

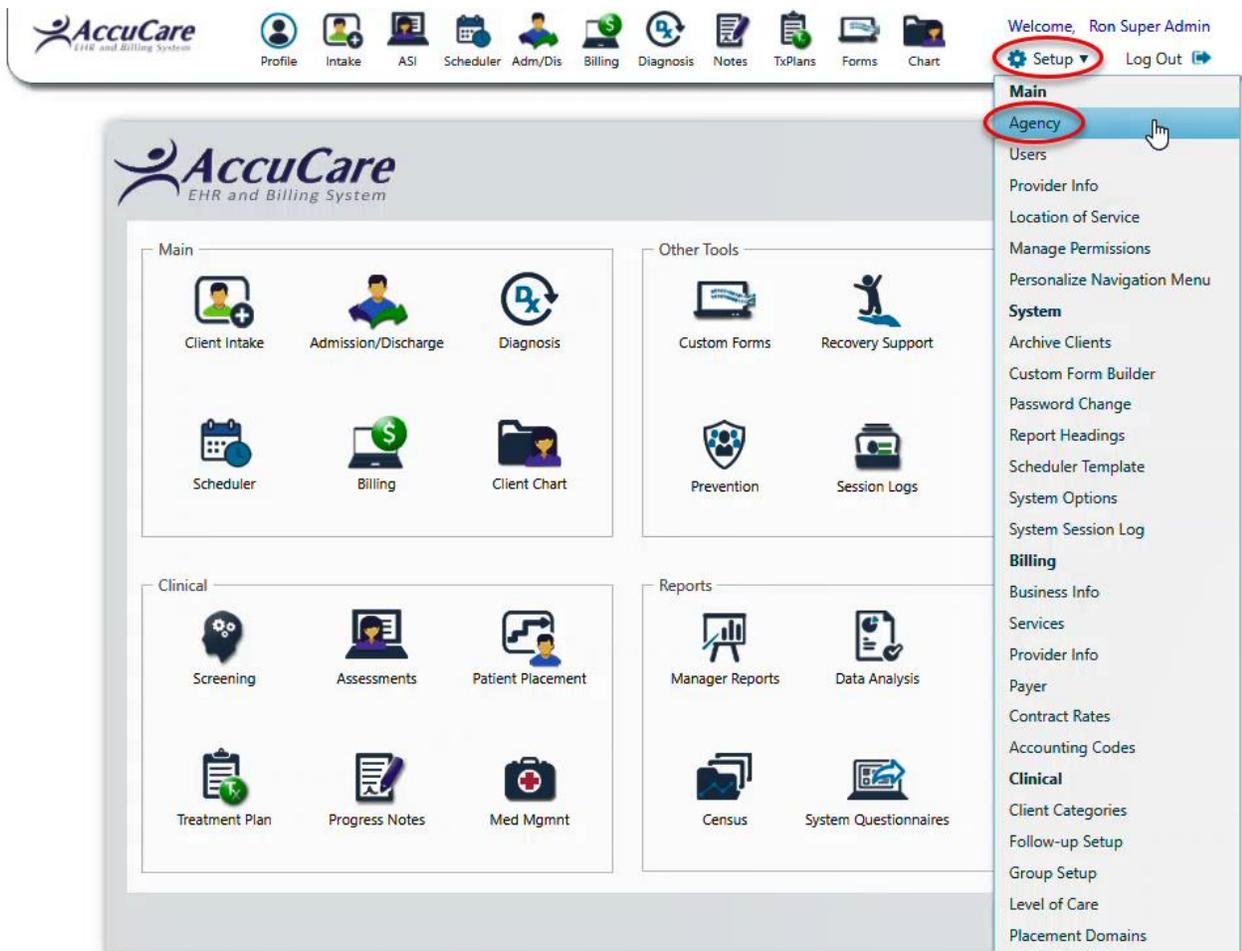
Initial Setup Instructions for Super Admin

Welcome to AccuCare, as a SuperAdmin, your first task will be to configure AccuCare to the level of HIPAA security and privacy you desire. After signing into AccuCare, you will be able to view the AccuCare Main Menu.

Step #1 - Setting up Your Agency

AccuCare maintains security and privacy through a three-level hierarchy of Agency, User and Client. Depending on your unique situation, an Agency could be your primary agency, satellite agency, inpatient/outpatient program, halfway house, or other unique program.

1. After logging in, locate the AccuCare ribbon directly above the AccuCare Menu. Move your mouse pointer to Setup then down to Agency.



