Patient Portal – Regional Training Cheat Sheet

Setting up Accounts

Express Validation – Recommended

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** | **Express Validation**
5. In the new window, make sure to enter the patient's email address and click **Generate**.
   a. If patients are present, share the code and open the URL so they can complete the process.
   b. If patients are not present, share the code and send the URL by clicking **Send Email**.

Email Validation

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, go to the Dashboard and click on **Portal accounts needing verification**.

1. Find and open the profile of the patient
2. Click on the **Portal** tab of the user profile
3. Click on **Setup Account** | **Email Validation** | **Validate Account**

The options for allowing the patient to initiate **Secure Messages**, receive **Patient Statements**, and view their **Balances** are dependent of the practice account configuration.

Managing Accounts
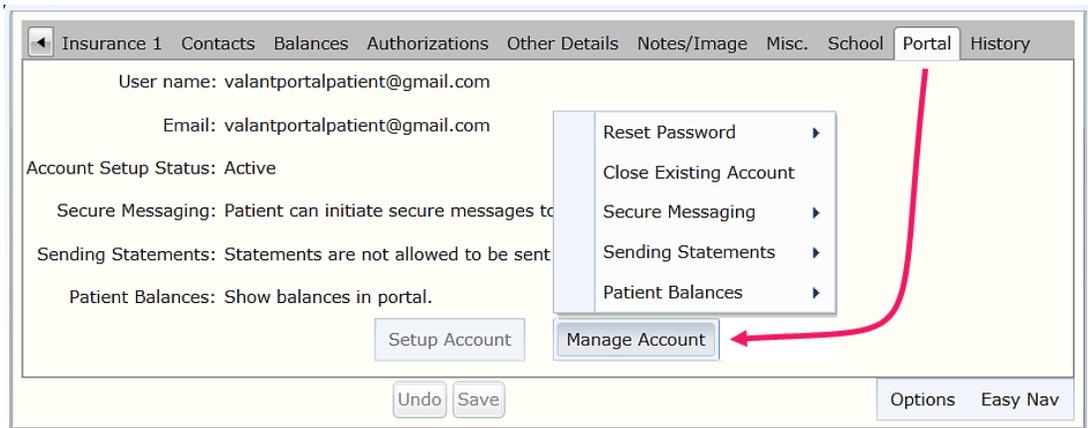
## Assigning Clinical Measures and Questionnaires

Scheduled Measures
Reminders to complete these measures will appear in the patient's portal two days before EVERY scheduled appointment: These measures are useful for tracking patient progress.

One-time Measures
These measures appear in the patient's portal during the scheduled time frame. (These can also be added by right clicking the appointment on the calendar). There are two ways to add one-time measures:
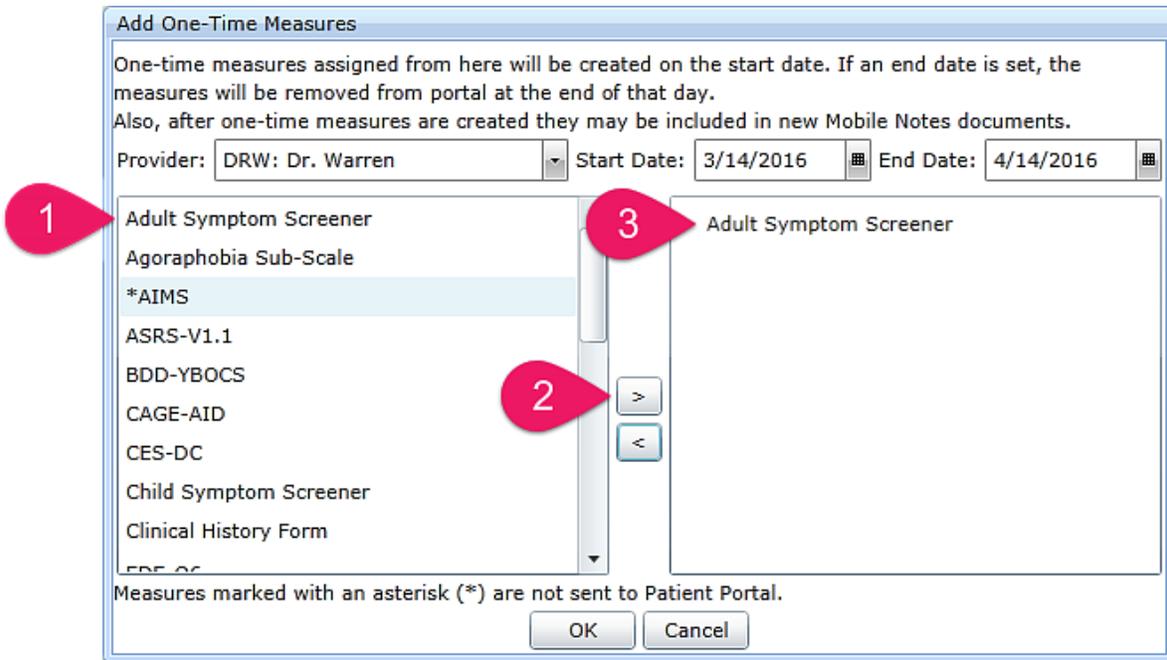
Option 1 (Recommended):

