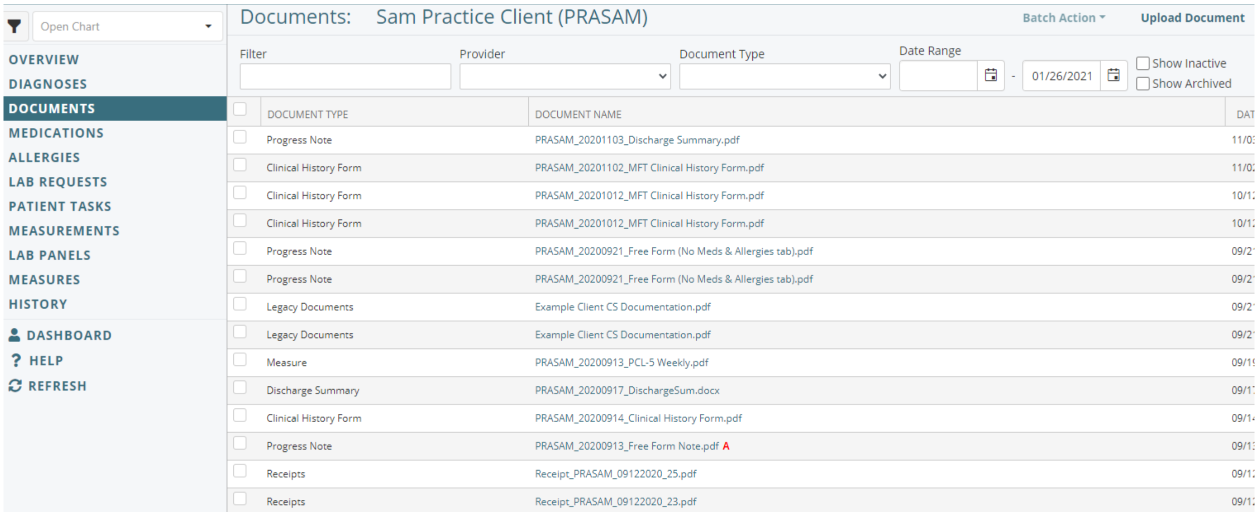
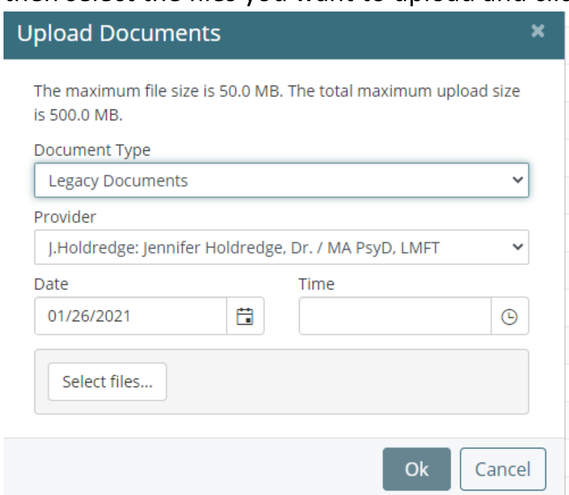
Uploading, Saving/Printing Documents & Sending eFaxes in Valant

Click on the Documents section of the Patient Chart



To upload a document:

1. Click Upload Document and a box will pop up
2. Select Document Type (for uploading documents from CS, select Legacy Documents. For all others, select Other) then select the files you want to upload and click Ok.



To send a fax:

