

AccuCare Workflow Guide

This is a general guide to the AccuCare clinical workflow. All workflows may vary. Use for reference and training only.

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MAIN MENU: NAVIGATION

Main Menu:

- Navigate to any of the main modules in AccuCare by selecting the associated Icon
- **Left navigation** pane and ribbon allows user to access any module within AccuCare without having to exit back to the main menu.
- **Top Ribbon** can be personalized for each user. Users can choose which Icons to display which

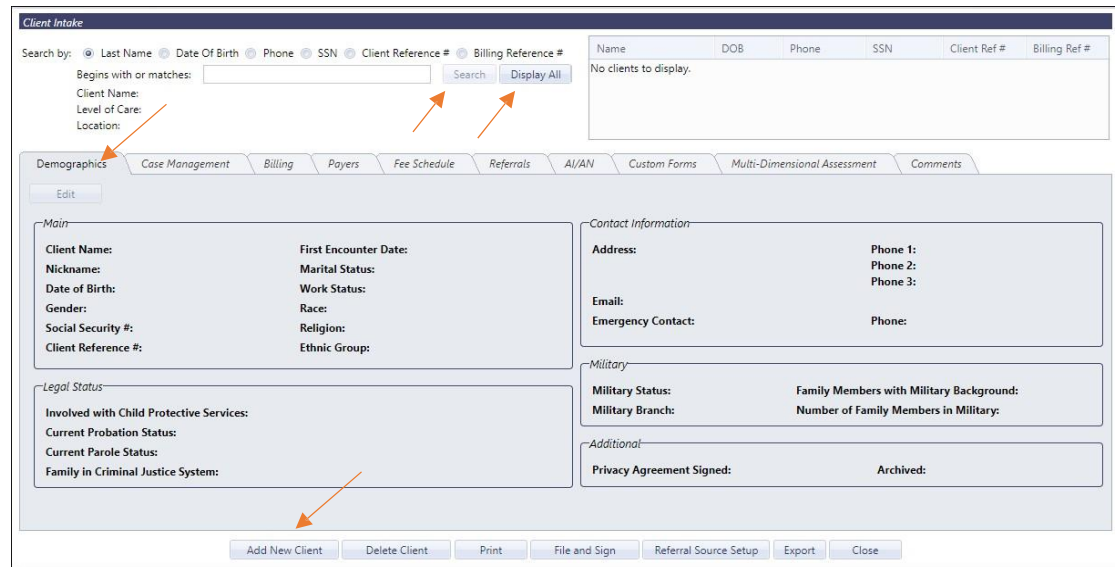
The screenshot displays the AccuCare EHR and Billing System main menu. At the top, a ribbon contains user-specific icons for Profile, Intake, Scheduler, Billing, Adm/Dis, Diagnosis, Forms, ASI, TlPlans, Notes, and Chart, along with a 'Welcome, Ronald J Alai' message and 'Setup' and 'Log Out' options. On the left, a navigation pane lists modules such as Home, Main Menu, Client Intake, Chart Management, Custom Forms, Scheduler, Admission/Discharge, Client Diagnosis, Census, System Questionnaires, Clinical Tools, Assessments, Discharge Summary, Follow Ups, GPRA Questionnaire, Medication Management, MHSIP, Patient Placement, Prevention, Progress Notes, Recovery Support, Screening Supplements, TEDS, Treatment Plan, TSR, Billing, Reports, Configuration, and Help. The central main menu area features icons for Client Intake, Admission/Discharge, Diagnosis, Custom Forms, Recovery Support, Follow Ups, Scheduler, Billing, Client Chart, Prevention, Session Logs, User Setup, Screening, Assessments, Patient Placement, Manager Reports, Data Analysis, Data Query, Treatment Plan, Progress Notes, Med Mgmt, Census, and System Questionnaires. A 'Log Out' button is located at the bottom right. Two callout boxes with arrows point to the 'Ribbon' and 'Left navigation' areas.

PRE-ADMISSION: CLIENT INTAKE

Adding New Client: Client Intake



- You can use **[Search]** or **[Display All]** to see if the client is already in AccuCare, or create a new one by entering in the most basic information
- On **Demographics Tab** - Click the **[Add New Client]** button to add new client to the database and enter their demographic information.



The screenshot shows the 'Client Intake' application interface. At the top, there is a search bar with options for 'Last Name', 'Date Of Birth', 'Phone', 'SSN', 'Client Reference #', and 'Billing Reference #'. Below the search bar, there are fields for 'Begins with or matches:', 'Client Name:', 'Level of Care:', and 'Location:'. The 'Search' and 'Display All' buttons are highlighted with orange arrows. The main content area is divided into several tabs: 'Demographics', 'Case Management', 'Billing', 'Payers', 'Fee Schedule', 'Referrals', 'AI/AN', 'Custom Forms', 'Multi-Dimensional Assessment', and 'Comments'. The 'Demographics' tab is active, showing an 'Edit' button and a 'Main' section with fields for 'Client Name', 'Nickname', 'Date of Birth', 'Gender', 'Social Security #', 'Client Reference #', 'First Encounter Date', 'Marital Status', 'Work Status', 'Race', 'Religion', and 'Ethnic Group'. There is also a 'Contact Information' section with fields for 'Address', 'Email', 'Emergency Contact', 'Phone 1', 'Phone 2', and 'Phone 3'. A 'Military' section includes 'Military Status', 'Military Branch', 'Family Members with Military Background', and 'Number of Family Members in Military'. An 'Additional' section has 'Privacy Agreement Signed' and 'Archived' fields. At the bottom, there are buttons for 'Add New Client', 'Delete Client', 'Print', 'File and Sign', 'Referral Source Setup', 'Export', and 'Close'. The 'Add New Client' button is highlighted with an orange arrow.

