

Chart Management

Guide Sheets

Created By Orion

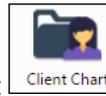
17 December 2020

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Chart Management - Introduction

This module provides users the ability to upload documents (PDF, JPG, GIF, and PNG formats) into their AccuCare System and attach those documents to a specific client's clinical record. It also allows the user to copy the client's report to a central location like an electric filing cabinet.



If you use the new menu view you will see an icon called Client Chart in the upper left quadrant call Main

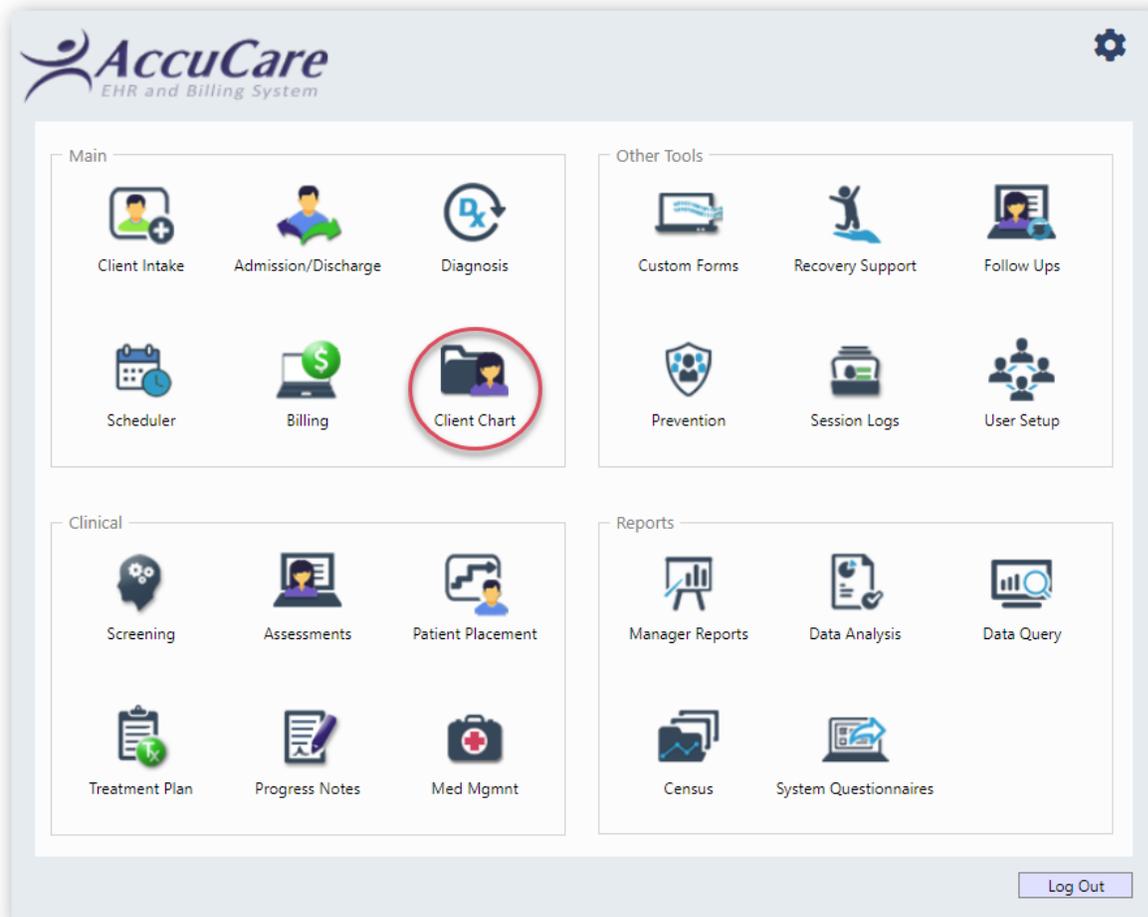
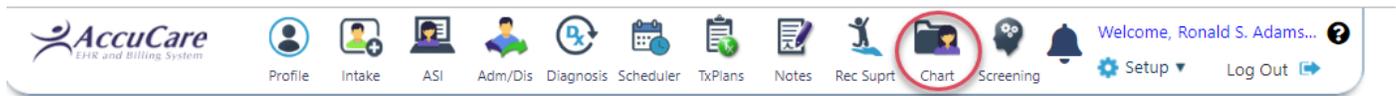


Chart Management Dialog Box

Chart Management

Select

Client Name:  Choose Filter(s): Select By:

Episode(s): Show Columns: All Dates Date Range to

Select	Client Name	Episode	Description	Level of Care	Location	Service Date	File Date	Document Type	Chart Category	Created By	Initials
No records to display.											

Chart Management – Options available to find your client

Search option:

- 1) Select a Client by typing the first couple of characters (see example below)
- 2) A list of clients who meet your search will show automatically. All relevant choices will appear allowing you to choose your client.

Client Name	Level of Care	Location	Service Date	File Date	Document Type	Chart Category	Created By	Initial Signature	Date S
Hatter, Charles Client Reference #: Date of Birth: 06/04/1952	Level 0.5 - Education	(BG - SA) Nicasa Buffalo Grove -	10/08/2018	10/24/2018	IOP Rehab	Group Note	Ron Admin	Ron Admin	10/24/2018
Haley, Kendall Client Reference #: Date of Birth: 10/10/1980	Level 0.5 - Education	(BG - SA) Nicasa Buffalo Grove -	10/22/2018	10/24/2018	IOP Rehab	Group Note	Ron Admin	Ron Admin	10/24/2018
Hale, Tammy 1 Group -IOP	Level 0.5 - Education	(BG - SA) Nicasa Buffalo Grove -	10/01/2018	10/24/2018	IOP Rehab	Group Note	Ron Admin	Ron Admin	10/24/2018
Hale, Tammy 1 Group -IOP	Level 0.5 - Education	(BG - SA) Nicasa Buffalo Grove -	08/17/2018	08/17/2018	Unassigned	Unassigned	Roy Able, BS,	Roy Able	08/17/2018

Filter(s) option:

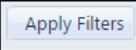
- 1) After selecting your client, you can go further to narrow down your search.
- 2) Using the Filter(s) option you can see the choices available to you.

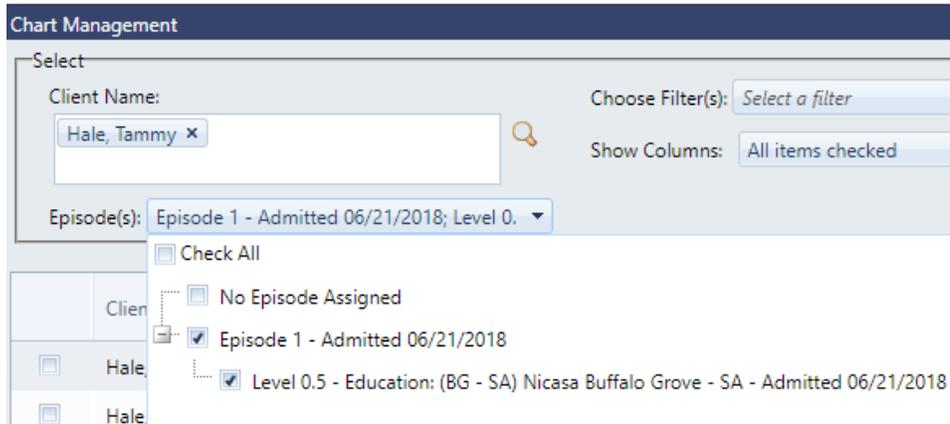


- 3) Once you have made this selection you will need to click on the  button found on the far right top of this dialog box

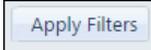
Client Name	Episode	Description	Level of Care
Hale, Tammy	1	Group -IOP	Level 0.5 - Ed
Hale, Tammy	1	Group -IOP	Level 0.5 - Ed

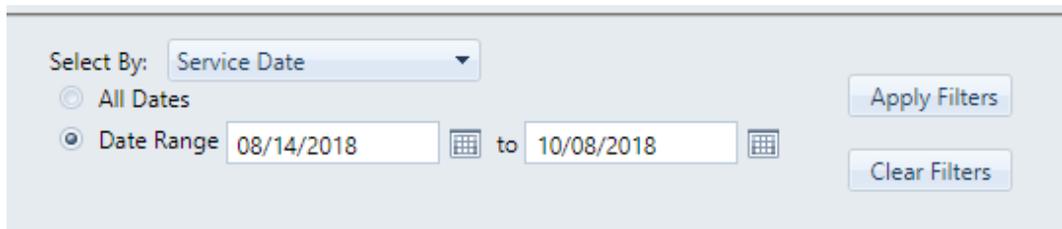
Episode(s) option:

- 1) If you know your client has an episode of care assigned you can search by this option to narrow down the search.
- 2) Using the Episode(s) option you can see the choices available to you.
- 3) Once you have made this selection you will need to click on the  button found on the far right top of this dialog box

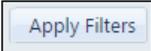


Dates or Date Range option:

- 1) With the option, the default is always set to All Dates if a narrower search is needed then you will need to use the Date Range option.
- 2) Using the Date Ranger option enter your beginning and ending dates.
- 3) Once you have made this selection click on the  button found on the far right top of this dialog box.



