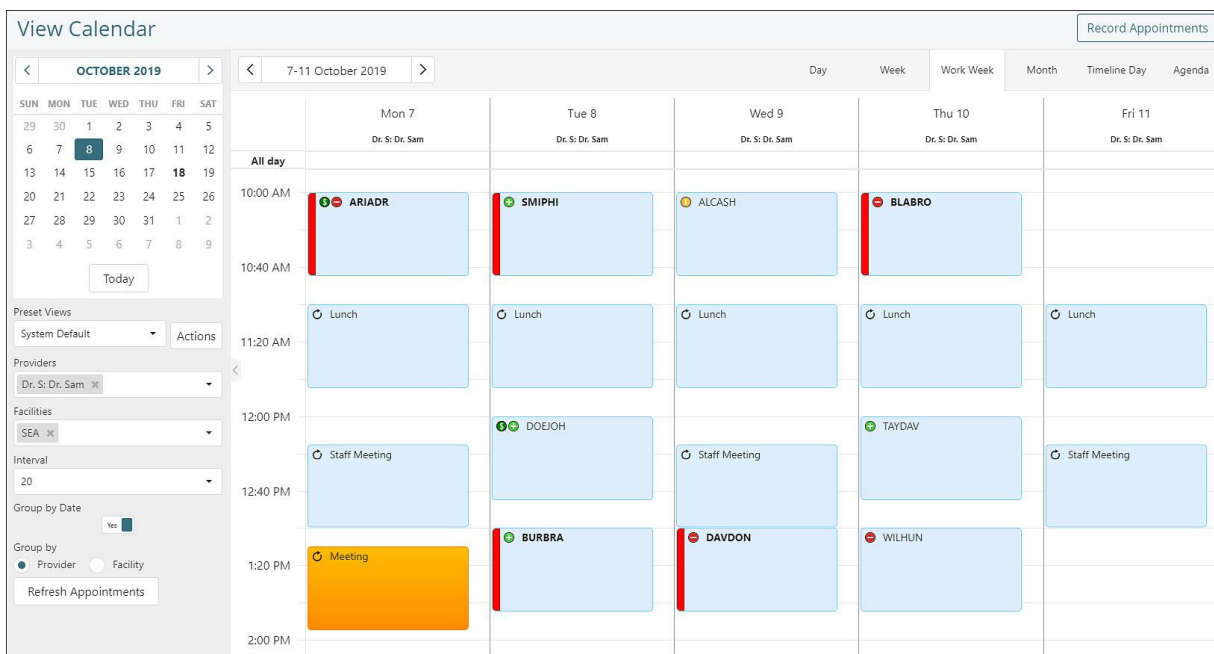


After views are saved users can select the Preset views drop-down to quickly move to different views of the calendar to see specific information.

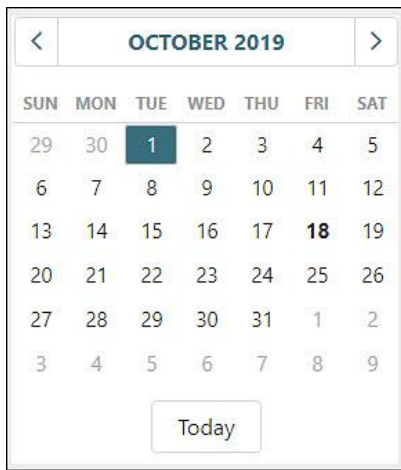


## Calendar View

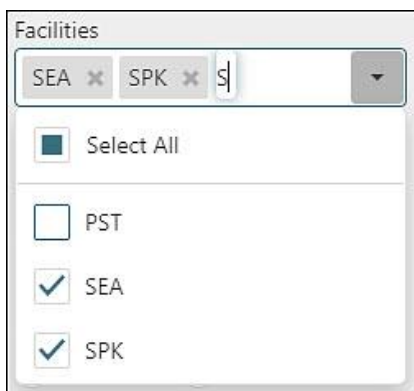
Calendar View provides a visual display of patient and non-patient appointments. Users can create, edit, and discard appointments directly from this view. There are also multiple options to customize your calendar view.