- Fill out the fields in **Main, Contact Information, Legal Status, Military** and **Additional** of the demographic dialog box.
- Not all fields are required.
- **Recommend discussing as group to gain consensus on what field should be filled out.**

Client Intake

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

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Abbey Janet	10/19/1980		232-32-2222		
Abbey Julia	03/07/1975	(555) 555-4524 789-78-7977		987979797	987979797

Begins with or matches: Search Display All

Demographics

Main

Title: Miss First Encounter Date: 03/15/2016
 First Name: Julia Marital Status: Married
 Middle Name: Work Status: Part-time (regular hou
 Last Name: Abbey Religion: Catholic
 Date of Birth: 03/07/1975 Religion Other:
 Gender: F Race: American Indian
 Social Security #: 789-78-7977 False SSN Ethnic Group:
 Last Name at Birth:
 Client Reference #: 987979797
 Nickname:

Contact Information

Address 1: 1512 South St
 Address 2:
 City: Omaha
 State: NE Zip Code: 68130-____
 Phone 1: (555) 555-4524 X Home
 Phone 2: () - - - - X Home
 Phone 3: () - - - - X Home
 Email:
 Emergency Contact Information
 Full Name: Janet Test Relation: sister
 Phone: (402) 454-5444 Home

Legal Status

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

Military

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

Additional

Privacy Agreement Signed: Archived:

Save Cancel

Case Management Tab:

- Click the **Case Management Tab**
- Click the **[Edit]** button to open this dialog box

Client Intake

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

Begins with or matches: Search

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Doe, John	10/31/2014				

Client Name: Doe, John
Level of Care: No Episode Assigned
Location:

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

Edit

Case Management

Assigned Agency: DEFAULT
Assigned User: TECH4

Category 1:
Category 2:
Category 3:
Category 4:
Category 5:

Add New Client Delete Client Print File and Sign Referral Source Setup Export Close

- **Assigned Agency** will show you which agency and group of clinicians the client is assigned to.
- **Assigned User** is usually the person who added the client to the database as new client.
- **Client Categories** allows you assign up to 5 tags per client from a picklist created in Setup > Client Categories.

The screenshot displays the 'Client Intake' window with a 'Case Management' modal open. The modal contains three main sections: 'Assigned Agency', 'Assigned User', and 'Client Categories'. Three orange arrows point to these sections. The 'Assigned Agency' list includes 'DEFAULT', 'MRP', and 'TCE'. The 'Assigned User' list shows 'Active Users' with 'Laura T. Johnson' and 'Orion Admin' selected, and a 'Disabled Users' section below. The 'Client Categories' section has five dropdown menus labeled 'Category 1' through 'Category 5', with values: '001 - Homeless', '002 - High School/ GED', '003 - Methamphetamine', '004 - Court Referred', and '005 - Grant Participant'. The background shows a client record for 'Test, John' with fields for Name, DOB, Phone, SSN, Client Ref #, and Billing Ref #.

Billing Tab:

- Complete the Billing Tab if you subscribed to Billing.
- Click on the **Billing Tab**
- Click [**Edit**] button to open the billing dialog box

Client Intake

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

Begins with or matches: Search Display All

Client Name: Test, Joe
Level of Care: No Episode Assigned
Location:

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Test, Joe					

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

Edit

Statement Information

Statement Name:
Address:
Phone:
Statement Comment:

Hold Statement:
Self Pay:

Referring Physician

Name:
NPI #:

Billing Comments

Reference Numbers

Billing Reference #:

Client Consent

Release of Info on File:
Release of Info Date:
Client given Informed Consent:
Assign Payment to Agency:

Client's Condition

Condition Related To:
Date of Current Illness:
First Date of Illness:

Add New Client Delete Client Print File and Sign Referral Source Setup Export Close

- The newly added client is automatically assigned a Billing Reference number once you open this dialog box
- You will need to click on [Copy form Demographics] button.
- Fill out (if applicable) Referring Provider, Client's Condition and Billing Comments.

Client Intake

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

Begins with or matches: test Search Display All

Client Name: Test, John

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Test, John	10/20/1980	(402) 999-9999	121-21-2121		BIL-01TESJOHM

Billing Information

Billing Reference #: BIL-01TESJOHM

Client Consent

Release of Info on File
Release of Info Date: Enter Date

Client Given Informed Consent

Assign Payment to Agency

Referring Provider

First Name: Sally Middle Initial:

Last Name: Johnson Suffix:

NPI #: 1245319599

Client's Condition

Condition Related To: Employment
 Other Accident
 Auto Accident Location (State): MA

Date of Current Illness: Enter Date

First Date of Illness: Enter Date

Dates Unable to Work: Enter Date to Enter Date

Dates Hospitalized: Enter Date to Enter Date

Statement Information

Copy from Demographics

First Name: John Last Name: Test

Address 1: 1234 A Street

Address 2:

City: Omaha

State: NE Zip: 68130-

Phone: (402) 999-9999 x Home

Statement Comment:

Hold Client Statement

Self Pay

Billing Comments

Save Cancel

Payers Tab

- Complete the Payers Tab if you want to assign/associate a Payer to the client.
- Click on the **Payers Tab**
- Click the **[Add New Payer Plan]** button to open the dialog box
- You can also edit existing Payers if they are already associated to the client.

The screenshot shows the 'Client Intake' interface with the 'Payers' tab selected. At the top, there is a search section with radio buttons for 'Last Name', 'Date Of Birth', 'Phone', 'SSN', 'Client Reference #', and 'Billing Reference #'. A search box contains 'test', and there are 'Search' and 'Display All' buttons. Below the search is a table with columns: Name, DOB, Phone, SSN, Client Ref #, and Billing Ref #. The first row contains 'Test, Joe'. Below the search section is a navigation bar with tabs: Demographics, Case Management, Billing, Payers (selected), Fee Schedule, Referrals, AI/AN, Custom Forms, Multi-Dimensional Assessment, and Comments. Under the 'Payers' tab, there is an 'Add New Payer Plan' button. Below this is a table with columns: Automation Order, Default, Payer Type, Payer Name, Plan Name, Plan Type, Effective Date, End Date, ID Number, Held, Edit, and Delete. The table is currently empty with the text 'No records to display.' at the bottom. At the very bottom of the window, there are buttons for 'Add New Client', 'Delete Client', 'Print', 'File and Sign', 'Referral Source Setup', 'Export', and 'Close'. Two orange arrows point to the 'Payers' tab and the 'Add New Payer Plan' button.

