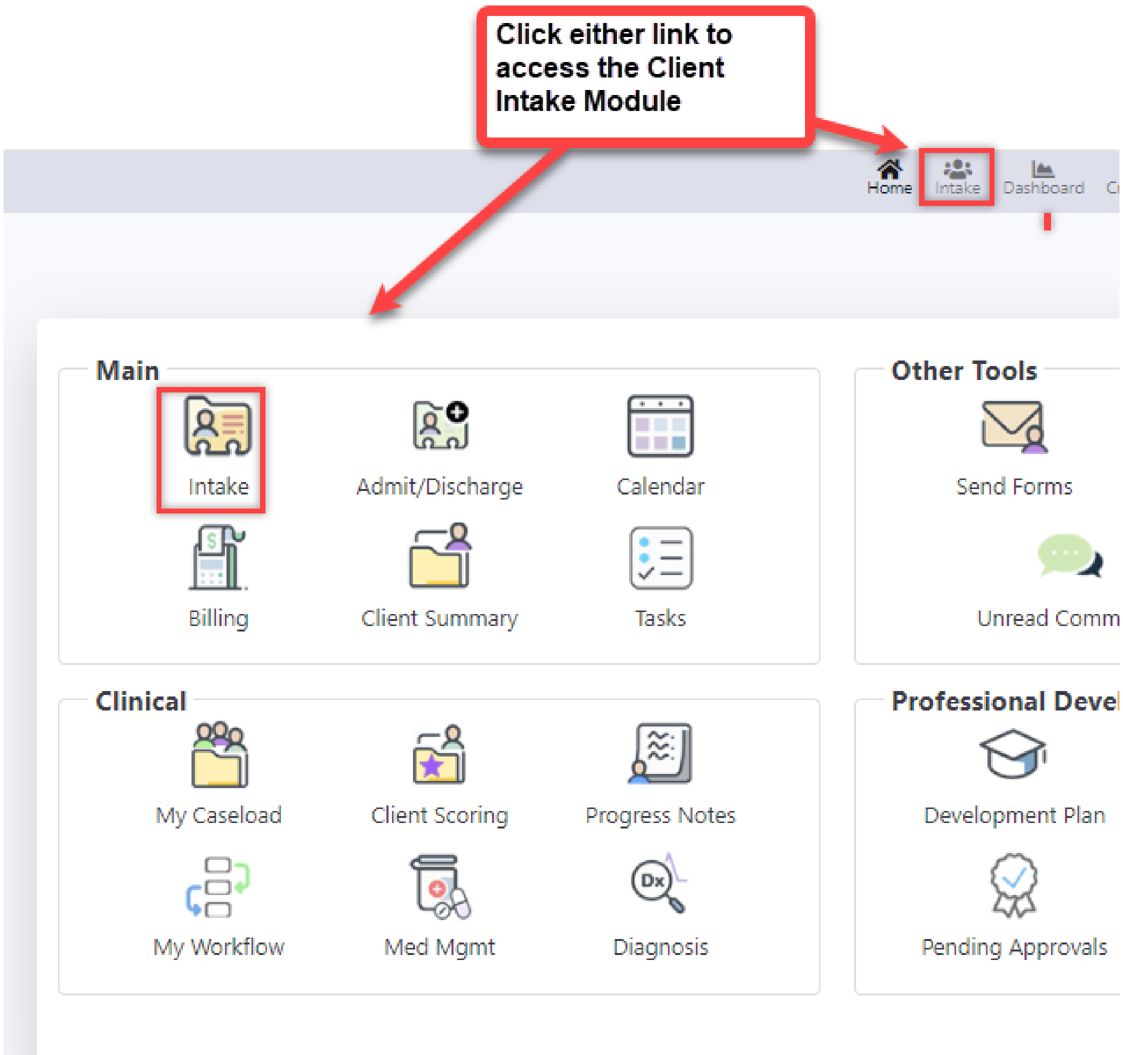
Client Intake Overview

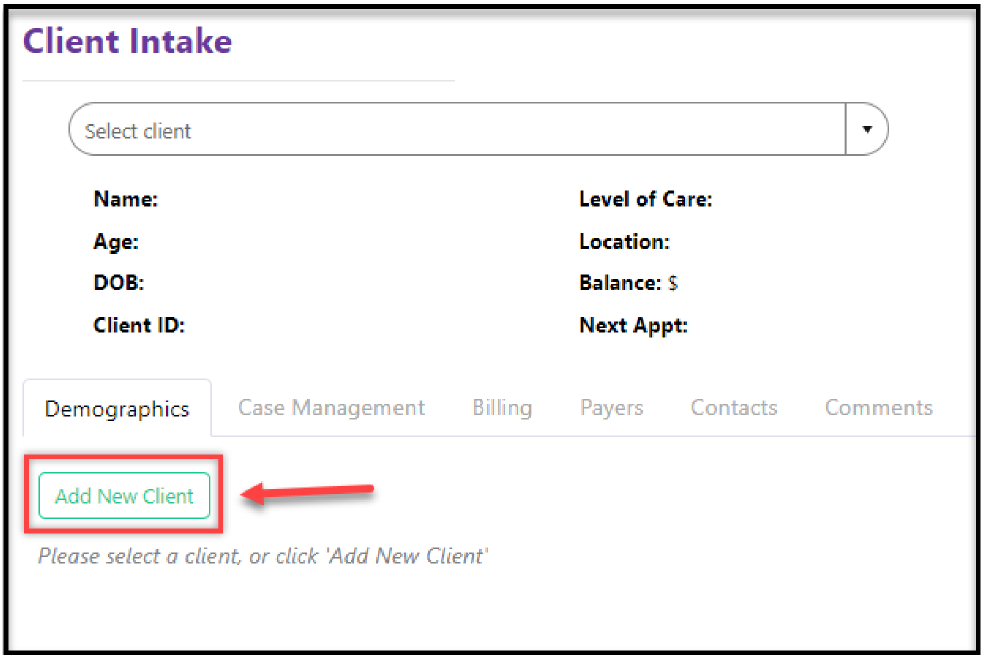
The client Intake module is the first place you would go to look up or add new clients to your database.

