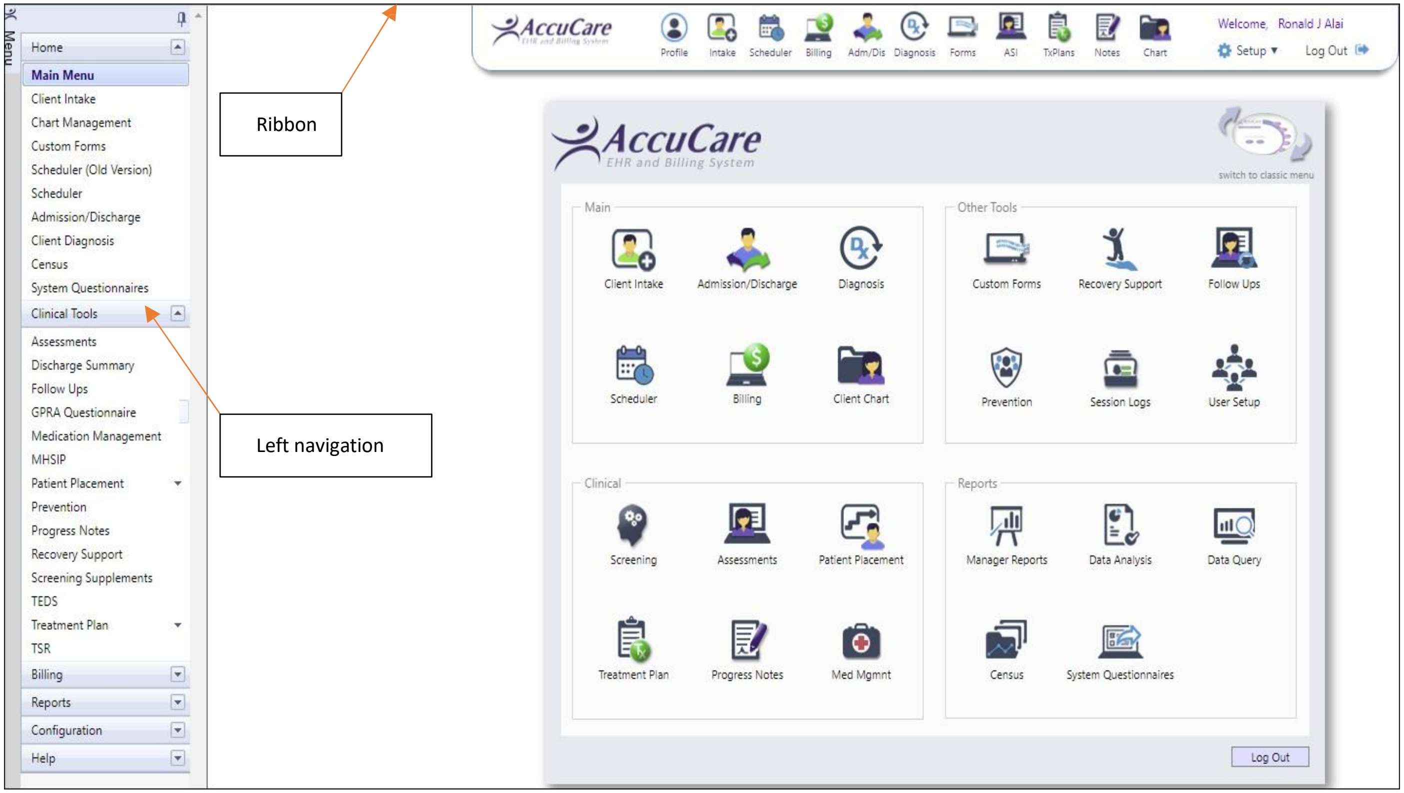
AccuCare Workflow Guide

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

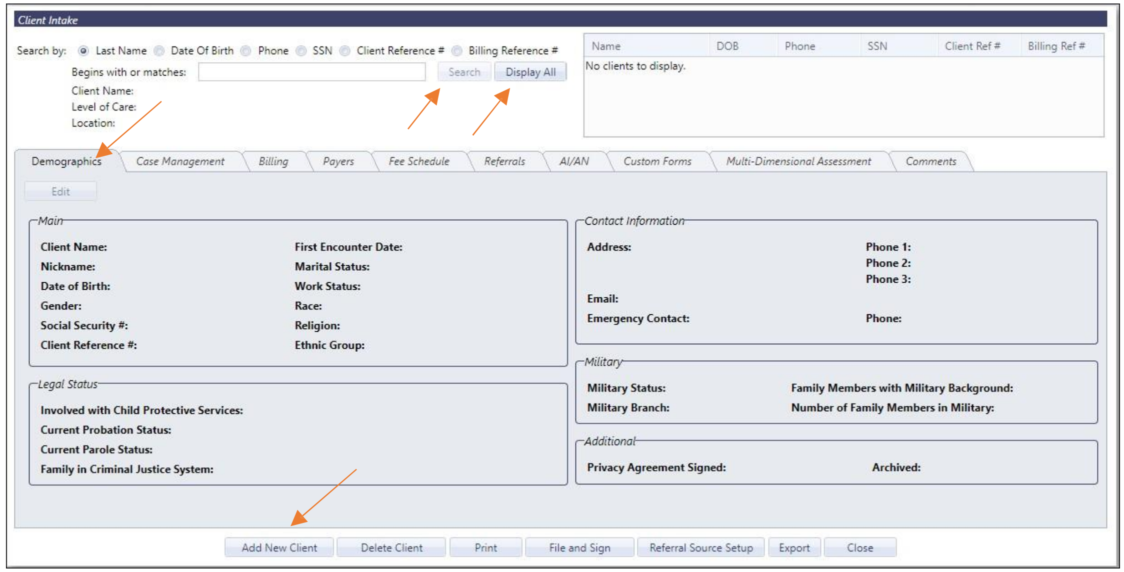
Main Menu:

- 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

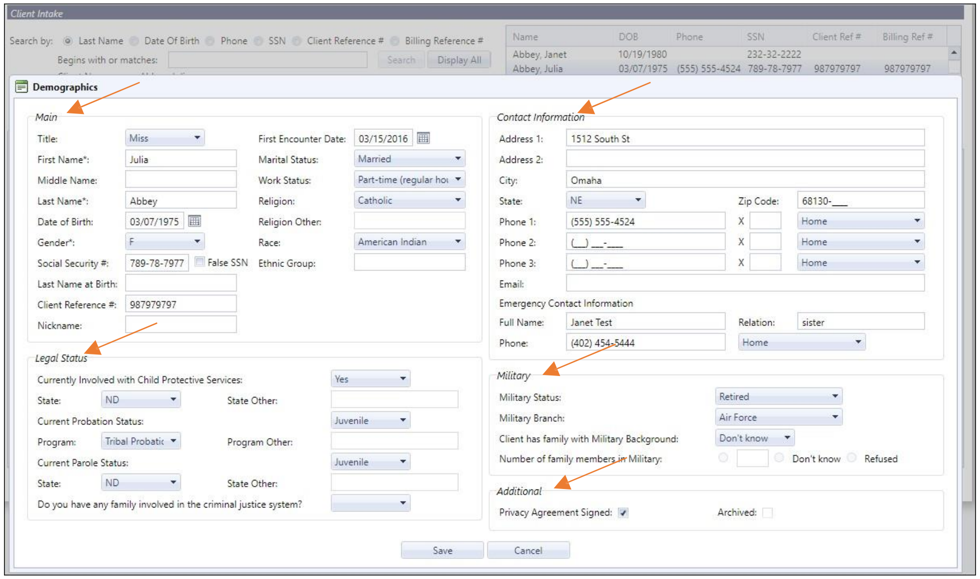


Adding New Client: Client Intake

- 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.

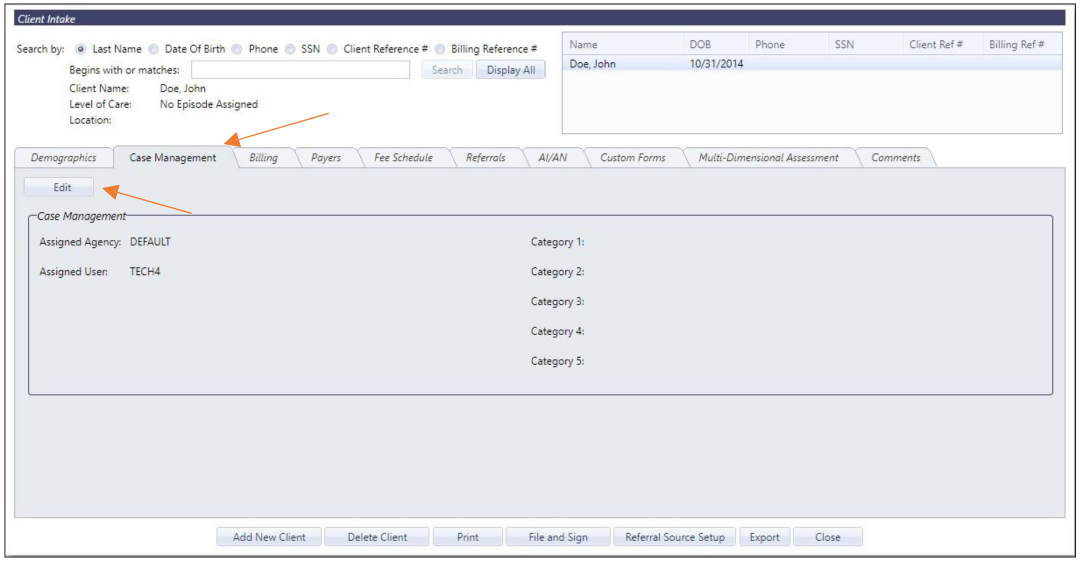


- Fill out the fields in ***Main, Contact Information, Legal Status, Military*** and ***Additional*** of the demographic dialog box.
- Not all fields are required.
- ***Recommend discussing as group to gain consensus on what field should be filled out.***

