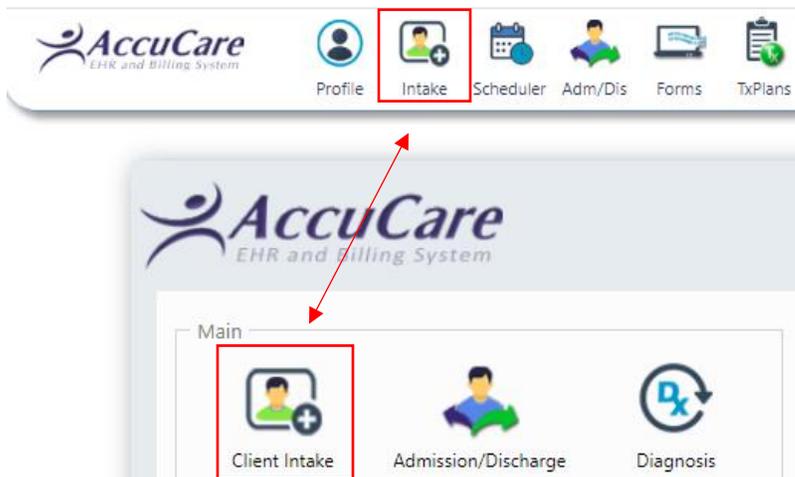


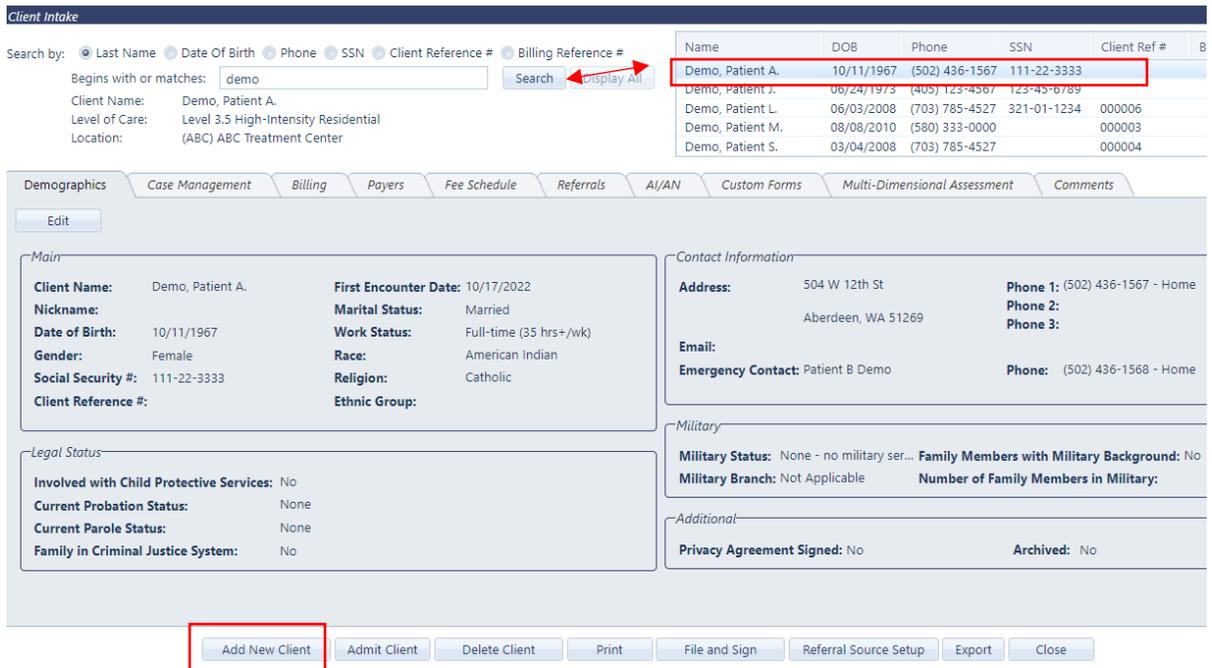
Accessing Custom Forms from Client Intake

Agencies can create Custom Forms and assign them to appear in different modules in AccuCare. Custom Forms can also be assigned a Category, to help organize how they appear in lists when selecting a Custom Form to administer. The following is an example of how access a Custom Form that was assigned to Client Intake

1. Click on Client Intake from the Main Menu or the top Ribbon



2. Select [Add New Client] for a new client, or select an existing client.



- After client is selected, go to the Custom Forms tab in Client Intake. Then Select the [Add] button.

Client Intake

Search by: Last Name Date Of Birth Phone SSN Client Reference # Billing Reference #

Begins with or matches:

Client Name: Demo, Patient L.
Level of Care: No Episode Assigned
Location:

Name	DOB	Phone	SSN	Client Ref #
Demo, Patient A.	10/11/1967	(502) 436-1567	111-22-3333	
Demo, Patient J.	06/24/1973	(405) 123-4567	123-45-6789	
Demo, Patient L.	06/03/2008	(703) 785-4527	321-01-1234	000006
Demo, Patient M.	08/08/2010	(580) 333-0000		000003
Demo, Patient S.	03/04/2008	(703) 785-4527		000004

Demographics | Case Management | Billing | Payers | Fee Schedule | Referrals | A/AN | **Custom Forms** | Multi-Dimensional Assessment | Comments

Date	Form Name	Categories	Added By	Edit	Delete	Print	File & Sign
No records to display.							

- Select the Category (if applicable). You may not have any Categories, so this can be left blank.

Create New Form

Select Category:

Select Form:

- CSOSA/RSC
- Occupational Therapy
- Physical Therapy
- Speech/Language
- Tribal Tech Adolescent
- Tribal Tech Adult

- Select the Custom Form name from the list.
NOTE: If category is selected, you'll only see the forms that were assigned to that Category. To see all of the forms, leave Category blank

Create New Form

Select Category: CSOSA/RSC

Select Form:

Client Intake

- 01_RSC_MedicalNursingAssessment
- 02_CSOSA-RSC_AuthorizationDisclosurePHI
- 03-07_RSC_Intk-Hist-Phys-Asmnt-TxP
- 08_RSC_PhysicianOrderSheet_Rev_0623
- 10_CSOSA_DietOrderForm
- 11_RSC_DischargeInstructions
- 20_RSC_Psychiatr...
- 21_RSC_PsychiatricFollowUp
- 22_RSC_PsychiatricUnsuitabilityCriteria

6. Upon completion, you can Save and electronically Sign Off a copy to the Client's Chart, Save and Close the form, or Cancel if you do not want to save the form.

by  C. Official Code 7-1003 (HIV/AIDS/Cancer records).

I understand this consent will remain in effect until

<input type="text" value="08/25/2023"/>	<input type="text" value="Joanne L. Dean"/>	<input type="text" value="01/01/1998"/>
Date	Client Name	Date of Birth
<input type="text" value="08/25/2023"/>	<input type="text" value="Jake Smith"/>	
Date	Witness Name	