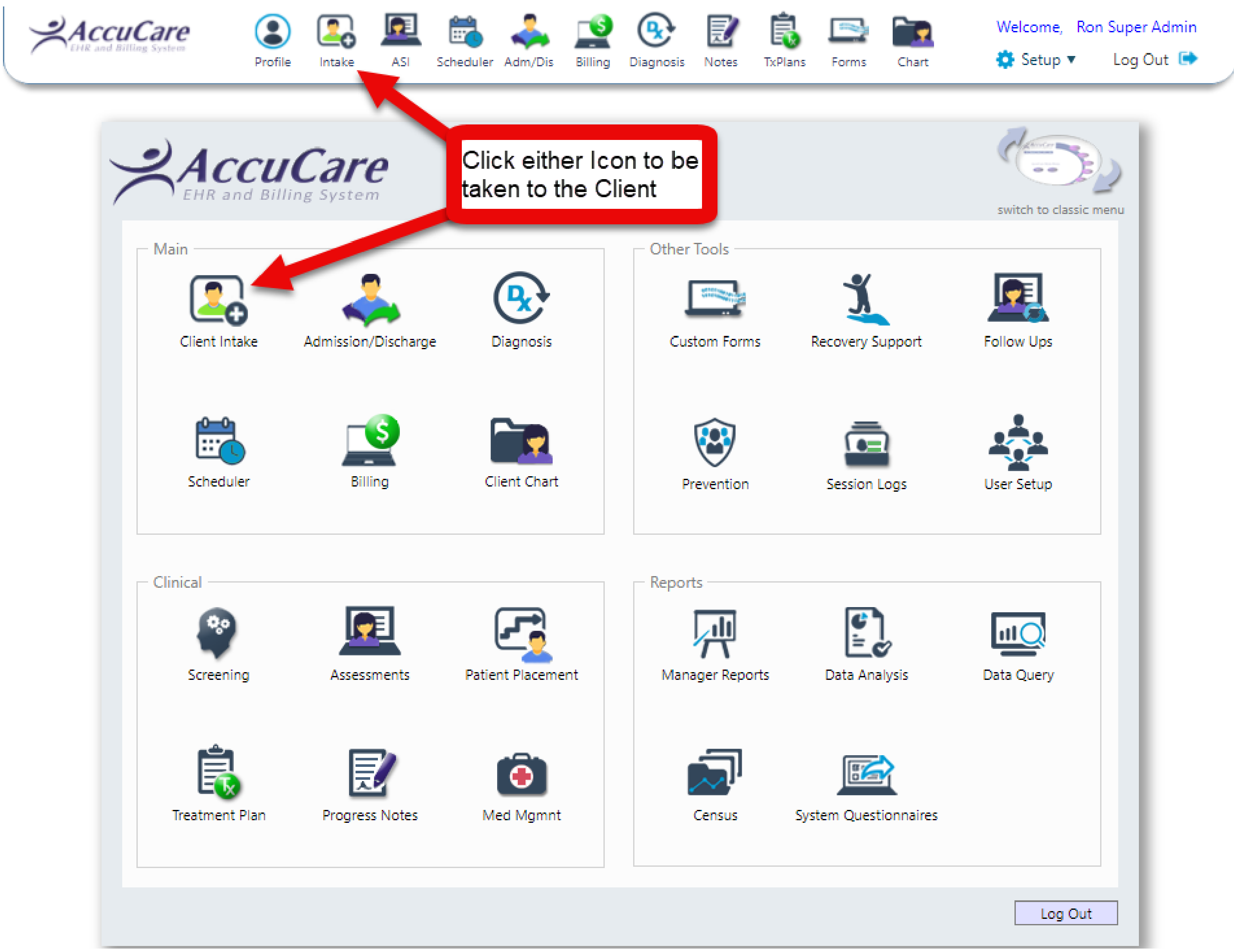
Adding a New Client to AccuCare to Start an Assessment

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.

