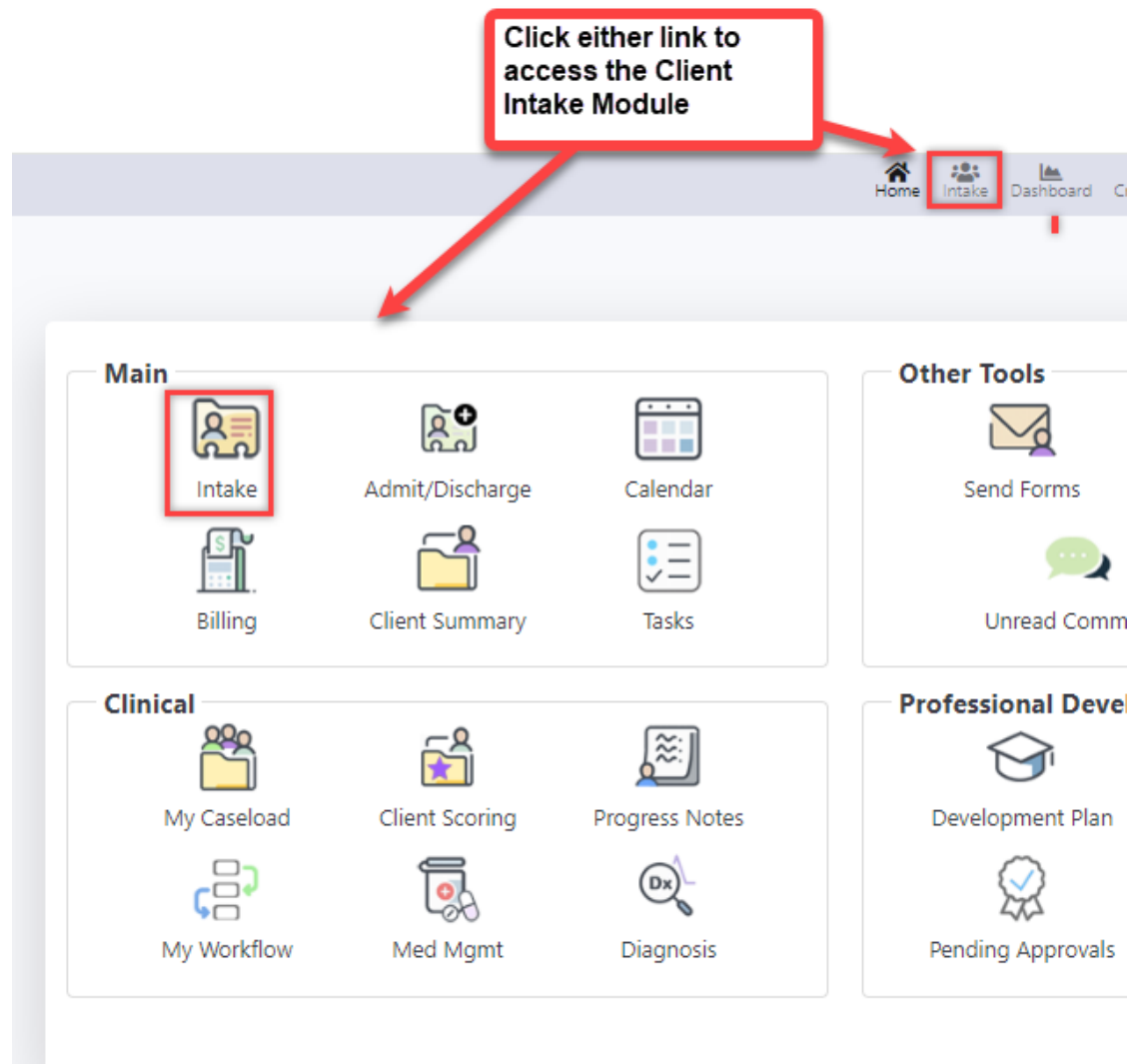


Client Intake Overview

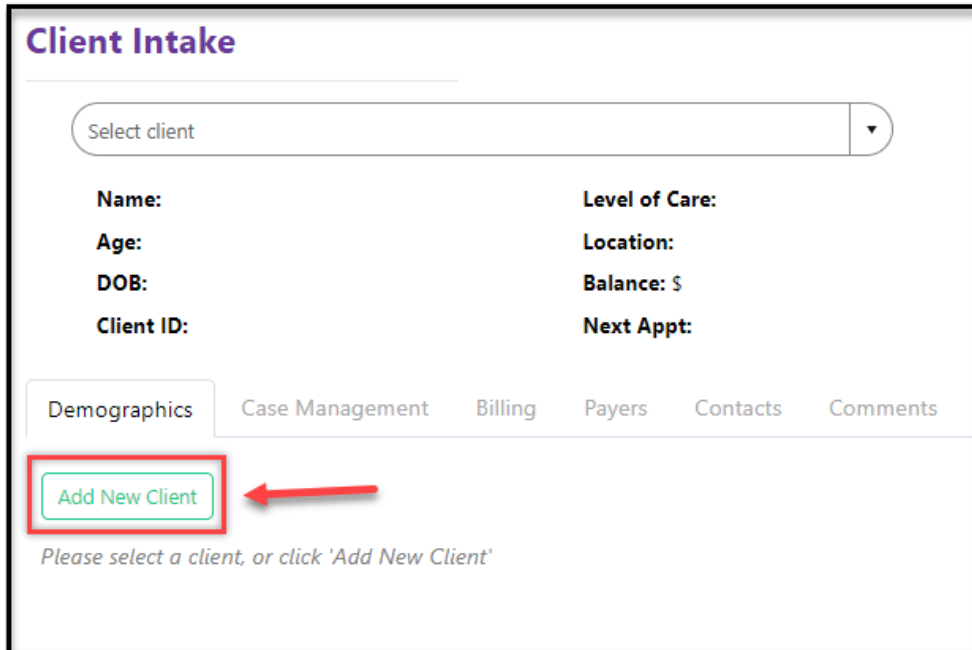
The client Intake module is the first place you would go to look up or add new clients to your database.

Location of Client Intake



Adding a New Client

