

# Adding Contacts to Client Record

The Client Intake allows users to add new contacts or pull contacts from the Contact Manager.

## Contact Tab

**Client Intake**

Jenkins, Robert

**Name:** Robert Jenkins      **Level of Care:**  
**Age:** 35      **Location:**  
**DOB:** 06/07/1989      **Balance:** \$0.00  
**Client ID:**      **Next Appt:** None

Admit Schedule Send Forms More

Demographics Case Management Billing Payers **Contacts** Comments

**Add Contact** Search

Name	Company	Type	Relationship	Appt Notify?	Primary Phone(s)	ROI Expire(s)	Actions
No matching records found							

## Contact Manager List

Users will be able to select from the contact manager to associate a contact with a client (Select a contact and click "Use")

**Add/Edit Contact Information**

Select Contact to AutoFill

-- Begin typing to search for contact --

1

2

Use

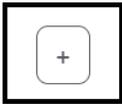
Contact Type

Hope Hospital - Tomas, Tom  
Hopewell Hospital -  
Orion Behavioral Health - Middleton, John Frederick

Add/Edit

1. Select Contact from the provided list
2. Click [Use] to add
3. Use the [Add/Edit](#) links if you need to add the drop list

4. To edit use the Pencil Icon  / to remove an entry use the X icon 

5. Use the Plus Icon  to add an Address, Phone, or Email Address.

6. User [Save] button to save contact to your client record

7. Use the [Copy to Contact Manager] to add a copy to the master list of contacts.

**Add/Edit Contact Information**

Select Contact to AutoFill

Contact Type: Provider

Company Name: Hope Hospital

Title: Mr

First Name: Tom

Middle:

Last: Tomas

Suffix:

Relationship: Substance Abuse Counselor

Preferred Method of Communication: Work Phone

Description	Address	County	Phys. Addr?	Mail Addr?	Actions
Hopital General Mailbox	1289 West Harlinton Ave Casper Wyoming 56889	Saline	✓	<input type="checkbox"/>	<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

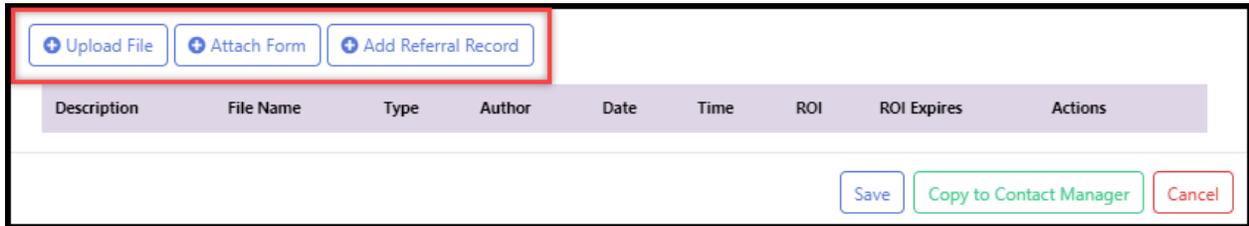
Phone	Extension	Type	Primary	Additional Info	Actions
568-459-2232		Cell	✓		<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

Email Address	Appt Notify?	Additional Info	Actions
HHSubstanceAbuse@hopehospitatinc.com		Main General mailbox	<input type="button" value="Add"/>

Description	File Name	Type	Author	Date	Time	ROI	ROI Expires
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## Additional Functions of Contact Tab

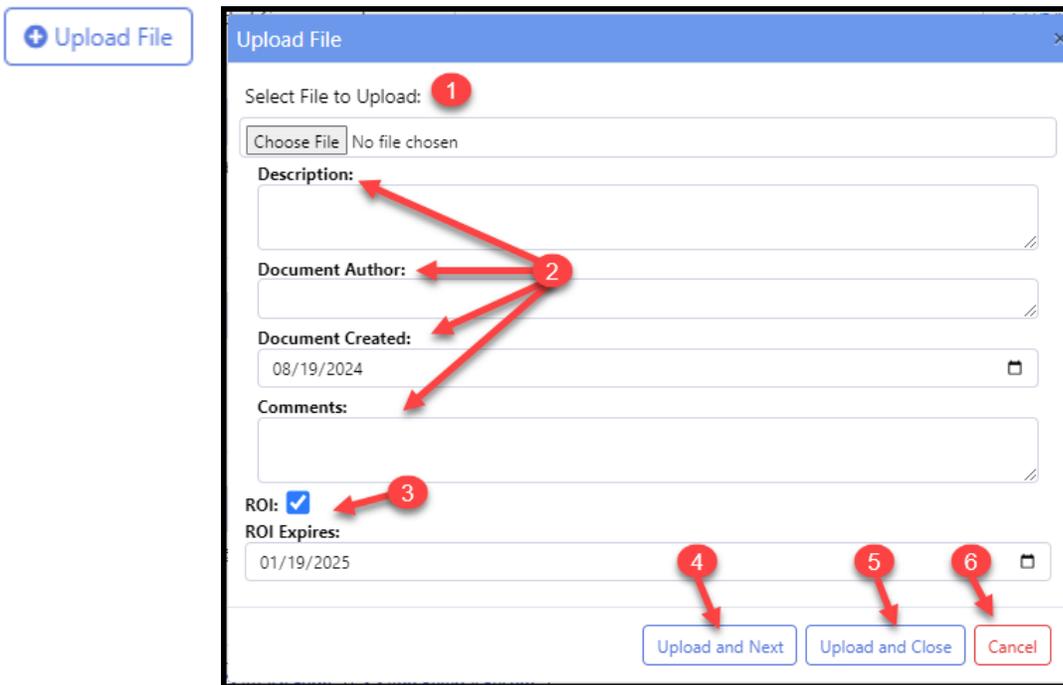
You will find three additional buttons at the bottom of the contact record. They are [Upload File], [Attach Form], and [Add to Referral Record].