- There is a calendar on the top left showing the current month that can be used to move to other dates. There is also a Today button that will navigate users back to the current day.



- Preset views allow users to configure and save multiple views.
- The Provider and Facilities drop-downs allows users to easily add and remove providers and facilities from the scheduler. Items can be added by selecting from the list, or narrow your list by typing in a name.



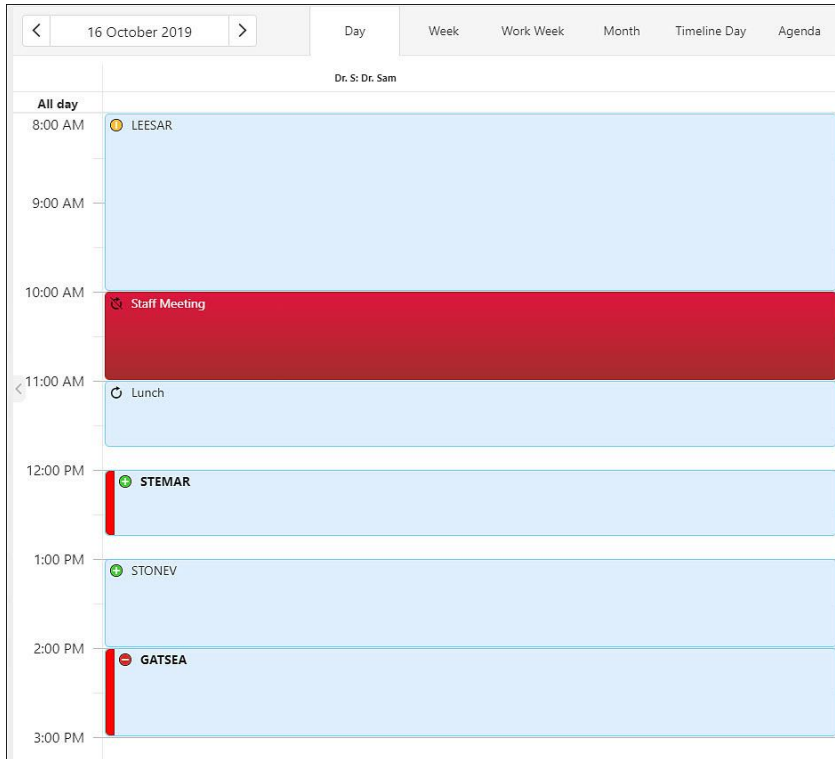
- The Interval Settings changes the time period in each calendar cell, making it easier to schedule meetings at the quarter hour or half past.
- The [Zoom slider](#) allows users to enhance the magnification of the calendar.
- Refresh button will refresh the calendar.
- Grouping options: Grouping by date allows user to see different provider or facility calendars next to each other in the same day. Users can also change Group by to view appointments by provider or facility.
- Different view options include Day, Week, Work Week, Month, Timeline Day, and Agenda. There are short descriptions and examples of each view in the Calendar View section below.
- Record Appointments button will take users to the “Record Appointments” page to view a list of unrecorded appointments.
- Appointments can be added to the scheduler by double-clicking on an empty area. The Appointment Details section of this handout will review the different appointment options.

# Calendar View Options

The calendar offers several views to accommodate different needs and provide user-friendly readability. The different options are Day, Week, Work Week, Month, Timeline Day, and Agenda. Below are examples and brief descriptions of each view.

## Day

Day View offers a view of the current day's appointments.



## Week

Week View shows appointments Sunday through Saturday.

