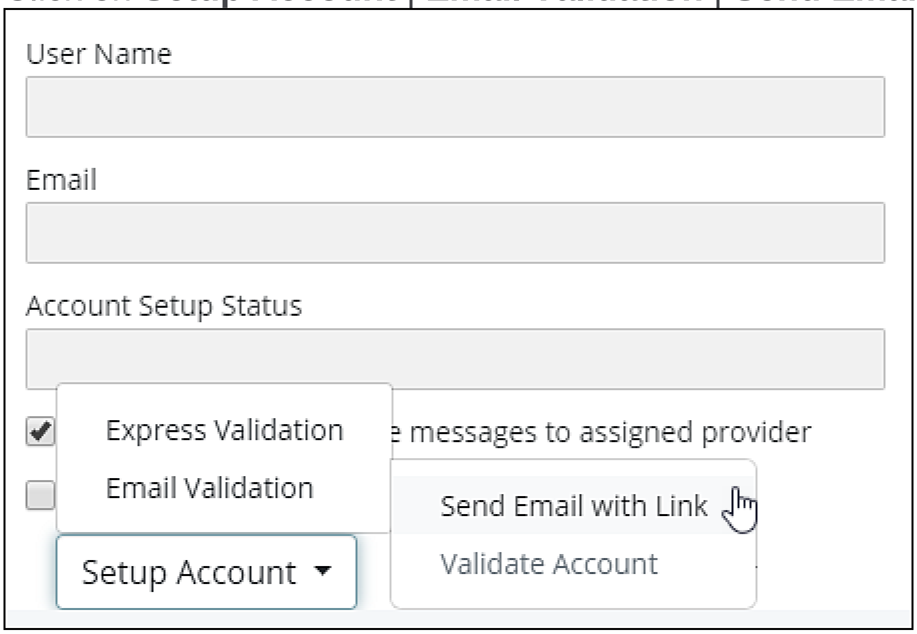
Valant Client Portal Setup

Email Validation

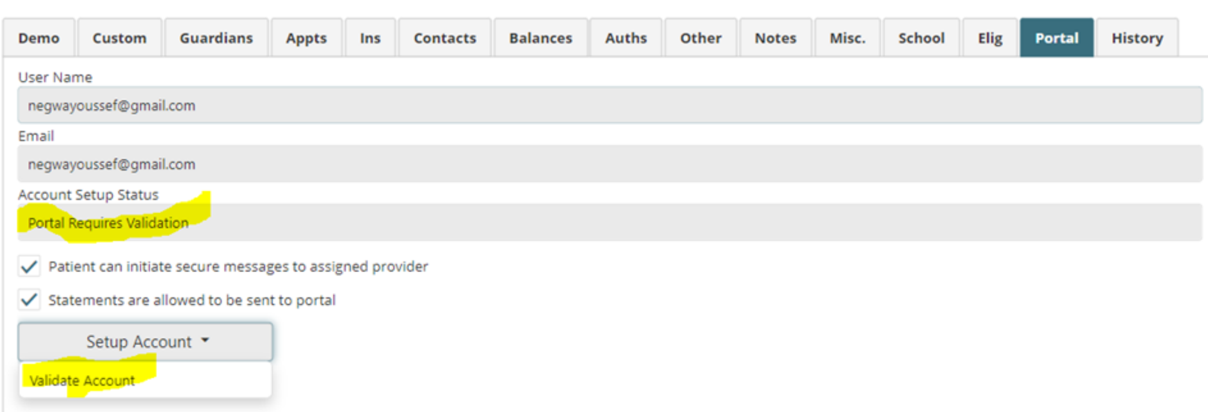
(Note: We do not use the Express Validation option.)

1. Click on **Persons and Institutions | Patients**
2. Find and open the profile of the patient
3. Click on the **Portal** tab of the user profile
4. Click on **Setup Account | Email Validation | Send Email with Link**



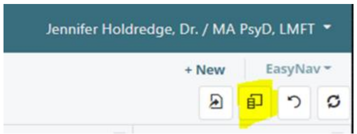
After the user has completed the process

