

Orion Healthcare Technology

How to Archive and Unarchive Clients

Guide Sheet

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Table of Contents

Archive Clients – overview	3
Where to find the Archive Clients module in AccuCare	3
How to use Archive Clients – hiding a client’s reports	5
Steps on how to pull up a client or clients and add them to the Working List to archive.....	5
How your users can tell if a client has been archived.....	8
How to Unarchive Clients – show a client’s reports	10
Steps on how to pull up a client or clients and add them to the Working List to unarchive	11
Have questions?	15

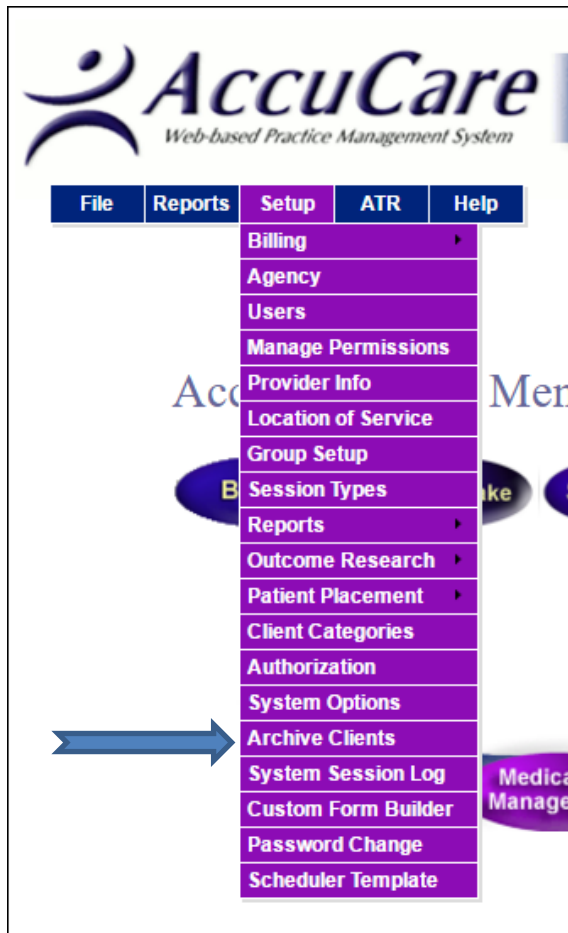
Archive Clients – overview

There many reasons you may want to archive a client. Perhaps the client is no longer receiving services from your organization. Another reason might be you have a duplicate entry of a client whose reports need to be hidden from other users. The Archive Client modules enables you keep all your reports safe but hidden away. If a future need arises you can always unhide those reports. To use the Archive Client module, you must have a super admin level access.

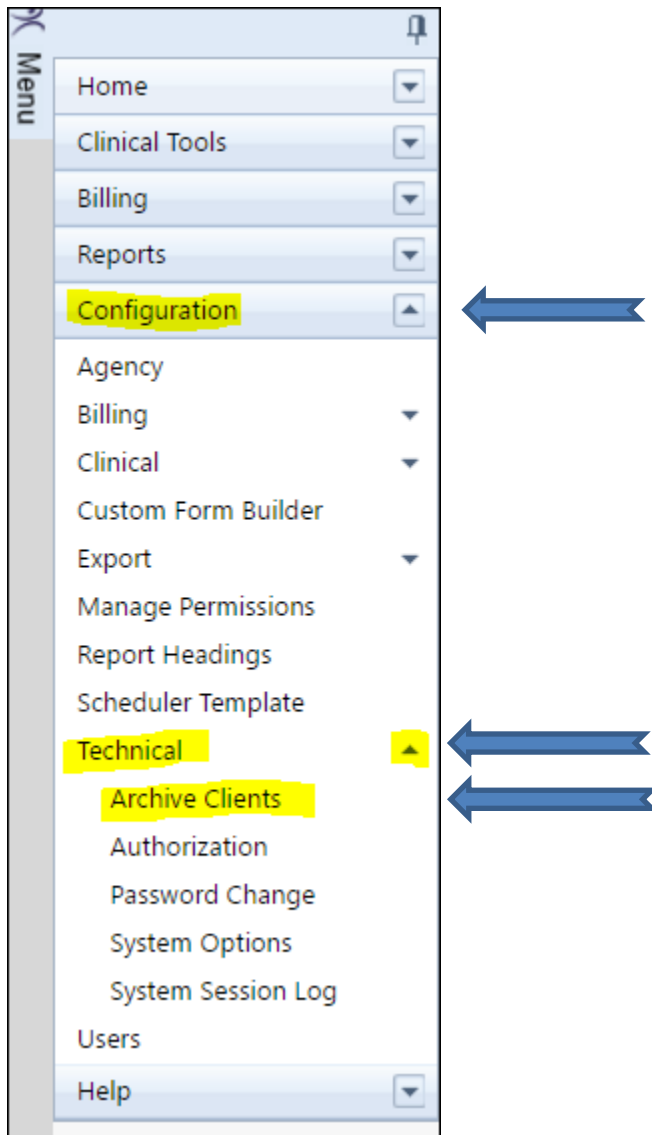
Where to find the Archive Clients module in AccuCare