<div> <div>&lt;</div> <div>13-19 October 2019</div> <div>&gt;</div> </div>		Day		Week	Work Week	Month	Timeline Day	Agenda
Sun 13 Dr. S: Dr. Sam		Mon 14 Dr. S: Dr. Sam	Tue 15 Dr. S: Dr. Sam	Wed 16 Dr. S: Dr. Sam	Thu 17 Dr. S: Dr. Sam	Fri 18 Dr. S: Dr. Sam	Sat 19 Dr. S: Dr. Sam	
All day								
8:00 AM		ARIADR	TAYDAV	LEESAR	ROGZAC	CHAERI		
9:00 AM								
10:00 AM								
11:00 AM			GORSTE	Staff Meeting	DOEJOH	JONDAN		
12:00 PM		Lunch	Lunch	Lunch	Lunch	Lunch		
1:00 PM		SMIELI	MALDAN	STEMAR	MALDAN	NIEMEG		
2:00 PM		Meeting	GATSEA	STONEV				

When too many appointments are scheduled at the same time to fit in the view, a "collector" icon will appear with the number of hidden appointments.

- Hovering over the icon or clicking on the icon will show a scrollable list of appointments.
- The appointments will show the same information as appointments in the main view (color categorization, icons, name display).
- The appointments each have a hover text icon, and users can click it to open the appointment.
- Users will be able to right-click on the appointment and use the appointment menu.



# Appointment Details

Appointments can be added to the scheduler by double-clicking on an empty space on the calendar. This will open the New Appointment window. Here users create both patient and non-patient appointments. There are different tabs that appear on the New Appointment window, detailed below:

## Appointment

This tab sets the details for the appointment. Time, Patient, Provider as well as details that will be used in the billing cycle. This tab also appears for non-patient appointments but only includes Time, Appointment Name, Provider Facility and Appointment Note.

New Appointment

Appointment

Recurrence

Other Details

Patient

Past/Future Appts

Conflicts (0)

History

Category

Select...

Start

11/5/2019, 10:00 AM

End

11/5/2019, 10:40 AM

☒ Patient appointment

☐ Non-Patient appointment

Patient

Select...

Provider

Dr. S: Dr. Sam

Facility

Select...

Primary Code

Select...

Charge

Add-on Code 1

Select...

Charge

Add-on Code 2

Select...

Charge

Units

1

Modifiers (1-4)

Service Units (per unit)

Appointment Note

Billing Comment

Delete

Actions

Accept Payment

Save

Cancel

## Recurrence

This tab is for setting recurring appointments. Users can set non-patient and patient appointment recurrences or edit existing reoccurring appointments.

The 'New Appointment' dialog box is shown with the 'Recurrence' tab selected. The 'Appointment' tab is also visible. The 'Recurrence' section includes a 'Recurrence' dropdown set to 'Weekly', a 'Repeat Every' spinner set to '2' with the unit 'week(s)', and a 'Repeat On' section with checkboxes for days of the week: SU, MO (checked), TU, WE (checked), TH, FR (checked), and SA. The 'End repeat' section has three options: 'Never', 'On' (selected) with a date field set to '2/4/2020' and a calendar icon, and 'After' with a spinner set to '1' and the unit 'occurrence(s)'. At the bottom are buttons for 'Delete', 'Actions', 'Accept Payment', 'Save', and 'Cancel'.

## Other Details

The Other Details tab only appears for patient appointments. This tab is used to configure more specific billing information, including Incident-To Supervisor and other less commonly used billing requirements.

The 'New Appointment' dialog box is shown with the 'Other Details' tab selected. The 'Appointment' and 'Recurrence' tabs are also visible. The 'Other Details' section includes a dropdown for 'Incident-To Supervisor' set to 'Select...'. Below are three checkboxes for 'Condition Related to Employment (Box 10a)', 'Condition Related to Auto Accident (Box 10b)', and 'Condition Related to Other Accident (Box 10c)'. The 'Auto Accident State' is a dropdown set to 'Select...'. There are two date fields with calendar icons: 'Date of Current Illness, Injury or Pregnancy (Box 14)' and 'Other Date (Box 15)', each followed by a 'Qualifier' dropdown set to 'Select...'. The 'Unable to work Dates (Box 16)' section has two date fields with calendar icons. The 'Referring Provider (Box 17)' is a dropdown set to 'Select...'. The 'Hospitalization Date (Box 18)' has a date field with a calendar icon. At the bottom are buttons for 'Delete', 'Actions', 'Accept Payment', 'Save', and 'Cancel'.



