

# Valant Reminders

## 1. Click Reminders Due on the Dashboard

The screenshot shows the Valant Dashboard for Rum River Counseling Inc. The top navigation bar includes the company name and the user's name, Jennifer Holdredge, Dr. / MA PsyD, LMFT. The dashboard is divided into several sections. On the left, under 'Action Items', there is a list of tasks with corresponding counts: Undocumented sessions (39), Unsigned documents (64), Uninitialed documents (13), Minimum unrecorded appointments (2), Patients with pending insurance claims (0), Patients missing demographic information (1), Demographic updates (0), Unread secure messages (0), and Patient secure message confirmation (0). Below this is a section for 'Today's Appointments' showing 'Out of Town' from 8:00 AM to 9:00 AM. On the right, the 'Reminders Due' section is highlighted, showing a reminder for a patient (signature) with the message 'please send patient's statement to her portal. thank y...' dated 04/29/2021. Below this is a 'Documentation Status' section showing a green bar and the number 388.

## 2. Click +New then select the Patient from Patients box and Assign to the person you are sending the reminder to. Then enter the Reminder info into the box and click Save. The reminder will be sent to the person.

The screenshot shows the 'Reminders' form in the Valant system. The top navigation bar is the same as the dashboard. The form has a search bar with 'Reminder' entered. Below the search bar are filters for 'Patients' and 'Date Range'. A '+ New' button is in the top right corner. The form is divided into two main sections. The top section is a table with columns: CREATOR, PATIENT ID, DATE, REMINDER, and TYPE. It currently shows 'No data available in table'. The bottom section is a form for creating a new reminder. It includes a 'Reminder Date' field set to 04/29/2021, a 'Patients' dropdown menu, an 'Assign to' dropdown menu set to Jennifer Holdredge, Dr. / MA PsyD, LMFT, and a 'Reminder' text area.

## 3. If you have a Reminder, it will show up as pictured below. Once you complete the Reminder, you can just delete it. You can also send a new reminder or email back to the person to let them know that it is completed

The screenshot shows the 'Reminders' table in the Valant system. The top navigation bar is the same as the dashboard. The table has columns: CREATOR, PATIENT ID, DATE, REMINDER, and TYPE. It shows one reminder with a signature in the CREATOR column, a signature in the PATIENT ID column, the date 04/29/2021, and the message 'please send patient's statement to her portal. thank you!'. A '+ New' button is in the top right corner.