There is two place you can access the Archive Clients module.

- 1) Under the classic menu go to **Setup** → **Archive Clients**



2) Under the Jump Navigation go to **Configuration** → **Technical** → **Archive Clients**



How to use Archive Clients – hiding a client’s reports

Steps on how to pull up a client or clients and add them to the Working List to archive

Step 1: Search by – select the one of the three ways to search. Last Name should work best but you may need to use SSN or Client Ref # to help you find the client.

Step 2: Begin with or matches – Type in the first three letter of the last name or type in the SSN or Client Ref # to match your Search By radio button selection.

The screenshot shows the 'AccuCare' software interface. At the top, it says 'File > Archive Clients'. Below this, there are search options: 'Search by:' with radio buttons for 'Last Name' (selected), 'SSN', and 'Client Ref. #'. A text box labeled 'Begins with or matches:' contains the text 'tes'. There are also checkboxes for 'Who have had:' with options 'No clinical activity' and 'No billing activity', and an 'after:' field with a calendar icon. Two buttons, 'Search' and 'Display All', are visible. Below the search area is a 'Working List' table with columns: Last Name, First Name, Middle Name, SSN, Client Ref. #, D.O.B., and Gender. The table is currently empty. At the bottom of the search area are 'Add' and 'Add All' buttons. At the bottom of the entire window are 'Remove', 'Remove All', 'Cancel', and 'Next >>' buttons.

Step 3: [Search] button – After entering in your selection click the [Search] button to display you client or clients

Step 4: [Add] or [Add All] button – Choose either the [Add] to add a client or [Add All] if you have more than client.

File > Archive Clients

Search by: Last Name SSN Client Ref. #

Begins with or matches:

Who have had: No clinical activity
 No billing activity

after:

Name Reference #	SSN	Client
Test, John	232-32-3222	
Test, Johnny	111-11-1111	JT19801111
Testing, John		

Working List:

Last Name	First Name	Middle Name	SSN	Client Ref. #	D.O.B.	Gender
Test	John		232-32-3222		11/24/1986	M
Test	Johnny	B	111-11-1111	JT19801111	10/10/1980	M
Testing	John					M

[Remove or Remove all] (other option)
 – To use the [Remove] button you will first need to highlight a client. The [Remove All] button does not require everyone to be selected to remove all clients from the Working List.

Step 5: [Cancel] or [Next] – If you changed your mind you can [Cancel] or click[Next] to continue.

Step 6: Active or Archive –

- 1) If this is the first time the Archive Clients module has been used, you will see all clients with radio button next to Active.
- 2) Simply click the Archive radio button(s) corresponding the client(s) you want to hide then click the [Finish] button.

Last Name	First Name	SSN	Client Ref. #	All Active	All Archived
Test	John	232-32-3222		<input checked="" type="radio"/> Active	<input type="radio"/> Archived
Test	Johnny	111-11-1111	JT19801111	<input checked="" type="radio"/> Active	<input type="radio"/> Archived
Testing	John			<input checked="" type="radio"/> Active	<input type="radio"/> Archived

<< Back Cancel Finish

In this example I have chosen to archive John Test.