- Go through column 1 choosing from picklists, enter dates and type in information.
- Under column 2 click the [Copy from Demographics] button
- Put in any Plan Notes (if applicable)

The screenshot shows the 'Payer Plan Details' form in the AccuCare system. The form is divided into two main sections: 'Payer Information' and 'Insured's Information'. The 'Payer Information' section includes fields for Payer Type (Insurance), Payer Name (ABH Aetna Better Health), Plan Name (ABH Rates), Effective Date (07/01/2017), End Date (Enter Date), Plan Type (Primary), Insured's ID (63454623), Group #, Group Name, and Relationship to Insured (Self). There are checkboxes for 'Set as Default Plan' and 'Hold'. The 'Insured's Information' section includes a 'Copy from Demographics' button, First Name (John), Middle Name, Last Name (Test), Suffix, Address 1 (1234 A Street), Address 2, City (Omaha), State (NE), Zip (68130), Gender (M), Date of Birth (10/20/1980), Employer/School, and two phone number fields. At the bottom, there is a 'Plan Notes' text area and 'Save' and 'Cancel' buttons. An orange arrow points to the 'Plan Notes' field. Red circles with numbers 1 and 2 highlight the 'Payer Plan Details' title and the 'Copy from Demographics' button respectively.

Fee Schedule Tab

- Complete the Fee Schedule Tab if you have a client that has a specific fee schedule.
- Click on the **Fee Schedule Tab**
- Click the **[Edit]** button to open the dialog box

The screenshot displays the 'Client Intake' interface. At the top, there is a search bar with fields for 'Last Name', 'Date Of Birth', 'Phone', 'SSN', 'Client Reference #', and 'Billing Reference #'. Below the search bar, the client information is displayed: 'Begins with or matches: test', 'Client Name: Test, Joe', 'Level of Care: No Episode Assigned', and 'Location:'. A table below shows the search results with columns for Name, DOB, Phone, SSN, Client Ref #, and Billing Ref #, containing one entry for 'Test, Joe'. The main area of the interface has several tabs: 'Demographics', 'Case Management', 'Billing', 'Payers', 'Fee Schedule', 'Referrals', 'AI/AN', 'Custom Forms', 'Multi-Dimensional Assessment', and 'Comments'. The 'Fee Schedule' tab is selected, and an 'Edit' button is visible. Below the 'Edit' button is a table with columns for 'Service', 'Default Units', 'Default Amount', 'Fee Schedule Units', and 'Fee Schedule Amount'. The table currently displays 'No records to display.'. At the bottom of the interface, there are several buttons: 'Add New Client', 'Delete Client', 'Print', 'File and Sign', 'Referral Source Setup', 'Export', and 'Close'.

- You can assign a fee schedule amount to override the client's insurance billing.
- Select the services you wish to assign the client by typing in the Fee Schedule Units and Fee Schedule Amount.

Client Intake

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

Begins with or matches: test Search Display All

Client Name: Test, John
Level of Care: No Episode Assigned
Location:

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Test, John	10/20/1980	(402) 999-9999	121-21-2121		BIL-01TESJOHM

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

Service: Assessment/ Evaluation Family Counseling

Fee Schedule Show only Services with a Fee Schedule

Service	Default Units	Default Amount	Fee Schedule Units	Fee Schedule Amount
Anger Management	1.000	\$100.00	<input type="text"/>	\$ <input type="text"/>
Art Therapy	1.000	\$65.00	<input type="text"/>	\$ <input type="text"/>
Assessment/ Evaluation	1.000	\$125.00	1	\$ 50
Crisis Intervention	1.000	\$115.00	<input type="text"/>	\$ <input type="text"/>
Family Counseling	1.000	\$125.00	1	\$ 100
General	1.000	\$75.00	<input type="text"/>	\$ <input type="text"/>
Group Counseling	1.000	\$100.00	<input type="text"/>	\$ <input type="text"/>

Save Cancel

Add New Client Delete Client Print File and Sign Referral Source Setup Export Close

Referral Tab

- Click the Referrals Tab if you want to record a referral record for the client, either incoming or outgoing.
- Click the [Add] button to add a referral to your client records.

Client Intake

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

Begins with or matches:

Client Name: Test, John
Level of Care: No Episode Assigned
Location:

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Test, John	10/20/1980	(402) 999-9999	121-21-2121		BIL-01TESJOHM

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

Date of Referral	Name	Agency	Contact	Type	Results	Edit	Delete	Print	File & Sign	Signed
No records to display.										

- Choose the radio button for type of referral you are creating
- You can select an existing **Referral Source** from the drop down list or create a new one to be added to the list by clicking on the **Add New** link
- Under **Referral Details** you can tag more details to the referral record.
- You can customize each picklist
- Type in any comments in the **Referral Comment** dialog box

The screenshot displays the 'Add/Edit Referral Record' dialog box. At the top, it shows search criteria and client information (Name: Able Tom, DOB: 12/03/1987, etc.). The dialog is divided into three main sections:

- Referral Source:** Includes a search bar, a dropdown menu showing 'Canku Teca - Lake Andes, Canku Teca, S', and an 'Add New' link.
- Referral Details:** Contains a 'Level of Care' dropdown (set to 'No Episode Assigned'), and several dropdown menus for 'Type of Contact', 'Previous Services', 'Service Requested', 'Funding Source', 'Referral Reason', 'Result', 'Category', 'Other 1', 'Other 2', and 'Heard about us?'. Each dropdown has an 'Add/Edit' link.
- Referral Comments:** A large text area at the bottom for entering notes.

Buttons for 'Save' and 'Cancel' are located at the bottom right of the dialog.