Apply Filters and Clear Filters option:

- 1) As you have seen above the  button activates your Filter(s), Episode(s), and Dates choices
- 2) To clear out all your filter choices simple click the  button

Special Note: Total Space Remaining Notice – We initial provide you with 10GB of space to save your reports. For most accounts this is more than enough to support you and your users.

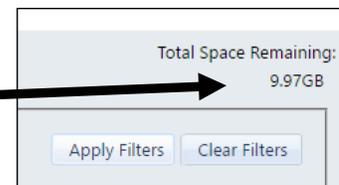
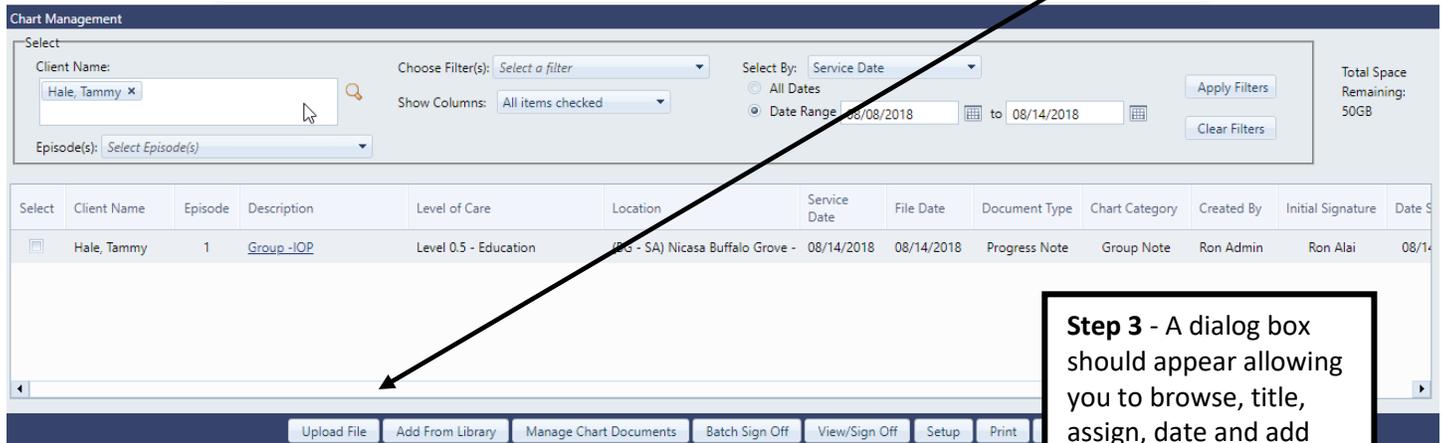


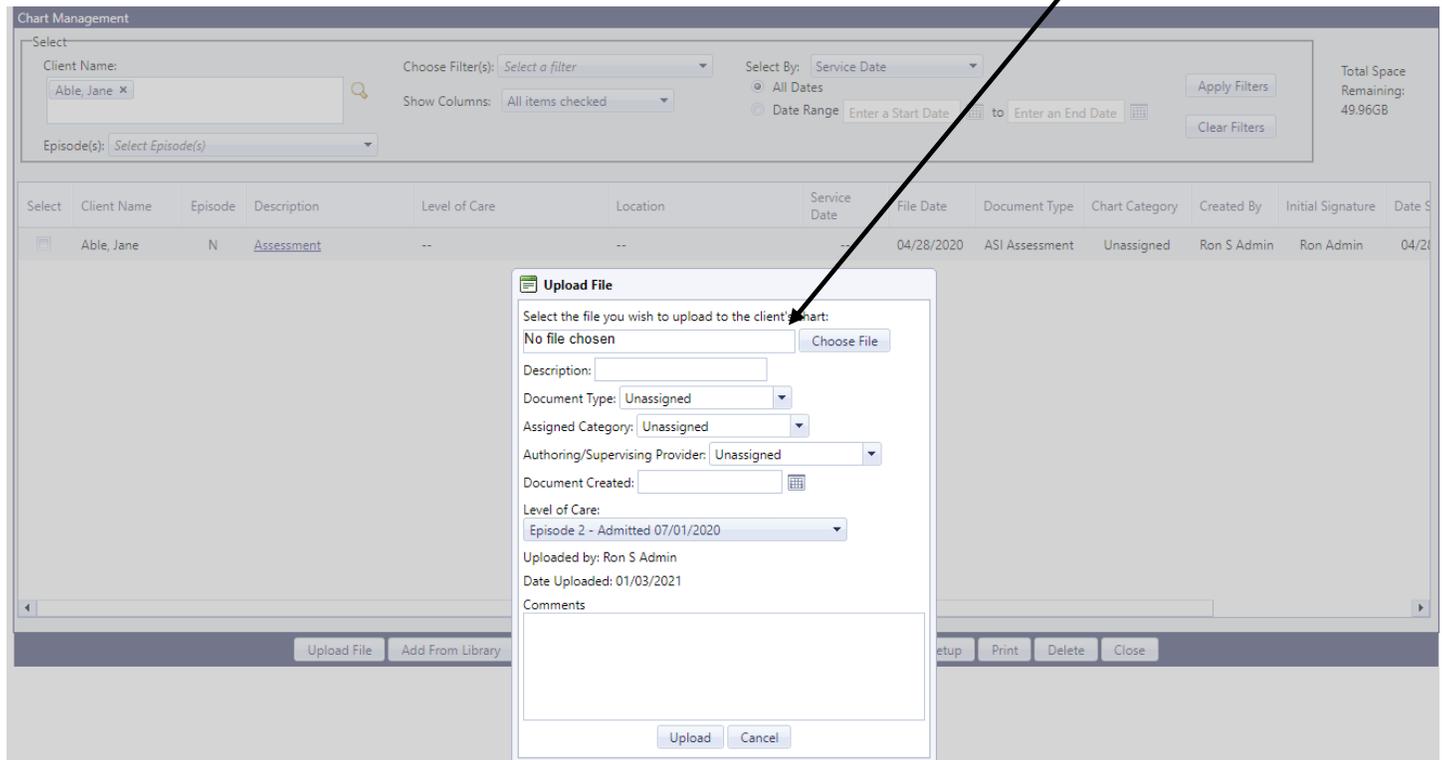
Chart Management – How to Upload Documents

Step 1 - Select a client by clicking once on their name to

Step 2 - Next click on [Upload file] button



Step 3 - A dialog box should appear allowing you to browse, title, assign, date and add comments.



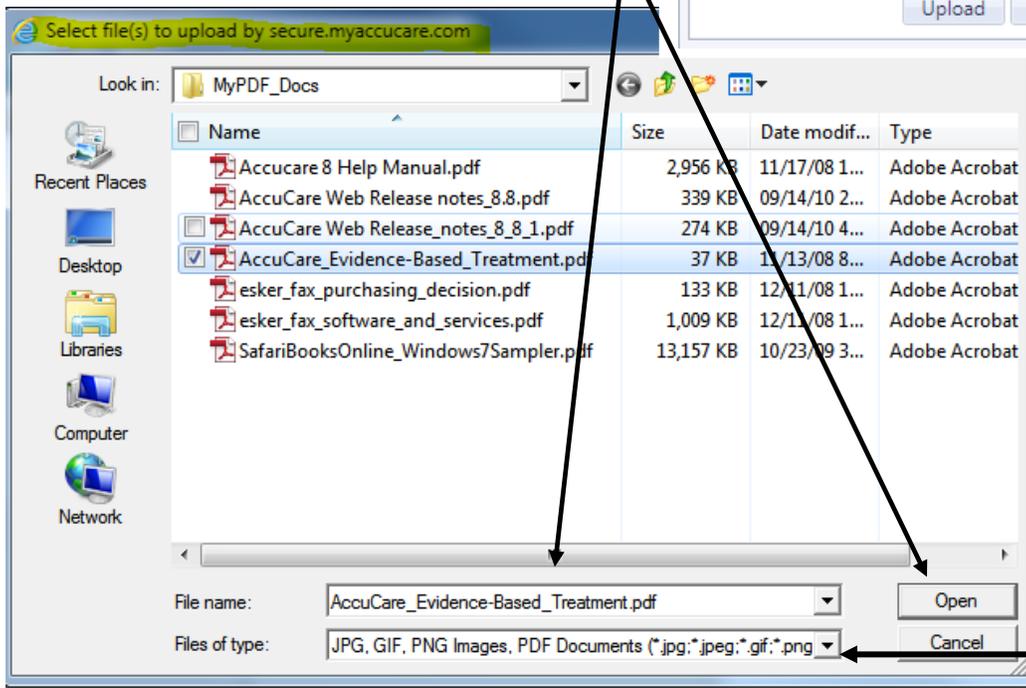
Upload Dialog Box Explained

Step 1 – [Choose File] button

When you click the [Choose File] button it will open another dialog box providing you the option to add a file from your computer to the AccuCare database. This file is then attached to the client you chose earlier.