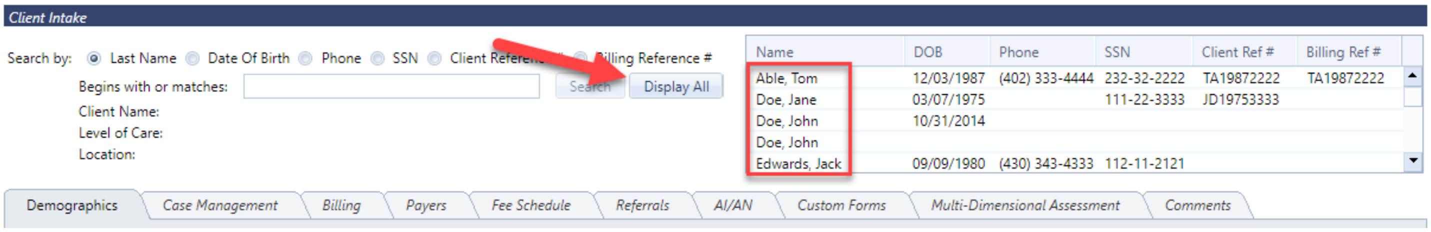
First locate the Client Intake Icon either on Main Menu or Ribbon

Step 1:



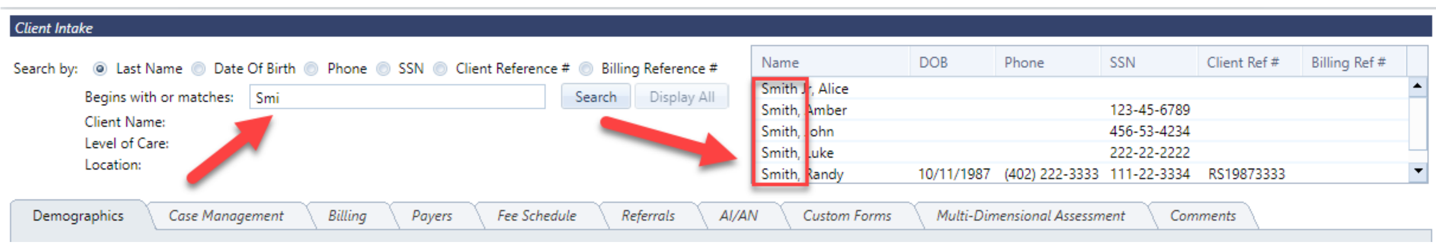
<u>The first action you need to take is to determine if the client has already been added to the database</u>

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

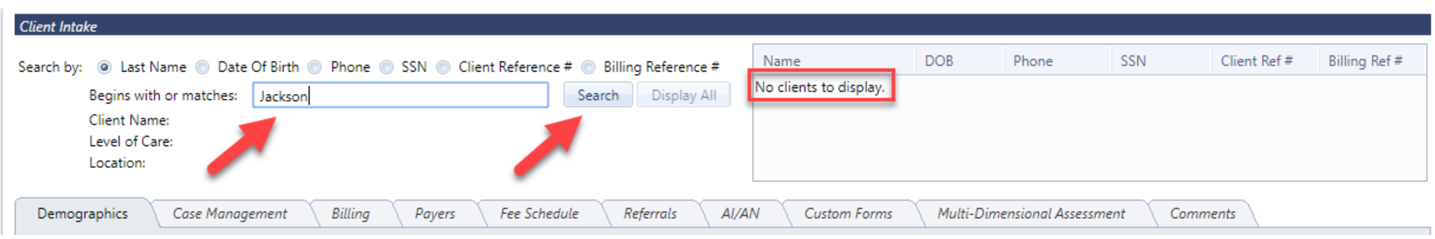


If you have a long list of clients, you could also search for the client by Last Name, DOB, Phone, SSN or Client Ref #.

