

# Adding a New Client to AccuCare to Start an Assessment

Before creating an assessment, you will first need to determine if the client already exist or you need to create as new client in AccuCare.

First locate the Client Intake Icon either on Main Menu or Ribbon

## Step 1:

The screenshot displays the AccuCare EHR and Billing System interface. At the top, there is a navigation ribbon with icons for Profile, Intake, ASI, Scheduler, Adm/Dis, Billing, Diagnosis, Notes, TxPlans, Forms, and Chart. A red arrow points from the 'Intake' icon in the ribbon to a red-bordered box containing the text 'Click either Icon to be taken to the Client'. Below this, the main dashboard is visible, featuring a 'Main' section with icons for Client Intake, Admission/Discharge, and Diagnosis. A red arrow points from the 'Client Intake' icon in the 'Main' section to the same red-bordered box. Other sections include 'Other Tools' (Custom Forms, Recovery Support, Follow Ups), 'Clinical' (Screening, Assessments, Patient Placement, Treatment Plan, Progress Notes, Med Mgmt), and 'Reports' (Manager Reports, Data Analysis, Data Query, Census, System Questionnaires). The interface also includes a 'Log Out' button at the bottom right and a 'switch to classic menu' option at the top right.

**The first action you need to take is to determine if the client has already been added to the database**

**Step 2:** Click on the [Display All] button to see all the clients. The default setting for this list is in alphabetic order by last name

Client Intake

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

Begins with or matches:

Client Name:

Level of Care:

Location:

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Able, Tom	12/03/1987	(402) 333-4444	232-32-2222	TA19872222	TA19872222
Doe, Jane	03/07/1975		111-22-3333	JD19753333	
Doe, John	10/31/2014				
Doe, John					
Edwards, Jack	09/09/1980	(430) 343-4333	112-11-2121		

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

If you have a long list of clients, you could also search for the client by Last Name, DOB, Phone, SSN or Client Ref #.

**Step 3:** Type in the first two or three letters of the last name then click on the [Search] button. This will narrow down your search.

Client Intake

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

Begins with or matches:

Client Name:

Level of Care:

Location:

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Smith, Alice					
Smith, Amber			123-45-6789		
Smith, John			456-53-4234		
Smith, Luke			222-22-2222		
Smith, Randy	10/11/1987	(402) 222-3333	111-22-3334	RS19873333	

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**Important Note:** When you do your search and find no clients to display from your search this mean your client is new to the database.

Client Intake

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

Begins with or matches:

Client Name:

Level of Care:

Location:

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
No clients to display.					

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**Step 4:** Click on the [Add New Client] button to add the client to your database.

Client Intake

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

Begins with or matches:

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
No clients to display.					

Client Name:   
Level of Care:   
Location:

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Edit

Main

Client Name:  First Encounter Date:   
Nickname:  Marital Status:   
Date of Birth:  Work Status:   
Gender:  Race:   
Social Security #:  Religion:   
Client Reference #:  Ethnic Group:

Contact Information

Address:  Phone 1:   
Phone 2:   
Phone 3:   
Email:   
Emergency Contact:  Phone:

Legal Status

Involved with Child Protective Services:   
Current Probation Status:   
Current Parole Status:   
Family in Criminal Justice System:

Military

Military Status:  Family Members with Military Background:   
Military Branch:  Number of Family Members in Military:

Additional

Privacy Agreement Signed:  Archived:

**Special note:** After finding out the client does not exist and then trying to add your client to Client Intake you may find the client you are trying to enter **may actually exist** in the database. The client may be hidden due to your security level. Please contact your Super Admin (the person who assigned your user-id and password) or Orion Healthcare Technology Customer Support for help.