1. Right-click the appointment from the Scheduler
2. Select "Add One-Time Measures"
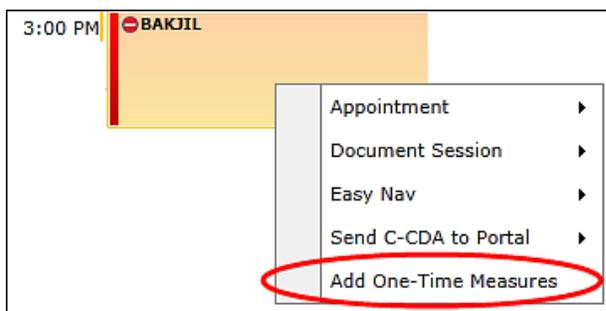
Option 2:

1. Click on **Open Patient Chart** and open a profile.
2. Click on the **Measures** subtab.
3. Continue with either **Scheduled** or **One-Time Measures**

Secure Messages
To send secure messages click on **Unread secure messages**

Keep an eye on actions that
require your attention:

Sending Statements

Before sending the statement, make sure the client settings are enabled to deliver statements.

1. Click on Persons and Institutions | Patient
2. Select the desired patient
3. Click on the **Portal** tab
4. Click on **Manage Account**
5. Select **Sending Statements**
6. Click the appropriate option
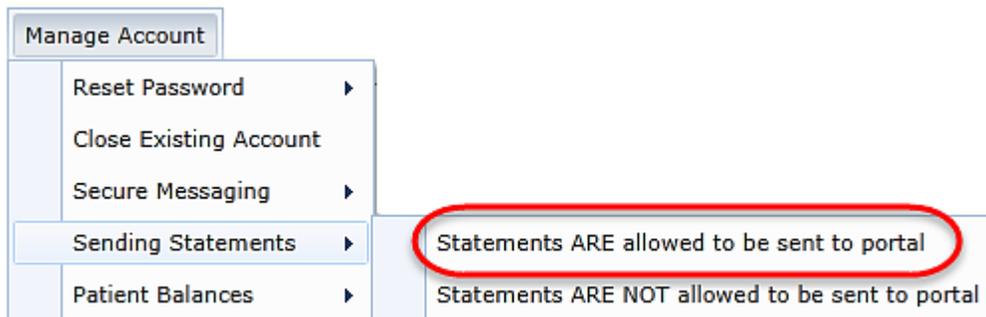
Sending the statements:

1. Click on **Billing** | **Create Patient Statements**
2. Use the **Patient** and **Statement Type** filters
3. Check the box "Prepare statements for sending to portal"
   a. If this option is not available, contact support
4. Click on **Generate Statements**
5. Print and/or save to desktop if needed
6. Click on **Send Statements(s) to Portal and Mark as Printed or Sent**

Uploading Practice Documents
Remember, uploaded documents will be accessible to all Patient Portal users at your organization.