Description	File Name	Type	Author	Date	Time	ROI	ROI Expires	Actions
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Save Copy to Contact Manager Cancel

## Upload File – Associate External Forms to a Contact



Upload File

Select File to Upload: 1

Choose File No file chosen

Description:

Document Author: 2

Document Created: 08/19/2024

Comments:

ROI:  3

ROI Expires: 01/19/2025

4 5 6

Upload and Next Upload and Close Cancel

1. Select the file stored on their computer by selecting [Choose File].
2. Provide a description of the document, indicate the author, indicate the date the document was created, and add comments
3. If the uploaded document is a release of information, select the ROI checkbox and enter the date the Release of Information expires
4. Click the [Upload and Next] button to add additional documents to the contact record
5. Click the [Upload and Close] button to add the document currently selected and return to the contact page
6. If you decide not to add click the [Cancel] to return to the contact page without saving the adding the file.

## Attach Form Associate Forms to Contact

The user will be able to select any custom forms that have been created and associate with a contact

The screenshot shows a dialog box titled "Attach Form" with a close button (X) in the top right corner. The dialog contains the following elements:

- Select Client Document to Attach:** A dropdown menu showing "Authorization To Disclose Client Information - APDS\_ROI". A red circle with the number 1 and an arrow points to the dropdown arrow.
- Comments:** A text input field. A red circle with the number 2 and an arrow points to the field.
- ROI:** A checkbox that is checked. A red circle with the number 3 and an arrow points to the checkbox.
- ROI Expires:** A date input field showing "02/18/2025". A red circle with the number 4 and an arrow points to the date field.
- Buttons:** Three buttons at the bottom: "Attach and Next", "Attach and Close", and "Cancel". Red circles with numbers 5 and 6 and arrows point to the "Attach and Close" and "Cancel" buttons, respectively.

1. Click in the down arrow to display all forms created for the client and select the form to add.
2. Use the comment fields to add any additional information regarding the form.
3. Click in the ROI checkbox if the document is a release of information and enter the expiration date of the release of information.
4. Select "Attach and Next" to add additional forms,
5. Select "Attach and Close" to attach a current document, and return to the contact's page.
6. Select Cancel to return to the contacts page and not attach any forms.

## Add Referral Record to Contact Record

The user can document referral details regarding a contact by selecting [Add Referral Record] while accessing the contact.

The screenshot shows a web form titled "Add Referral Record" with a blue header bar. On the left, there is a button labeled "Add Referral Record". The form contains the following fields and controls:

- Select Referral Type:** Radio buttons for "Incoming" (selected), "Outgoing", and "None". A red arrow labeled "1" points to this section.
- Referral Date:** A date input field containing "08/18/2024". A red arrow labeled "2" points to this field.
- Age at Referral:** A text input field containing "35". A red arrow labeled "3" points to this field.
- Type of Contact:** A dropdown menu with an "Add/Edit" link to its right. A red arrow labeled "4" points to this dropdown.
- Previous Services:** A dropdown menu with an "Add/Edit" link to its right.
- Services Requested:** A dropdown menu with an "Add/Edit" link to its right.
- Funding Source:** A dropdown menu with an "Add/Edit" link to its right.
- Referral Reason:** A dropdown menu with an "Add/Edit" link to its right.
- Referral Result:** A dropdown menu with an "Add/Edit" link to its right.
- Category:** A dropdown menu with an "Add/Edit" link to its right.
- Other 1:** A dropdown menu with an "Add/Edit" link to its right.
- Other 2:** A dropdown menu with an "Add/Edit" link to its right.
- Heard about us?:** A dropdown menu with an "Add/Edit" link to its right.
- Referral Comments:** A large text area for entering comments. A red arrow labeled "5" points to this area.

At the bottom right of the form, there are "Save" and "Cancel" buttons.

1. Select a radio button to indicate if the referral is Incoming, Outgoing, or None.
2. Enter the date of referral
3. Age at referral will automatically be entered for the client
4. Click the dropdown arrow of each applicable choice. If you don't find one you need then use [Add/Edit](#) links to add to that picklist.
5. Add a comment about your referral comments here.

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