Custom Forms Tab:

- Click on the Custom Forms Tab
- Click the **[Add]** button open the Create New Form dialog box
- Click the drop down arrow to see published assigned custom forms.
- Once you have selected the form click the **[Create New Form]** button

The screenshot displays the 'Client Intake' software interface. At the top, there is a search bar with options for 'Last Name', 'Date Of Birth', 'Phone', 'SSN', 'Client Reference #', and 'Billing Reference #'. Below this, a table shows client information for 'Test, Joe'. The main navigation bar includes tabs for 'Demographics', 'Case Management', 'Billing', 'Payers', 'Fee Schedule', 'Referrals', 'AI/AN', 'Custom Forms', 'Multi-Dimensional Assessment', and 'Comments'. The 'Custom Forms' tab is selected, and an 'Add' button is visible. A 'Create New Form' dialog box is open, showing a dropdown menu for 'Form Type' with 'Confidential Health and Intake Questionnaire' selected. The dialog box has 'Create New Form' and 'Cancel' buttons. Orange arrows point to the 'Add' button, the 'Custom Forms' tab, the dropdown arrow, and the 'Create New Form' button.

- Here is an example the of a published forms
- Select a Level of Care from picklist if available
- Collect information from client to fill out form
- Save when done to add to you client's record

The screenshot displays a web-based form titled "Client Intake Custom Forms" within a "Client Intake" application window. The form is for "FAMILY RECOVERY SERVICES" and is a "CONFIDENTIAL HEALTH AND INTAKE QUESTIONNAIRE". It includes a "GENERAL INFORMATION" section with the following fields and options:

- Form Date:** 01/22/2018
- Level of Care:** No Episode Assigned (dropdown menu)
- Client Information:** Name (Joe Test), Intake Date, Age, Date of Birth, Place of Birth, Address, Phone.
- Emergency Contact:** NAME OF EMERGENCY CONTACT, Address, Phone.
- Treatment History:** Previous Substance abuse treatment? (Yes, No, Not Answered), Dates, Most Recent Program, Date.
- Services:** Detox (checkbox), Residential (checkbox).
- Referral:** Who referred you to Ujima? (text field).

At the bottom of the form are "Save" and "Cancel" buttons. Red arrows in the image point to the "Client Reference #" field in the background, the "Level of Care" dropdown, and the "Who referred you to Ujima?" field.

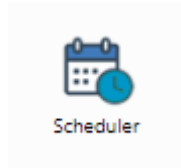
Comments Tab

- Click the Comments Tab
- To add other comments click the **[Edit]** button
- This dialog box can be used for general comments and notes

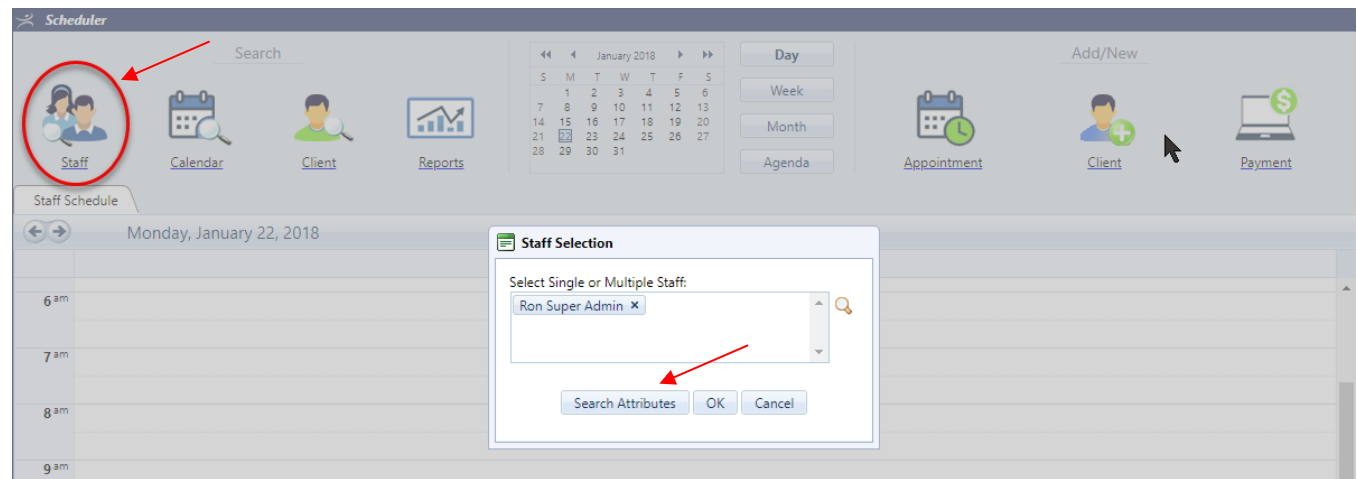
The screenshot displays the 'Client Intake' interface. At the top, there are search filters for 'Last Name', 'Date Of Birth', 'Phone', 'SSN', 'Client Reference #', and 'Billing Reference #'. A search bar contains 'test', and a table below shows a result for 'Test, Joe'. The main navigation bar includes tabs for 'Demographics', 'Case Management', 'Billing', 'Payers', 'Fee Schedule', 'Referrals', 'AI/AN', 'Custom Forms', 'Multi-Dimensional Assessment', and 'Comments'. The 'Comments' tab is active, and an 'Edit' button is visible. A dialog box titled 'Comments' is open, featuring a large text area for input and 'Save' and 'Cancel' buttons at the bottom. Orange arrows point to the 'Edit' button and the text area in the dialog box.