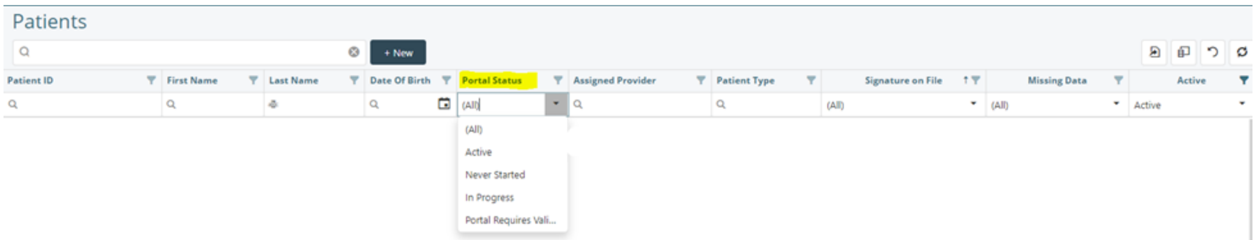
1. Go to the Dashboard and click on **Portal accounts needing verification**
2. Find and open the profile of the patient
3. Click on the **Portal** tab of the user profile
4. Click on **Setup Account | Email Validation | Validate Account**



Portal Status in Patients Tab

You can adjust your Patient List Settings (second box in upper right corner) to include the Portal Status.

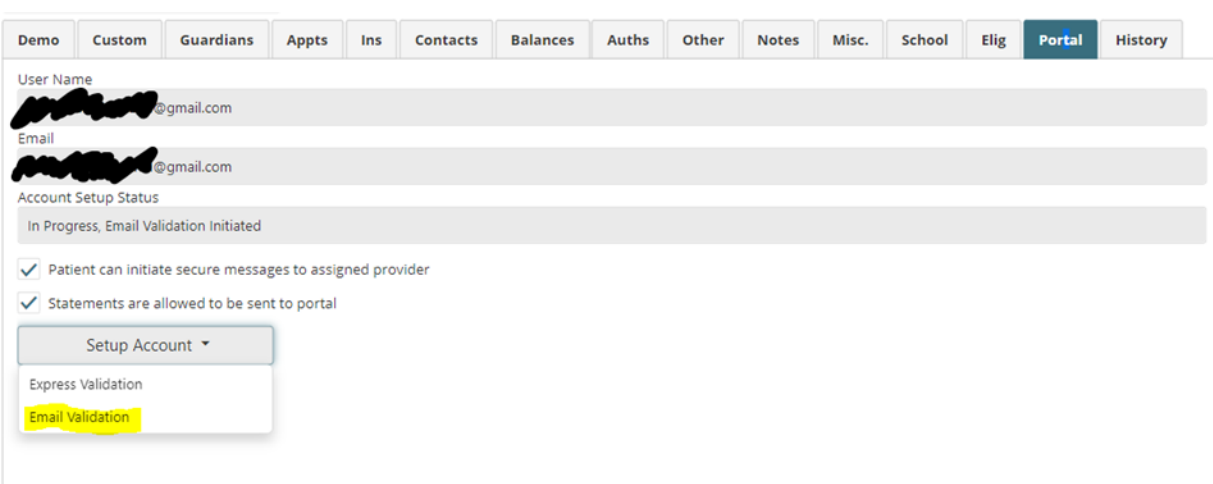




Notes

- The Patient has 72 hours to setup their account or the link will expire
- The password must be at least 6 characters long, contain 1 lower case letter, and 1 number or non-alphabetic character (Example: #$%^&*?@)
- A final account verification is still required by the provider before additional information (such as Measures) is available via the Patient Portal

If you need to resend the link to the Portal, click Email Validation.



Warning

If the patient is having trouble accessing their account after it is activated, it is best to reset their password rather than re-initiating their account. Re-initiating their account, will orphan their existing account permanently. It will be impossible to re-associate the old portal with the account in the EMR.

Portal Issues

The reasons why clients would have issues:

- They are confusing Policies with Measures and are expecting to receive a link that is similar to when they completed the policies or they keep trying to use the Policy link. Policies are sent via IntakeQ and are not associated with the Client Portal.
- They are not activating the Portal, so they cannot do Measures (look to see if the Portal Status says “Active” – if it says “In Progress” then they have not activated it.)
- They have activated the Portal and no one has had a chance to validate (Validate is the final step that we do after they activate the Portal). That tiny window of time can be confusing if there is a delay.
- Rarely - We forgot to send Measures or the Measures are assigned to the wrong provider. (look in the Patient Chart – Measures – One Time Measures to see that they were sent and that the correct provider is listed under Provider ID.)
- Clients don't complete Measures within the allotted time and they expire (look in the Patient Chart – Measures – One Time Measures to see that the “end date” has not passed.)