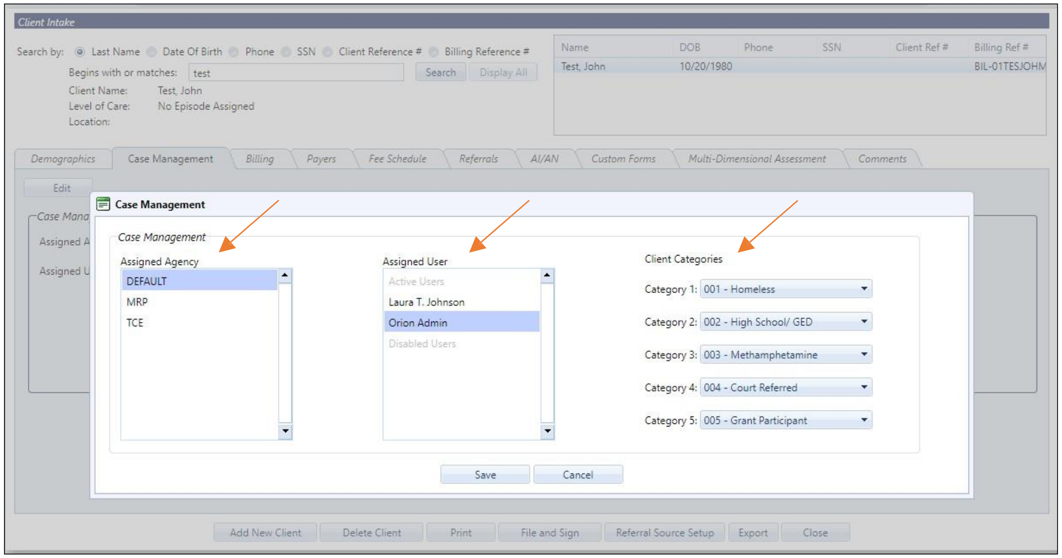


Case Management Tab:

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

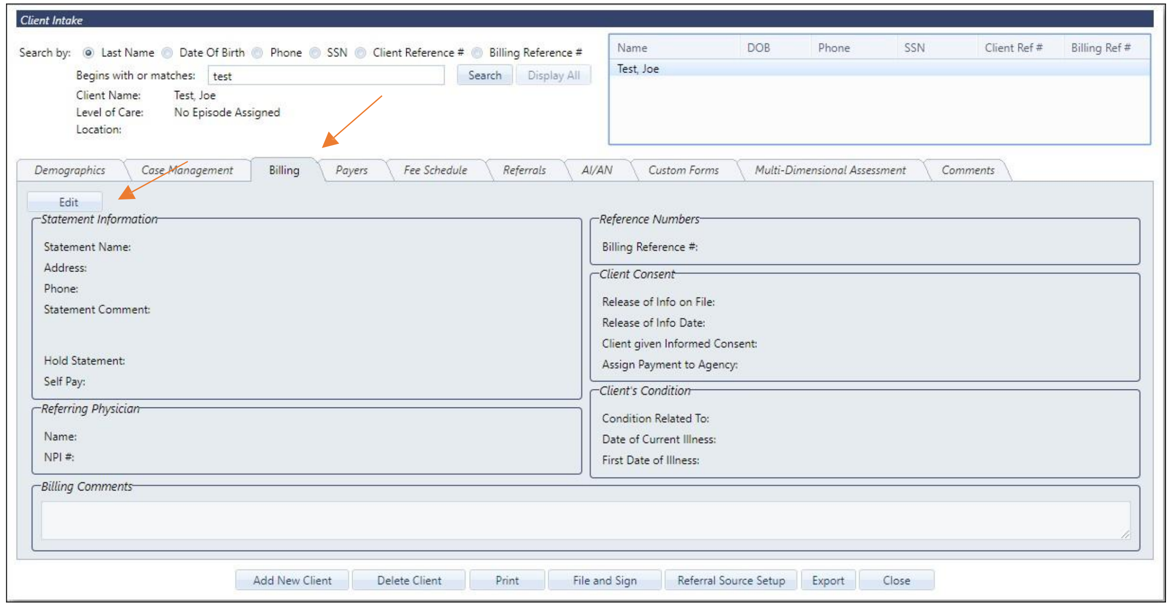


- **Assigned Agency** will show you which agency and group of clinicians the client is assigned to.
- **Assigned User** is usually the person who added the client to the database as new client.
- **Client Categories** allows you assign up to 5 tags per client from a picklist created in Setup > Client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

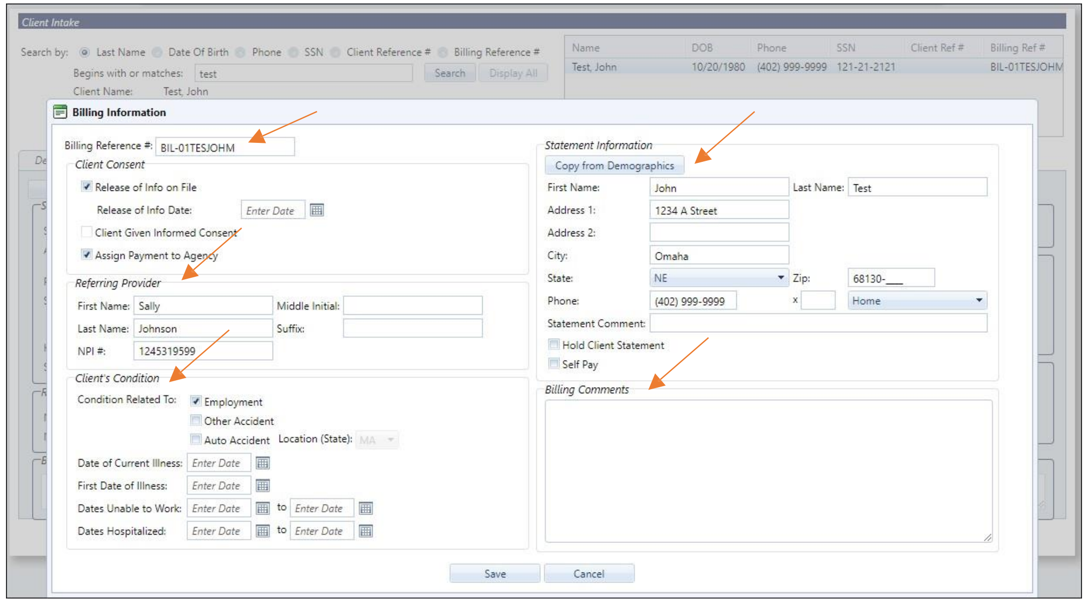


Billing Tab:

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

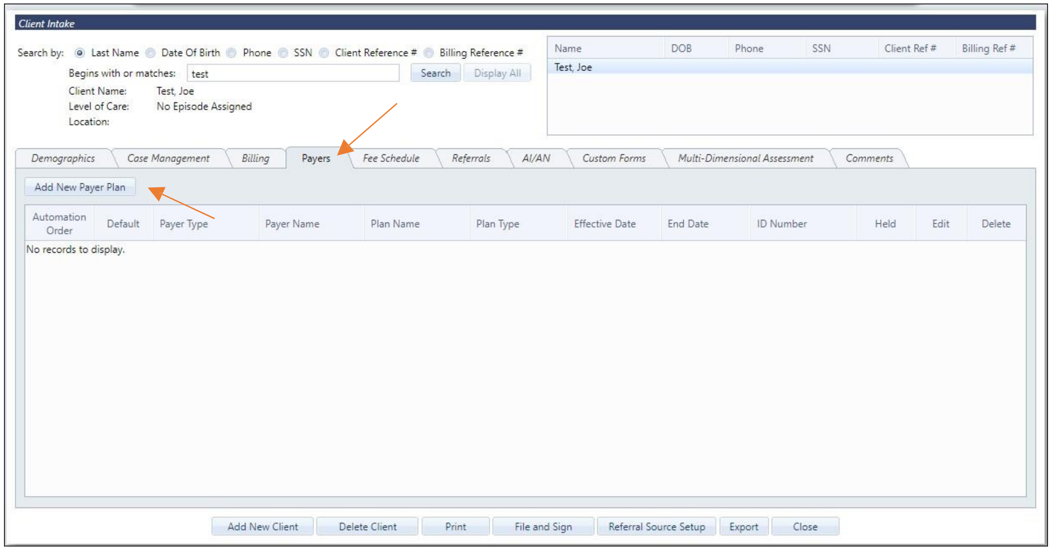


- The newly added client is automatically assigned a Billing Reference number once you open this dialog box
- You will need to click on [**Copy form Demographics]** button.
- Fill out (*if applicable*) **Referring Provider, Client's Condition** and **Billing Comments**.

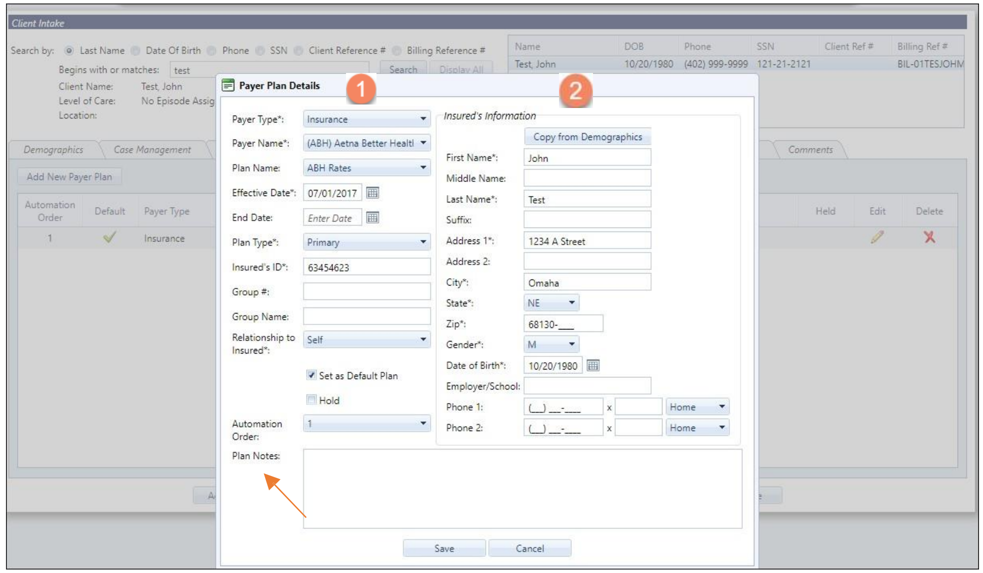


Payers Tab

- 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.