Step 2 –Selecting a file

You can browse your hard drive or network to add the file. Simply click on the file and click the [Open].



Important Note:

You can only upload the following file types:

- 1) PDF
- 2) JPG
- 3) GIF
- 4) PNG

Name of the file you have decided to upload in the clients chart from your computer or network **(This a required field)**

These links allow you to create, edit and delete pick lists. Once you have created the pick lists they can be used over and over for other client charts. **(See next page for screen shots for detail view)**

Description: Enter a title that best describes document you have uploaded to your AccuCare database. **(This is a required field)**

The screenshot shows the 'Upload File' form with the following fields and callouts:

- File Selection:** A text box containing 'Custom Training Questionnaire.pdf' and a 'Choose File' button. A callout box points to this field.
- Description:** A text box containing 'Training Doc'. A callout box points to this field.
- Document Type:** A dropdown menu with 'IOP Rehab' selected. A callout box points to this dropdown.
- Assigned Category:** A dropdown menu with 'Inpatient Rehab' selected. A callout box points to this dropdown.
- Authoring/Supervising Provider:** A dropdown menu with 'Roy Able' selected. A callout box points to this dropdown.
- Document Created:** A date field with '01/05/2020' and a calendar icon. A callout box points to this field.
- Level of Care:** A dropdown menu with 'Episode 3 - Admitted 01/01/2020' selected. A callout box points to this dropdown.
- Uploaded by:** A text box containing 'Ron S Admin'.
- Date Uploaded:** A text box containing '01/03/2021'.
- Comments:** A text area containing 'Adding Training Questionnaire'. A callout box points to this area.
- Buttons:** 'Upload' and 'Cancel' buttons at the bottom.

Document Type: What you are uploading into the client's chart? For example: Driver License, Identification Card, Photo etc... **Use the link next to this dropdown list to create you list.**

Authoring / Supervising Provider: This is a list of providers created in **Provider Info Module.** Who you would want to associate to this uploaded file.

Assigned Category: What does the uploaded image apply to? For example - Is it Assessment, Intake or some other document? **Use the link next to this dropdown list to create you list.**

Document Created: Using the calendar to the right choose the date the document was created.

Comments: Add your comments here to give future users any additional information about this document.

Level of Care: If a level of care has been assigned this client then this dropdown list will present your choices.

Chart Management – Example of Varies Files added to a Client’s Record

Chart Management

Select a Client:

Total Space Remaining: 9.97GB

Filters

Filter(s): Episode(s): Dates: All Dates Date Range to

Select	Date	Episode	Description	Level of Care	Location	Created By	Document Type	Chart Category	Initial Signature	Date Signed	# Signatures
<input type="checkbox"/>	01/14/2016	1	Asmt Test	Level 0.5 - Education	(BBB) Business	Ron Alai, CCII	Initial Assessment	30-Day Reveiw	Ron Alai, CCII	01/14/2016	1
<input type="checkbox"/>	12/08/2015	1	Test 4	Level 0.5 - Education	(BBB) Business	Curtis Gormle	Unassigned	Unassigned	Curtis Gormley	12/08/2015	1
<input type="checkbox"/>	12/08/2015	1	December Note 2	Level 0.5 - Education	(BBB) Business	Curtis Gormle	Unassigned	Unassigned	Curtis Gormley	12/08/2015	1
<input type="checkbox"/>	12/08/2015	1	December Prog Note	Level 0.5 - Education	(BBB) Business	Dylan Lambre	Unassigned	Unassigned	Curtis Gormley	12/08/2015	1
<input type="checkbox"/>	12/08/2015	1	December Assessment	Level 0.5 - Education	(BBB) Business	Curtis Gormle	Unassigned	Unassigned	Curtis Gormley	12/08/2015	1

By click on a Document Title you will be able to view the contents of each file that has been attached.

How to View a Document

Select	Date	Episode	Description	Level of Care	Location
<input type="checkbox"/>	01/14/2016	1	Asmt Test	Level 0.5 - Education	(BBB) Business
<input type="checkbox"/>	12/08/2015	1	Test 4	Level 0.5 - Education	(BBB) Business
<input type="checkbox"/>	12/08/2015	1	December Note 2	Level 0.5 - Education	(BBB) Business
<input type="checkbox"/>	12/08/2015	1	December Prog Note	Level 0.5 - Education	(BBB) Business
<input type="checkbox"/>	12/08/2015	1	December Assessment	Level 0.5 - Education	(BBB) Business

To view a document – Click on the underscore of the Description – this will open up a preview for you look at the PDF. (See Fig. A)

Fig. A

Chart Management

Current View

Description: Asmt Test
 Version: 1
 Type: Initial Assessment
 Category: 30-Day Review
 Provider:
 Uploaded By: Ron Alai, CCII
 Date Uploaded: 01/14/2016
 Comments: Sig Pad Test
 Amendment Note: N/A

E-Signature 1: John Test
 Title: Client
 Date: 01/14/2016, 03:01 PM
 Comments:

Sign Off Amend/Revise
 Capture Client Signature

Revision History
 Version: 1 View

Orion Healthcare Technology
 18047 Oak Street
 Omaha, Ne 68130
 402-341-8880
<http://www.orionhealthcare.com>

Substance Abuse Evaluation

Client Name: Test, John
Client Address:
Client Phone:
Client SSN: ***-**-**22
Interview Date: 01/14/2016
Client Reference #:
Date of Admission: 12/08/2015
Needed By:

PRESENTING SITUATION

Mr. Test is a 29-year-old male born on November 24, 1986.

MEDICAL STATUS

Mr. Test said he has never been hospitalized for medical problems. Mr. Test said he has experienced no

Previous Document 1 of 1 Next Print Close

How to View Multiple Documents

Chart Management

Select a Client: Test, John

Total Space Remaining: 9.97GB

Filters
 Filter(s): Select a filter Episode(s): Select Episode(s) Dates: All Dates Date Range Enter a Start Date to Enter an End Date Apply Filters Clear Filters

Select	Date	Episode	Description	Level of Care	Location	Created By	Document Type	Chart Category	Initial Signature	Date Signed	# Signatures
<input checked="" type="checkbox"/>	01/14/2016	1	Asmt Test	Level 0.5 - Education	(BBB) Business	Ron Alai, CCII	Initial Assessment	30-Day Review	Ron Alai, CCII	01/14/2016	1
<input checked="" type="checkbox"/>	12/08/2015	1	Test 4	Level 0.5 - Education	(BBB) Business	Curtis Gormle	Unassigned	Unassigned	Curtis Gormley	12/08/2015	1
<input type="checkbox"/>	12/08/2015	1	December Note 2	Level 0.5 - Education	(BBB) Business	Curtis Gormle	Unassigned	Unassigned	Curtis Gormley	12/08/2015	1
<input type="checkbox"/>	12/08/2015	1	December Prog Note	Level 0.5 - Education	(BBB) Business	Dylan Lambre	Unassigned	Unassigned	Curtis Gormley	12/08/2015	1
<input type="checkbox"/>	12/08/2015	1	December Assessment	Level 0.5 - Education	(BBB) Business	Curtis Gormle	Unassigned	Unassigned	Curtis Gormley	12/08/2015	1

Step 1: To view multiple documents – Check the box to far right of those documents you wish to preview.