SCHEDULER: SEARCH FOR STAFF ATTRIBUTES

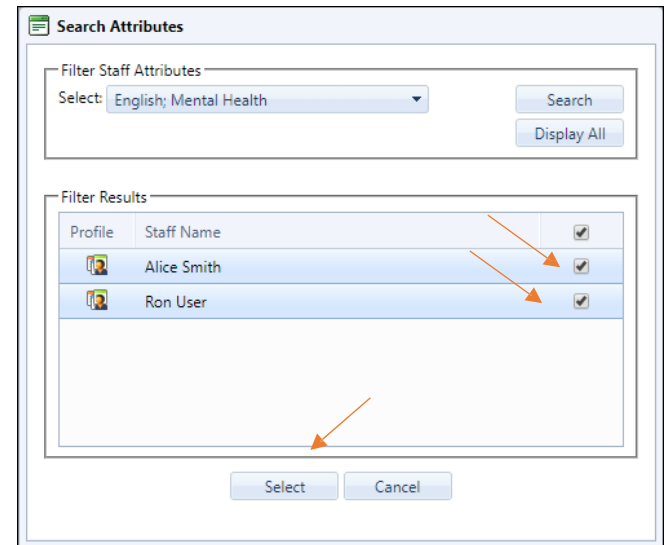
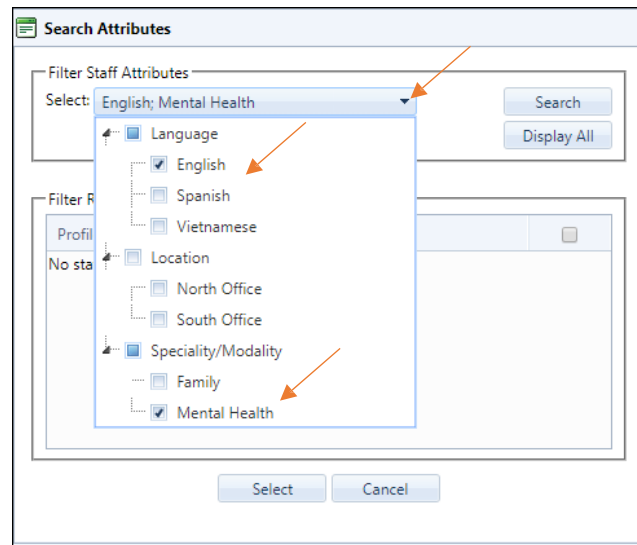
Search for Staff via attributes:



- Open the Scheduler Module
- Click on the Staff Icon
- To find staff with the attributes you are looking for – click the **[Search Attributes]** button

A screenshot of the "Scheduler" software interface. The top navigation bar includes icons for "Staff", "Calendar", "Client", and "Reports". A red circle highlights the "Staff" icon, with a red arrow pointing to it. To the right, there is a calendar for January 2018 and buttons for "Day", "Week", "Month", and "Agenda". Further right are "Appointment", "Client", and "Payment" icons. A "Staff Selection" dialog box is open in the center, containing a search field with "Ron Super Admin" entered, a magnifying glass icon, and three buttons: "Search Attributes", "OK", and "Cancel". A red arrow points to the "Search Attributes" button. The background shows a "Staff Schedule" grid for "Monday, January 22, 2018" with time slots from 6 am to 9 am.

- Click the drop down picklist to see the list of attributes created by your organization
- Check the appropriate attributes to find the staff members
- Click the **[Search]** button to display those staff members from the attributes you selected
- Check the box for each staff member and click the **[Select]** button to see their schedule.



SCHEDULER: APPOINTMENTS AND CHECK-INS

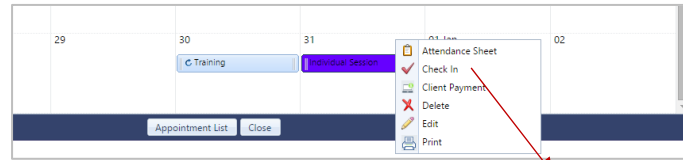
Add New Appointment:

- Schedule any appointment from the scheduler
- Use templates to assist with auto-filling the appointment details
- Select Transfer to Billing and/or Transfer to Progress Notes to track for check-ins and quality assurance

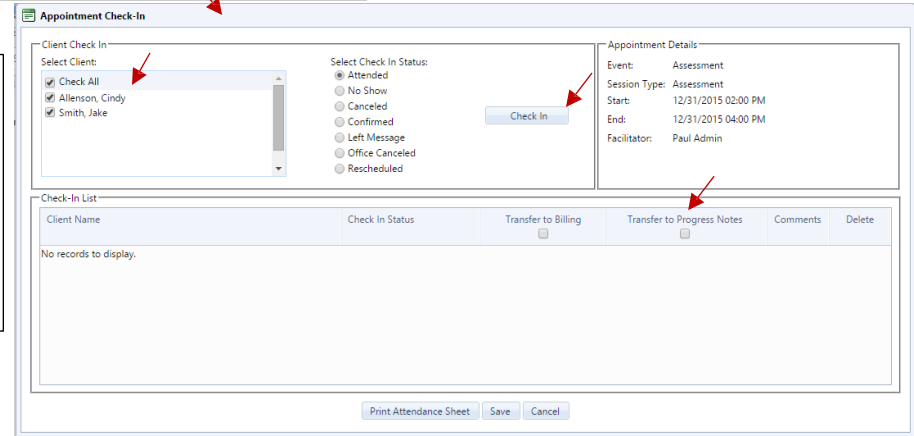
The screenshot displays the AccuCare Scheduler interface. The main window shows a calendar for September 2015 with various appointment slots. A 'New Appointment' dialog box is open in the foreground, allowing for the creation of a new appointment. The dialog box includes fields for Staff (John Training), Facilitator (John Training), Clients (Adams, Leo M.), and Template (Individual Session). It also features a Recurrence section with options for Daily, Weekly, Monthly, and Yearly, and a Transfer section with checkboxes for 'Transfer To Billing' and 'Transfer To Progress Notes'. The 'Transfer To Billing' checkbox is checked. The dialog box has 'Save' and 'Cancel' buttons at the bottom. An orange arrow points to the 'Template' dropdown, and two red arrows point to the 'Transfer To Billing' and 'Transfer To Progress Notes' checkboxes. The background calendar shows a grid with dates from 03 to 09, and various appointment slots like 'Assessment', '1st Session - to test Archiver', 'Anger Management', and 'Discharge'.