Last Name	First Name	SSN	Client Ref. #	All Active	All Archived
Test	John	232-32-3222		<input type="radio"/> Active	<input checked="" type="radio"/> Archived
Test	Johnny	111-11-1111	JT19801111	<input checked="" type="radio"/> Active	<input type="radio"/> Archived
Testing	John			<input checked="" type="radio"/> Active	<input type="radio"/> Archived

How your users can tell if a client has been archived

A basic rule within AccuCare is you cannot work on a client until you have selected them in Client Intake. In this example I have chosen John Test. Notice the check box next to the word Archived



File > Client Intake and Administration

Search by: Last Name SSN Client Ref. #

Begins with or matches:

John Test
SSN: 232-32-3222
DOB: 11/24/1986


Name Reference #	SSN	Client
Test, John	232-32-3222	
Test, Johnny	111-11-1111	JT19801111
Testing, John		

Demographics | Contact Info | Military Status | AI/AN | Legal Status | Case Management | Schedule | Comments

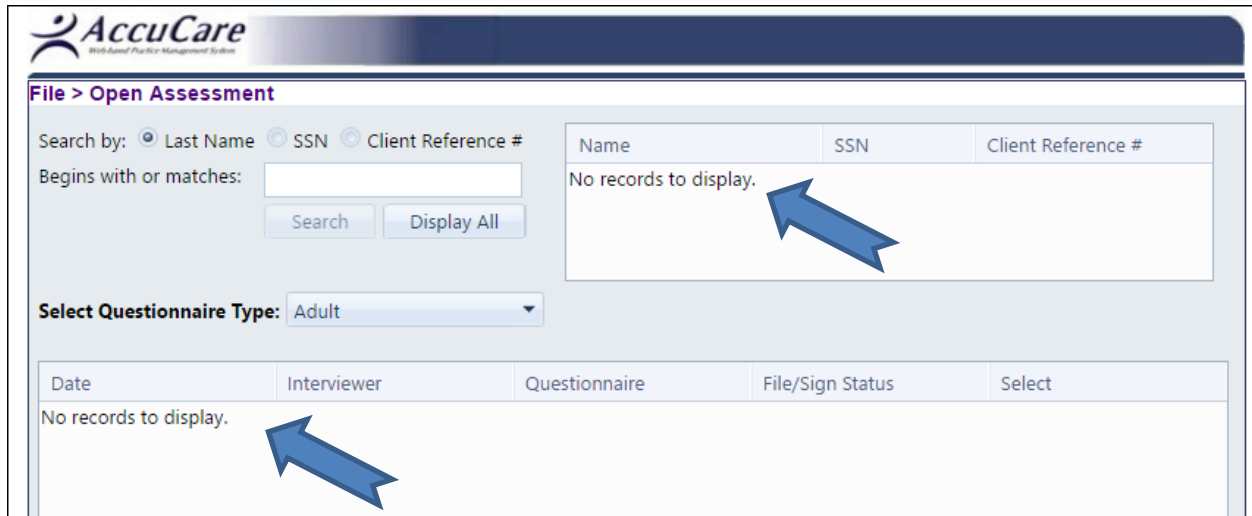
Title: Mr. First Name*: John Middle Name: Last Name*: Test Date of Birth: 11/24/1986 Gender*: M Social Security #: 232-32-3222 False SSN: First Encounter Date: 12/07/2015 Marital Status: Married Work Status: Full-time(35 hrs+/wk) Religion: Catholic Religion Other: Race: Ethnic Group: Privacy Agreement Signed: Archived:

New Edit Delete Save Cancel Print File & Sign Custom Forms Exit to Main Menu Exit

This is telling the user, this client's reports are hidden throughout AccuCare

Users will see all clients in Client Intake – if they select a client that has been archived  and attempt to see a report like their assessment, treatment plan, progress note etc. it will display as if there are no records to be found.

Here is example of what it would look like if I select an archived client and exited to the open assessments. The report is hidden so it cannot be accessed or updated.