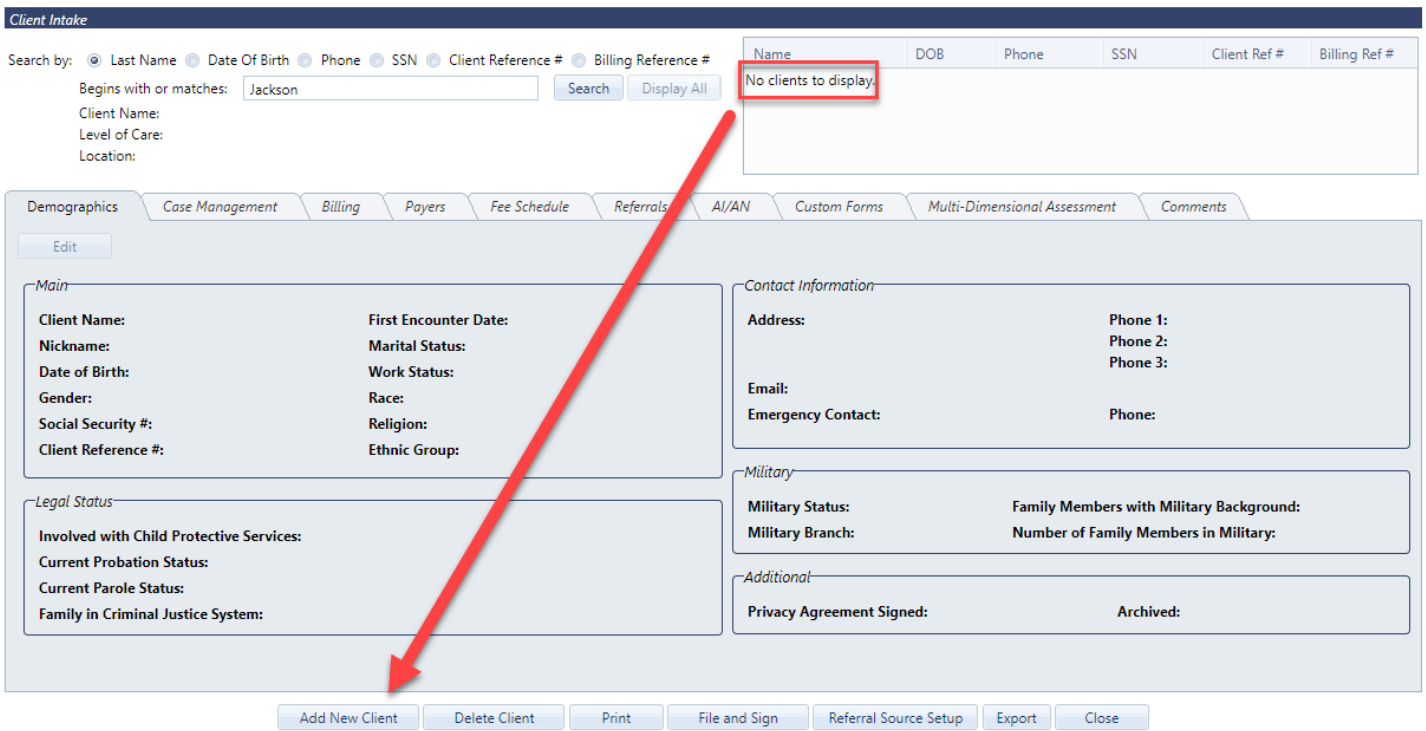
Step 3: Type in the first two or three letters of the last name then click on the [**Search**] button. This will narrow down your search.