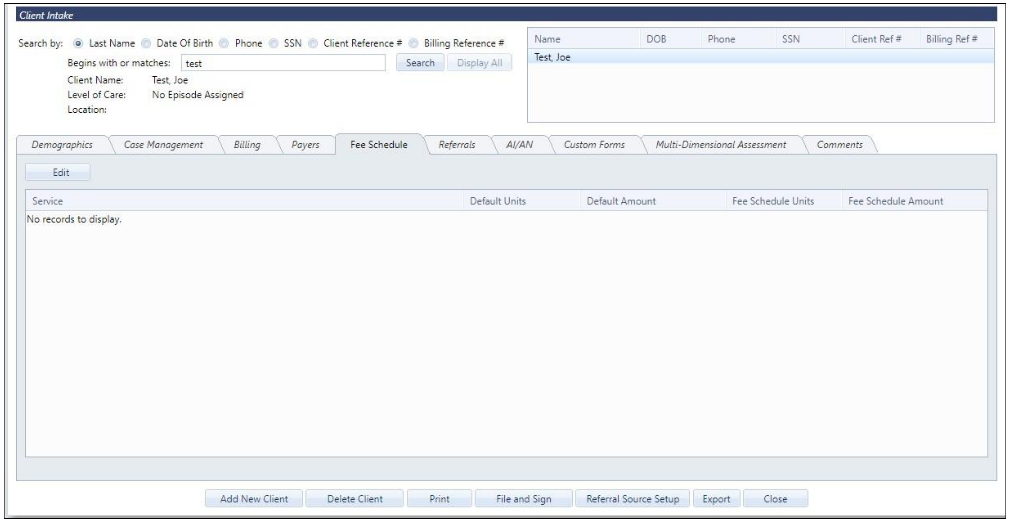


- Go through column 1 choosing from picklists, enter dates and type in information.
- Under column 2 click the [**Copy from Demographics**] button
- Put in any **Plan Notes** (if applicable)

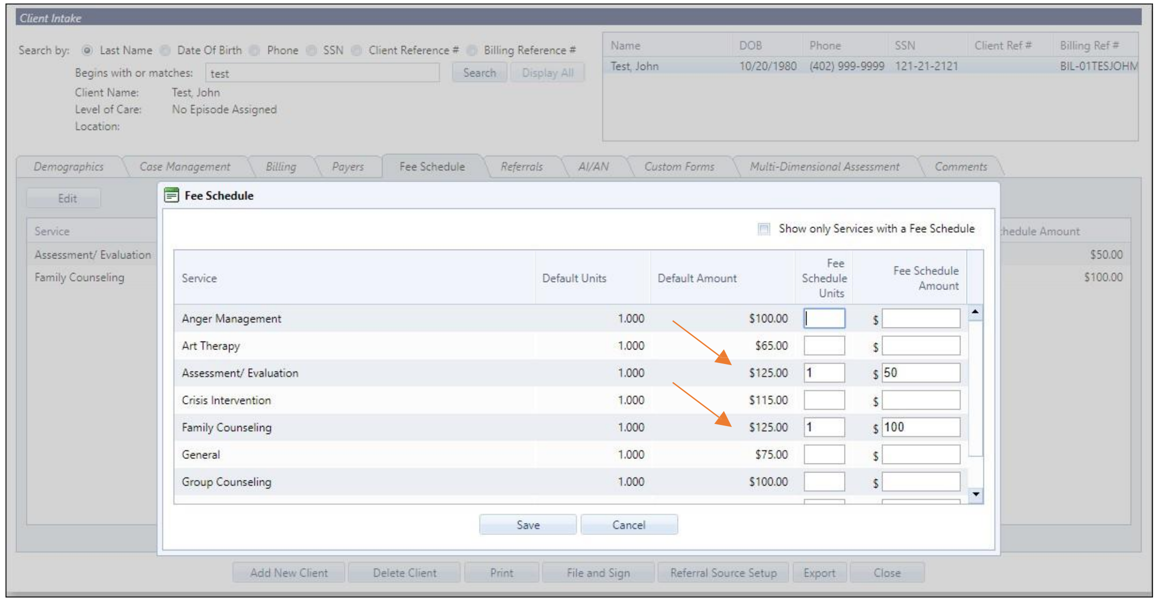


Fee Schedule Tab

- 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

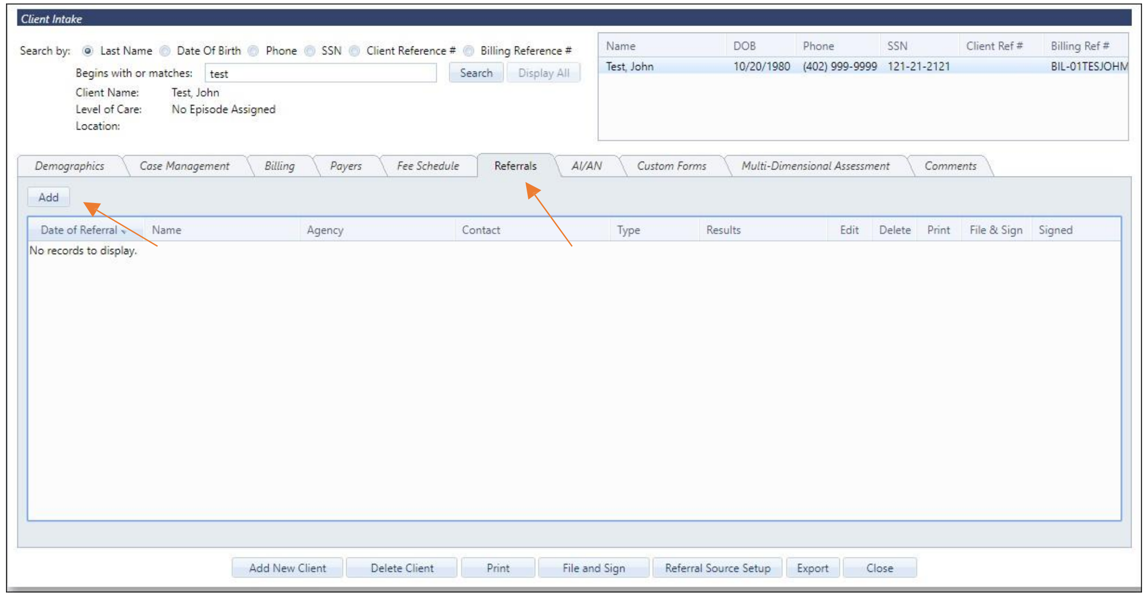


- You can assign a fee schedule amount to override the client's insurance billing.
- Select the services you wish to assign the client by typing in the Fee Schedule Units and Fee Schedule Amount.

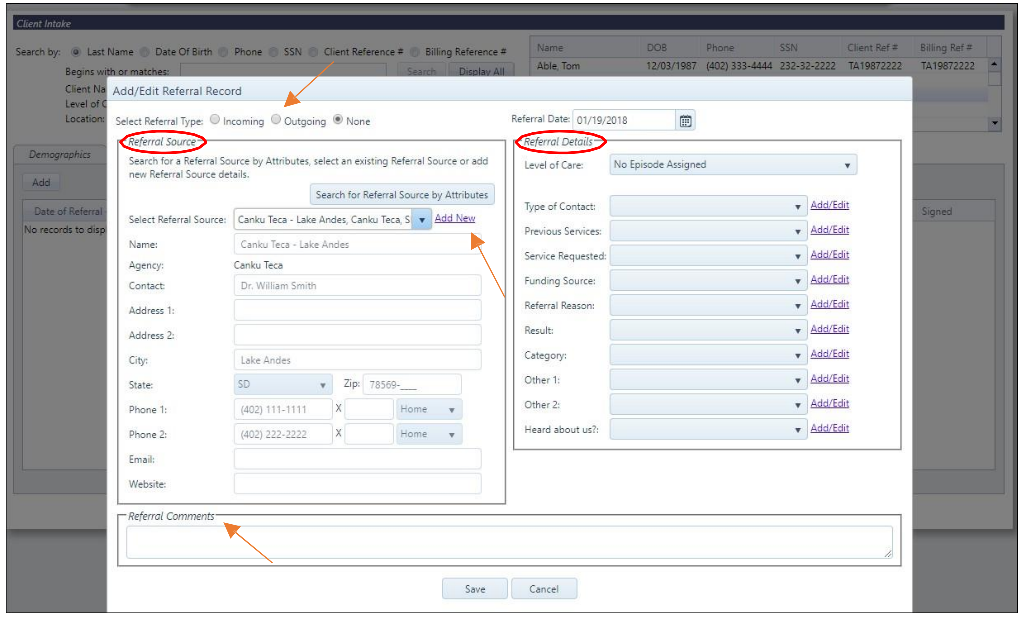


Referral Tab

- 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.