2. AccuCare initially comes with 'Default Agency' as the initial Agency Name and 'DEFAULT' as the initial Agency ID. You will need to set up your Agency here.

AccuCare
Web-based Practice Management System

Setup > Agency Administration

Add/Delete/Change Agency Information

*Fields with an * are required.*

* Agency Name: Orion Healthcare Technology

* Agency ID: OHTCS

Address1: 18047 Oak Street

Address2:

City, State, Zip: Omaha, Ne 68130

Phone: (402) 341-8880

Type:

IHS Area, Facility and Service Type fields are for the use of the IHS National Data Warehouse (NDW) submission process only.

Add **Edit** **Delete** **Print** **Exit**

Order by: Agency Name Agency ID

Agency Name	Agency ID	Select
Default Agency	DEFAULT	<input type="radio"/>
Orion Healthcare Technology	OHTCS	<input checked="" type="radio"/>
Test	TEST	<input type="radio"/>

3. Click on the 'Add' button and enter at least the two required fields of Agency Name and Agency ID.

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IHS Area:

IHS Service Unit:

IHS Facility:

IHS Service Type:

IHS Area, Facility and Service the IHS National Data Warehouse only.

Add **Edit** **Delete** **Print** **Exit**

4. Click [Save] and [Exit] when finished, or [Save] and [Add] to add additional Agency. Use care when creating an Agency ID so it can be easily remembered which Agency Name it represents. Once you click 'Save', you will not be able to modify the Agency ID.

This Agency ID (for example in this case OHTCS) will appear in assessments and other records where Agency ID or Agency Number is required.

Tom Eden Forward-<F8> Backward-<F7> General Information Stop-<F4>

File > Open Assessment > Adult JCAHO > For: Tom Eden

General Medical Employment Drug/Alcohol Legal Family History Family/Social Psychiatric Spirituality