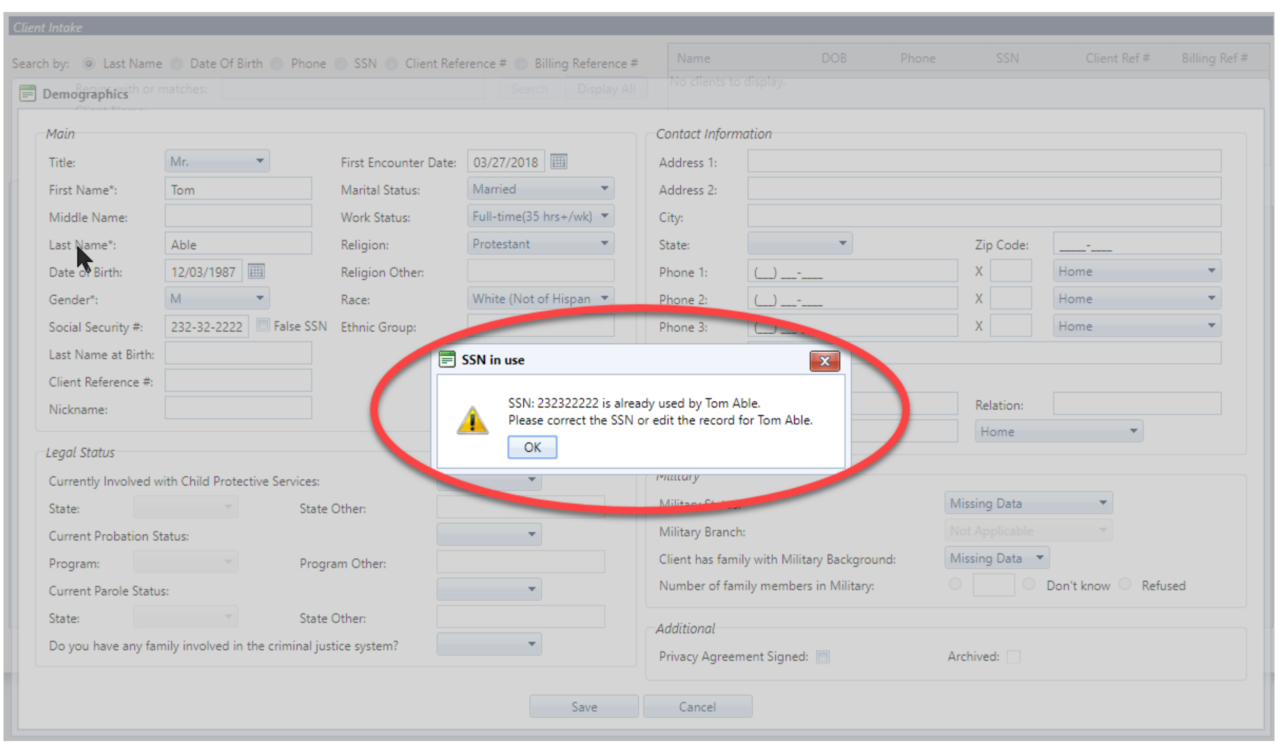
Important Note: When you do your search and find no clients to display from your search this mean your client is new to the database.