Step 2: Click the [View/Sign Off] Button (See Fig. B) & (Fig. C)

Upload File Add From Library Manage Chart Documents View/Sign Off Print Delete Close

How to go Toggle through Multiple Documents

Fig. B

Chart Management
Current View

Description: Asmt Test
Version: 1
Type: Initial Assessment
Category: 30-Day Review
Provider:
Uploaded By: Ron Alai, CCII
Date Uploaded: 01/14/2016
Comments: Sig Pad Test
Amendment Note: N/A

E-Signature 1: John Test
Title: Client
Date: 01/14/2016, 03:01 PM
Comments:

Sign Off Amend/Revise
Capture Client Signature

Revision History
Version: 1 View

Page 1/3 Zoom: 100%

Orion Healthcare Technology
18047 Oak Street
Omaha, Ne 68130
402-341-8880
<http://www.orionhealthcare.com>
Substance Abuse Evaluation

Client Name: Test, John
Client Address:
Client Phone: Client Reference #:
Client SSN: ***-**-**22 Date of Admission: 12/08/2015
Interview Date: 01/14/2016 Needed By:

PRESENTING SITUATION
Mr. Test is a 29-year-old male born on November 24, 1986.

MEDICAL STATUS
Mr. Test said he has never been hospitalized for medical problems. Mr. Test said he has experience

Previous Document 1 of 2 Next

Use the [Next] and [Previous] button to toggle through each document.

Fig. C

Chart Management
Current View

Description: Test 4
Version: 1
Type: Unassigned
Category: Unassigned
Provider:
Uploaded By: Curtis Gormley
Date Uploaded: 12/08/2015
Comments:
Amendment Note: N/A

E-Signature 1: Curtis Gormley
Title:
Date: 12/08/2015, 11:56 AM
Comments:

Sign Off Amend/Revise
Capture Client Signature

Revision History
Version: 1 View

Page 1/1 Zoom: 100%

Your Agency Name
Your Address
Your City, State, and Zip
Your Phone Number
<http://www.yourwebsite.com>

Progress Notes
12/09/2015 to 12/09/2015

Client Name: Test, John
Client SSN:
Client Reference #:

Date	Type of Session	Time of Session
12/09/2015	120 Day - Progress Note Check	(0h 00m)

Notes
Test

Curtis Gormley
Curtis Gormley 12/08/2015
Date

Previous Document 2 of 2 Next Print Close

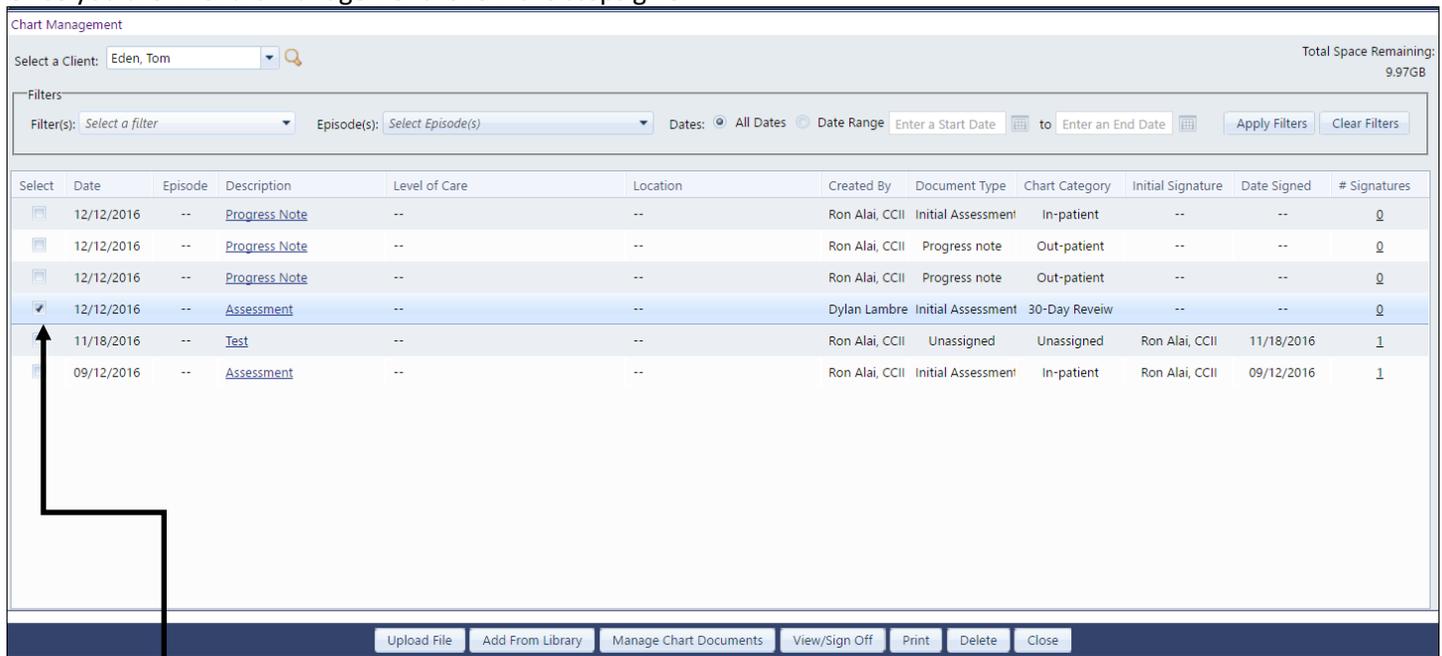
Chart Management – How to Sign Off Documents (Electronically)

Chart Management has other functions that allow you the user to electronically sign-off documents within the system. This action will lock the document so it cannot be deleted or modified. If you were to upload the same document into Chart Management, it would not overwrite the original but would be considered revised or amended. A revision history would then be created so you now have an audit trail connecting the documents within the client’s record.

Steps to follow to sign off a document

- 1) Once you are in Chart Management
- 2) Type in the first couple letters of the last name (if you need help please see instructions further up in this document)
- 3) Select a document that hasn’t been signed (See Step 1 below)
- 4) Next click on the  button

Once you are in Chart Management follow the steps given

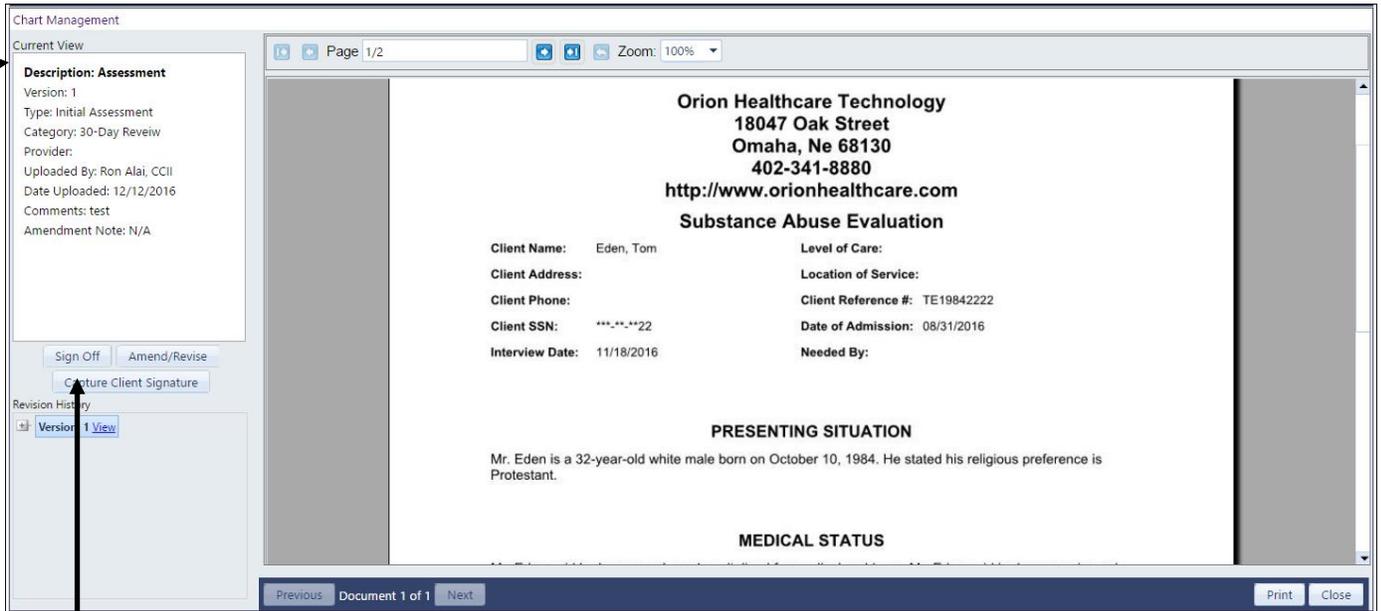


The screenshot shows the 'Chart Management' interface. At the top, there is a search bar with 'Eden, Tom' entered. Below that are filter options for 'Filter(s)', 'Episode(s)', and 'Dates'. The main area contains a table with columns: Select, Date, Episode, Description, Level of Care, Location, Created By, Document Type, Chart Category, Initial Signature, Date Signed, and # Signatures. The table lists several documents, with the one dated 12/12/2016 and description 'Assessment' selected. At the bottom, a toolbar contains buttons for 'Upload File', 'Add From Library', 'Manage Chart Documents', 'View/Sign Off', 'Print', 'Delete', and 'Close'. An arrow points from a text box below to the 'View/Sign Off' button.

