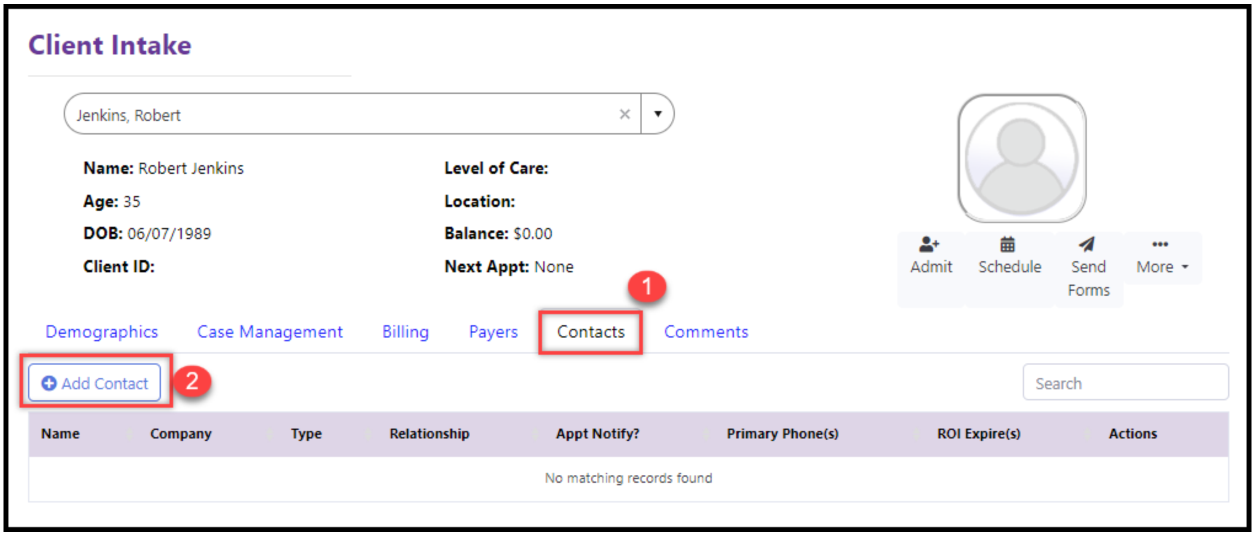
Adding Contacts to Client Record

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

Contact Tab



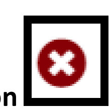
Contact Manager List

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

1. **Select Contact from the provided list**