1. Add the fax recipient to "Outside Providers"

Click Persons and Institutions | Outside Providers

Click on the New Provider button in the upper right corner of the browser window

Complete the name and fax # fields and click Save

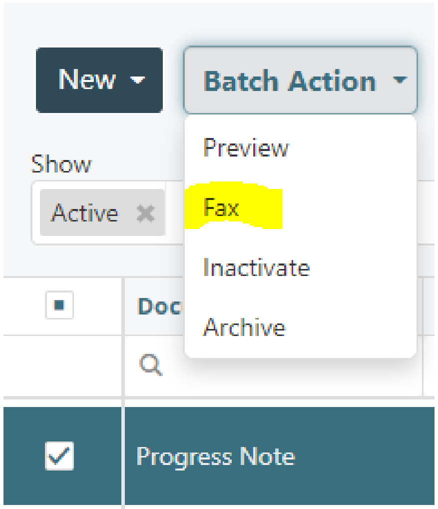
2. In the Patient Chart – Documents

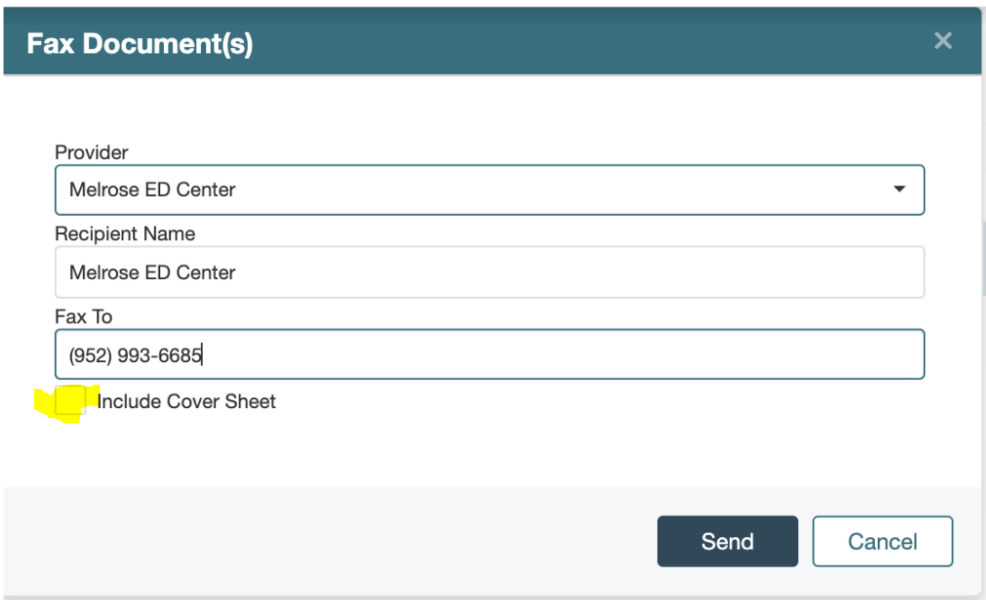
Select the documents you wish to efax

Click Batch Action – Fax

Select the recipient as the "Provider" and be sure that the "Include Cover Sheet" box is NOT checked.

Send





Note: The efax file size limit is 20 MB.

<u>Notes Printing/Saving in Valant</u>

In Patient Chart - Documents

In *Document Type* select *Progress Notes*

Select the ones you want

In *Batch Action* select *Print*

And it will generate a PDF of all the notes selected

You can either save or physically print the notes

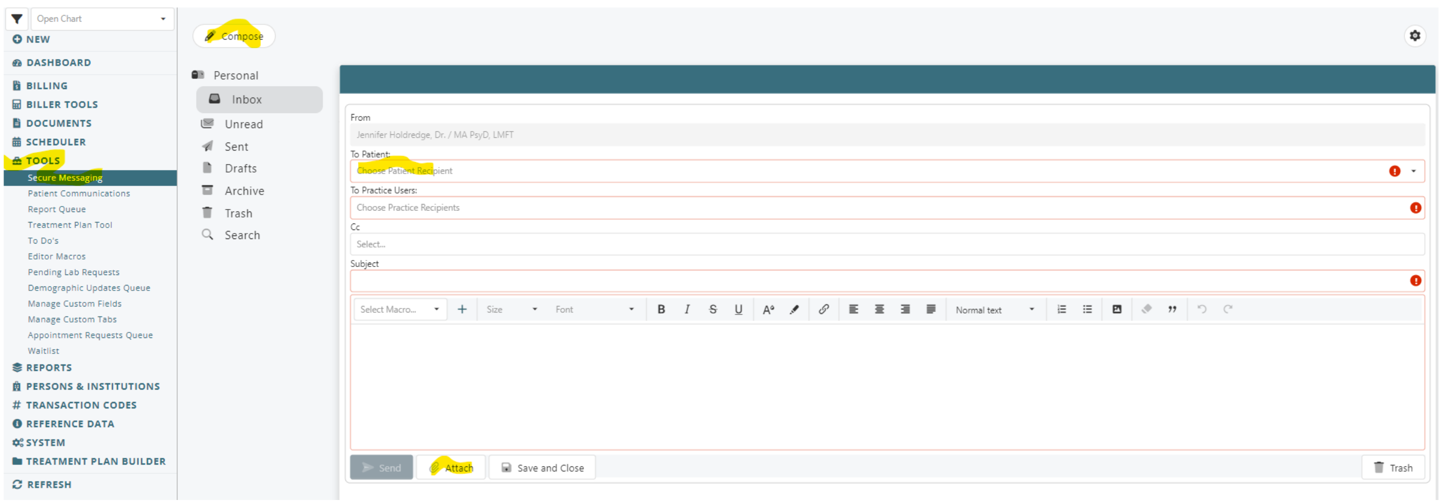
Sending Notes to Clients using Patient Messaging in Valant

1. Notes Saving in Valant

- In Patient Chart - Documents
- In *Document Type* select *Progress Notes*
- Select the ones you want
- In *Batch Action* select *Print*
- And it will generate a PDF of all the notes selected
- You will save the notes so that you can attach them to the Patient Message
- Attaching Notes to Patient Message

2. Sending notes using Patient Messaging

- Tools – Secure Messaging
- Compose – To Patient (select your client)
- Add a subject line and a message
- Attach the Notes you want to send
- Click Send



Charging for Records:

If there is a records request that you are able to charge for (Social Security (not appeals), Life Insurance, Attorneys, etc.) then you would visit the Staff Resources website and complete the Invoice for Record Copies found under the Staff Forms and Guides tab. You would save that and upload it to the Patient Chart Documents and include it with your efax.

The next step would be to create a visit on your schedule – use the Record Copies billing code and you would enter the total from the invoice as the rate. Payments received will be applied to that charge.