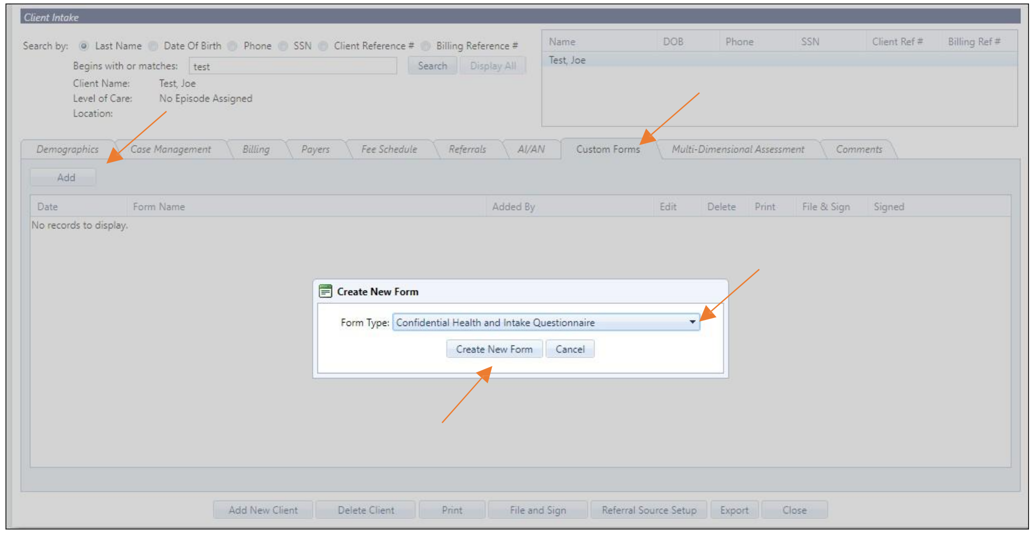


- Choose the radio button for type of referral you are creating
- You can select an existing **Referral Source** from the drop down list or create a new one to be added to the list by clicking on the *Add New* link
- Under **Referral Details** you can tag more details to the referral record.
- You can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

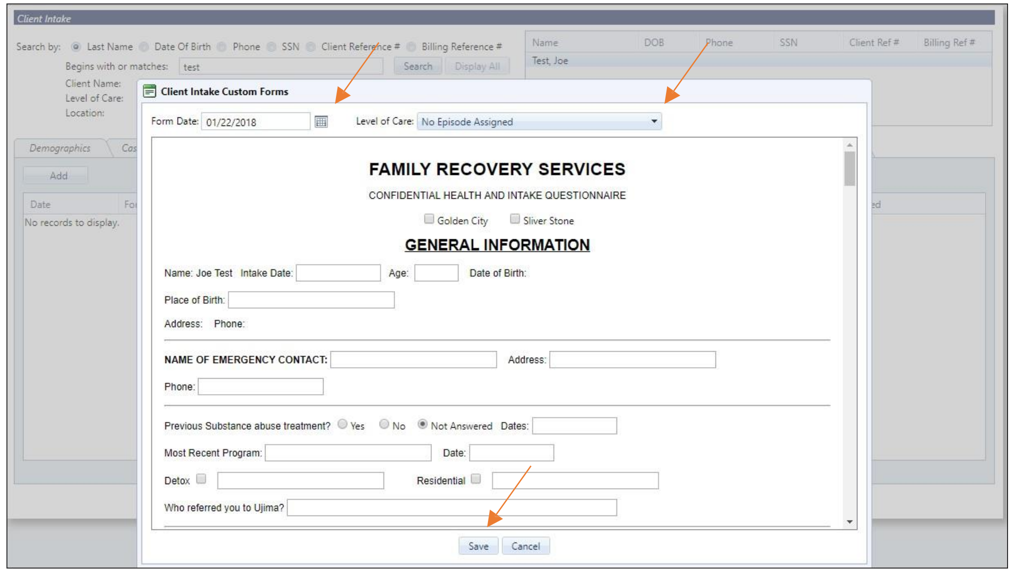


Custom Forms Tab:

- 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

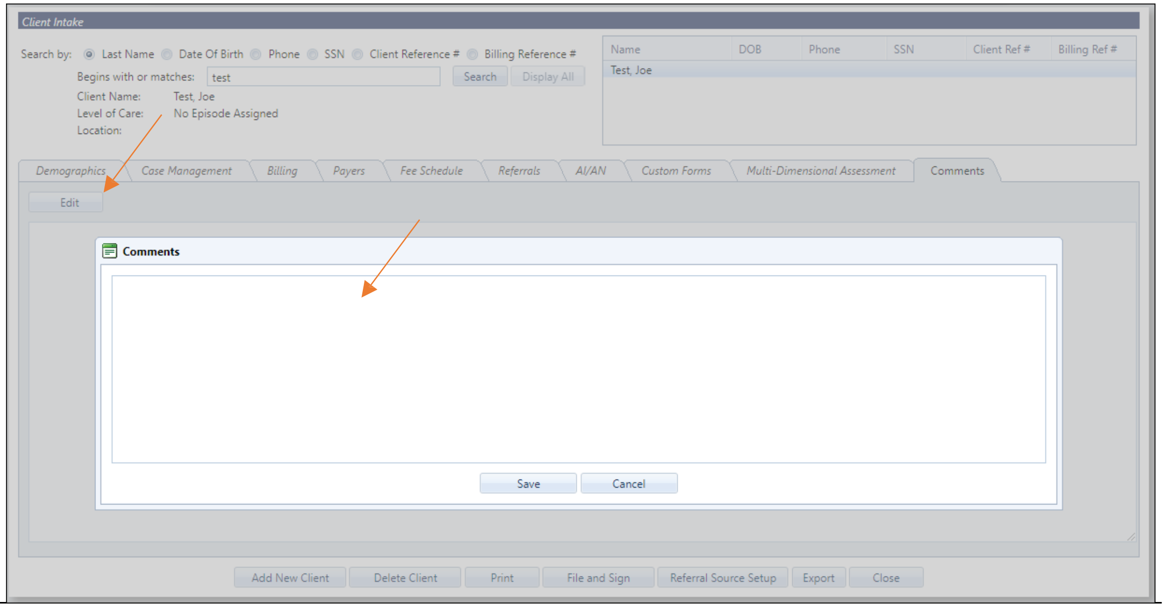


- Here is an example the of a published forms
- Select a Level of Care from picklist if available
- Collect information from client to fill out form
- Save when done to add to you client's record



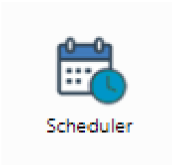
Comments Tab

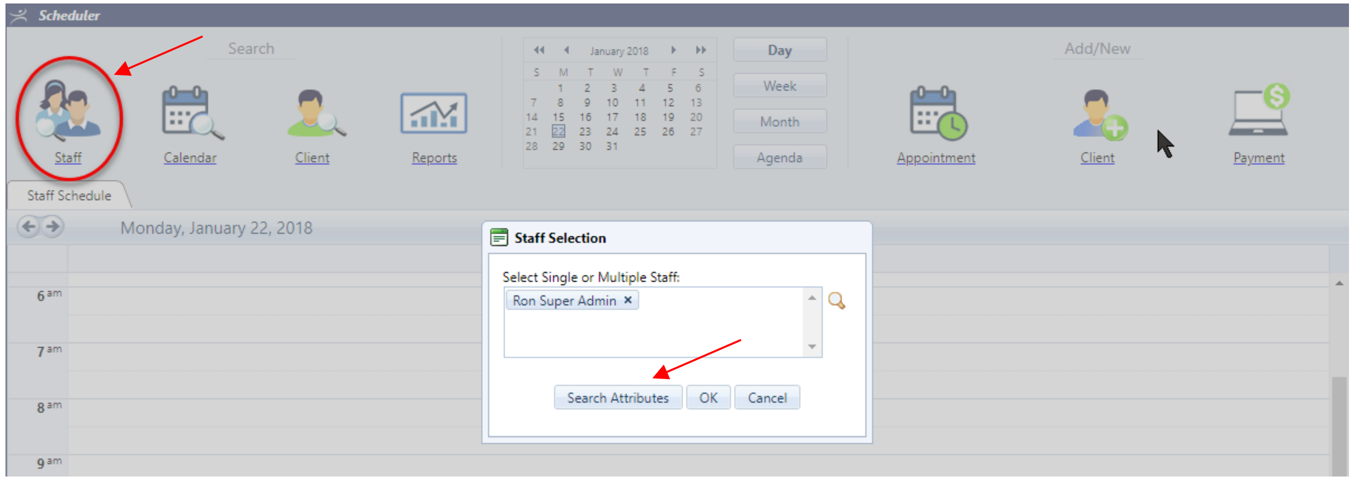
- Click the Comments Tab
- To add other comments click the [**Edit**] button
- This dialog box can be used for general comments and notes



SCHEDULER: SEARCH FOR STAFF ATTRIBUTES

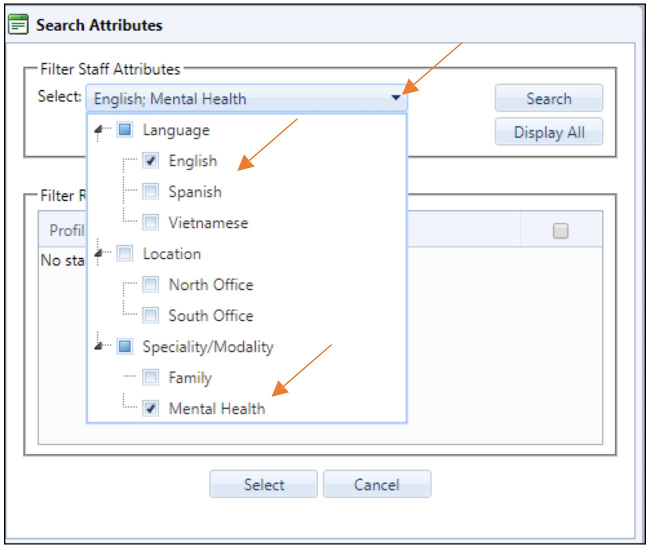
Search for Staff via attributes:

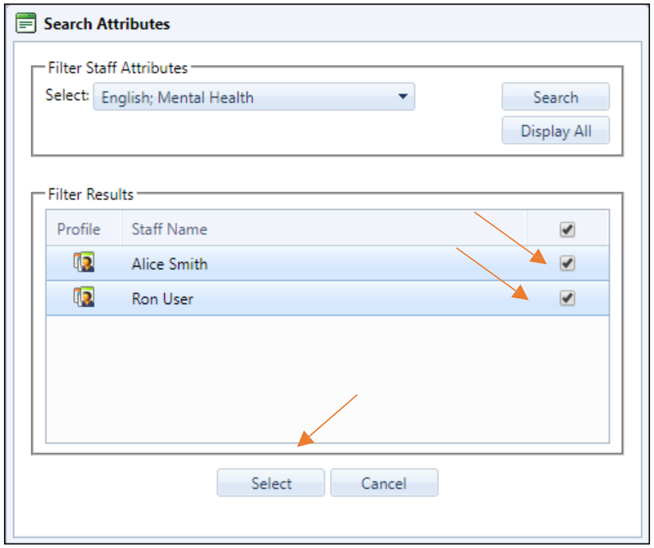




- Open the Scheduler Module
- Click on the Staff Icon
- To find staff with the attributes you are looking for – click the [**Search Attributes**] button