2. **Click [Use] to add**

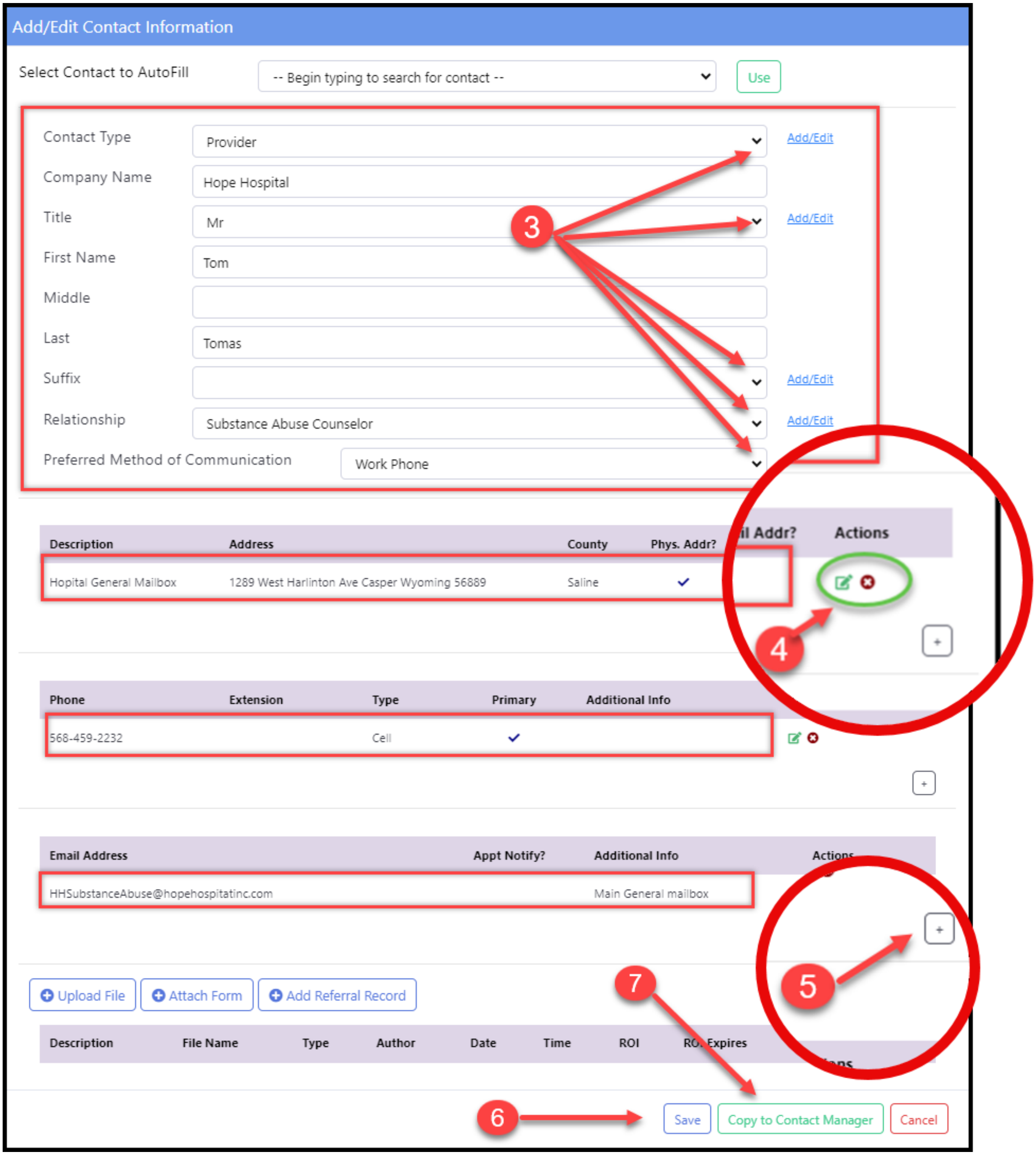
3. **User the Add/Edit links if you need to add the drop list**

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.**

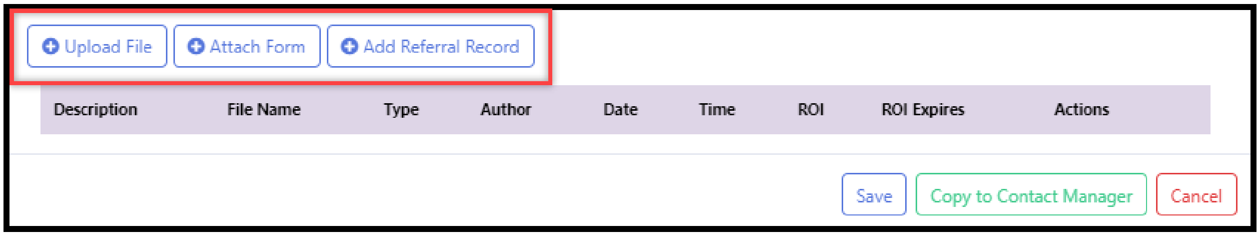
6. **User [Save] button to save contact to your client record**