Time Assessment Diagnostic Recommendation

Level of Care: No Episode Assigned

G1. Client Reference Number: _____

G2. Social Security Number: 233-23-2222

G3. Agency Number: OHTCS

G4. Date of admission: 12/15/2015

G5. Date of interview: 04/01/2016

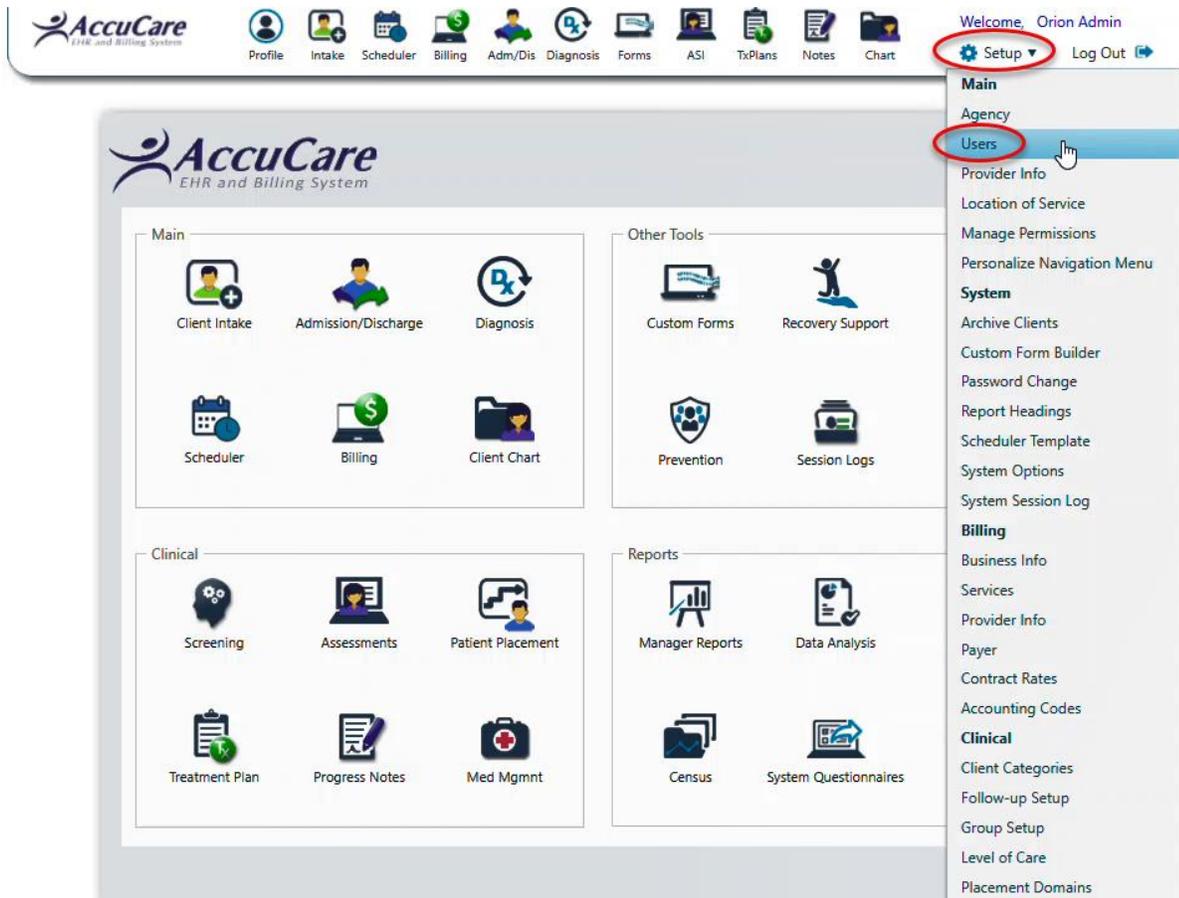
G6. Time begun: 13 : 55

G51. Who referred you for an evaluation? _____

Use arrow keys and tab to select correct choice, or use the

Step #2 - Setting Up Your Users

1. Return to the Main Menu,
2. Select the Setup menu then go down to Users.



You are now at the User Administration page. Only a User who has SuperAdmin level can access to this area. Orion creates the first User, usually the SuperAdmin with permission to access all areas of AccuCare and to all patients in the database. Users are normally classified as a "Standard User" and "SuperAdmin". The SuperAdmin has access to all the areas of AccuCare subscribed areas and to all the patients in the database.

Standard Users are classified into roles:

- Clinical Admin
- Director
- Senior Clinician
- Clinician
- Low-Level Admin

Each of these roles has default program and patient access. However, the SuperAdmin can deny any default program for a standard user. If a default program access is denied to a User, then that User Role is considered "customized".

SuperAdmin can also change the patient level access. However, some program access levels have requirements for specific data access levels. In such cases, the system admin cannot change the patient level access. In the example below, the SuperAdmin has created a new User. A User could be a Clinical Admin, Director, Senior Clinician, Clinician, or Low-Level Admin.

The screenshot shows the AccuCare Web-based Practice Management System interface. The page title is "Setup > User Administration". Below the title, there are radio buttons for "Order By: User Name" (selected) and "User ID". To the right, there is a "Select a User:" dropdown menu with "Jack Tester, CCII" selected. Below this, there are several tabs: "General", "Customized", "IHS NDW", "Electronic Signature", "Attributes", and "Schedule". The "General" tab is active, showing a form with the following fields and values:

User ID:	TEST	Agency:	DEFAULT
Password:	*****	Supervisor's Name:	
Confirm Password:	*****	Supervisor's Title:	
Change Password at Next Login:	<input type="checkbox"/>	User Type:	<input type="radio"/> Standard <input checked="" type="radio"/> SuperAdmin
Disabled:	<input type="checkbox"/>	Clinical Program Access:	Administrator
Full Name:	Jack Tester, CCII	Billing Program Access:	Administrator
Title:	Clinician Tester	Default Patient Access:	All patients
Initials:	JXT		

At the bottom of the form, there are buttons for "Add", "Edit", "Save", "Cancel", "Delete", "Print", and "Close".

3. First, you must create a User ID and a Password. The User ID must be unique for each newly added person.
4. Next, enter the User's Full Name and the User's Title. These will appear on the first signature line of client reports.
5. Three initials are required in the Initials field. If you do not know the user's middle initial or if the user has no middle initial, use 'X' as the middle initial.
6. From the drop down menu, select the appropriate Agency to associate with this User.
7. If you enter a Supervisor's Name and Title, that information will appear on the second signature line of printed reports.

8. Select the User Type. If you select "SuperAdmin", it automatically selects "Administrator" for clinical program access and "All patients" for patient access. If you select "Standard" User type, select the program level access and patient level access. Some program level access has requirements for specific patient level access. If you choose to customize program access, click on customized tab and select the programs that you would like to deny/allow and move the list to the appropriate select box.
9. When finished either [Save] then [Exit], or [Save] then [Add] additional Users.

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