Select	Date	Episode	Description	Level of Care	Location	Created By	Document Type	Chart Category	Initial Signature	Date Signed	# Signatures
<input type="checkbox"/>	12/12/2016	--	Progress Note	--	--	Ron Alai, CCII	Initial Assessment	In-patient	--	--	0
<input type="checkbox"/>	12/12/2016	--	Progress Note	--	--	Ron Alai, CCII	Progress note	Out-patient	--	--	0
<input type="checkbox"/>	12/12/2016	--	Progress Note	--	--	Ron Alai, CCII	Progress note	Out-patient	--	--	0
<input checked="" type="checkbox"/>	12/12/2016	--	Assessment	--	--	Dylan Lambre	Initial Assessment	30-Day Reviw	--	--	0
<input type="checkbox"/>	11/18/2016	--	Test	--	--	Ron Alai, CCII	Unassigned	Unassigned	Ron Alai, CCII	11/18/2016	1
<input type="checkbox"/>	09/12/2016	--	Assessment	--	--	Ron Alai, CCII	Initial Assessment	In-patient	Ron Alai, CCII	09/12/2016	1

Step 1: Select at least one document

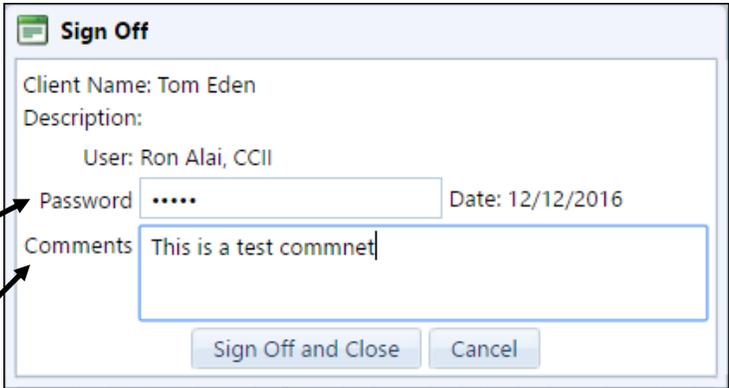
Step 2: Click on [View/Sign Off] button



Step 3: Click the [Sign Off] button

Note: Use the Current View window to verify you have the right document.
Warning! – Once you sign off a document you will not be able to delete it from the database. It is considered a historical document.

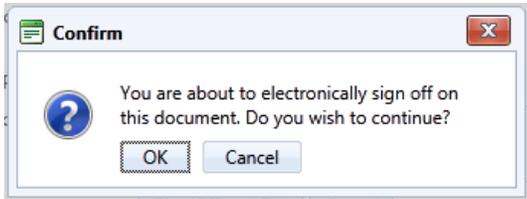
Step 4: Type in your AccuCare password here



Step 5: Add a comment (optional but recommended)

Step 6: Click on [Sign Off and Close] button

Step 7: Confirm by Clicking [Ok] or [Cancel] to stop the process



After confirming to sign off the document you notice additional information has been added to the Current View dialog box

Notice the **[Sign Off]** button is grayed out. This means the document has been signed.

Also after clicking on the **[Close]** button you will also see the name of the person and date the documents was initially signed off – this is another way to determine if the documents have been locked.

	12/12/2016	--	Progress Note	--	--	Ron Alai, CCII	Progress note	Out-patient	--	--	0
	12/12/2016	--	Assessment	--	--	Dylan Lambre	Initial Assessment	30-Day Review	Ron Alai, CCII	12/12/2016	1
	11/18/2016	--	Test	--	--	Ron Alai, CCII	Unassigned	Unassigned	Ron Alai, CCII	11/18/2016	1
	09/12/2016	--	Assessment	--	--	Ron Alai, CCII	Initial Assessment	In-patient	Ron Alai, CCII	09/12/2016	1

Chart Management – How to Amend /Revise a document

Both documents that have been signed and not signed can be amended and revised. When you amend or revise a document it is important to remember you are not deleting the original document but adding to the revised list. As we go through these instructions please note the area below in the Current View dialog box called *Revision History*.

Steps to follow to Amend or Revised a Document

- 1) Once you are in Chart Management
- 2) Type in the first couple letters of the last name (if you need help please see instructions further up in this document)
- 3) Select a document that has been signed (See Step 1 below)

Select	Date	Episode	Description	Level of Care	Location	Created By	Document Type	Chart Category	Initial Signature	Date Signed	# Signatures
<input type="checkbox"/>	12/12/2016	--	Progress Note	--	--	Ron Alai, CCII	Initial Assessment	In-patient	--	--	0
<input type="checkbox"/>	12/12/2016	--	Progress Note	--	--	Ron Alai, CCII	Progress note	Out-patient	--	--	0
<input type="checkbox"/>	12/12/2016	--	Progress Note	--	--	Ron Alai, CCII	Progress note	Out-patient	--	--	0
<input checked="" type="checkbox"/>	12/12/2016	--	Assessment	--	--	Dylan Lambre	Initial Assessment	30-Day Reveiw	Ron Alai, CCII	12/12/2016	1
<input type="checkbox"/>	11/18/2016	--	Test	--	--	Ron Alai, CCII	Unassigned	Unassigned	Ron Alai, CCII	11/18/2016	1
<input type="checkbox"/>	09/12/2016	--	Assessment	--	--	Ron Alai, CCII	Initial Assessment	In-patient	Ron Alai, CCII	09/12/2016	1

Step 1: Click on the document you wish to amend or revise. In this example, I have decided to revise, add another reversion to this document reference.

Step 2: Click on the [Amend / Revise] button

The screenshot displays the 'Chart Management' interface. On the left, a sidebar shows document details for 'Assessment' (Version: 1, Type: Initial Assessment, Category: 30-Day Reveiw, Provider: Ron Alai, CCII, Date Uploaded: 12/12/2016, Comments: test, Amendment Note: N/A). Below this is a 'Revision History' section with a 'Version: 1 View' link. The main content area shows a document preview with the following text:

Orion Healthcare Technology
 18047 Oak Street
 Omaha, Ne 68130
 402-341-8880
<http://www.orionhealthcare.com>
Substance Abuse Evaluation

Client Name: Eden, Tom Level of Care:
 Client Address: Location of Service:
 Client Phone: Client Reference #: TE1984222
 Client SSN: ***-**-**22 Date of Admission: 08/31/2016
 Interview Date: 11/18/2016 Needed By:

PRESENTING SITUATION

At the bottom of the interface, there are navigation buttons: 'Previous', 'Document 1 of 1', 'Next', 'Print', and 'Close'. An arrow from the 'Amend/Revise' button in the sidebar points to the 'Version: 1 View' link in the revision history.

Amend/Revise Document

Select Revision Type:
 Upload Revised Document Edit Document Details

Reason for Amending/Revising: [Add/Edit Reason](#)

Notes

Select the document you wish to upload to the client's chart:

Description:

Document Type:

Assigned Category:

Authoring/Supervising Provider:

Document Created:

Level of Care:

Uploaded by: Ron S Admin
Date Uploaded: 01/03/2021

Comments

This dialog box will come up so you can either **Upload Revised Documents** or **Edit Document Details**– (See next page for detailed instructions)

Select Revision Type: (Upload Revised Document)
This option uploads a new revised copy of the document. Using the Browse button to find the document.

Select Revision Type: (Edit Document Details) This option allows me just the edit the existing document information. The [Browse] button becomes inactive.

