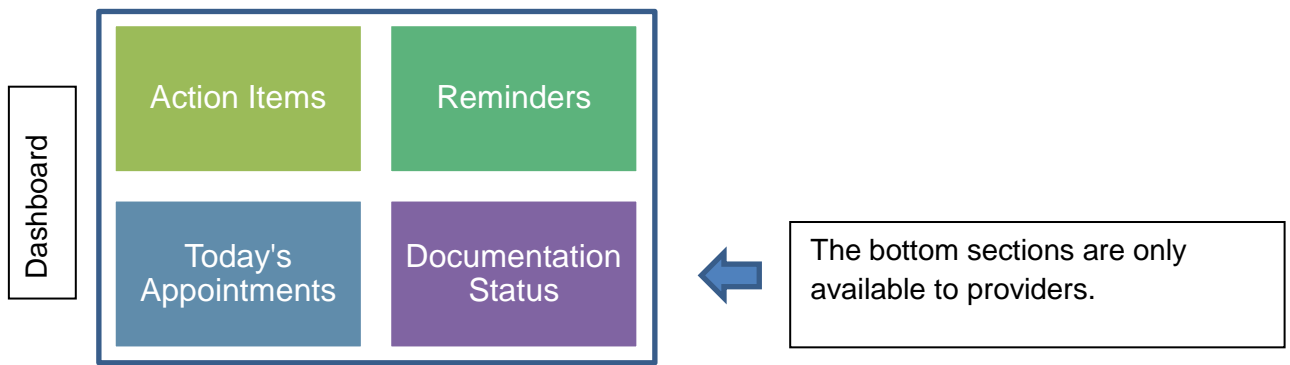


# EMR Basics – Regional Training Cheat Sheet

This cheat sheet is not a comprehensive reference guide. It is a job aid that will help you locate basic features and follow processes in the EMR. Print it and keep it handy. It is a great tool for experienced users that can also be used to coach those who have already received basic training but are still new to the Valant EHR.

## Dashboard

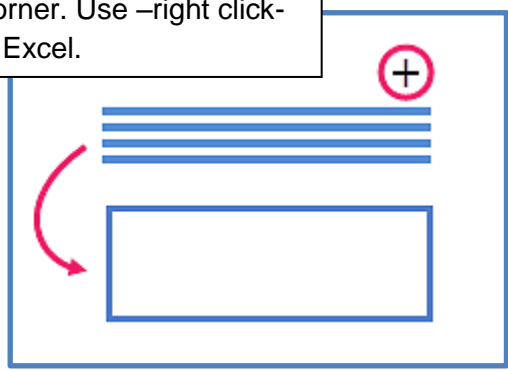
Some staff users may not have access to the bottom sections of the dashboard.



## Data Lists




When you click on an item, the details will appear at the bottom. To add a new item, (patient, provider, insurance company, etc.) click on the 'New' button at the top right-side corner. Use –right click– to export to Excel.

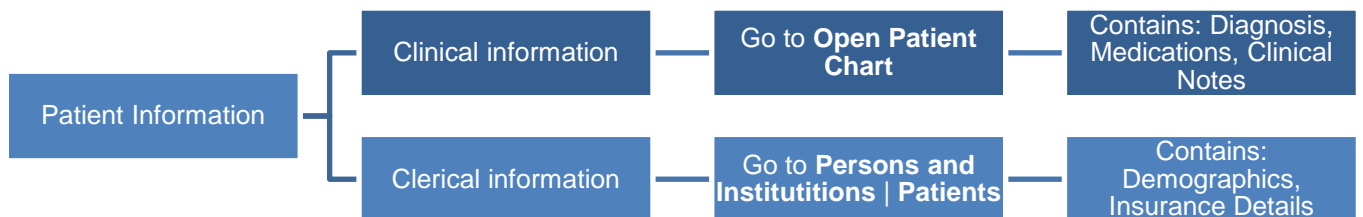


## Preferences

- To set user and appointment preferences go to **System | Preferences**.
- To set practice preferences go to **Persons and Institutions | Practice** and click on the **Preferences** tab.
- To configure procedure codes go to **Transaction Codes | Procedures**. Here you can set the fee and default duration for your practice codes, including custom codes like 'no show'.
  - Transaction fees can be modified on an individual basis by accessing the details of an appointment.