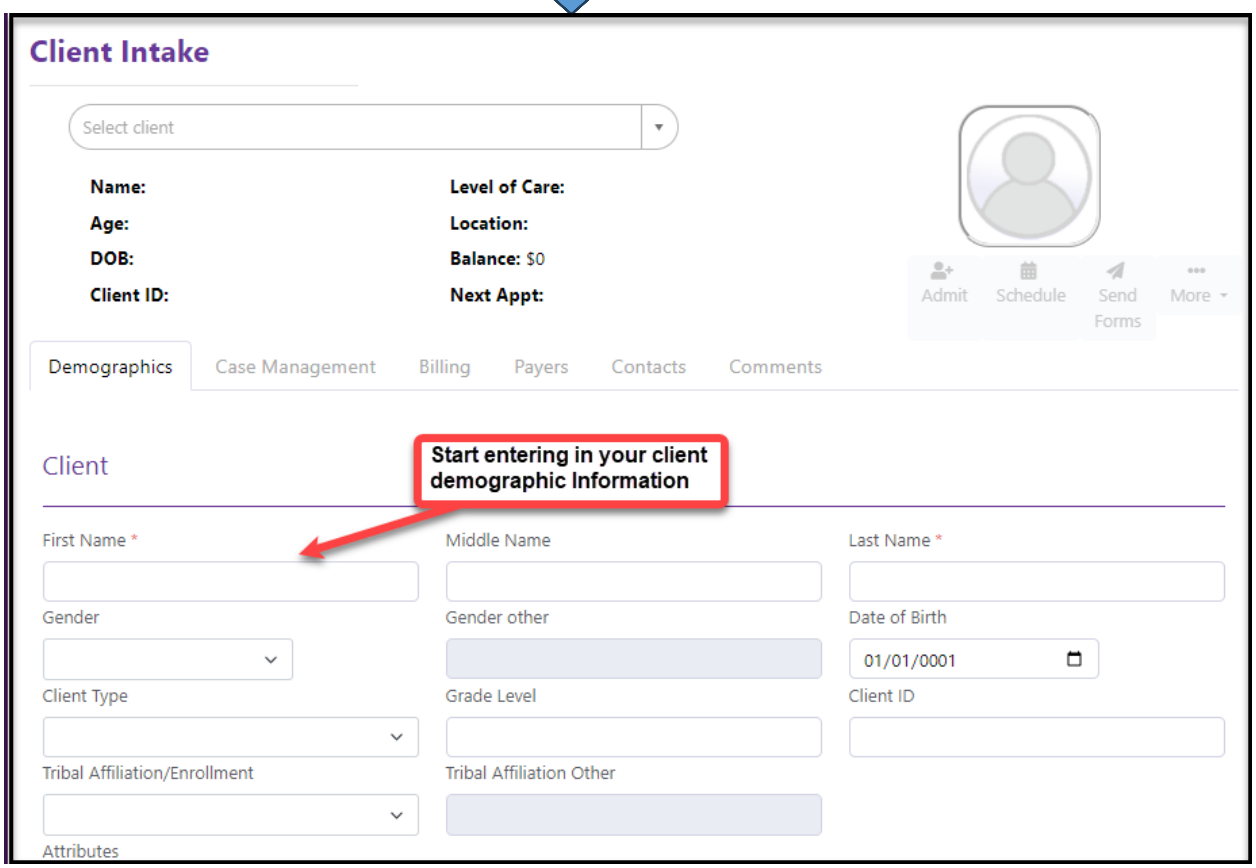
Location of Client Intake



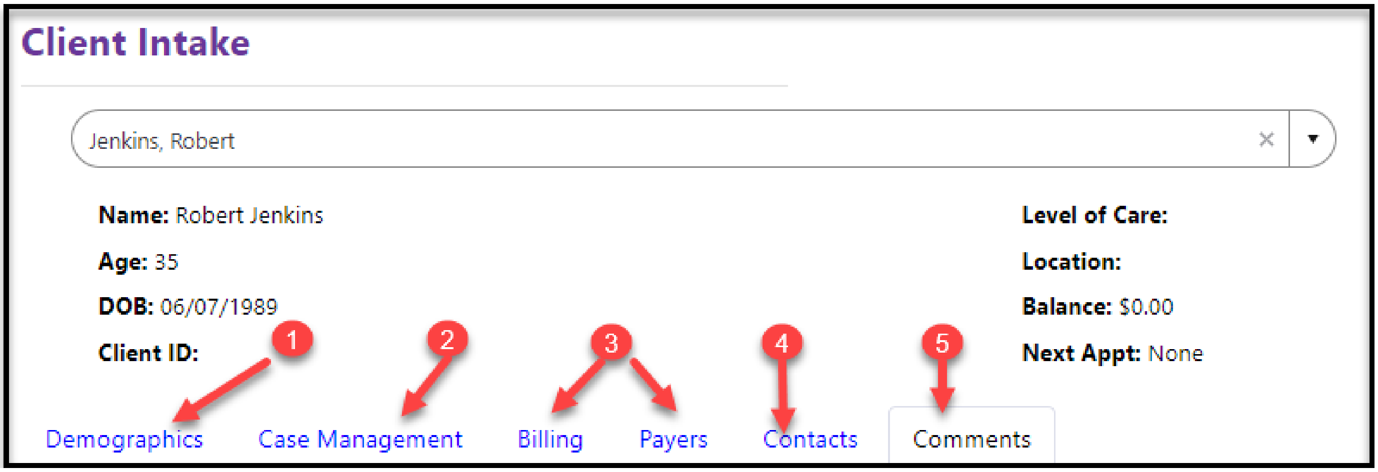
Adding a New Client

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





Client Intake Tabs



1. **Added access to Demographics**
    a. 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**
    a. User will be able to assign staff that will be involved in the client's treatment
    b. 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** -
    a. Billing and Payers in client intake is the initial release of billing
    b. This will allow users to enter client billing info and payers for clients
    c. This will feed into the rest of the billing system when the final areas are released