1. Click on **Documents** | **Practice Documents** | **Upload Documents**
2. Select "Patient Portal Forms" in the "Document Type" menu
3. Browse to the desired document and click **OK**.

The Patient's Perspective

The home tab of the Patient Portal displays information related to any uncompleted clinical measures or forms, upcoming appointments (if any) and may display billing notification based on the configuration of your practice.

You should instruct your patients to click on **Change Demographics or Insurance Information** so they can complete/verify the demographic data as noted in the EHR.

Additional tabs include Clinical Documents (if Meaningful Use is provisioned), Billing (if provisioned), Account Settings, Practice Paper Work, Locations, and Messages (if Secure Messaging is provisioned).
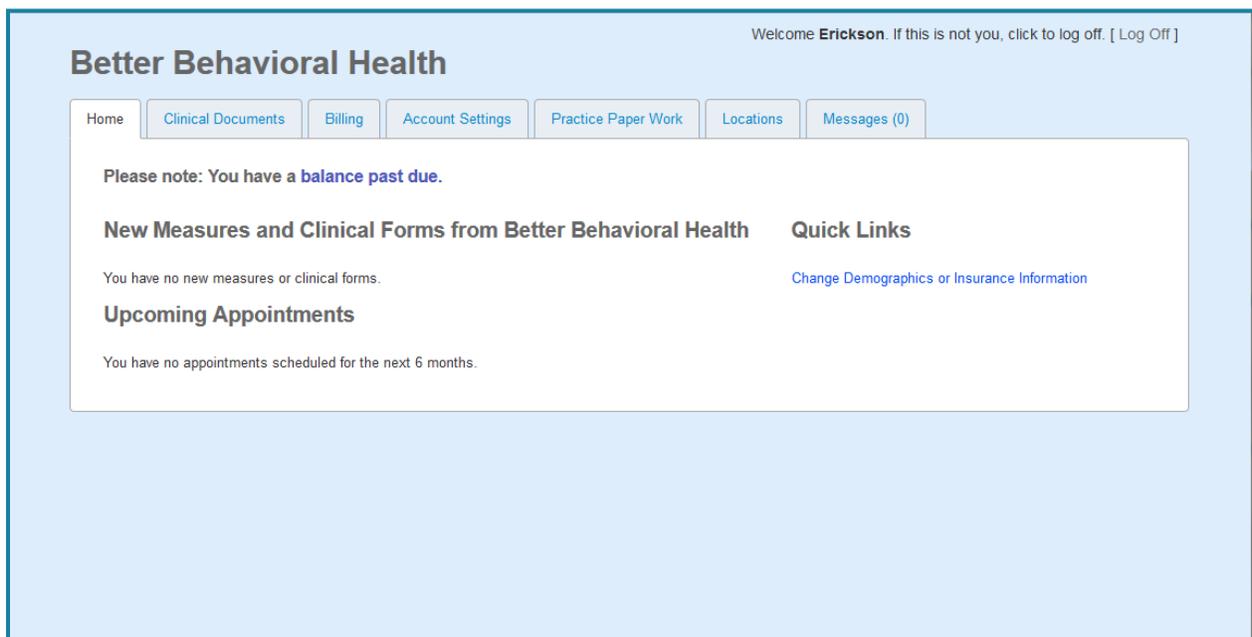
Patients can change their password or email address by accessing the **Account Settings** tab. Passwords must be at least six characters long and have at least one upper case letter, one lower case letter and one number or non-alphabetic character (e.g., !@@#$%^&*?).

The **Practice Paper Work** tab contains documents and blank forms which have been previously uploaded by the practice for the use of the patients. It is important to note that only blank forms should be uploaded into the **Practice Documents** as all users with access to the Patient Portal will have access to all of the forms. Forms can be inactivated in **Documents | Practice Documents** if forms require updates. The patient can click on the name of the document to download or print each document.

It is the responsibility of the practice to support patients with questions, concerns, and issues related to the Patient Portal.

If you would like to add features to your Patient Portal module or a feature is not working as expected, please contact Valant Support at 888-774-0532 ext.3 or by email at support@valant.com.