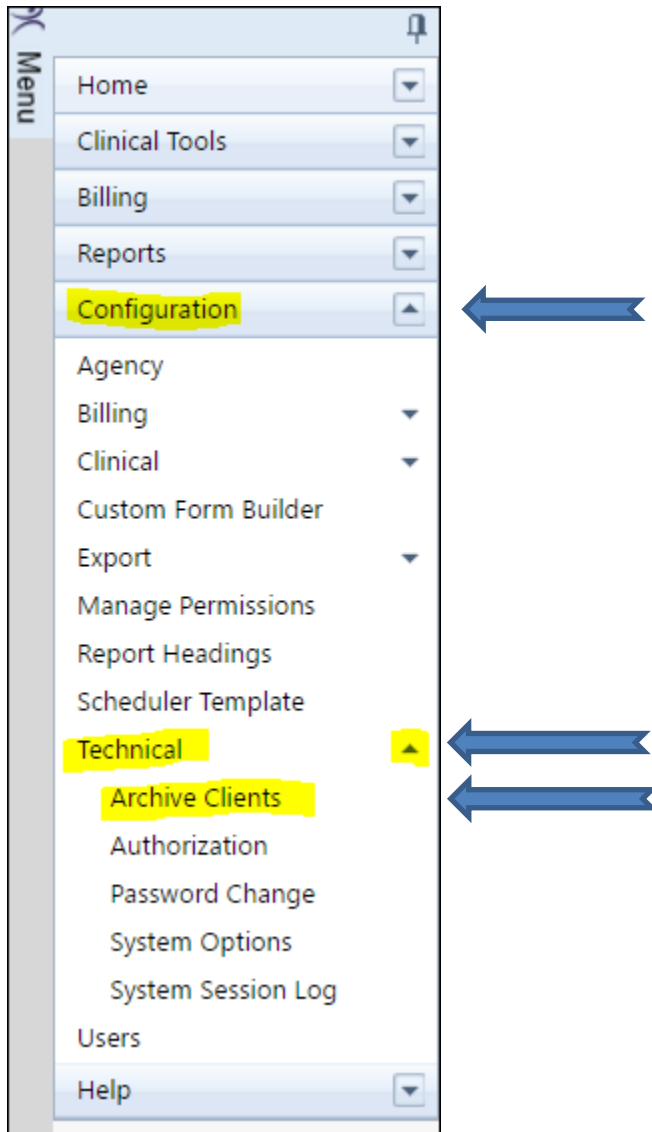


Here is another example of what it would look like if I select an archived client and exit to the open treatment plan. The report is hidden so it cannot be accessed or updated as well.



How to Unarchive Clients – show a client’s reports

To unarchive a client the process is the same. You would need to be a Super Admin to gain access to **Configuration** → **Technical** → **Archive Clients**.



Steps on how to pull up a client or clients and add them to the Working List to unarchive

Step 1: Search by – select the one of the three ways to search. Last Name should work best but you may need to use SSN or Client Ref # to help you find the client.

Step 2: Begin with or matches – Type in the first three letter of the last name or type in the SSN or Client Ref # to match your Search By radio button selection.

Step 3: [Search] button – After entering in your selection click the [Search] button to display you client or clients

Step 4: [Add] or [Add All] button – Choose either the [Add] to add a client or [Add All] if you have more than client.

Name Reference #	SSN	Client
Test, John	232-32-3222	
Test, Johnny	111-11-1111	JT19801111
Testing, John		

Working List:						
Last Name	First Name	Middle Name	SSN	Client Ref. #	D.O.B.	Gender

AccuCare
Web-based Practice Management System

File > Archive Clients

Search by: Last Name SSN Client Ref. #

Begins with or matches:

Who have had: No clinical activity
 No billing activity

after:

Name Reference #	SSN	Client
Test, John	232-32-3222	
Test, Johnny	111-11-1111	JT19801111
Testing, John		