Client Intake

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

Begins with or matches:

Demographics

Main

Title:  First Encounter Date:   
First Name\*:  Marital Status:   
Middle Name:  Work Status:   
Last Name\*:  Religion:   
Date of Birth:  Religion Other:   
Gender\*:  Race:   
Social Security #:  False SSN:  Ethnic Group:   
Last Name at Birth:   
Client Reference #:   
Nickname:

Contact Information

Address 1:   
Address 2:   
City:   
State:  Zip Code:   
Phone 1:  X  Home   
Phone 2:  X  Home   
Phone 3:  X  Home

Legal Status

Currently Involved with Child Protective Services:   
State:  State Other:   
Current Probation Status:   
Program:  Program Other:   
Current Parole Status:   
State:  State Other:   
Do you have any family involved in the criminal justice system?

Military

Military Status:  Military Branch:   
Client has family with Military Background:   
Number of family members in Military:   Don't know  Refused

Additional

Privacy Agreement Signed:  Archived:

SSN in use

SSN: 232322222 is already used by Tom Able.  
Please correct the SSN or edit the record for Tom Able.

**Step 5:** After clicking on the [Add New Client] button, fill out at the very least the Main and Contact Information quadrants of the prior to conducting an assessment. The Legal and Military quadrants are optional but recommended (if applicable to your organizations data collection requirements).

**Client Intake**

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

**Demographics**

**Main**

Title: [Dropdown] First Encounter Date: 03/10/2017 [Calendar]

First Name\*: Tom Marital Status: Married [Dropdown]

Middle Name: [Text] Work Status: Full-time(35 hrs+ /wk) [Dropdown]

Last Name\*: Able Religion: Protestant [Dropdown]

Date of Birth: 12/03/1987 [Calendar] Religion Other: [Text]

Gender\*: M [Dropdown] Race: White (Not of Hispan) [Dropdown]

Social Security #: 232-32-2222 [Text]  False SSN Ethnic Group: [Text]

Last Name at Birth: [Text]

Client Reference #: TA19872222

Nickname: [Text]

**Contact Information**

Address 1: 4334 West Side Street

Address 2: [Text]

City: Omaha

State: NE [Dropdown] Zip Code: 68130- [Text]

Phone 1: (402) 333-4444 X  Mobile [Dropdown]

Phone 2: ( ) - - X  Home [Dropdown]

Phone 3: ( ) - - X  Home [Dropdown]

Email: [Text]

**Emergency Contact Information**

Full Name: Jane Able Relation: wife

Phone: (402) 333-5545 Home [Dropdown]

**Legal Status**

Currently Involved with Child Protective Services: [Dropdown]

State: [Dropdown] State Other: [Text]

Current Probation Status: [Dropdown]

Program: [Dropdown] Program Other: [Text]

Current Parole Status: [Dropdown]

State: [Dropdown] State Other: [Text]

Do you have any family involved in the criminal justice system? [Dropdown]

**Military**

Military Status: Missing Data [Dropdown]

Military Branch: Not Applicable [Dropdown]

Client has family with Military Background: Missing Data [Dropdown]

Number of family members in Military:   Don't know  Refused

**Additional**

Privacy Agreement Signed:  Archived:

Save Cancel

**Step 6:** After adding the new client demographics in Client intake, click the ASI Icon found ribbon above to open the Assessment module.

**AccuCare** HR and Billing System

Profile Intake **ASI** Scheduler Adm/Dis Billing Diagnosis Notes TxPlans Forms Chart