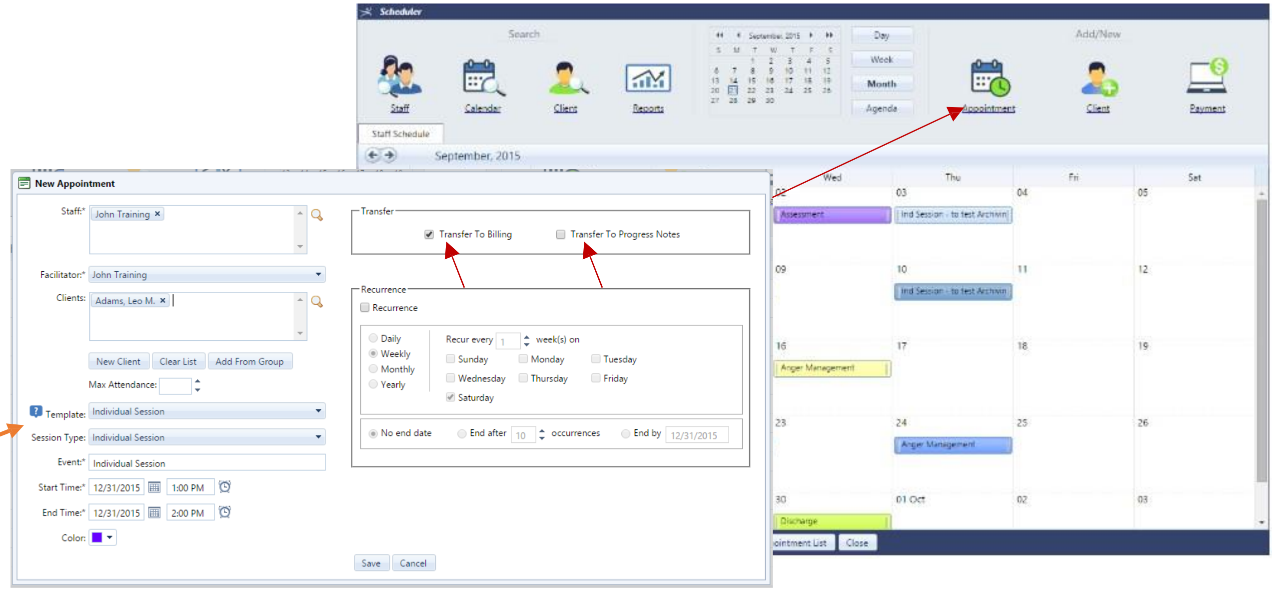
- Click the drop down picklist to see the list of attributes created by your organization
- Check the appropriate attributes to find the staff members
- Click the [**Search**] button to display those staff members from the attributes you selected
- Check the box for each staff member and click the [**Select**]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





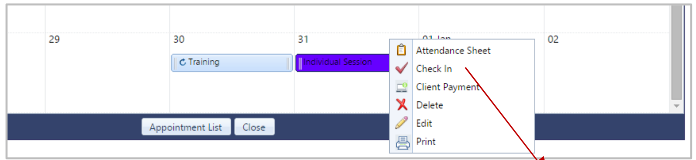
Add New Appointment:

- 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

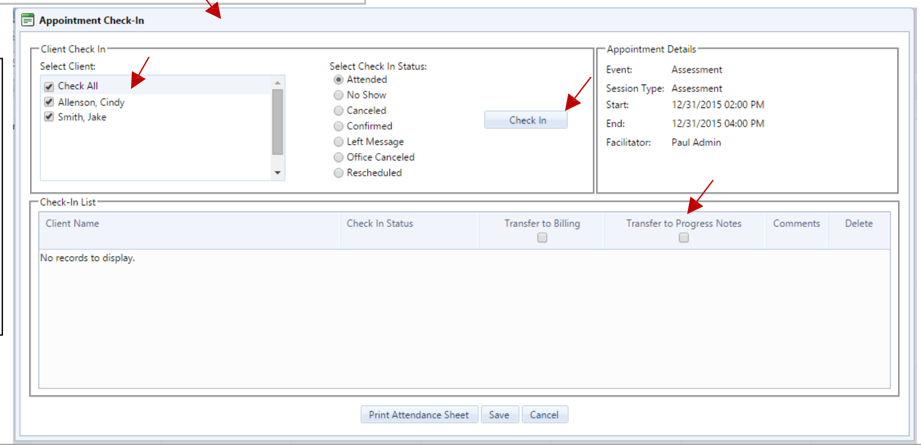


Check-in Appointments:

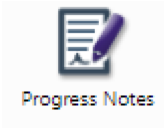
- After the appointment is complete, you can check in the client by right clicking on the appointment and selecting the "Check In" icon.
- This allows user to "check in" clients from the appointment and assign the appropriate check in status.
- By checking in the client, this will allow users to track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



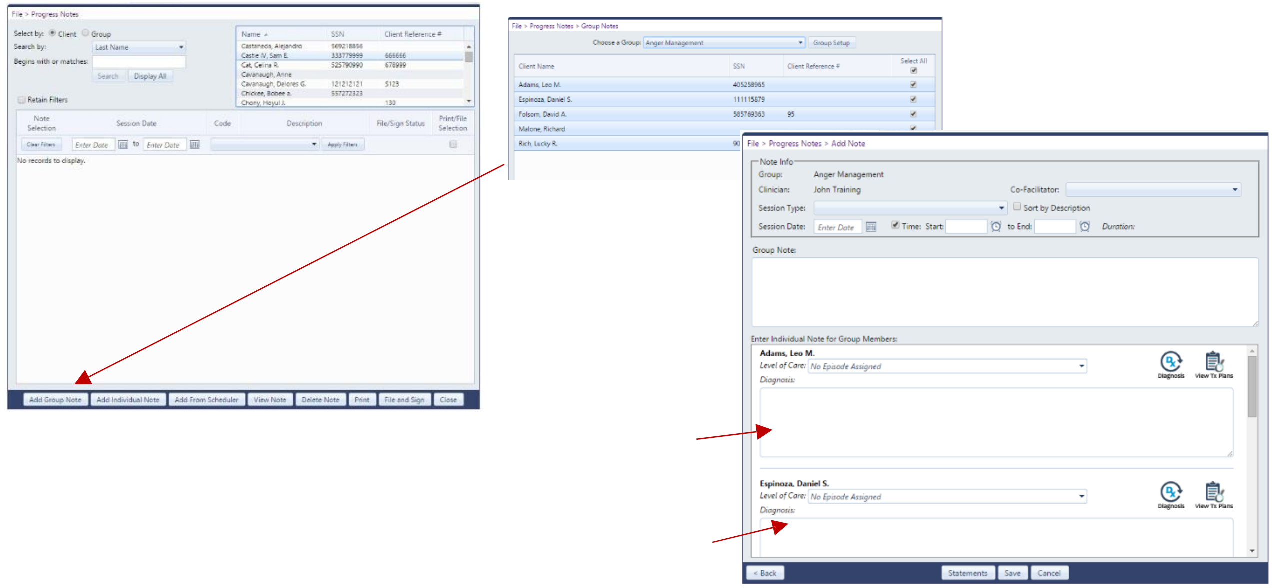
NOTE: Checked In clients that have "Transfer to Progress Notes" selected, will allow the appointment to be transferred in progress notes automatically (see Progress Notes section)



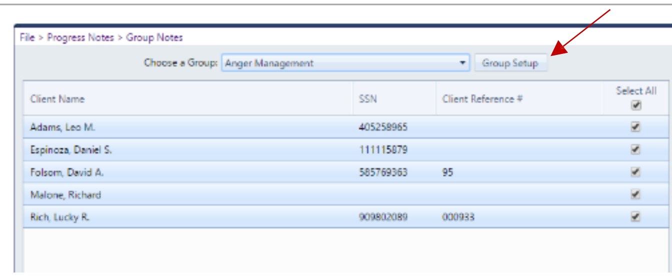
Creating Progress Notes

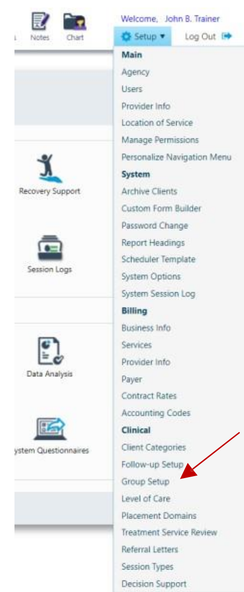


- Create individual or group notes
- For group notes, you can create one group note to go to all clients in the group, but also personalize each client's note that will append to their group note.



