

Uploading, Saving/Printing Documents & Sending eFaxes in Valant

(see end of this document for info re: downloading from ClinicSource)

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

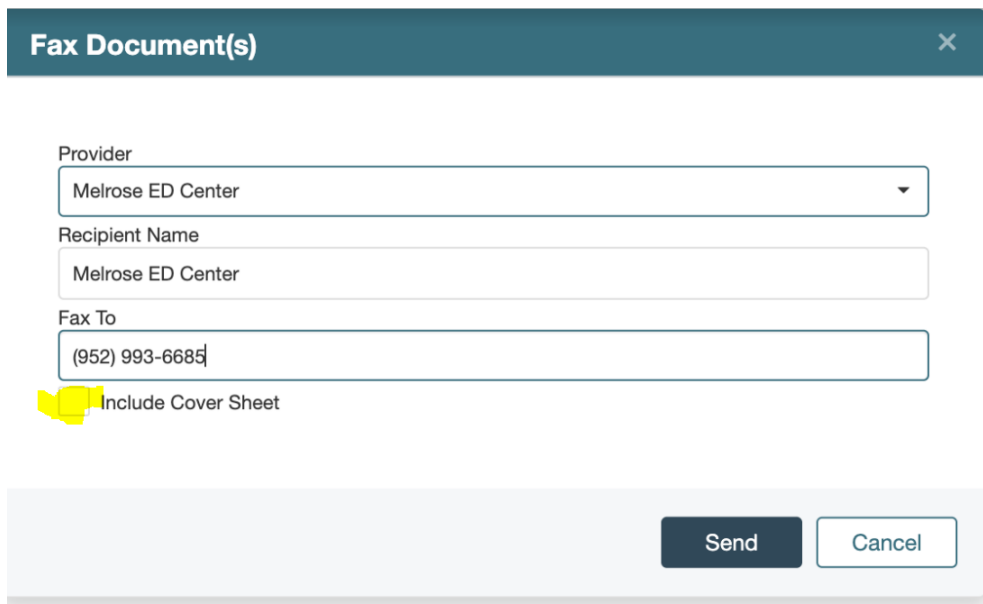
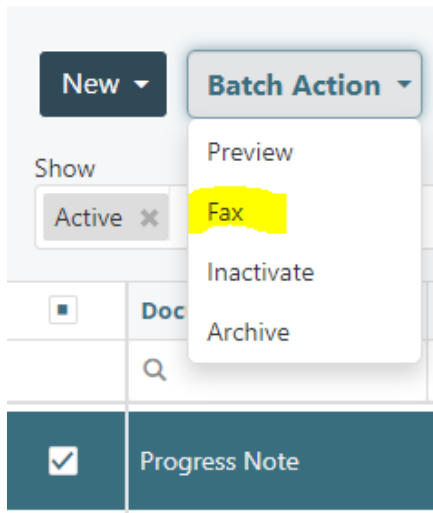
2. In the Patient Chart – Documents

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



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

To download Documents from ClinicSource

1. Click on the Documents tab
2. Select the documents you want to download and click the Printer icon
3. The items will download into a PDF that you can save to later upload in Valant or to efax

The screenshot shows the ClinicSource interface with the 'Documentation' tab selected. The navigation bar includes tabs for Schedule, Documentation, Visits, Patients, Billing, Payments, Accounts, Payroll, and Report. Below the navigation bar, there are filters for 'MH', 'From: 1/1/2010', 'To: 1/31/2021', and 'Therapist:'. A table displays a list of documents, with one document titled 'Evaluation' selected, indicated by a yellow checkmark in the selection column.

Document	ID
Evaluation	29153