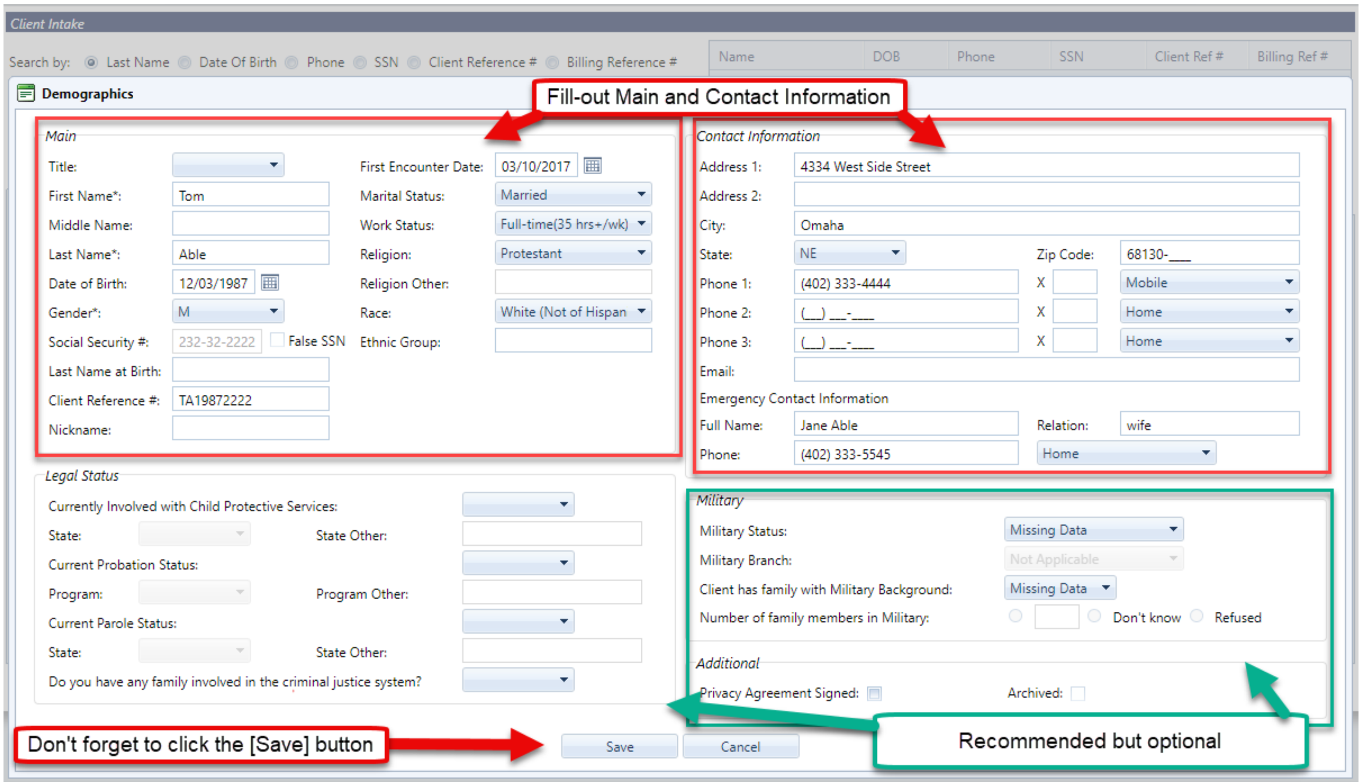
Step 4: Click on the [**Add New Client**] button to add the client to your database.



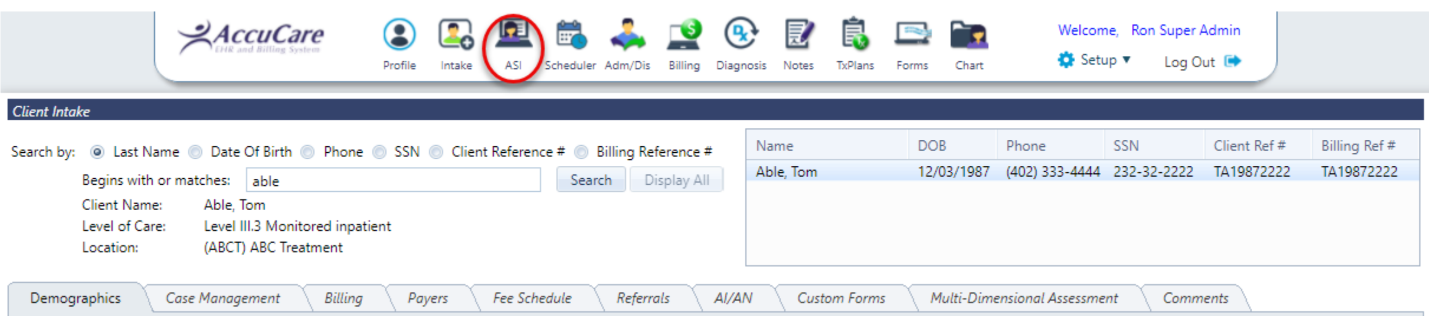
Special note: **After finding out the client does not exist and then trying to add your client to Client Intake you may find the client you are trying to enter *may actually exists* in the database. The client may be hidden due to your security level. Please contact your Super Admin (the person who assigned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