Check-in Appointments:

- After the appointment is complete, you can check in the client by right clicking on the appointment and selecting the “Check In” icon.
- This allows user to “check in” clients from the appointment and assign the appropriate check in status.
- By checking in the client, this will allow users to track the status and carry the appointment information into billing and progress notes actions

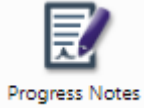


NOTE: Checked In clients that have “Transfer to Progress Notes” selected, will allow the appointment to be transferred in progress notes automatically (see Progress Notes section)

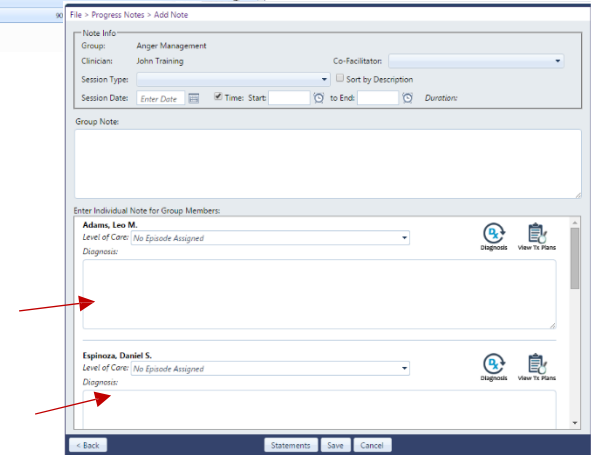
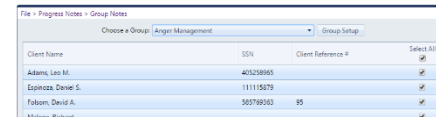
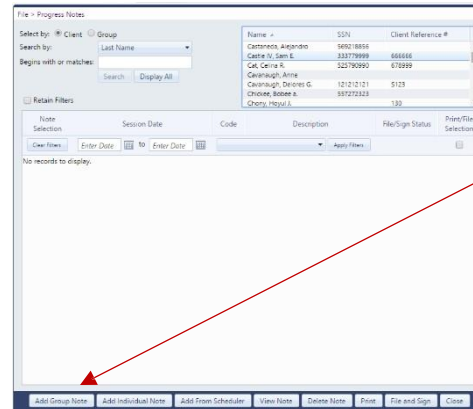


PROGRESS NOTES

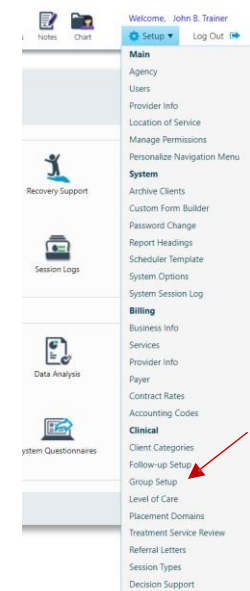
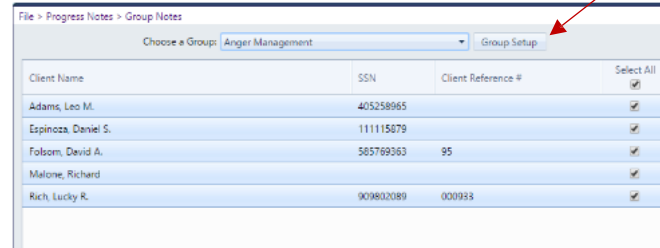
Creating Progress Notes



- Create individual or group notes
- For group notes, you can create one group note to go to all clients in the group, but also personalize each client's note that will append to their group note.



- NOTE: you can create and modify clients in groups by selecting "Group Setup" or by the Setup drop down list from the top Ribbon.



Progress Notes – add from Scheduler

- You can create progress notes from scheduler appointments.
- Clients that have been “checked-in” via scheduler and have the “transfer to progress notes” selected, will appear in the appointment transfer window.
- Information from the appointment will automatically fill data for the note
- Select the appointments you wish to complete the note and follow the standard process to complete a progress note.

The image shows two overlapping software windows. The left window is titled 'File > Progress Notes' and contains a search interface for clients. It has a 'Select by' dropdown set to 'Client', a search field with 'Last Name' selected, and a list of client records with columns for Name, SSN, and Client Reference #. Below the list are 'Retain Filters' and 'Note Selection' options. At the bottom, there are buttons for 'Add Group Note', 'Add Individual Note', 'Add From Scheduler', 'View Note', and 'Delete Note'. A red arrow points from the 'Add From Scheduler' button to the right window.

The right window is titled 'File > Progress Notes > Appointment Transfer' and displays 'Appointment Filters' and a table of appointments. The table has columns for Client Name, SSN, Client Reference #, Note Created, and a checkbox. The appointments are grouped by date and session type.

Client Name	SSN	Client Reference #	Note Created	
Date: 09/17/2015, 11:00 AM Session Type: Anger Management Subject: Anger Management				
Status: Attended				
Able, Jacob		JA19804344	No	<input checked="" type="checkbox"/>
Adams, Leo M.			No	<input checked="" type="checkbox"/>
Date: 09/17/2015, 9:00 AM Session Type: Adult OP Admission Subject: Adult OP Admission				
Status: Attended				
Abalone, John A.		5464646464	No	<input type="checkbox"/>
Abernacky, Paul		gh46544565	No	<input type="checkbox"/>

PROGRESS NOTE – CREATE AN INDIVIDUAL NOTE

Create a Client note:

- Search for the client (unless you already have the client selected) and click the **[Add Individual Note]** button

The screenshot shows the 'File > Progress Notes' window. At the top, there are radio buttons for 'Client' (selected) and 'Group'. Below that, a 'Search by:' dropdown is set to 'Last Name', and a text input field contains 'tes'. There are 'Search' and 'Display All' buttons. A 'Retain Filters' checkbox is present. A table displays search results with columns for Name, SSN, and Client Reference #. One record is shown: 'Test, Joe'. Below the search section, there are filters for 'Session Date' (with 'Enter Date' and calendar icons) and 'Code' (with a dropdown). There are 'Clear Filters' and 'Apply Filters' buttons. The main area shows 'No records to display.' At the bottom, a toolbar contains buttons: 'Add Group Note', 'Add Individual Note' (highlighted with an orange arrow), 'Add From Scheduler', 'View Note', 'Delete Note', 'Print', 'File and Sign', and 'Close'.

Filling out Note Info:

- Select your Session Type for this note by clicking on the drop down arrow.
- Select Co-Facilitator (if applicable) by clicking on the drop down arrow.