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

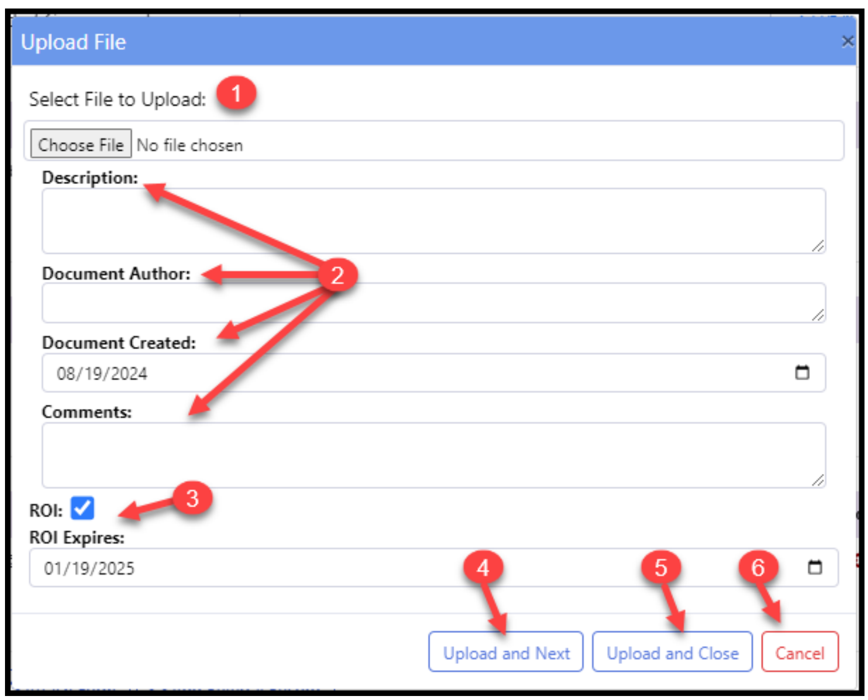


Additional Functions of Contact Tab

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



Upload File – Associate External Forms to a Contact



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.**

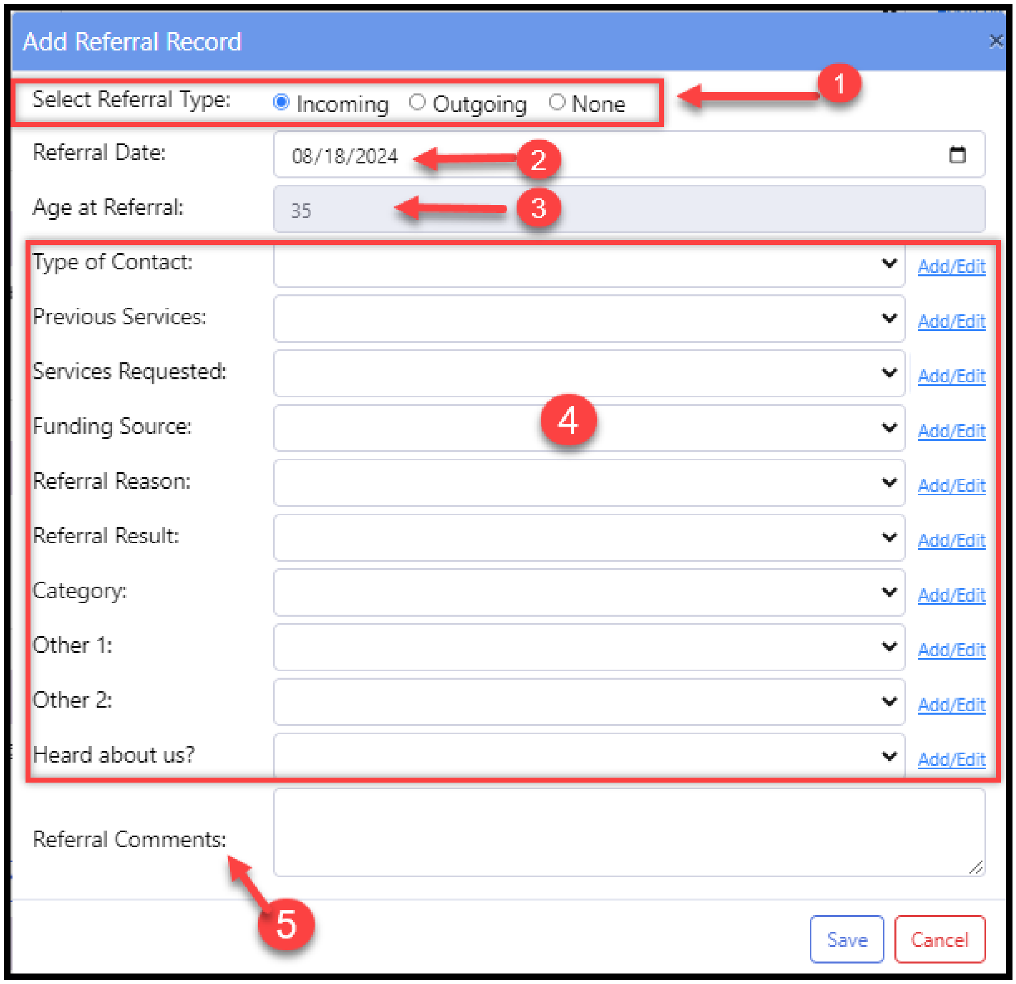
Attach Form Associate Forms to Contact

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

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.



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 and we will be happy to assist you!