## Patients

- When you add a new patient, the only required fields to be able to create an appointment are First name, Last Name and Gender. However, all the demographic fields highlighted in yellow are required in order to perform billing and e-prescribing actions.
-  "Info release authorized" and "Signature on file" may be required for successful Insurance billing.
- Once in the calendar, double click an appointment to view and edit its details.












## Admin Scheduler: things to remember

- Click on **Change View** to select the providers and facilities that will show in your calendar.
- To save a 'view' click on **Action | Save as new view**
- In Month View, any given day displays three appointments only. Click on the arrow to see additional appointments.
- Options available from an appointment:



- Right click the appointment and select **Categorize** to apply a color code to the entry in question.

## Appointment Icons in the calendar

-  Documentation has not been started
-  Documentation has been started but not signed
-  Documentation has been signed and saved to the Patient Chart
-  Red bar indicates that no charge has been created for this session yet
-  The patient has a copay (hover over appointment for amount)
-  An appointment note has been attached (hover over for details)
-  Recurring appointment
-  Recurring appointment where this occurrence has been edited
-  Patient has been checked in

## Scheduler – Left side panel

◀ December, 2015 ▶

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Preset view: Action ▼

Calendar: By Providers ▼

Selected providers:

Dr. Smith

Dr. Lawrence

Dr. Diaz

Facilities:

(All selected)

Downtown Office

South Office

Change View

Timer interval: 15 ▼

Zoom:

Use fixed column width

Go to Today
Refresh
Record Appointments

- **Preset View** – Used to select a saved calendar View.
- **Action Button** – Used to add or delete preset views
- **By Providers/By Facilities Button** – Sets view to display appointments by Provider or by Facility. It toggles text based on selection.
- **Selected Providers** – List of providers selected for display.
- **Selected Facilities** – List of Facilities selected for display.
- **Change View** – Allows for the selection of Providers and Facilities to be included in the main calendar view.
- **Timer Interval** – Sets calendar time interval to one of the preset values. The Automatic setting takes into account the appointments currently being displayed on the calendar and sets an interval that best matches the displayed schedules.
- **Zoom Slider** - Shrink or expand concurrent appointments to more easily manage group services
- **Use Fixed Column Width** - When the box is checked, concurrent appointments will be shrunk to fit within the default column width of the scheduler. When the box is unchecked, concurrent appointments will expand to show their information more fully.
- **Go to Today** – Changes the view to display the current day, the overall view of Day, Week, Month, etc. will not change.
- **Refresh** – Updates the local calendar with that on the Valant server to ensure the most current data is displayed. Should be used in larger practices to prevent double booking.
- **Record Appointments as Completed** – Changes the display to a list view of all unrecorded appointments. Allows for easier identification of appointments which are not able to be recorded as completed due to missing data.

## Patient Chart

Nice to know: There are four ways to access the Patient Chart depending on where you are in the EMR.

1. From the main navigation bar

Clicking the **Easy Nav** button that appears:

2. When right clicking an appointment in the calendar.
3. In the patient's page: Go to **Persons and Institutions** | **Patients** and select a patient.
4. When viewing a charge: Go to **Billing** | **View/Edit Charges** and select a patient.

## Patient Chart – Adding Diagnoses

Dashboard BAKJIL x

Overview **Diagnoses** Documents Medications Allergies Lab Requests Patient Tasks Measurements Family History L&L

Show inactive/resolved diagnoses  Show Diagnoses History  DSM-5  DSM-IV [New Diagnosis](#)

### DSM-5 Diagnoses

ICD-9	Description	ICD-10	Description	Specificity	Status	Date	Billing
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### DSM-5 Other Conditions

ICD-9	Description	ICD-10	Description	Specificity	Status	Date	Billing
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### General Medical & Non-DSM-5 Diagnoses

ICD-9	Description	ICD-10	Description	Specificity	Status	Date	Billing
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GAF:  DSM-IV Axis IV:

[Save](#) [Undo](#)

[Options](#) [Easy Nav](#)