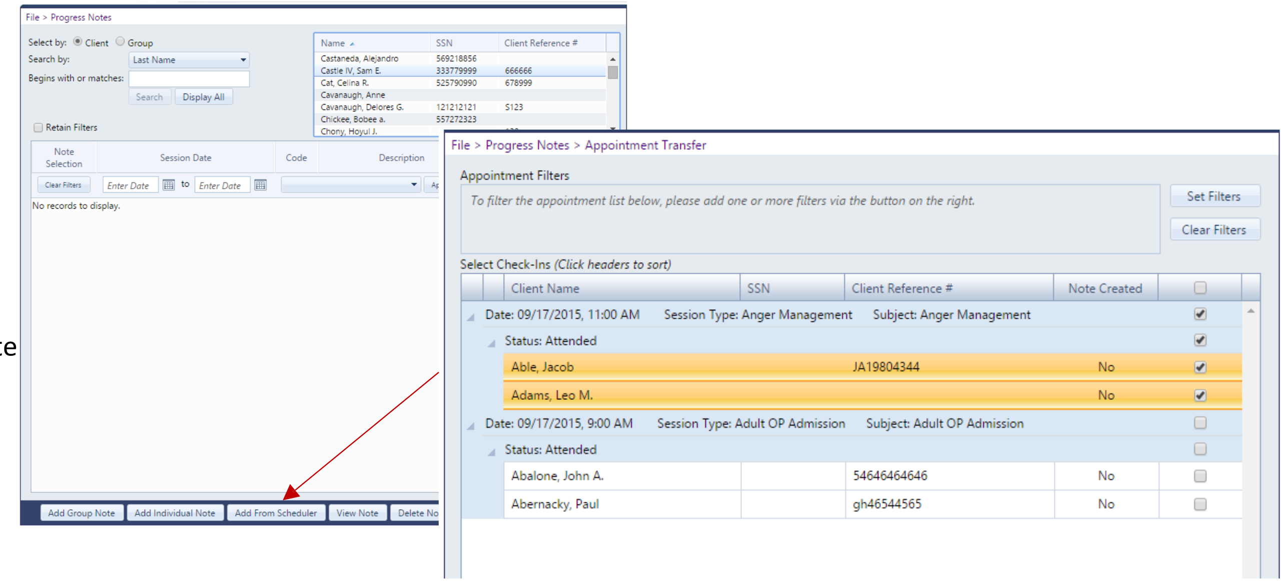
- NOTE: you can create and modify clients in groups by selecting "Group Setup" or by the Setup drop down list from the top Ribbon.





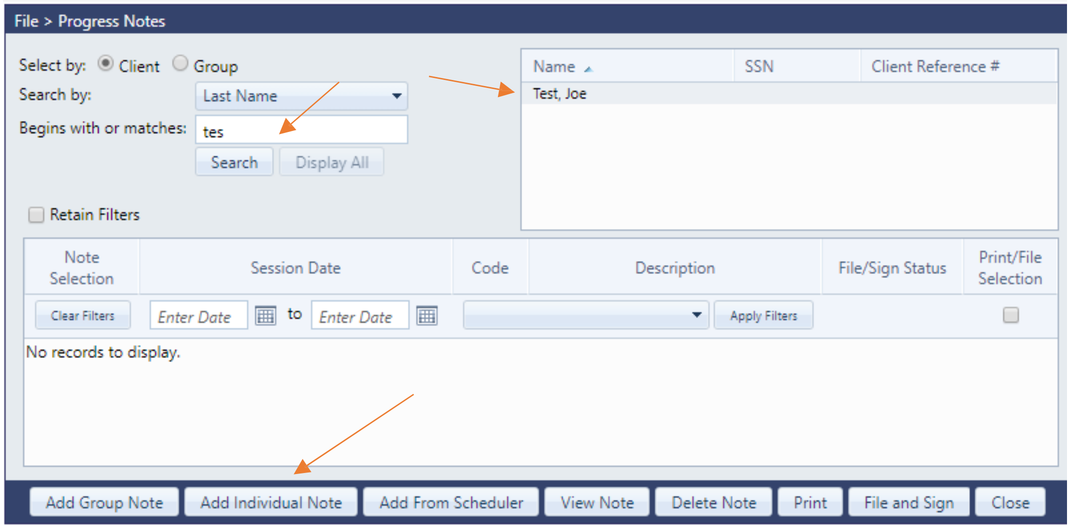
<u>Progress Notes – add from Scheduler</u>

- 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.



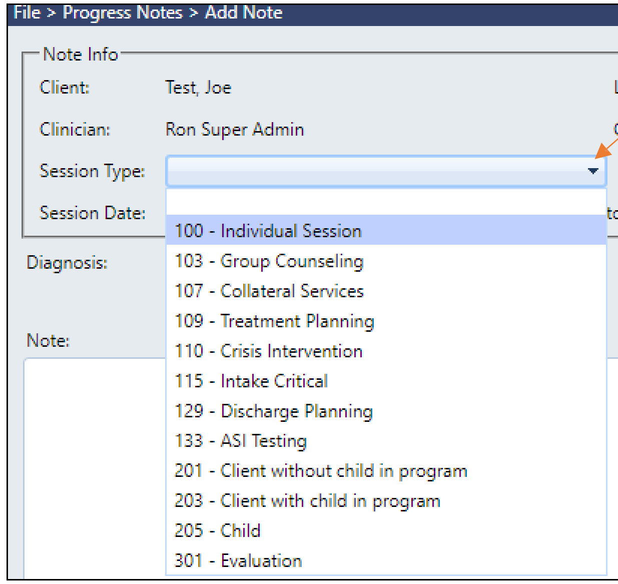
Create a Client note:

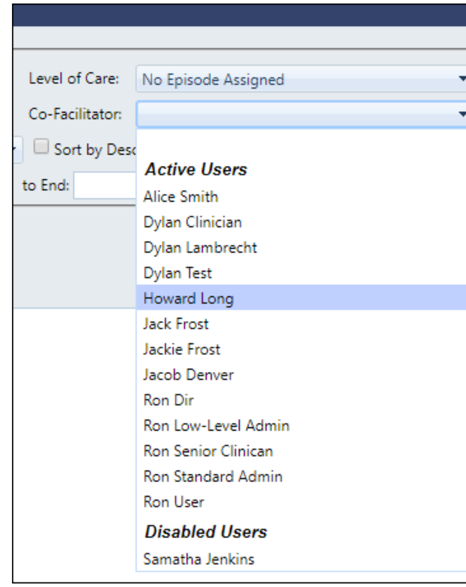
- Search for the client (unless you already have the client selected) and click the [**Add Individual Note**] button



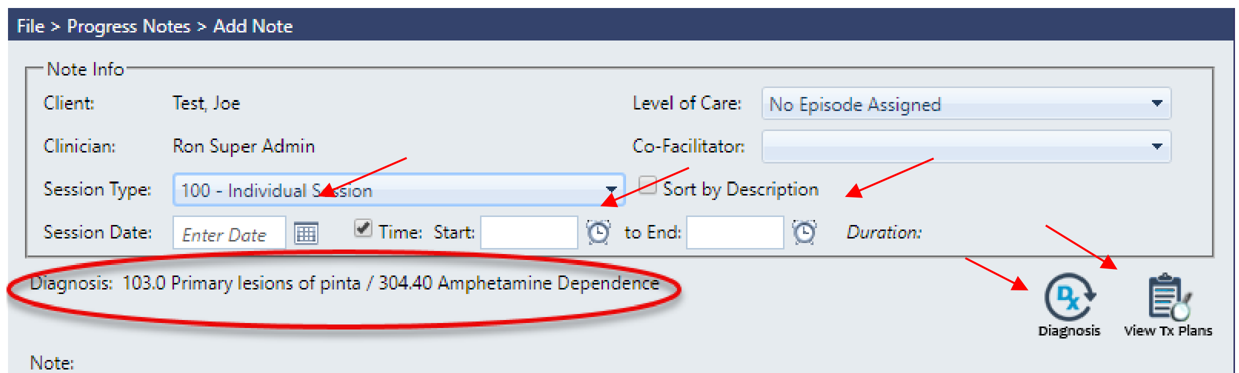
Filling out Note Info:

- 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.

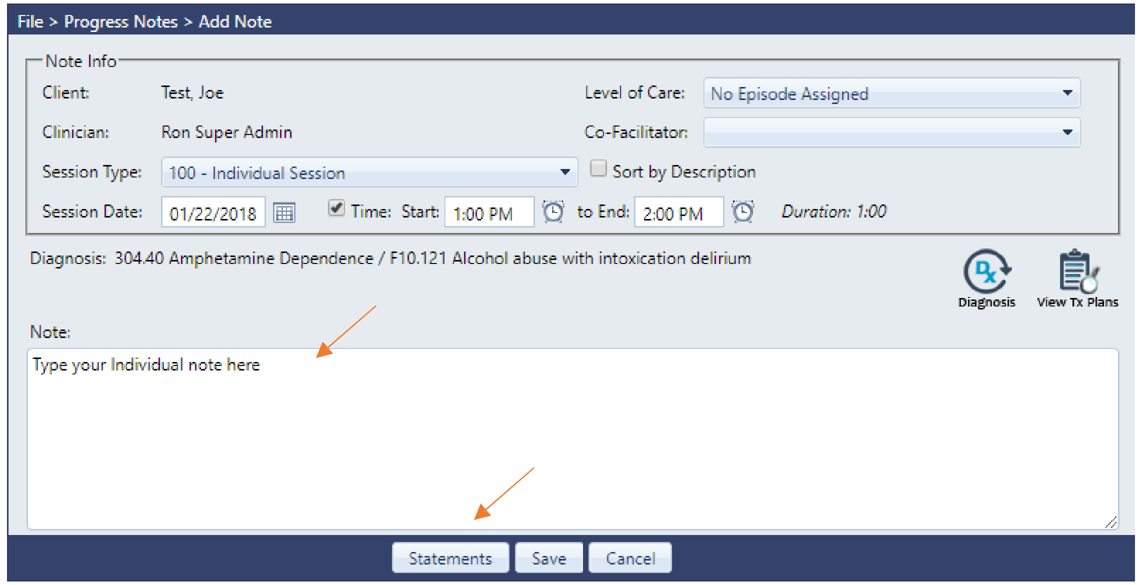




- Select Session Date
- Start Time and End Time
- Diagnosis can be added as part of the note if the client already has one assigned.
- If the client has a treatment plan, you can also view from here. You can copy and paste statements from the treatment plan to ensure your progress notes are following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