Adding a new Client from the client intake will allow the user to immediately start adding all demographic information



Client Intake

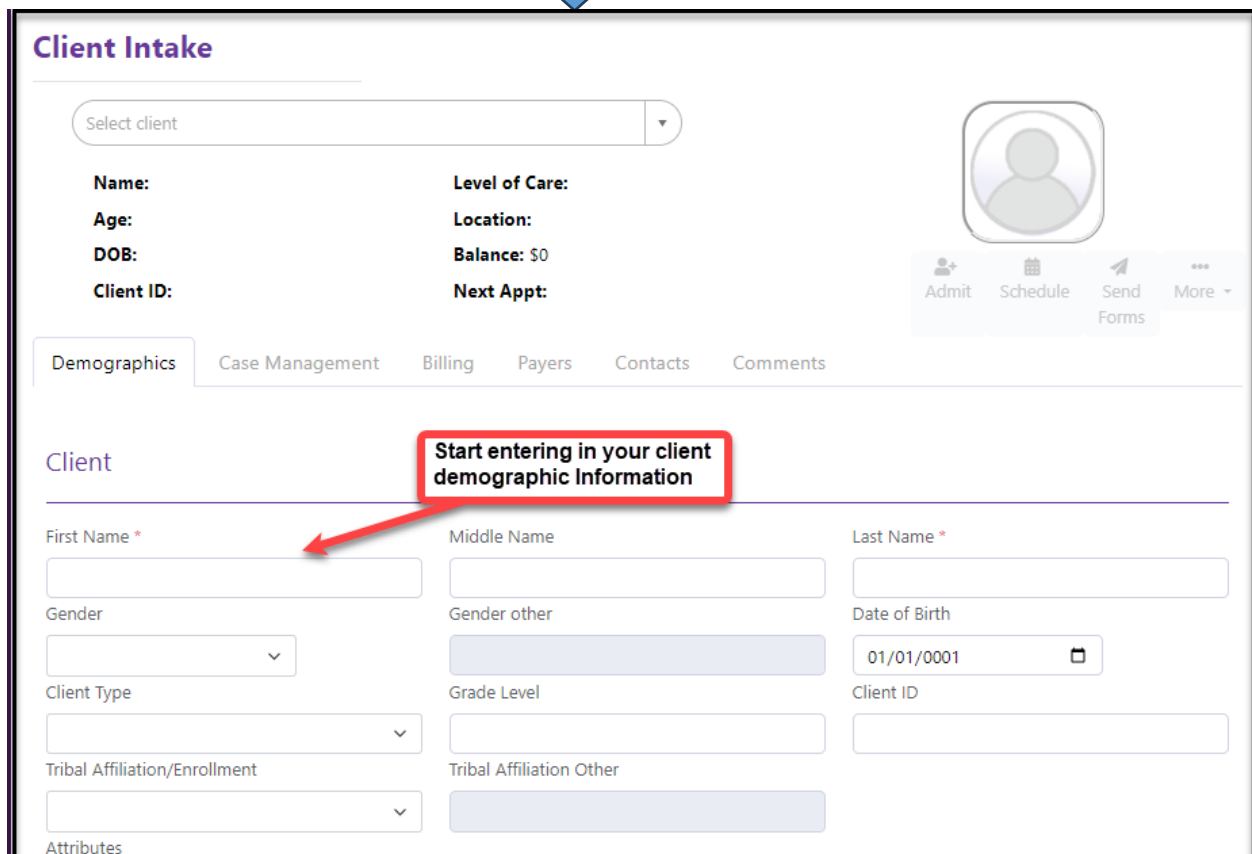
Select client

Name: **Level of Care:**
Age: **Location:**
DOB: **Balance: \$**
Client ID: **Next Appt:**

