Uploading, Saving/Printing Documents & Sending eFaxes in Valant

Click on the Documents section of the Patient Chart

Y Open Chart -	Documents: Sam Practice Client (PRASAM)				E	Batch Action	Ŧ	Upload Documen	t		
OVERVIEW DIAGNOSES	Filter	Provider	~	Document Type	Date	e Range	•	01/26/2021	ä	Show Inactive	
DOCUMENTS	DOCUMENT TYPE		DOCUMENT NAME								DAT
MEDICATIONS	Progress Note		PRASAM_20201103_Discharge	Summary.pdf						1	1/0
ALLERGIES	Clinical History Form		PRASAM_20201102_MFT Clinic	al History Form.pdf						1	1/0
LAB REQUESTS	Clinical History Form		PRASAM_20201012_MFT Clinic	al History Form.pdf						1	0/1
PATIENT TASKS	Clinical History Form		PRASAM_20201012_MFT Clinic	al History Form.pdf						1	D/1
LAB PANELS	Progress Note		PRASAM_20200921_Free Form	(No Meds & Allergies tab).pdf						0	9/2
MEASURES	Progress Note		PRASAM_20200921_Free Form	(No Meds & Allergies tab).pdf						0	9/2
HISTORY	Legacy Documents		Example Client CS Documentat	tion.pdf						0	9/2
Lashboard	Legacy Documents		Example Client CS Documentat	tion.pdf						0	9/2
? HELP ♂ REFRESH	Measure		PRASAM_20200913_PCL-5 Wee	kly.pdf						0	9/1
	Discharge Summary		PRASAM_20200917_Discharge	5um.docx						0	9/1
	Clinical History Form		PRASAM_20200914_Clinical His	story Form.pdf						0	9/1
	Progress Note		PRASAM_20200913_Free Form	Note.pdf A						0	9/1
	Receipts		Receipt_PRASAM_09122020_25	i.pdf						0	9/1
	Receipts		Receipt_PRASAM_09122020_23	.pdf						0	9/1

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.

Upload Documents	×
The maximum file size is 50.0 MB. The total maximum upload size is 500.0 MB.	
Legacy Documents V	
Provider	
J.Holdredge: Jennifer Holdredge, Dr. / MA PsyD, LMFT 🛛 🗸	
Date Time	
01/26/2021	
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

New	-	Batch Action 🝷
Show		Preview
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Fax Document(s)

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Melrose ED Center		
ах То		
(952) 993-6685		
Include Cover Sheet		

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. <u>Sending notes using Patient Messaging</u>
- 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

▼ Open Chart ・			
O NEW	Compose		\$
B DASHBOARD			
BILLING	Personal		
BILLER TOOLS	Inbox		
DOCUMENTS	Unread	From	
# SCHEDULER	Sent	Jennifer Holdredge, Dr. / MA PsyD, LMFT	
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