Welcome, Ron Super Admin Setup Log Out

**Client Intake**

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

Begins with or matches: able Search Display All

Client Name: Able, Tom

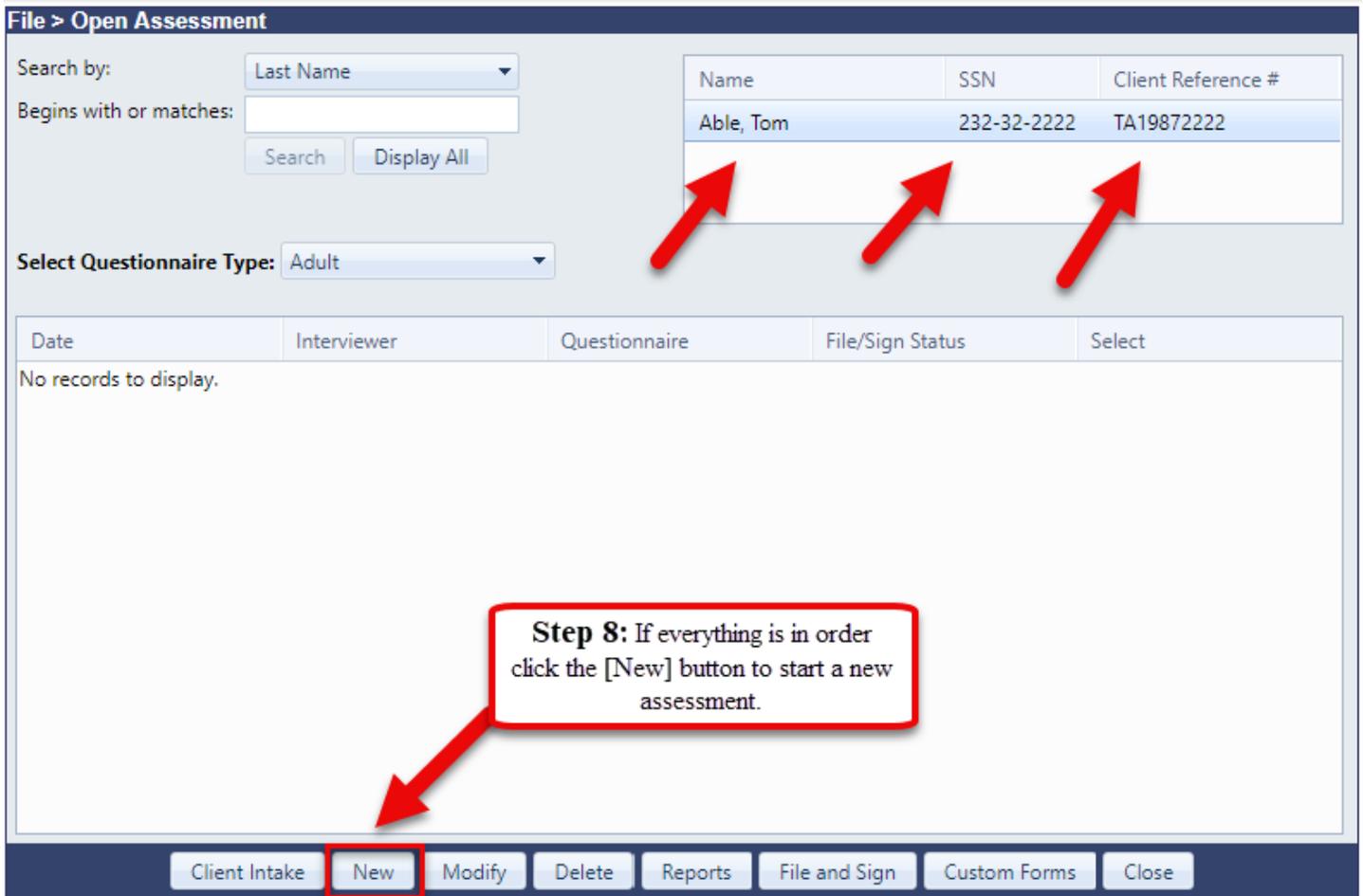
Level of Care: Level III.3 Monitored inpatient

Location: (ABCT) ABC Treatment

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Able, Tom	12/03/1987	(402) 333-4444	232-32-2222	TA19872222	TA19872222

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**Step 7:** Prior to clicking the [New] button check that you have right client by reviewing the SSN and / or Client Reference #. If you need to change some information, click the [Client Intake] button to go back and make changes.



**File > Open Assessment**

Search by: Last Name  
Begins with or matches:   
Search Display All

Select Questionnaire Type: Adult

Name	SSN	Client Reference #
Able, Tom	232-32-2222	TA19872222

Date	Interviewer	Questionnaire	File/Sign Status	Select
No records to display.				

**Step 8:** If everything is in order click the [New] button to start a new assessment.

Client Intake **New** Modify Delete Reports File and Sign Custom Forms Close

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!