File > Progress Notes > Add Note

Note Info

Client: Test, Joe

Clinician: Ron Super Admin

Session Type: [Dropdown Arrow]

Session Date: [Field]

Diagnosis: [Field]

Note: [Text Area]

- 100 - Individual Session
- 103 - Group Counseling
- 107 - Collateral Services
- 109 - Treatment Planning
- 110 - Crisis Intervention
- 115 - Intake Critical
- 129 - Discharge Planning
- 133 - ASI Testing
- 201 - Client without child in program
- 203 - Client with child in program
- 205 - Child
- 301 - Evaluation

Level of Care: No Episode Assigned

Co-Facilitator: [Dropdown Arrow]

Sort by Desc [Checkbox]

to End: [Field]

Active Users

- Alice Smith
- Dylan Clinician
- Dylan Lambrecht
- Dylan Test
- Howard Long
- Jack Frost
- Jackie Frost
- Jacob Denver
- Ron Dir
- Ron Low-Level Admin
- Ron Senior Clinician
- Ron Standard Admin
- Ron User

Disabled Users

- Samatha Jenkins

- Select Session Date
- Start Time and End Time
- Diagnosis can be added as part of the note if the client already has one assigned.
- If the client has a treatment plan, you can also view from here. You can copy and paste statements from the treatment plan to ensure your progress notes are following the treatment plan.

File > Progress Notes > Add Note

Note Info

Client: Test, Joe

Clinician: Ron Super Admin

Session Type: 100 - Individual Session

Session Date: Enter Date [Calendar Icon] Time: Start: [Clock Icon] to End: [Clock Icon] Duration: [Field]

Diagnosis: 103.0 Primary lesions of pinta / 304.40 Amphetamine Dependence

Note: [Text Area]

Level of Care: No Episode Assigned

Co-Facilitator: [Dropdown Arrow]

Sort by Description [Checkbox]

Diagnosis [Icon]

View Tx Plans [Icon]

- Type in your notes
- Select the **[Statements]** button if you have reusable statements you would like to use for this note

Using Statement Templates:

- Click the **[Add]** button to create statements to assist with commonly used phrases and templates for both Individual and Group.
- Select your statement from the list of available statements then click **[Use]** button to copy the statement into your Progress Note

PROGRESS NOTE – SETTING UP A GROUP

Setup a Group

- Any user can create their own group
- From the ribbon go to Setup down to Clinical click on Group Setup link to open the module.

The screenshot displays the AccuCare EHR and Billing System interface. At the top, there is a navigation bar with the AccuCare logo and a series of icons for Profile, Intake, ASI, Scheduler, Adm/Dis, Diagnosis, Notes, ToPlans, Forms, Chart, and Placement. The main content area is divided into four sections: Main, Other Tools, Clinical, and Reports. The Main section contains icons for Client Intake, Admission/Discharge, Diagnosis, Scheduler, Billing, and Client Chart. The Other Tools section contains icons for Custom Forms, Recovery Support, Prevention, and Session Logs. The Clinical section contains icons for Screening, Assessments, Patient Placement, Treatment Plan, Progress Notes, and Med Mgmt. The Reports section contains icons for Manager Reports, Data Analysis, Census, and System Questionnaires. On the right side, there is a vertical navigation menu with the following items: Welcome, Ron Super Admin; Setup (with a dropdown arrow); Log Out; Main; Agency; Users; Provider Info; Location of Service; Manage Permissions; Personalize Navigation Menu; System; Archive Clients; Custom Form Builder; Password Change; Report Headings; Scheduler Template; System Options; System Session Log; Billing; Business Info; Services; Provider Info; Payer; Contract Rates; Accounting Codes; Clinical; Client Categories; Follow-up Setup; Group Setup (highlighted with a blue bar and a mouse cursor); Level of Care; Placement Domains; Treatment Service Review; Referral Letters; Session Types; and Decision Support.

- To create a new group select **[Add New Group]** button



- Select Group Facilitator by clicking the drop arrow
- Type in Group Name
- Click **[Add Clients]** to search for the clients

Group Setup - Add / Edit Group

Add New Group

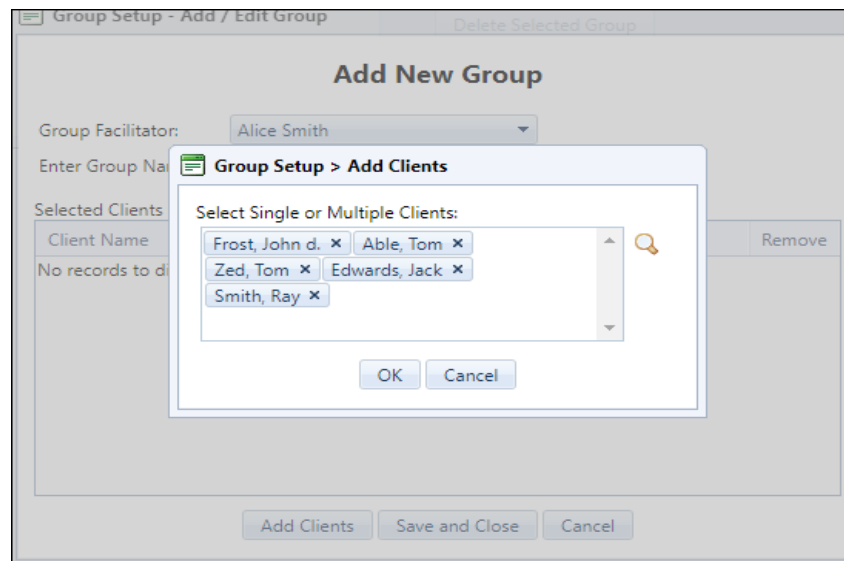
Group Facilitator:

Enter Group Name:

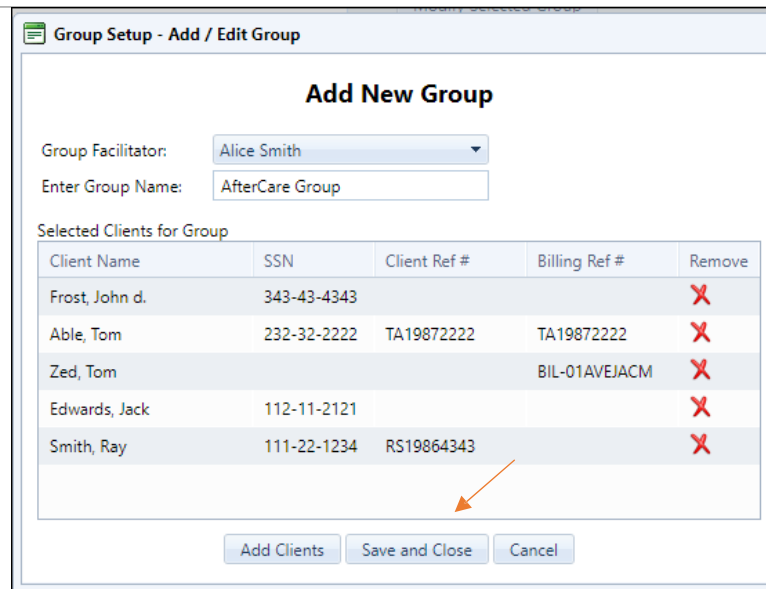
Selected Clients for Group

Client Name	SSN	Client Ref #	Billing Ref #	Remove
No records to display.				

- Start selecting your clients by typing in 2 letter to the last name and selecting them
- Once you have select all you clients for the group client the [OK] button to add them your group



- Review your list to ensure all clients for this group have been selected
- Click the [Save and Close] button to create your new group



PROGRESS NOTES – CREATE IN A GROUP NOTE

Create a Group Note

- Change the Select by Radio button to Group
- Click the drop down arrow to select your group from the picklist
- You will see your group of clients on the list to the right
- Click the [Add Group Note] to go the next dialog box

File > Progress Notes

Select by: Client Group

Group: Aftercare Group

- AA Meeting
- Aftercare Group
- Art Therapy
- Dylan Stop Touching
- New Ron Group

Name	SSN	Client Reference #
Able, Tom	232322222	TA19872222
Edwards, Jack	112112121	
Frost, John d.	343434343	
Smith, Ray	111221234	RS19864343
Zed, Tom		

Code Description File/Sign Status Print/File Selection

Clear Filters Enter Date to Enter Date Apply Filters

No records to display.

Add Group Note Add Individual Note Add From Scheduler View Note Delete Note Print File and Sign Close

- Your given group of review of you clients. All clients are automatically selected.
- Clicking the [**Group Setup**] button gives you the opportunity to add or remove clients to you group list
- If client didn't show remove the check so they don't get the group note
- Once you are satisfied the list is complete click the [**Next**] button to next dialog box

File > Progress Notes > Group Notes

Choose a Group: Aftercare Group **Group Setup**

Client Name	SSN	Client Reference #	Select All
Able, Tom	232322222	TA19872222	<input checked="" type="checkbox"/>
Edwards, Jack	112112121		<input checked="" type="checkbox"/>
Frost, John d.	343434343		<input checked="" type="checkbox"/>
Smith, Ray	111221234	RS19864343	<input checked="" type="checkbox"/>
Zed, Tom			<input checked="" type="checkbox"/>

Cancel **Next >**

- Just like an Individual Note you will select the Session Type, Pick a Co- Facilitator (if applicable), Session Date, Start and End time.
- **Under Group Note** textbox type in notes you want everyone in this group to receive
- **Under Individual Note for Group Members** textbox add the diagnosis and type in individual note.
- Once you have type in both the group note and individual notes for your group click the **[Save]** button.

File > Progress Notes > Add Note

Note Info

Group: Aftercare Group

Clinician: Ron Super Admin

Co-Facilitator:

Session Type: Sort by Description

Session Date: Time: Start: to End: Duration:

Group Note:

Group Note goes here. Everyone in the group will get this note.

Enter Individual Note for Group Members:

Able, Tom

Level of Care:

Diagnosis:

This is an individual note which is associated to this client .

Edwards, Jack

Level of Care:

Diagnosis:

This is an individual note which is associated to this client .

Frost, John d.

Level of Care:

Diagnosis:

This is an individual note which is associated to this client .

< Back Statements Save Cancel

- In this example and below you can see the client received the Group note and their own personalized note appended to the group note.

File > Progress Notes

Select by: Client Group
 Group: Aftercare Group

Name	SSN	Client Reference #
Able, Tom	232322222	TA19872222
Edwards, Jack	112112121	
Frost, John d.	343434343	
Smith, Ray	111221234	RS19864343
Zed, Tom		

Retain Filters

Note Selection	Session Date	Code	Description	File/Sign Status	Print/File Selection
<input checked="" type="checkbox"/>	02/15/2018	103	Group Counseling	--	<input type="checkbox"/>
<input type="checkbox"/>	01/22/2018	103	Group Counseling	--	<input type="checkbox"/>
<input type="checkbox"/>	01/16/2018	100	Individual Session	--	<input type="checkbox"/>
<input type="checkbox"/>	09/27/2017	110	Crisis Intervention	Signed	<input type="checkbox"/>
<input type="checkbox"/>	04/13/2017	201	Client without child in program	Signed	<input type="checkbox"/>
<input type="checkbox"/>	04/13/2017	103	Group Counseling	Signed	<input type="checkbox"/>
<input type="checkbox"/>	04/13/2017	110	Crisis Intervention	Signed	<input type="checkbox"/>

File > Progress Notes > View Note

Note Info

Client: Able, Tom Level of Care: - Level III.3 Monitored inpatient: (ABCT) ABC 1

Clinician: Ron Super Admin Co-Facilitator:

Session Type: 103 - Group Counseling Sort by Description

Session Date: 01/22/2018 Time: Start: 9:00 AM to End: 10:00 AM Duration: 1:00

Diagnosis:

Note:

Group Note goes here. Everyone in the group get this note
 This is an individual note which is associated to this client