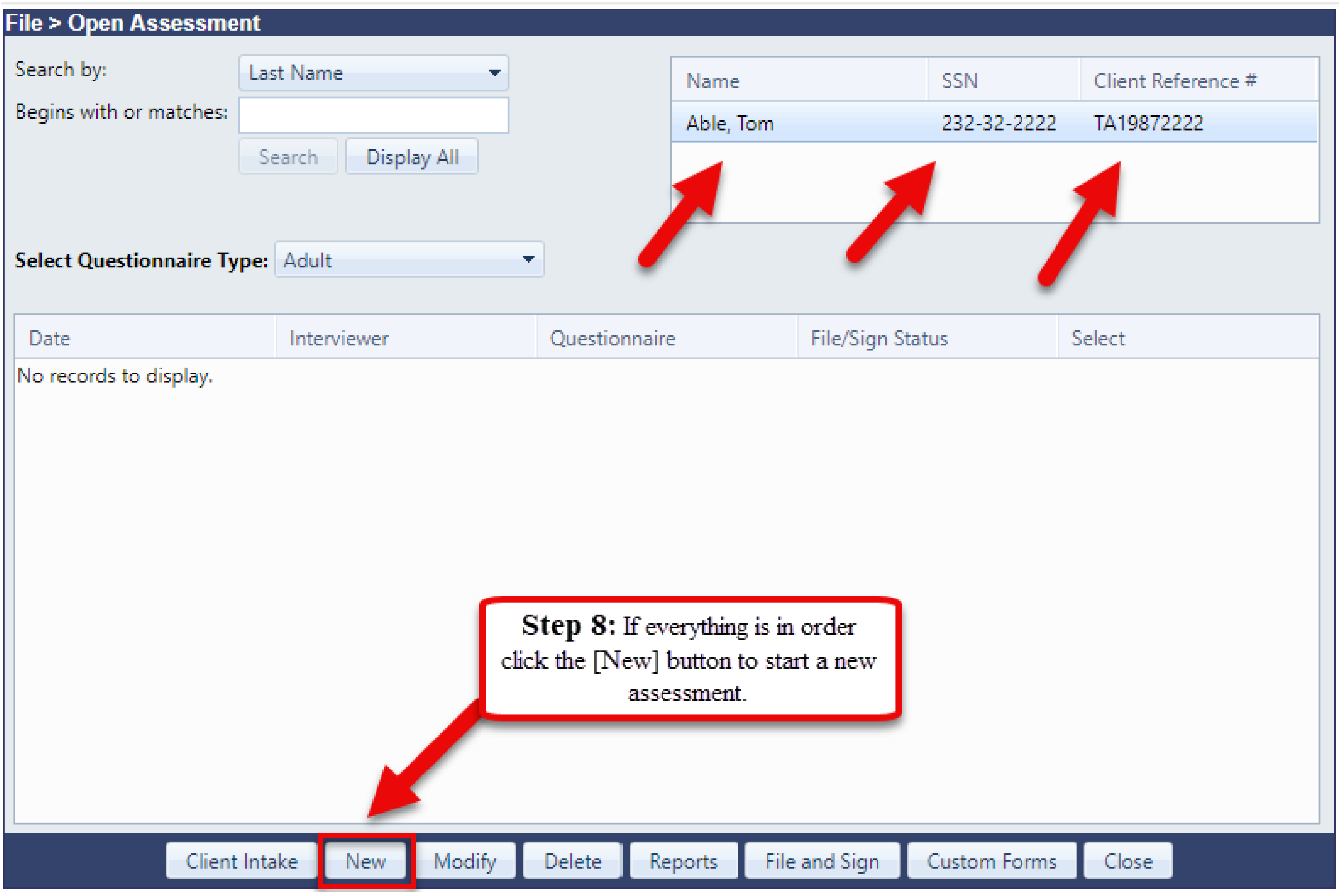
Step 5: After clicking on the [Add New Client] button, fill out at the very least the Main and Contact Information quadrants of the prior to conducting an assessment. The Legal and Military quadrants are optional but recommended (if applicable to your organizations data collection requirements).



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



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.



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