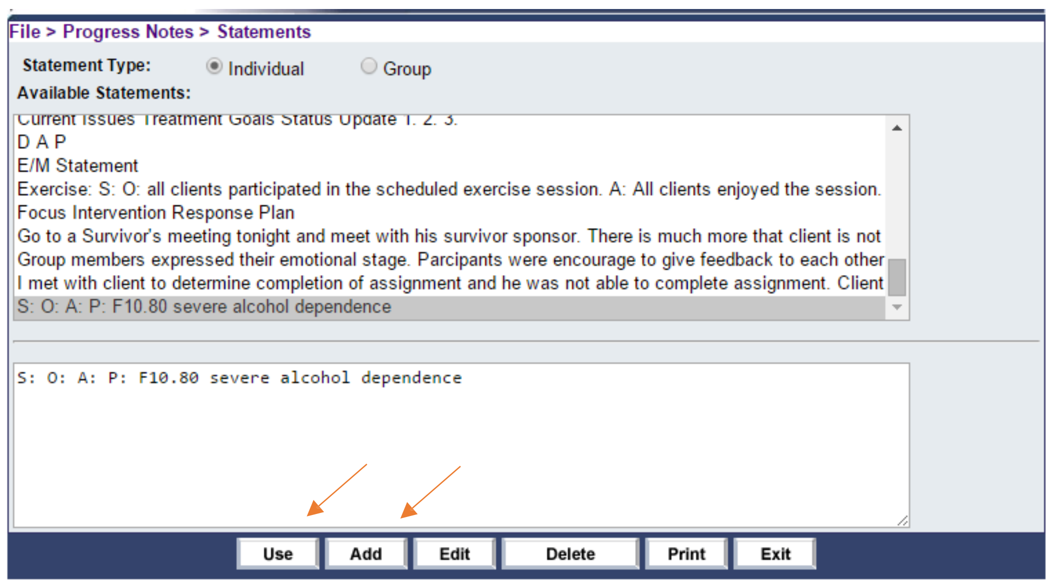


- Type in your notes
- Select the [**Statements**] button if you have reusable statements you would like to use for this note



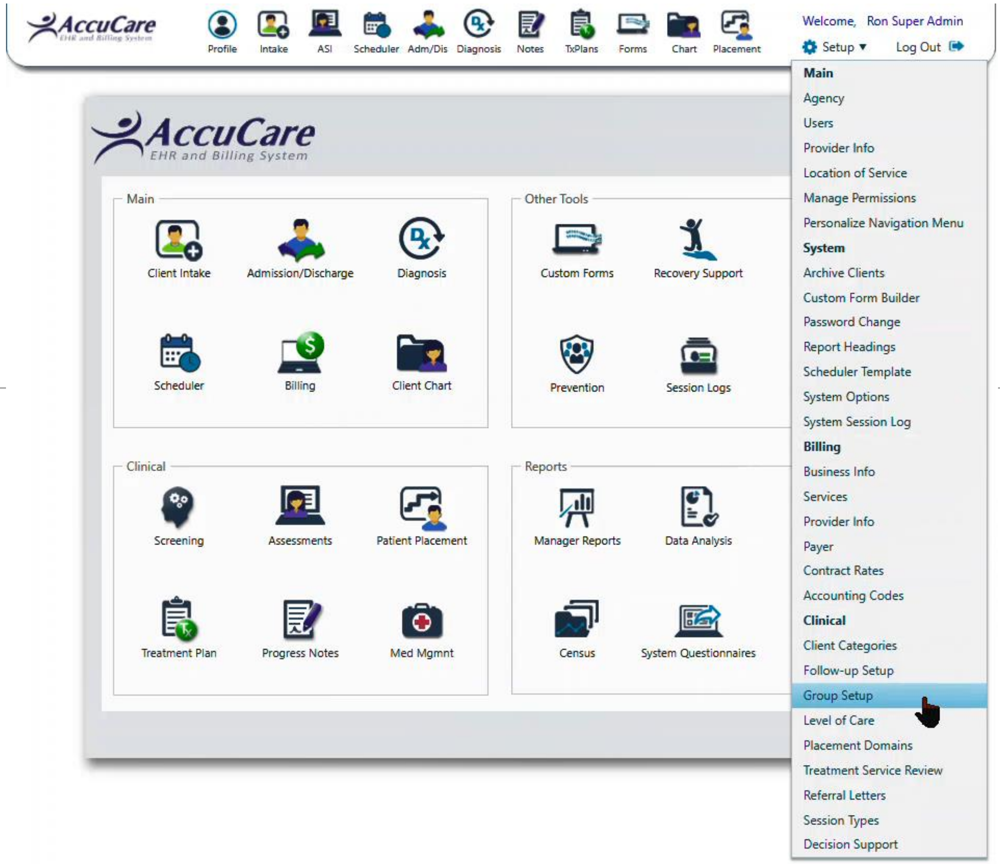
Using Statement Templates:

- 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

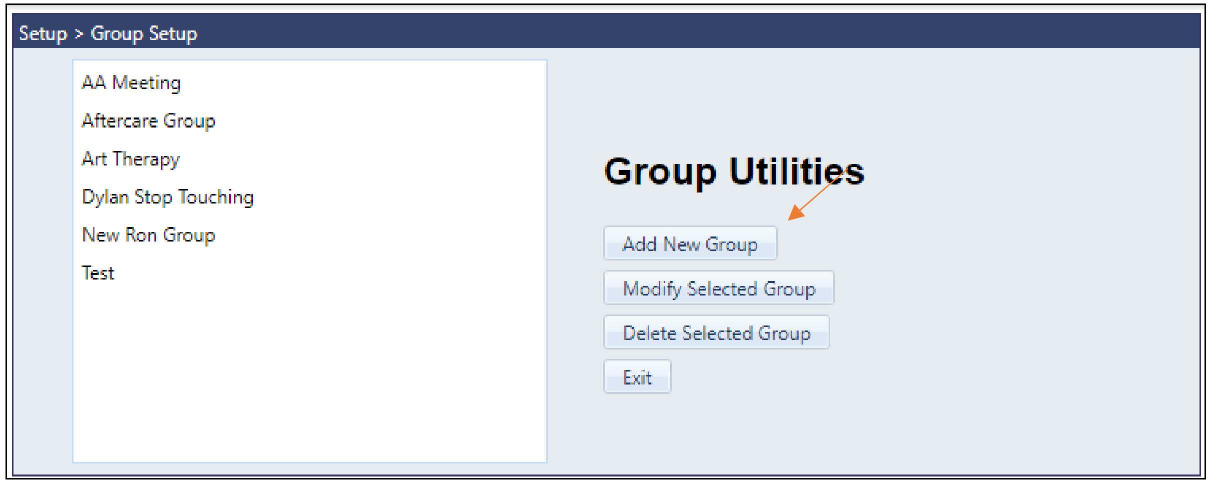


Setup a Group

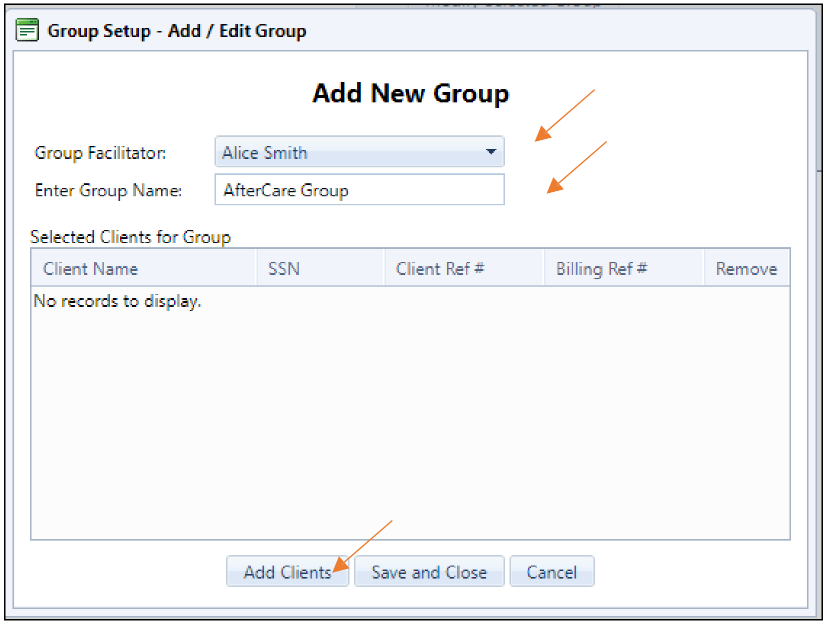
- Any user can create their own group
- From the ribbon go to Setup down to Clinical click on Group Setup link to open the module.



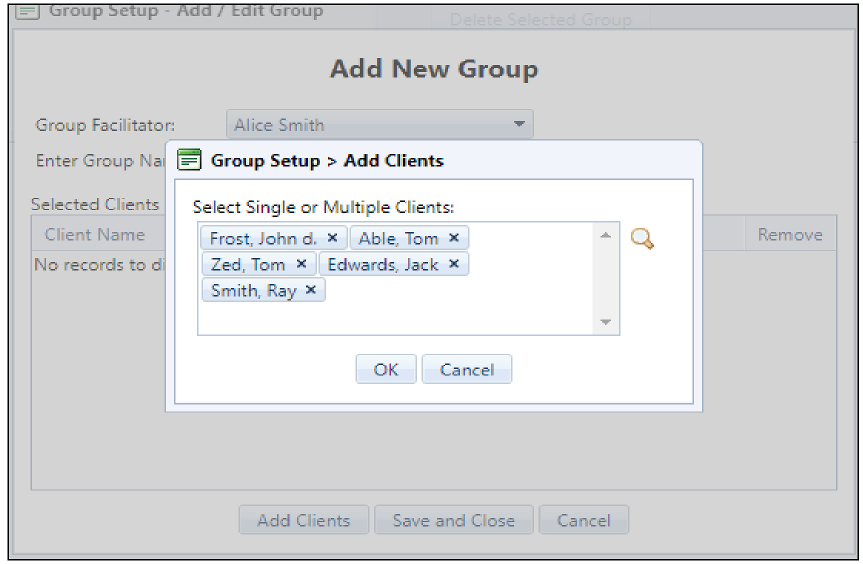
- To create a new group select **[Add New Group]** button



