



EHR Offline Documents

Valant

1. Make sure you are connected to WiFi. Open the client's document in Valant as you normally would through the Valant scheduler.
 2. Once the document is open go to **File | Save As**.
 3. Save the document to the Desktop and do not change the filename prior to saving the file.
 4. Close the Word document utilizing the X button on the right-hand corner.
 5. When you are in your session open the file you saved on the Desktop.
 6. Save the completed note using the Save Icon on the left-hand corner of your Word document.
 7. Close the Word document utilizing the X button on the right-hand corner.
- When you return in a location that has internet - Sign on to Valant and go to the left Navigation Tree in the EHR.
8. Select Document | Save Templated Document. Saving the templated document will update the copy of the note that is in the Unsigned Documents Tab. This allows for future editing of the note.
 9. Click on the Browse button.
 10. Navigate to the desktop and select the file.
 11. Once the file name appears in your Save Templated Document window, Press the Ok Button.
 12. You can confirm the document was uploaded by going to your Unsigned Document Section.
 13. Delete the document(s) from the desktop to eliminate any HIPAA concerns
- If you are select a Supervisor to your document under your Unsigned Document section.
14. Select the Action button on the column furthest to the right.
 15. Select Manage.
 16. Add your supervisor.