Demographics Case Management Billing Payers Contacts Comments

Add New Client

Please select a client, or click 'Add New Client'



Client Intake

Select client

Name: **Level of Care:**
Age: **Location:**
DOB: **Balance: \$0**
Client ID: **Next Appt:**

Demographics Case Management Billing Payers Contacts Comments

Client

Start entering in your client demographic Information

First Name * Middle Name Last Name *

Gender Gender other Date of Birth

Client Type Grade Level Client ID

Tribal Affiliation/Enrollment Tribal Affiliation Other

Attributes

Client Intake Tabs

The screenshot shows a web interface titled "Client Intake". At the top, there is a search bar containing "Jenkins, Robert". Below the search bar, client information is displayed: Name: Robert Jenkins, Age: 35, DOB: 06/07/1989, and Client ID. To the right, additional information is shown: Level of Care, Location, Balance: \$0.00, and Next Appt: None. At the bottom, there is a row of tabs: Demographics, Case Management, Billing, Payers, Contacts, and Comments. Five red arrows with numbers 1 through 5 point to these tabs: Arrow 1 points to Demographics, Arrow 2 points to Case Management, Arrow 3 points to Billing, Arrow 4 points to Payers, and Arrow 5 points to Comments.

1. Added access to Demographics

- All settings established are set up for Workflow-required fields or hidden fields that will carry over into client intake Demographics

2. Added access to Case Management

- User will be able to assign staff that will be involved in the client's treatment
- The case management selection will be used for gaining access to a client's record, listing in "submit for review" for Sign Offs, and categorizing or filtering when generating reports

3. Added Client Billing and Payers Information -

- Billing and Payers in client intake is the initial release of billing
- This will allow users to enter client billing info and payers for clients
- This will feed into the rest of the billing system when the final areas are released

4. Added Contact List

- Add the ability to create a global list of contacts
- Under the setup/Admin/Contact Manager, the user can create a list of contacts for the agency that can be used when assigning contacts for an individual

5. Added Comment

- Add the ability to add a quick note
- Create and assign a comment type
- Associate a contact inapplicable

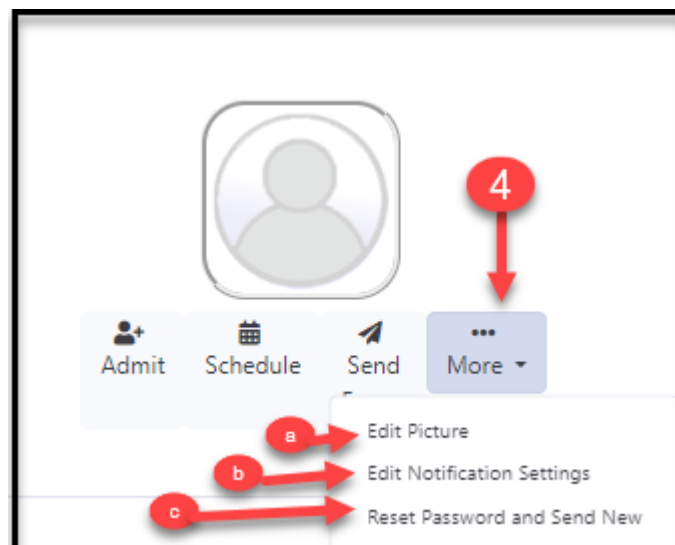
Additional Functions of Client Intake Modules

Once you have added a new client or looked up a client, you will be able to access links to

- 1) Admit a client into a Level of Care to create an Episode of Care
- 2) Schedule an appointment
- 3) Send Forms.

The screenshot shows the 'Client Intake' interface. At the top, there is a search bar with 'Albert, Alan' entered. Below this, client details are displayed in two columns: Name (Alan Albert), Age (22), DOB (02/13/2002), and Client ID on the left; Level of Care, Location, Balance (\$0.00), and Next Appt (None) on the right. A profile picture placeholder is shown. Below the details are tabs for Demographics, Case Management, Billing, Payers, Contacts, and Comments. At the bottom left are 'Add New Client' and 'Edit' buttons. On the right, a vertical menu contains 'Admit', 'Schedule', 'Send Forms', and a 'More' dropdown. Red arrows with numbers 1, 2, and 3 point to the 'Admit', 'Schedule', and 'Send Forms' buttons respectively.

- 4) The "More" drop-down includes options to
 - a. Upload a client photo
 - b. customize a notification schedule for appointments
 - c. Reset passwords for portal access



For additional questions, contact AccuCare Support at 800-324-7966 or email support@orionhealthcare.com and we will be happy to assist you!