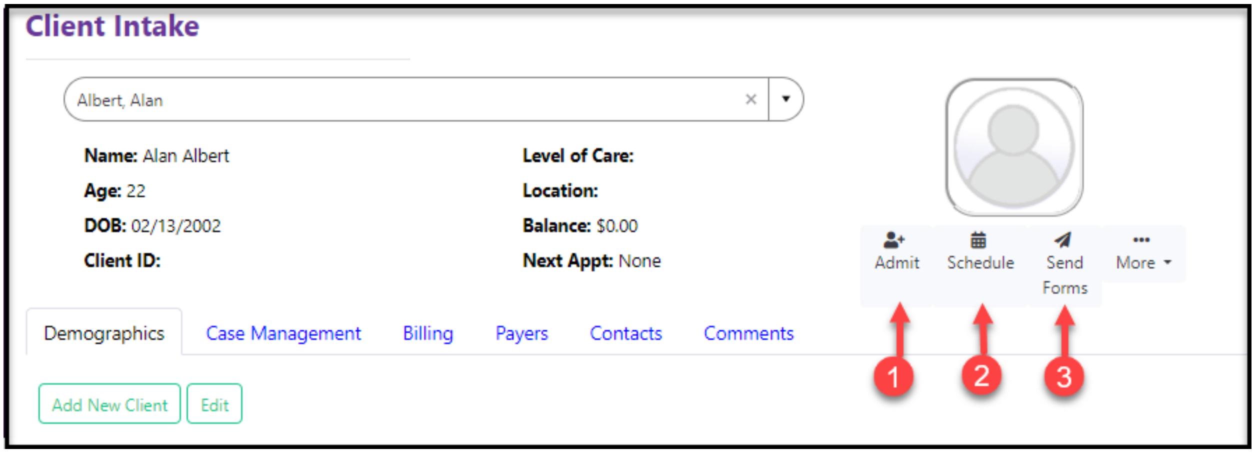
4. **Added Contact List**
    a. Add the ability to create a global list of contacts
    b. Under the setup/Admin/Contact Manager, the user can create a list of contacts for the agency that can be used when assigning contacts for an individual

5. **Added Comment**
    a. Add the ability to add a quick note
    b. Create and assign a comment type
    c. Associate a contact inapplicable

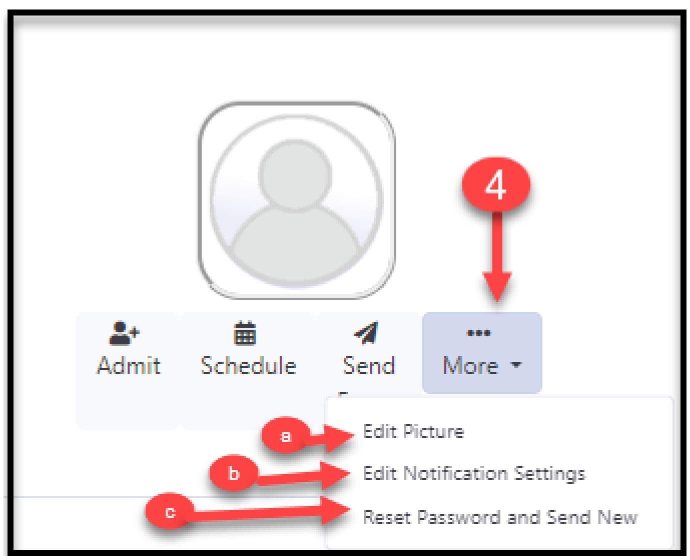
Additional Functions of Client Intake Modules

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.



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!