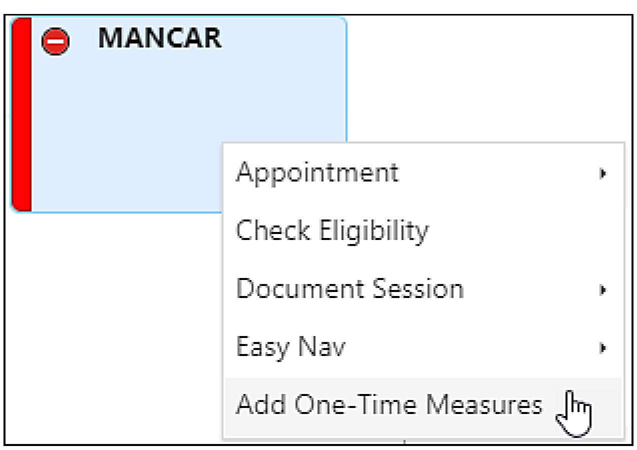
Sending Measures to the Patient Portal

Valant allows measures to be assigned and completed by patients with a patient portal account. This allows patients to fill out measures before an appointment. There are two different measurement: Scheduled Measures and One-Time Measures. Scheduled Measures are sent on a recurring basis to the portal two days before a patient has an appointment. One-Time Measures are assigned once. One-Time Measures can be assigned from the Scheduler or from the Patients Chart. In order to assign a one-time measure follow either of the following steps:

From the scheduler:

1. Right click on the Appointment

2. Click **“Add One-Time Measures”**

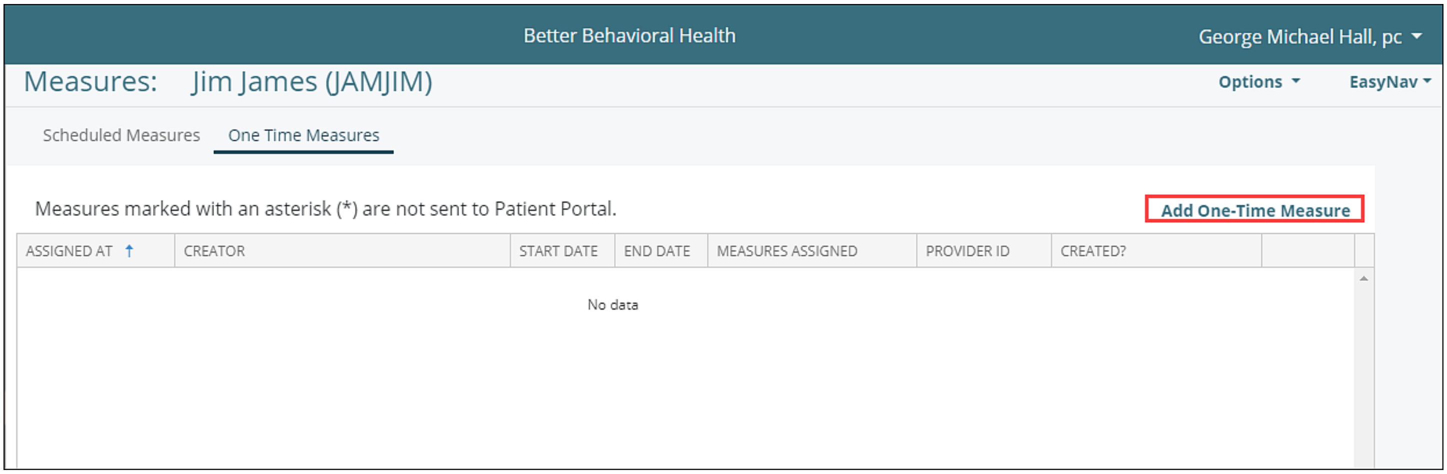


From the Patient Chart:

1. Click **Measures** from the navigation menu of the chart

2. Click the **One-Time Measures** subtab

3. Click the **Add One-Time Measure** button



After you select “Add One-Time Measure” on either option a dialog box will open to assign the measure. To assign the measure:

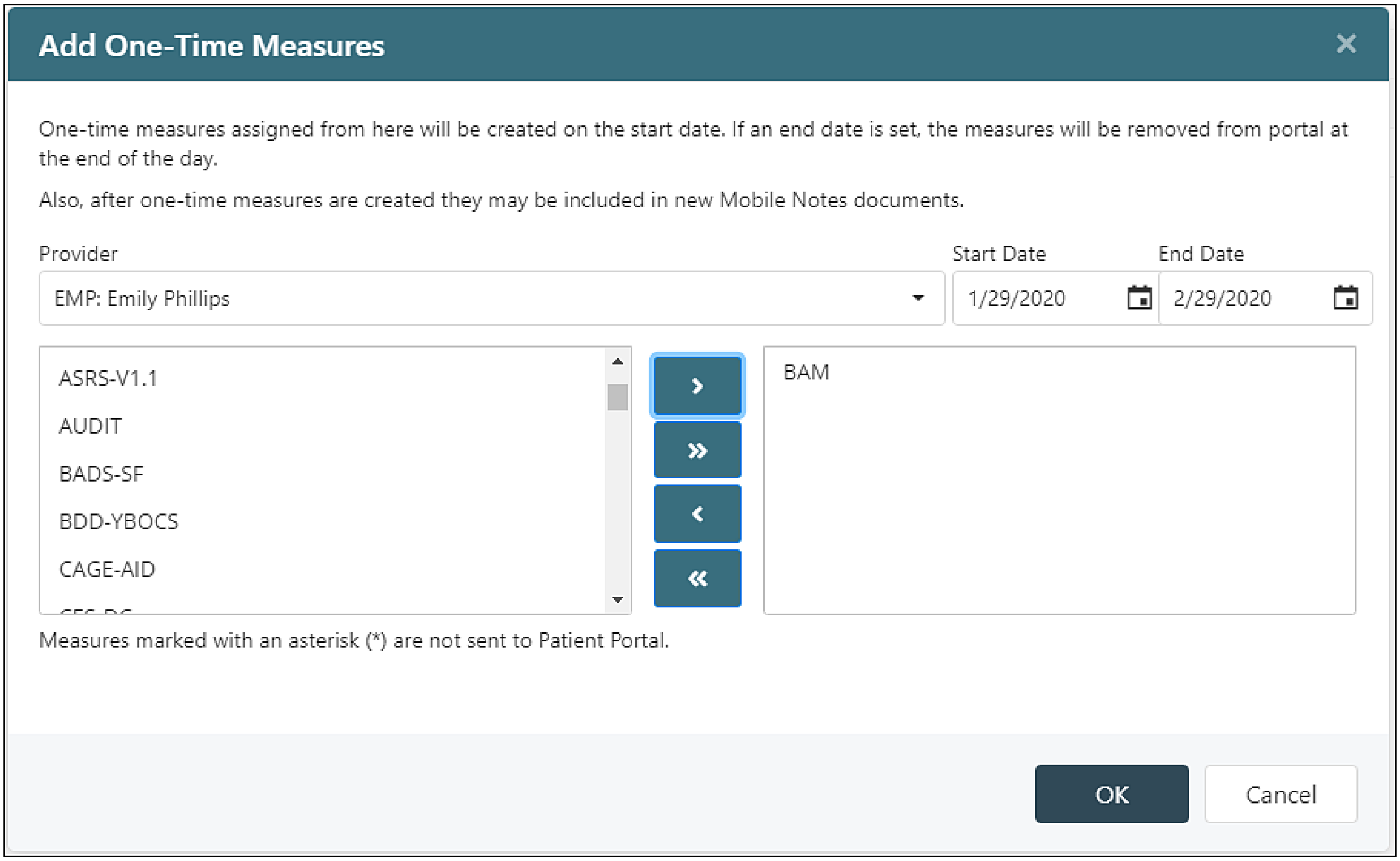
1. Assign the Provider who will be authoring the note with the **Provider** drop-down

