

Valant Treatment Plan

Primary Providers – Valant Treatment Plan Tool

Primary providers can access the Treatment Plan Tool either from within Mobile Notes during session or from the left-hand menu at any time. Primary providers are defined as the provider listed in the Patients record as the Assigned Provider.

Access within the Mobile Note

1. Select the **Valant Treatment Plan** tab in the Mobile Notes window
2. Click **Create/View/Update Treatment Plan**
3. The Treatment Plan screen will open in a new browser tab
4. The client should be the only person listed on this screen. Click **Create New Treatment Plan** or **view active**, as applicable

Access Out of Session

1. **Tools > Treatment Plan Tool**
2. The Treatment Plan screen will open in a new browser tab
3. Use the **Search** box at the top of the screen to find the client in question
4. Click **Create New Treatment Plan** or **view active**, as applicable

For detailed instructions on how to use the Valant Treatment Plan Tool, please reference Knowledge Base article: <http://help.valant.com/80948-documentation-tools/pps-treatment-plan>. This article includes a 20-minute video and a 7-page downloadable guide.

Other (Secondary) Providers – Word Treatment Plan

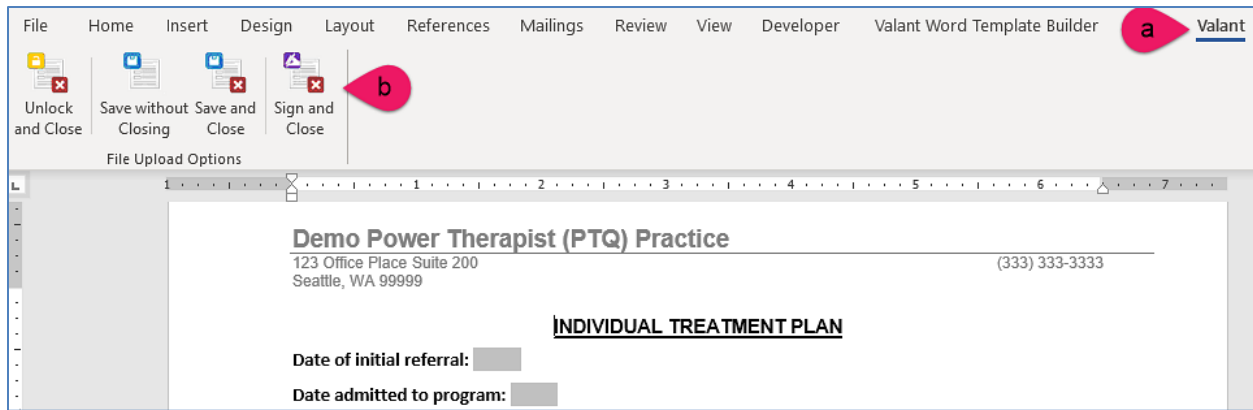
Providers other than the primary provider who are treating the client can use Word templates to create and update their treatment plans.

New > New Templated Clinical Note – New blank Treatment Plan

OR

New > New Templated Clinical Note from Last – Update an existing Treatment Plan

1. In the New Document window, complete the **Patient**, **Date/Time**, and **Primary Code** fields
 - a. *Specific primary code they want to use for TPs*
 - b. *Add supervisors to TPs*
2. For **Document Template**, select **Individual Treatment Plan**
 - a. Note: Do NOT select an Undocumented Session. Leave this drop-down blank.
3. Click **OK**
4. The document will open in Microsoft Word on your computer. Complete the relevant text boxes and checkboxes.
5. Click the **Valant** add-in tab in the upper-right, then click **Sign and Close** to complete the Treatment Plan



Note: If you do not have the Valant Word Add-in installed on your computer, it can be downloaded from the Knowledge Base: <http://help.valant.com/79965-basics/installing-the-valant-word-add-in-on-a-pc>

Another Alternative if Treatment Plan Tool Unavailable

Create Treatment Plan within the Mobile Notes Document

You may write your treatment plan within the space provided on the Mobile Notes Document and this will carry forward into each subsequent Mobile Note, where you can add updates, etc. to your treatment plan.

Treatment Plan

Create/View/Update Treatment Plan

- Do not attach the active treatment plan to this note
- When this note is signed, attach the treatment plan that is active at the time of signing to this note. (Please Note: If there is no active treatment plan at the time this note is signed, no treatment plan will be attached)

Insert Macro... Create Macro

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