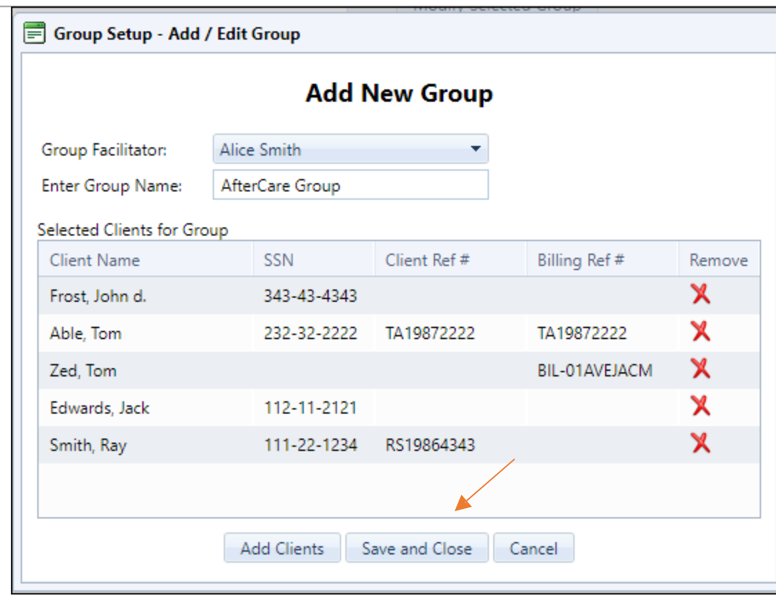
- Select Group Facilitator by clicking the drop arrow
- Type in Group Name
- Click [**Add Clients**] to search for the clients



- 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

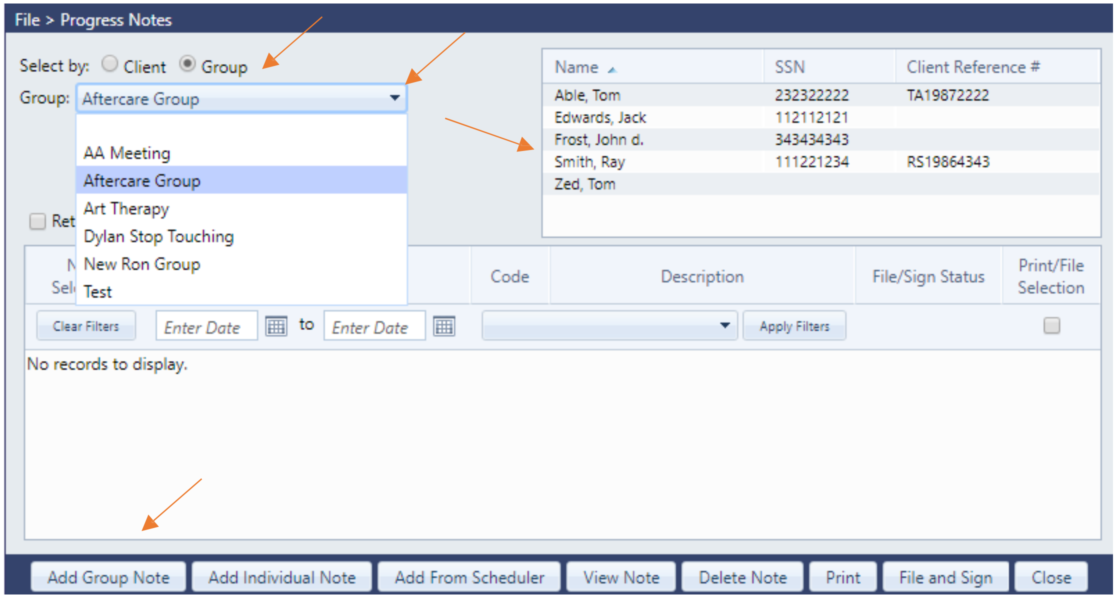


- Review your list to ensure all clients for this group have been selected
- Click the [**Save and Close]** button to create your new group

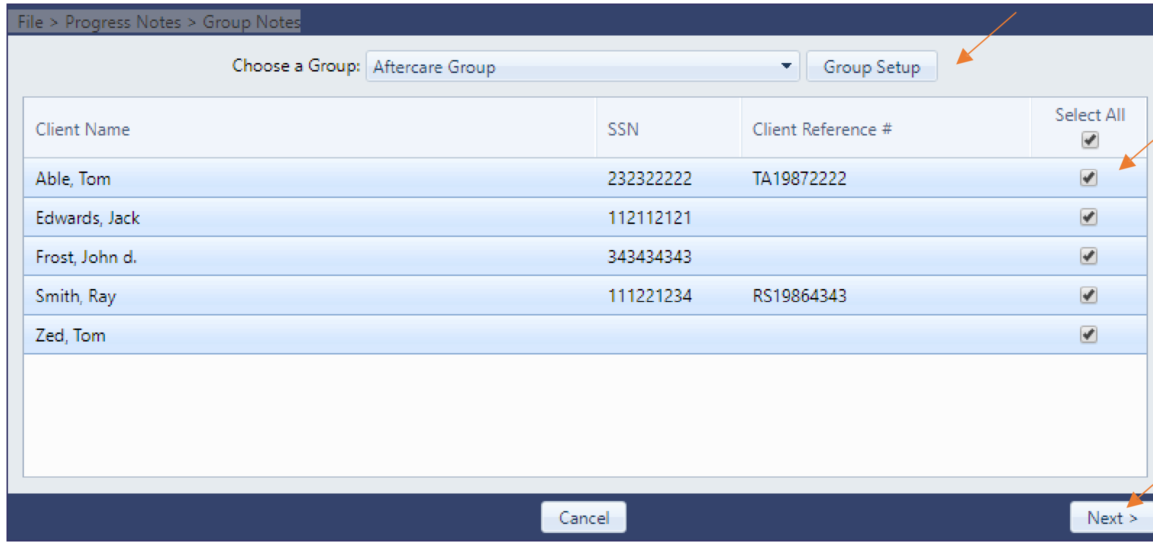


Create a Group Note

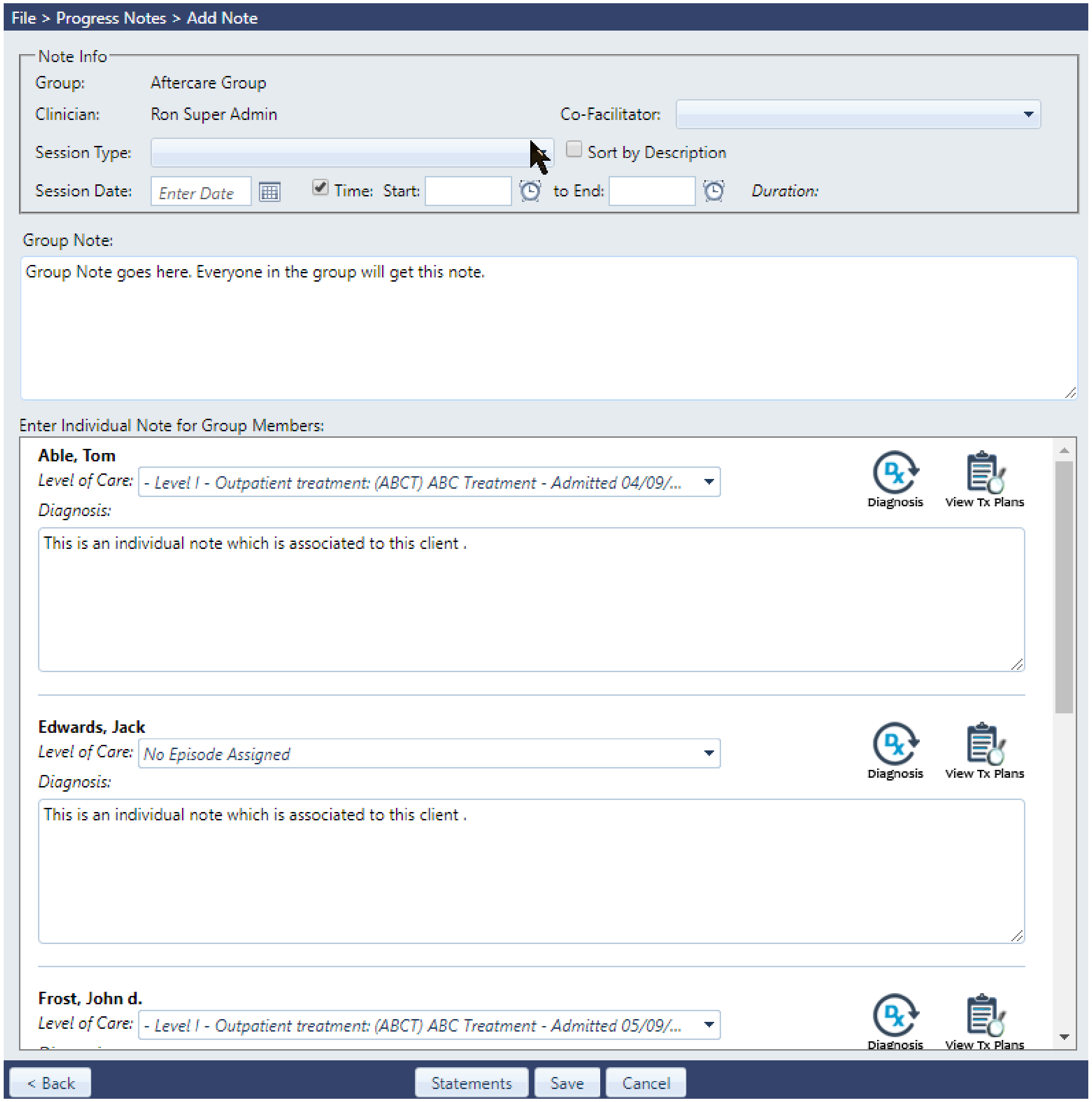
- Change the Select by Radio button to Group
- Click the drop down arrow to select your group from the picklist
- You will see your group of clients on the list to the right
- Click the [**Add Group Note**] to go the next dialog box



- 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



- 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.



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