2. Enter a start and end date

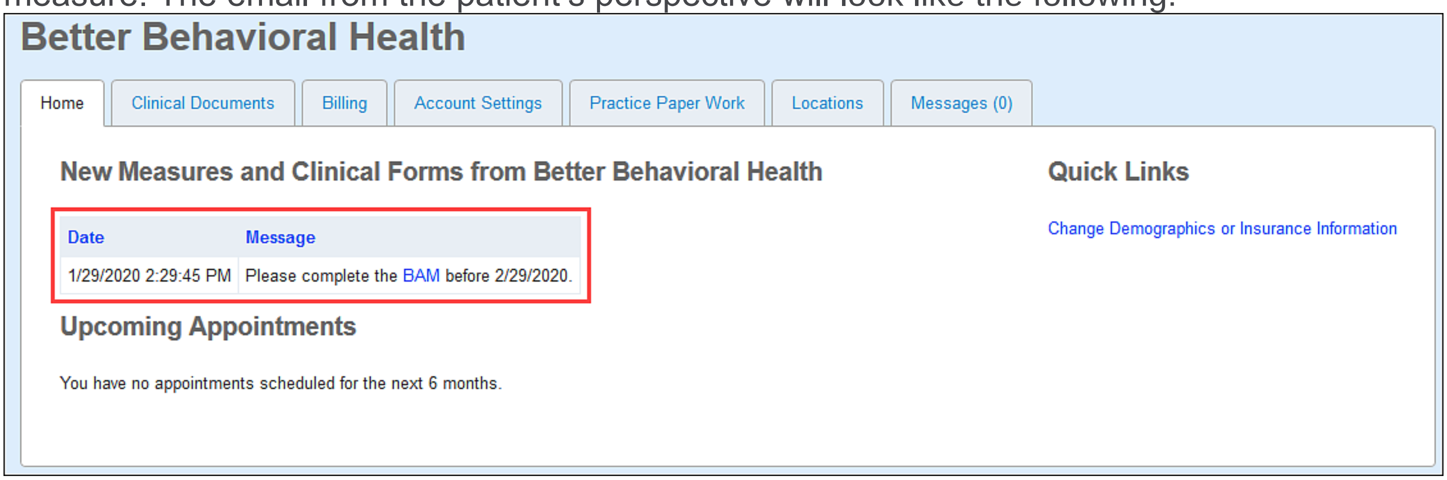
3. Click the **Measure**

4. Move the Measure to the column on the right side by clicking the greater than (**>**) button

5. Click **OK**

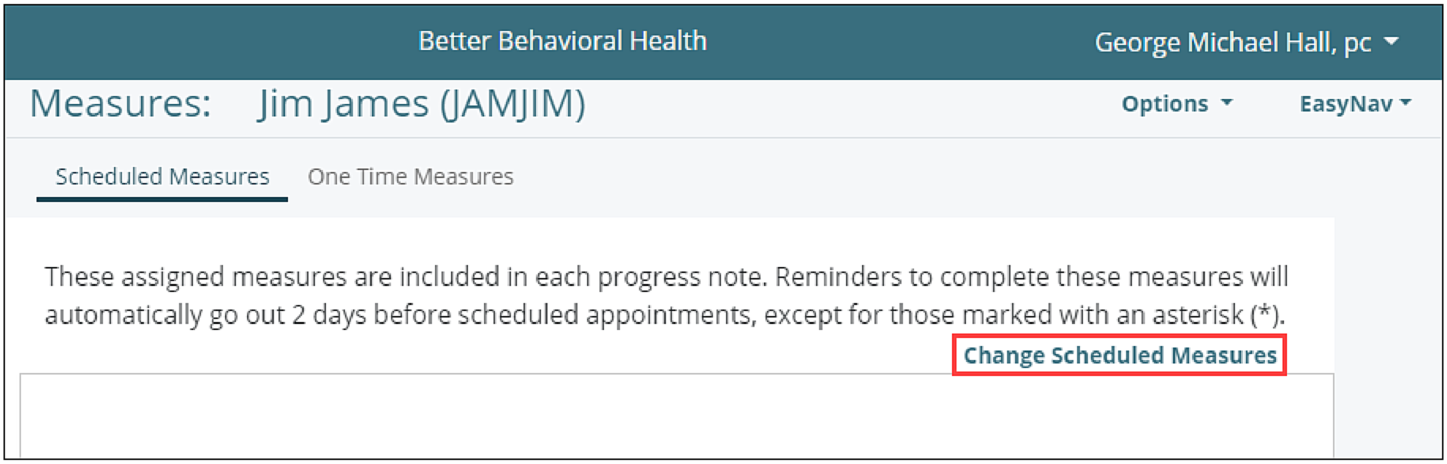


Once a measure is assigned it will be immediately sent to the patient portal account to be completed. An email will be sent to the patient the following day to notify them of the measure. The email from the patient's perspective will look like the following:



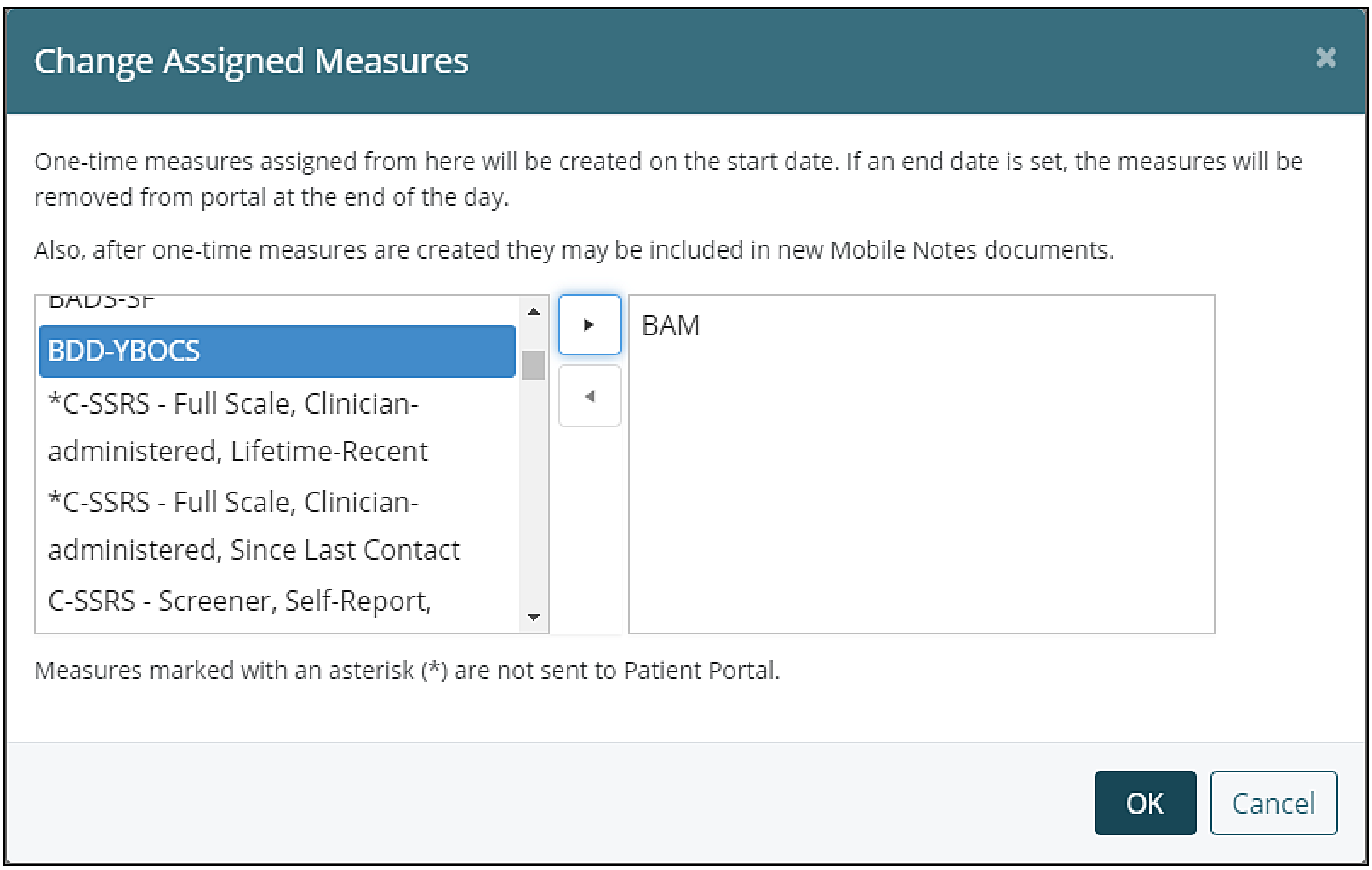
Scheduled Measures can only be assigned from the Patients Chart. From the patient chart:

1. Click on the **Measures** tab
2. Click on the **Scheduled Measures** subtab
3. Click on the **Change Scheduled Measures** button on the bottom center of the page



After selecting Change Scheduled Measures a box will appear to add and remove scheduled measures.

1. Select the **Measure(s)** to be assigned.
2. Move the Measure to the column on the right side by clicking the greater than button
3. Select **OK**



A reminder e-mail notification will be sent to the patient two days before the scheduled appointment.