## Patient

The Patient tab allows the user to view the patient demographics, including a high level overview of billing information like balances, current insurance, and other details.

New Appointment

Appointment

Recurrence

Other Details

Patient

Past/Future Appts

Conflicts (0)

History

Patient

Sarah "Sarah" Flores (FLOSAR)

Copay

\$10.00

Patient Type

Coinsurance

Birthdate

02/12/1989

Insurance Balance

\$385.00

Age

30

Patient Balance

-\$290.00

SSN

Total Balance

\$95.00

Address

123 30th ave, Seattle, WA 98343

Guarantor

Main Phone

(206) 232-2332

Insurance 1

Blue Cross

Phone 2

Auth 1 (Visits)

Phone 3 (Home)

Auth 2 (Visits)

Phone 4 (Home)

Insurance 2

Home Email

sarah@valant.com

Auth 1 (Visits)

Work Email

Auth 2 (Visits)

Contact Name

Insurance 3

Contact Phone

Auth 1 (Visits)

Contact Note

Auth 2 (Visits)

Notes

Delete

Actions

Accept Payment

Save

Cancel

## Past/Future Appts

The Past/Future Appts Tab will show a list of the previous 10 and upcoming 10 appointments for the patient.

New Appointment

Appointment

Recurrence

Other Details

Patient

Past/Future Appts

Conflicts (0)

History

Upcoming Appointments

Date	Time	Duration	Provider	Facility	Transaction Code
11/21/2019	09:30 AM - 10:10 AM	40	Dr. S	SEA	90837

Previous Appointments

Date	Time	Duration	Provider	Facility	Transaction Code
9/26/2019	09:00 AM - 09:45 AM	45	Dr. S	SEA	90837
7/5/2019	12:15 PM - 01:00 PM	45	Dr. S	SEA	90837
7/3/2019	12:15 PM - 01:00 PM	45	Dr. S	SEA	90837
7/1/2019	12:15 PM - 01:00 PM	45	Dr. S	SEA	90834
6/28/2019	12:15 PM - 01:00 PM	45	Dr. S	SEA	90837
6/26/2019	12:15 PM - 01:00 PM	45	Dr. S	SEA	90837
6/24/2019	12:15 PM - 01:00 PM	45	Dr. S	SEA	90837
6/21/2019	12:15 PM - 01:00 PM	45	Dr. S	SEA	90837
5/30/2019	09:30 AM - 10:15 AM	45	Dr. S	SEA	90834

Delete

Actions

Accept Payment

Save

Cancel

## Conflicts

The Conflicts tab will show conflicts on the scheduler, or the potential conflicts over the next six months with this provider, at this appointment time.

Edit Appointment

Appointment

Recurrence

Other Details

Patient

Past/Future Appts

Conflicts (1)

History

Conflicts in Next 6 months

Refresh Data

Appointment	Name	Transaction Code	Note
11/5/2019, 8:00 AM	TAYDAV	90834	

Page 1 of 1 (1 items) < 1 >

Delete

Actions

Accept Payment

Save

Cancel

## History

The History tab is an audit-log of all actions that pertain to the appointment. Any modifications that are made to an appointment will be track in the history tab, including the user who performed the change and when the change was made.

Edit Appointment

Appointment

Recurrence

Other Details

Patient

Past/Future Appts

Conflicts (1)

History

History

Event Type	Description	Time	User
Modified	Recorded: Old=False, New=True;	10/22/2019, 3:40	Dr. Sam
Modified	Add-on 1 code: Old=null, New=90791;Service units: Old=1, New=2;	10/22/2019, 3:32	Dr. Sam
Modified	Category: Old=, New=:Primary code: Old=90837, New=99441;	10/22/2019, 3:30	Dr. Sam
Added		10/22/2019, 3:16	Dr. Sam

Page 1 of 1 (4 items) < 1 >

Delete

Actions

Accept Payment

Save

Cancel

# Showing appointment Intake Openings in the Scheduler

## Showing Openings for New Clients

*Designate time on the schedule when provider is available to see clients*

### 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"
7. Select the relevant **Facility**
8. Click **Save**


## Scheduler: Intake Opening Categories

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

Appointment Note

# Appointment Icons in the Scheduler

## IO: Appointment Icons in the Scheduler

*This article applies to Valant IO*



The patient has not been billed for this appointment. The details of the appointment, such as any payments, have not carried over in the patient's billing account, yet. Marking the appointment as complete will bill the patient and remove the red bar