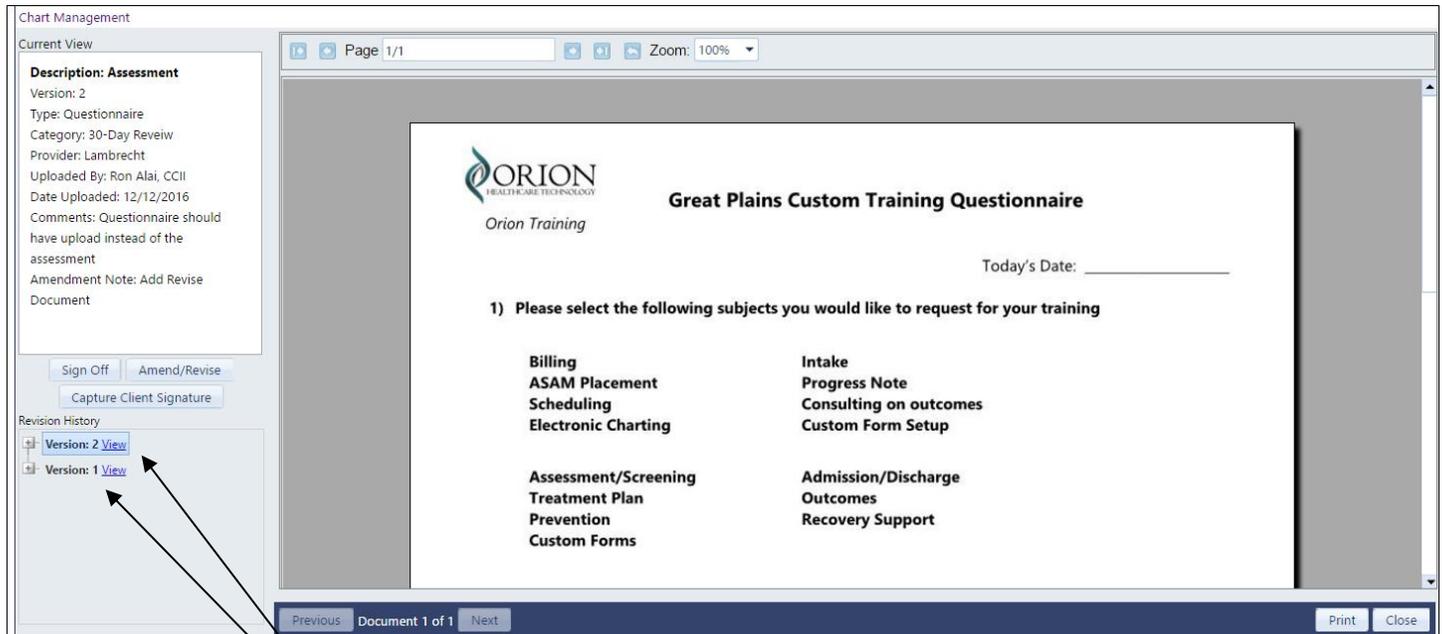
Enter all required information:
Select from dropdown, put in notes and browse for files you want to upload and add to this client's record.

The [Upload] button becomes active if I have selected *Upload Revised Document*

The [Save Changes] button becomes active if I have selected *Edit Document Details*

The [Cancel] button will stop any actions if you decide to not Amend/Revise the Document

Uploading the questionnaire, the version becomes Version 2. My original image is marked as Version 1 and can be seen by clicking the underlined View under the See Revision History.



The most recent entry will appear on the top in the list under *Revision History*. Both are available for viewing but [Version 1] cannot be altered since it has been signed. [Version 2] which hasn't been signed off is open and can be deleted, revised and amended.

Chart Management – How to Print with or without Header

Steps to follow to Print with a Header

- 1) Once you are in Chart Management
- 2) Type in the first couple letters of the last name (if you need help please see instructions further up in this document)
- 3) Select a document under the description column

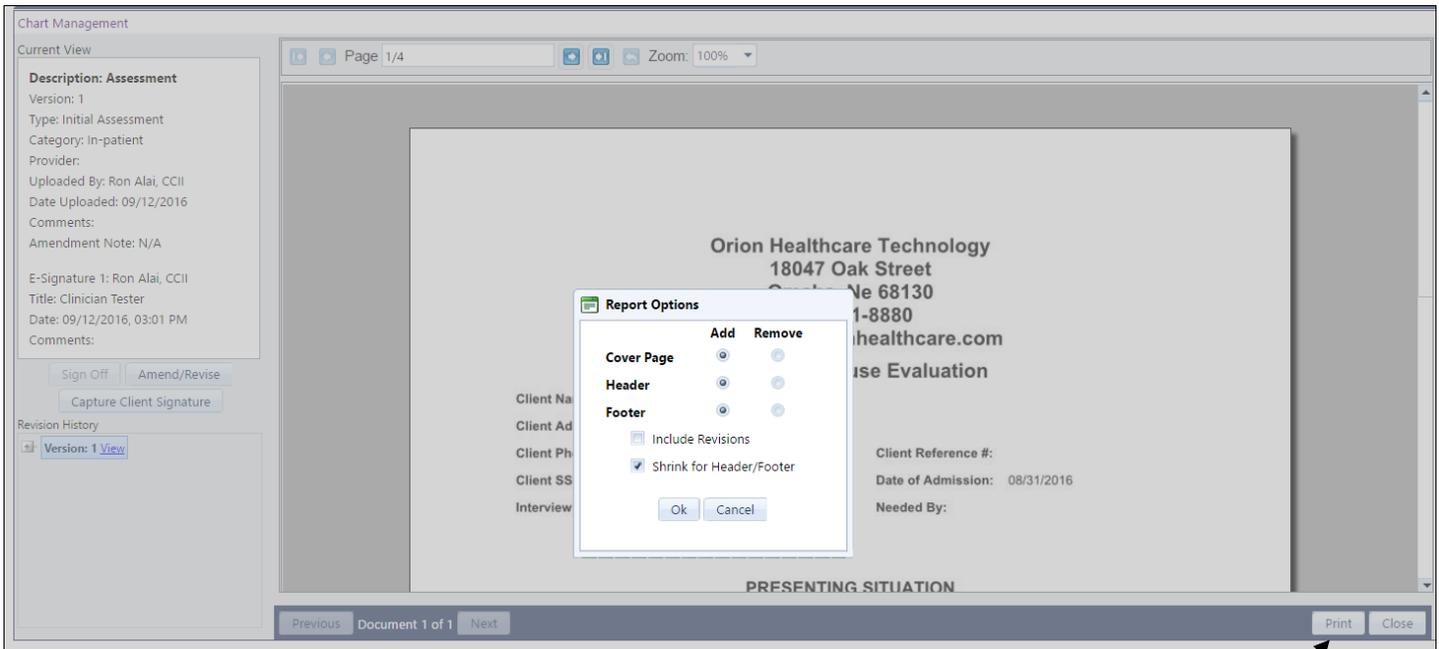
The screenshot shows the 'Chart Management' interface. At the top, there is a search bar with 'Eden, Tom' entered. Below it are filter options for 'Filters', 'Episode(s)', and 'Dates'. The main area is a table with columns: Select, Date, Episode, Description, Level of Care, Location, Created By, Document Type, Chart Category, Initial Signature, Date Signed, and # Signatures. The table contains six rows of data. The first row is selected, and an arrow points to the 'Assessment' document from 09/12/2016.

Select	Date	Episode	Description	Level of Care	Location	Created By	Document Type	Chart Category	Initial Signature	Date Signed	# Signatures
<input checked="" type="checkbox"/>	12/12/2016	--	Assessment	--	--	Ron Alai, CCII	Questionnaire	30-Day Reviw	--	--	0
<input type="checkbox"/>	12/12/2016	--	Progress Note	--	--	Ron Alai, CCII	Initial Assessment	In-patient	--	--	0
<input type="checkbox"/>	12/12/2016	--	Progress Note	--	--	Ron Alai, CCII	Progress note	Out-patient	--	--	0
<input type="checkbox"/>	12/12/2016	--	Progress Note	--	--	Ron Alai, CCII	Progress note	Out-patient	--	--	0
<input type="checkbox"/>	11/18/2016	--	Test	--	--	Ron Alai, CCII	Unassigned	Unassigned	Ron Alai, CCII	11/18/2016	1
<input type="checkbox"/>	09/12/2016	--	Assessment	--	--	Ron Alai, CCII	Initial Assessment	In-patient	Ron Alai, CCII	09/12/2016	1

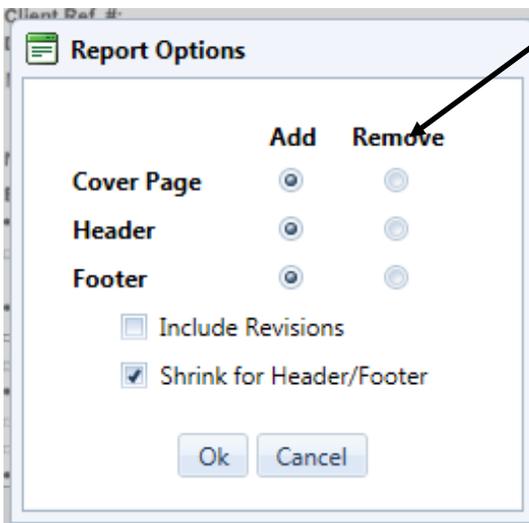
At the bottom of the interface, there are buttons for 'Upload File', 'Add From Library', 'Manage Chart Documents', 'View/Sign Off', 'Print', 'Delete', and 'Close'.

