

Uploading, Saving/Printing Documents & Sending eFaxes in Valant

Click on the Documents section of the Patient Chart

DOCUMENT TYPE	DOCUMENT NAME	DATE	
<input type="checkbox"/>	Progress Note	PRASAM_20201103_Discharge Summary.pdf	11/03
<input type="checkbox"/>	Clinical History Form	PRASAM_20201102_MFT Clinical History Form.pdf	11/02
<input type="checkbox"/>	Clinical History Form	PRASAM_20201012_MFT Clinical History Form.pdf	10/12
<input type="checkbox"/>	Clinical History Form	PRASAM_20201012_MFT Clinical History Form.pdf	10/12
<input type="checkbox"/>	Progress Note	PRASAM_20200921_Free Form (No Meds & Allergies tab).pdf	09/21
<input type="checkbox"/>	Progress Note	PRASAM_20200921_Free Form (No Meds & Allergies tab).pdf	09/21
<input type="checkbox"/>	Legacy Documents	Example Client CS Documentation.pdf	09/21
<input type="checkbox"/>	Legacy Documents	Example Client CS Documentation.pdf	09/21
<input type="checkbox"/>	Measure	PRASAM_20200913_PCL-5 Weekly.pdf	09/13
<input type="checkbox"/>	Discharge Summary	PRASAM_20200917_DischargeSum.docx	09/17
<input type="checkbox"/>	Clinical History Form	PRASAM_20200914_Clinical History Form.pdf	09/14
<input type="checkbox"/>	Progress Note	PRASAM_20200913_Free Form Note.pdf A	09/13
<input type="checkbox"/>	Receipts	Receipt_PRASAM_09122020_25.pdf	09/12
<input type="checkbox"/>	Receipts	Receipt_PRASAM_09122020_23.pdf	09/12

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.

The maximum file size is 50.0 MB. The total maximum upload size is 500.0 MB.

Document Type
Legacy Documents

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

Date
01/26/2021

Time

Select files...

Ok Cancel

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

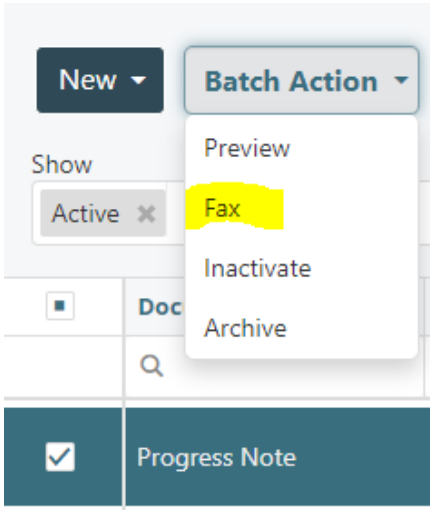
2. In the Patient Chart – Documents

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

A screenshot of a 'Fax Document(s)' dialog box. The title bar is dark teal with a close button. The main area is white and contains three input fields: 'Provider' with a dropdown menu showing 'Melrose ED Center', 'Recipient Name' with a text input containing 'Melrose ED Center', and 'Fax To' with a text input containing '(952) 993-6685'. Below these fields is a checkbox labeled 'Include Cover Sheet' which is checked. At the bottom right, there are two buttons: 'Send' and 'Cancel'.

Note: The efax file size limit is 20 MB.

Notes Printing/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 can either save or physically print the notes

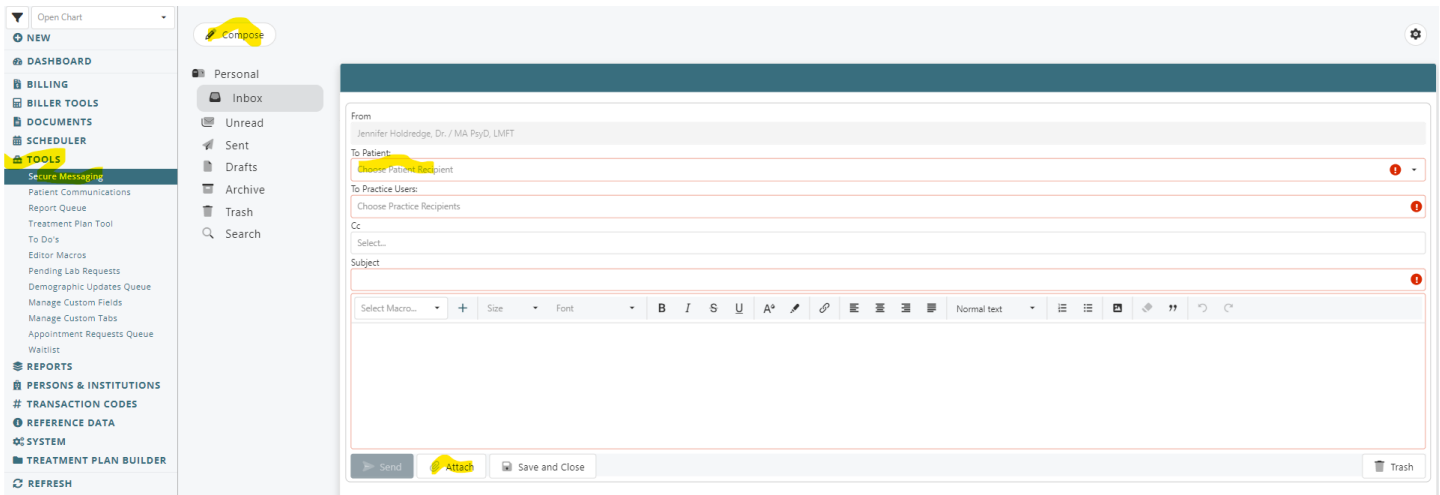
Sending Notes to Clients using Patient Messaging in Valant

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.