The patient has a co-pay that is due at the time of service. To see where this information is pulled from go to **Persons and Institutions | Patients | Select a Patient | Demographics** tab | **Copay**



An appointment note has been attached to the appointment. To see where this information is pulled from go to **Tools | Appointments**. Double-click an appointment and click the **Appointment** tab | **Appointment Note**



This is a recurring appointment. To edit this setting go to **Tools | Appointments**. Double-click an appointment and click **Edit Recurrence**



This instance of a recurring appointment series has been edited. To see this setting click on **Tools | Appointments**. Double-click an appointment and revise "Start Time"/"End Time"



The patient has been checked in



The documentation for this session has not been started



The documentation for this session has been started, but it has not been signed



The documentation for this session has been signed



The documentation for this session has been skipped

# Availability (for online scheduling)

**NOTE: you can skip this step for now as we do not use the online scheduling feature at this time.**

The Availability feature allows providers to configure available hours based on time, facility and days of the week. This can help guide scheduling and allows patients the ability to request appointments through the patient portal.

To set Availability for a provider:

1. Click **Persons and Institutions | Providers** and select yourself from the provider list
2. Click the **Availability** tab
3. Click **New Availability**

The screenshot shows the Valant web application interface. On the left is a sidebar with a menu. The 'Providers' option under 'PERSONS & INSTITUTIONS' is highlighted with a red circle and the number 1. The main content area is titled 'Providers' and contains a search bar, a 'Show Inactive' checkbox, and a table of providers. The table has columns for 'PROVIDER ID' and 'NAME'. Three providers are listed: 'Dr. Cyn', 'Dr. Elliot', and 'Dr. Ian'. 'Dr. Ian' is highlighted with a red circle and the number 2. Below the table is a tabbed interface with tabs for 'Provider', 'Preferences', 'Notes', 'Availability', and 'History'. The 'Availability' tab is selected. In the 'Availability' tab, there is a 'New Availability' button with a red circle and the number 3. Below the button is a table with columns: 'Facility', 'Day of the week', 'Start', 'End', and 'Time'.

Facility	Day of the week	Start	End	Time

4. In the "Add Provider Availability" window configure the availability for the provider including the facility, days of the week and time then click **OK**. IF providers need to set up varying time ranges at different locations or times they may need to repeat this step.

Add Provider Availability

Facilities

SEA: Seattle TAC: Tacoma

Days of the week

Monday Tuesday Wednesday Thursday Friday

Time

8:30 AM

4:00 PM

12:00 AM 2:00 AM 4:00 AM 6:00 AM 8:00 AM 10:00 AM 12:00 PM 2:00 PM 4:00 PM 6:00 PM 8:00 PM 10:00 PM

Snap to 30-minute ticks

OK

Cancel

5.

Once configured the Availability will show in a grid. This allows users to easily edit or delete existing Availability directly on the grid.

Provider
Preferences
Notes
Availability
History

New Availability

Facility	↑4	Day of the week	↑1	Start	↑2	End	↑3	
Seattle		Monday		8:30 AM		4:00 PM		<a href="#">Delete</a>
Tacoma		Sunday		8:30 AM		4:00 PM		<a href="#">Delete</a>
Seattle		Monday		8:30 AM		4:00 PM		<a href="#">Delete</a>
Tacoma		Tuesday		8:30 AM		4:00 PM		<a href="#">Delete</a>
Seattle		Wednesday		8:30 AM		4:00 PM		<a href="#">Delete</a>
Tacoma		Thursday		8:30 AM		4:00 PM		<a href="#">Delete</a>
Seattle		Friday		8:30 AM		4:00 PM		<a href="#">Delete</a>
Tacoma		Saturday		8:30 AM		4:00 PM		<a href="#">Delete</a>