Step 1: Click on the document you wish to printout. In this example, I have decided to printout a Tom Eden’s Assessment.

Decide if you would prefer to have the header printed at the top of your printout or not. A preview will come up to show you what the output will look like before printing.

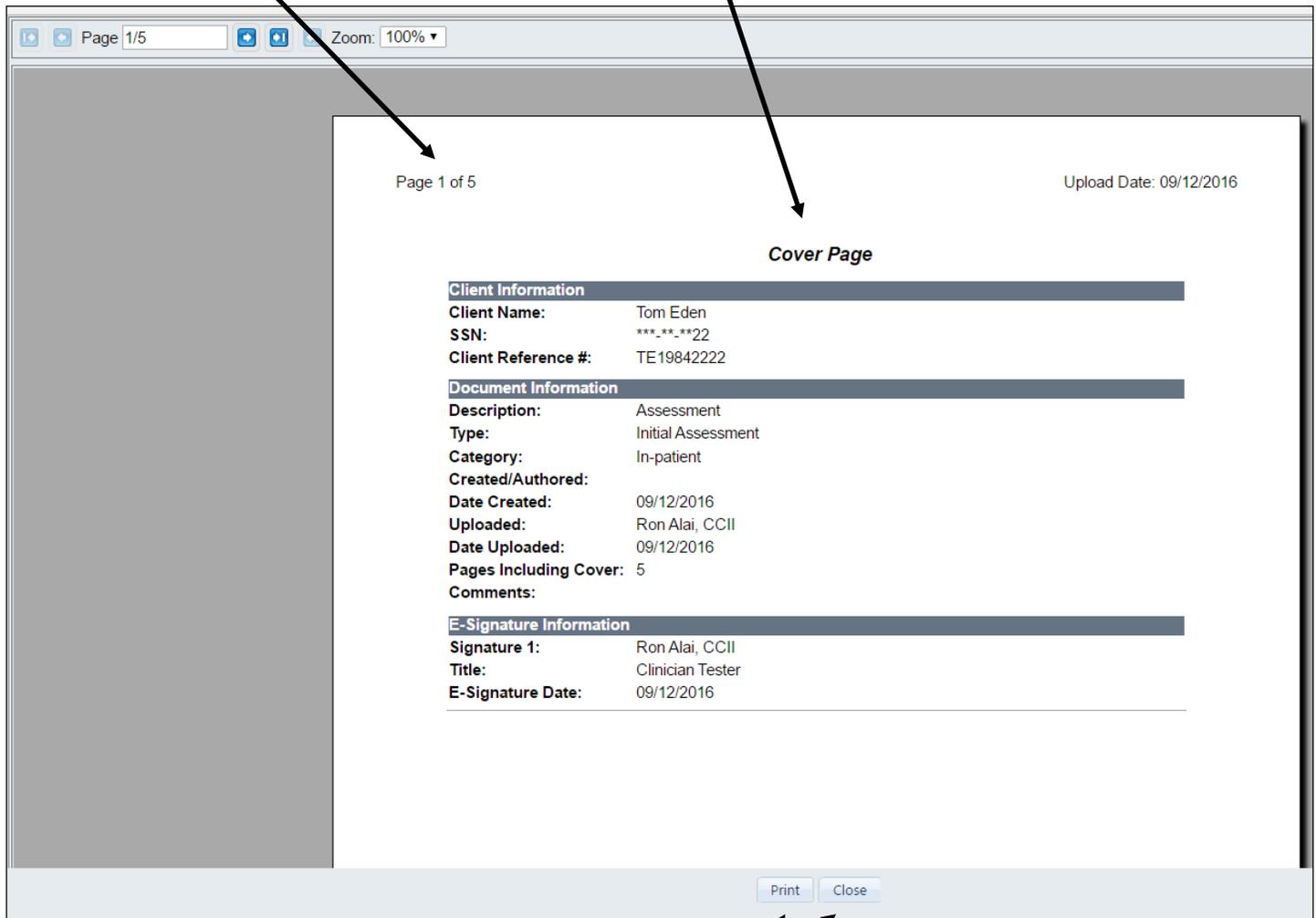


Step 2: Click on the [Print] button to select to have your printout **with a Header** or **Without Header**. Make your choices then click on the [Ok] button.



Step 3: In this exercise I have chosen to have header at the top of each page.

Note: Whenever you print out a document in Chart Management the first page will always be a cover page followed by the rest of the document.



Step 4: Select [Print] to printout the document or [Close] to cancel and go back to the previous page.

This is a screen shot of the same document but without a cover page.

The screenshot shows a PDF viewer window with a toolbar at the top containing icons for navigation and zoom, and a status bar showing 'Page 1/4' and 'Zoom: 100%'. The document content includes:

- Page 1 of 4 (top left)
- Upload Date: 09/12/2016 (top right)
- Orion Healthcare Technology**
18047 Oak Street
Omaha, Ne 68130
402-341-8880
<http://www.orionhealthcare.com>
- Substance Abuse Evaluation**
- Client Name: Eden, Tom
- Client Address:
- Client Phone:
- Client Reference #:
- Client SSN: ***-**-**22
- Date of Admission: 08/31/2016
- Interview Date: 08/31/2016
- Needed By:

PRESENTING SITUATION

Mr. Eden is a 31-year-old white male born on October 10, 1984. He stated his religious preference is Protestant.

MEDICAL STATUS

Mr. Eden said he has never been hospitalized for medical problems. Mr. Eden said he has experienced no medical problems in the past 30 days. He reported that he has not been bothered at all by medical problems during this time period, and he expressed no need for medical treatment.

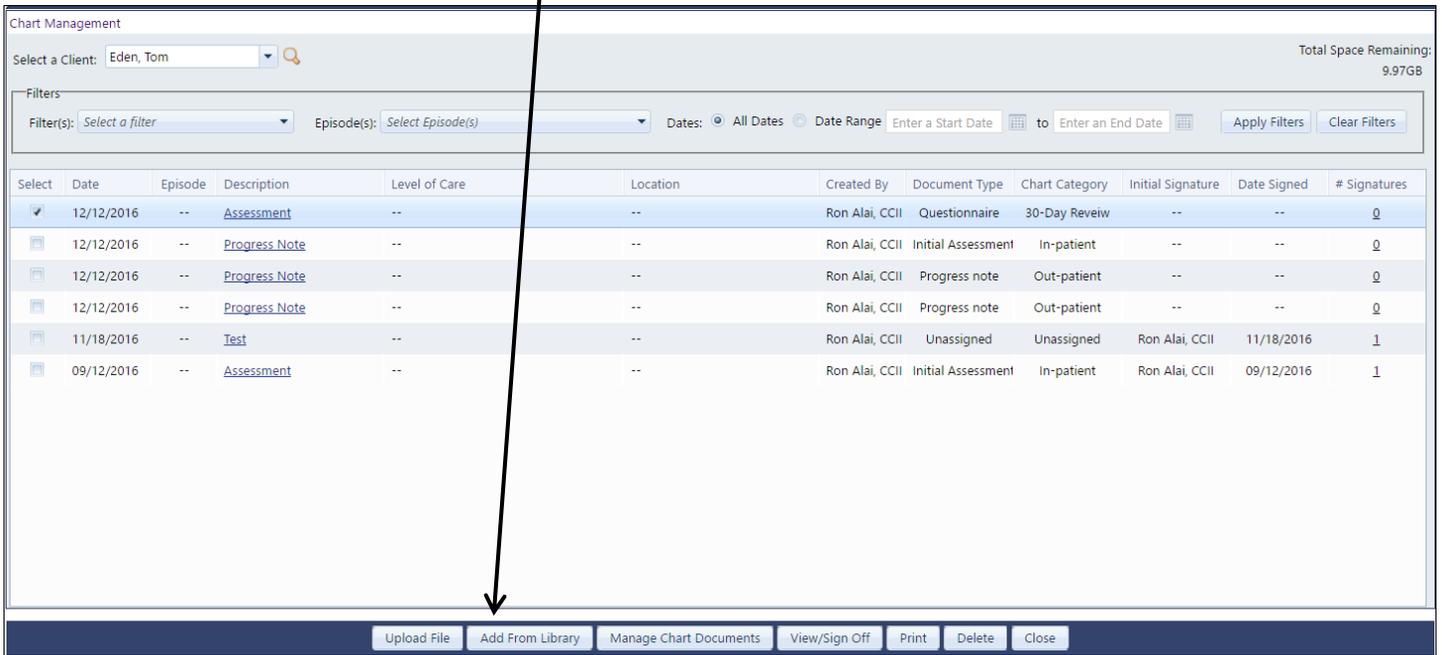
EMPLOYMENT/SUPPORT STATUS

At the bottom of the page, there are 'Print' and 'Close' buttons.

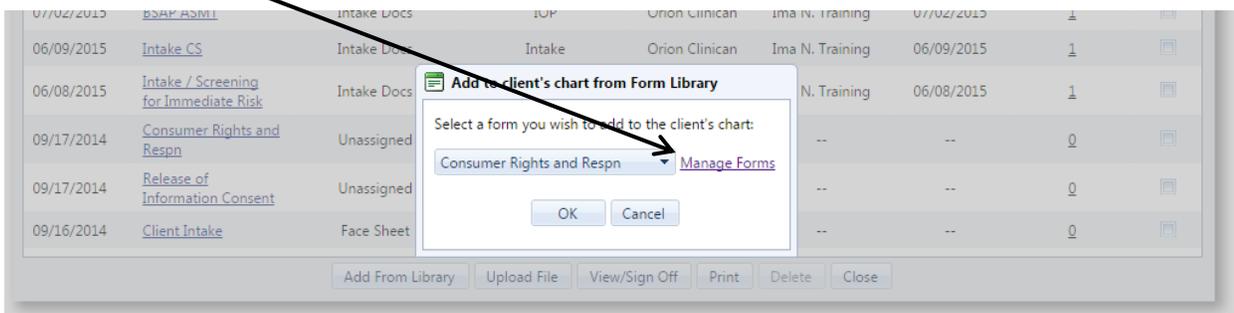
Chart Management – How to Use the Form Library

Steps to follow using the [Add From Library] Button

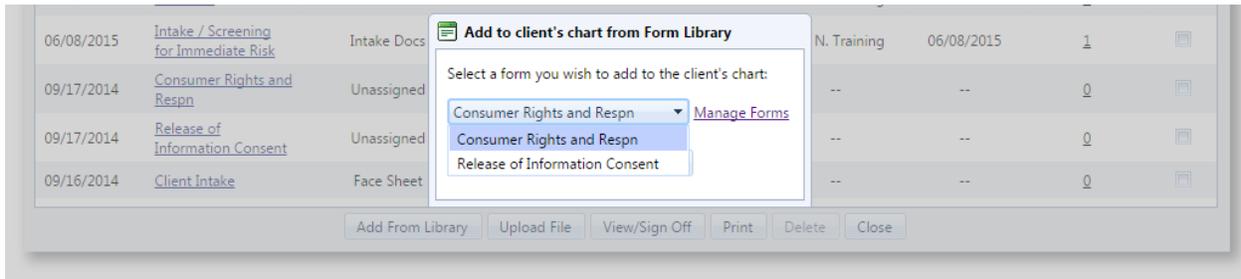
- 1) Once you are in Chart Management
- 2) Type in the first couple letters of the last name (if you need help please see instructions further up in this document)
- 3) Click on the [Add From Library] button



- 4) The following Dialog box will come up – if you are a standard user, you will only be able to use the forms uploaded by your Super Admin user. The Super Admin is the only user who can click on the Manage Forms link to add more reusable forms.



- 5) Here is an example of forms added by the Super Admin. As the user in this scenario, you simply find the reusable form you wish to add to your client's chart. Then click the [OK] button



- 6) To File this form to clients, record, associate a Document Type, Assigned a Category and Document Date

Form Information

Description:

Document Type: [Add/Edit Type](#)

Assigned Category: [Add/Edit Category](#)

Authoring/Supervising Provider:

Document Created:

Uploaded by: Ronald J Alai

Date Uploaded: 08/20/2015

View / Sign Off after Filing

Comments

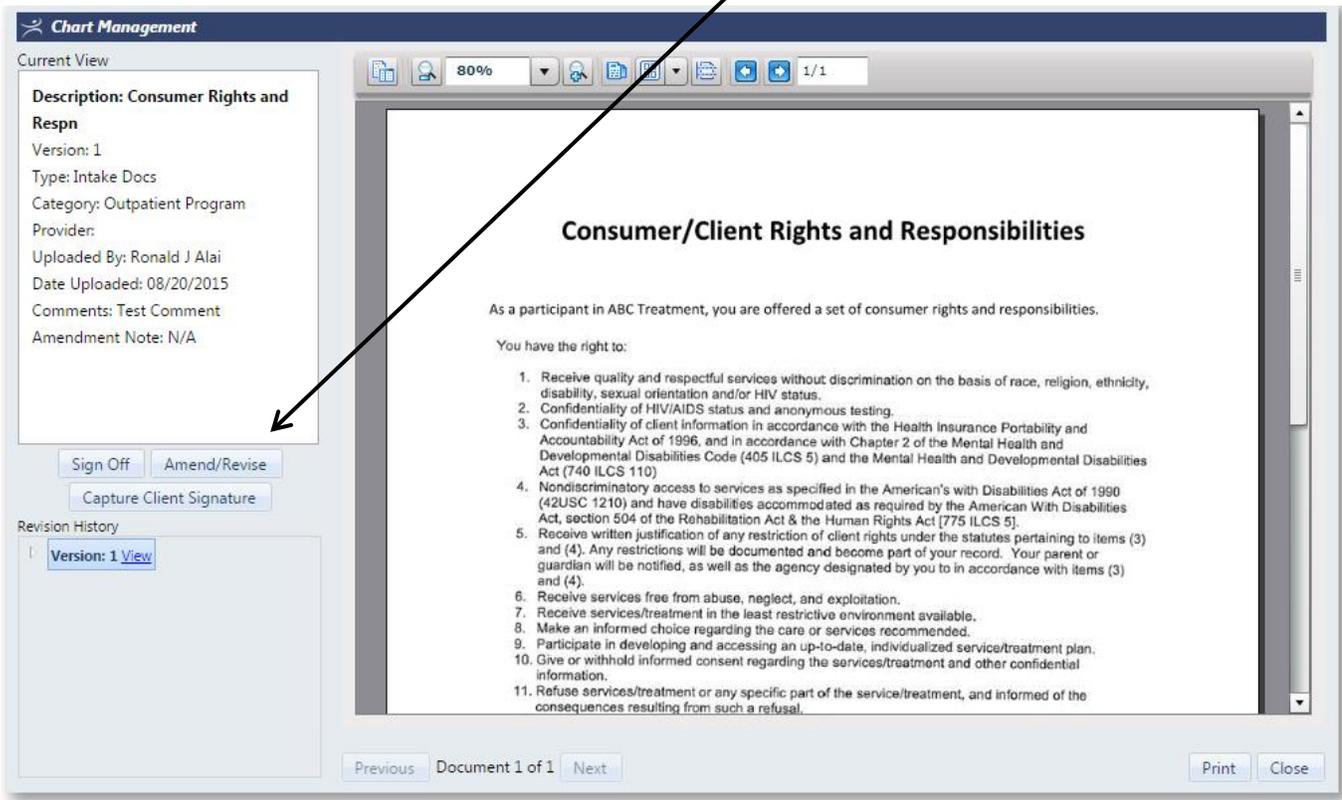
To expedite the process check this box to bring up the option to Sign off after Filing.

Put comments here

Click on [File] to add this form the client's chart

Click on {Close} to cancel this action

7) A preview of the form will come up to allow you and your client to sign the form



8) Below is an example of the client signature on the Consumer/Client Rights and Responsible form.