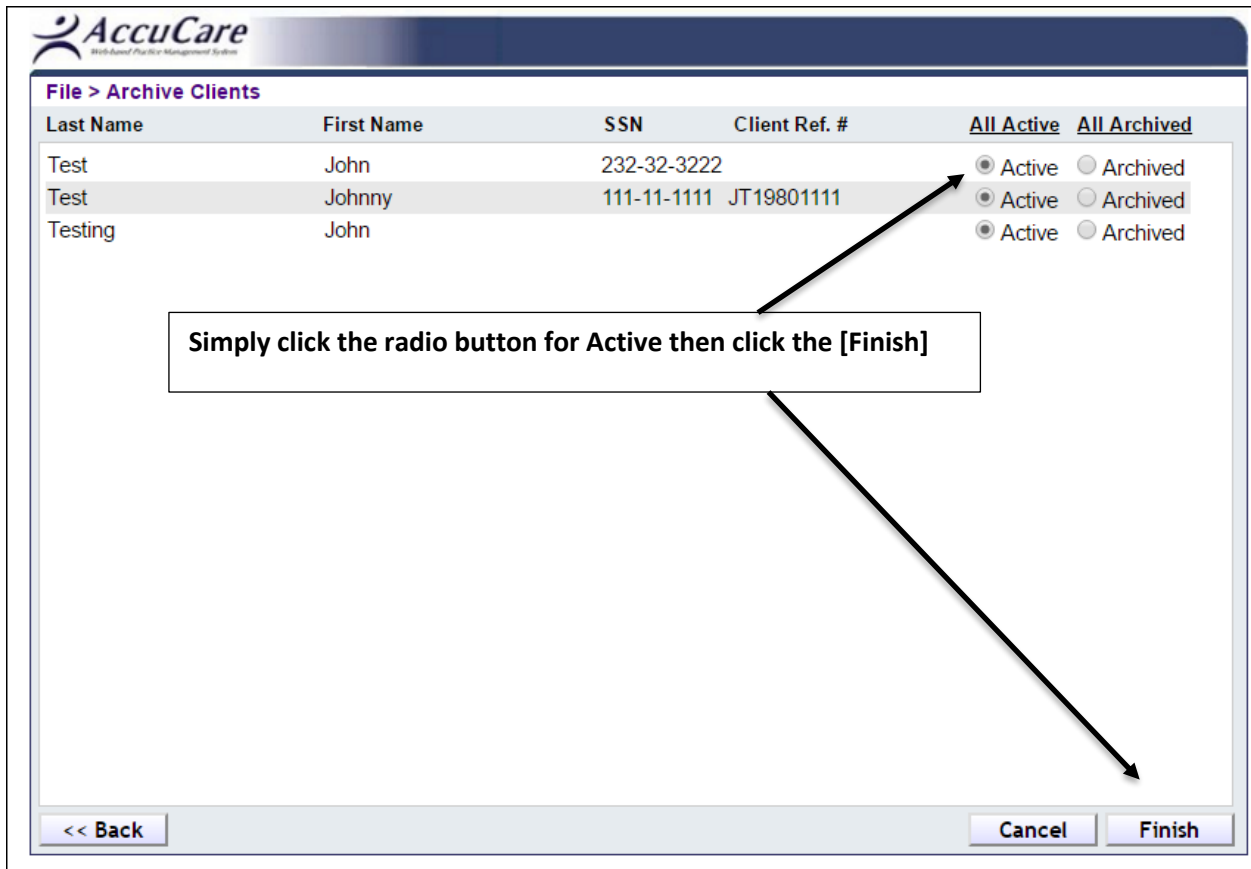
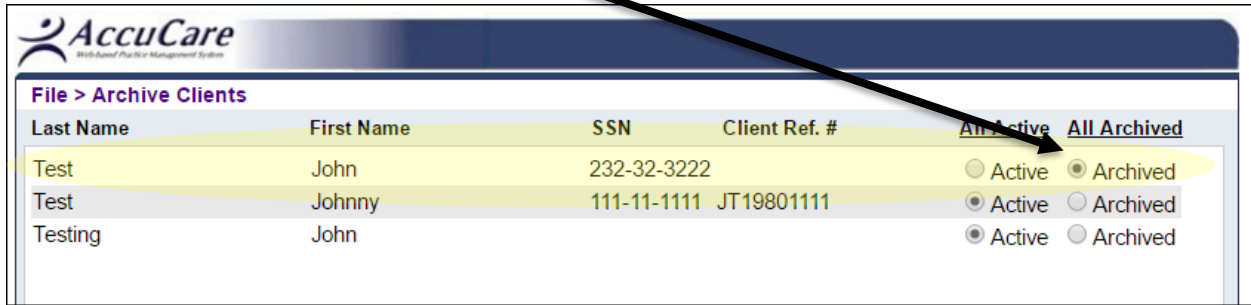
Working List:

Last Name	First Name	Middle Name	SSN	Client Ref. #	D.O.B.	Gender
Test	John		232-32-3222		11/24/1986	M
Test	Johnny	B	111-11-1111	JT19801111	10/10/1980	M
Testing	John					M

[Remove or Remove all] (other option)
 – To use the [Remove] button you will first need to highlight a client. The [Remove All] button does not require everyone to be selected to remove all clients from the Working List.

Step 5: [Cancel] or [Next] – If you changed your mind you can [Cancel] or click[Next] to continue.

In this example, you see John Test archived.

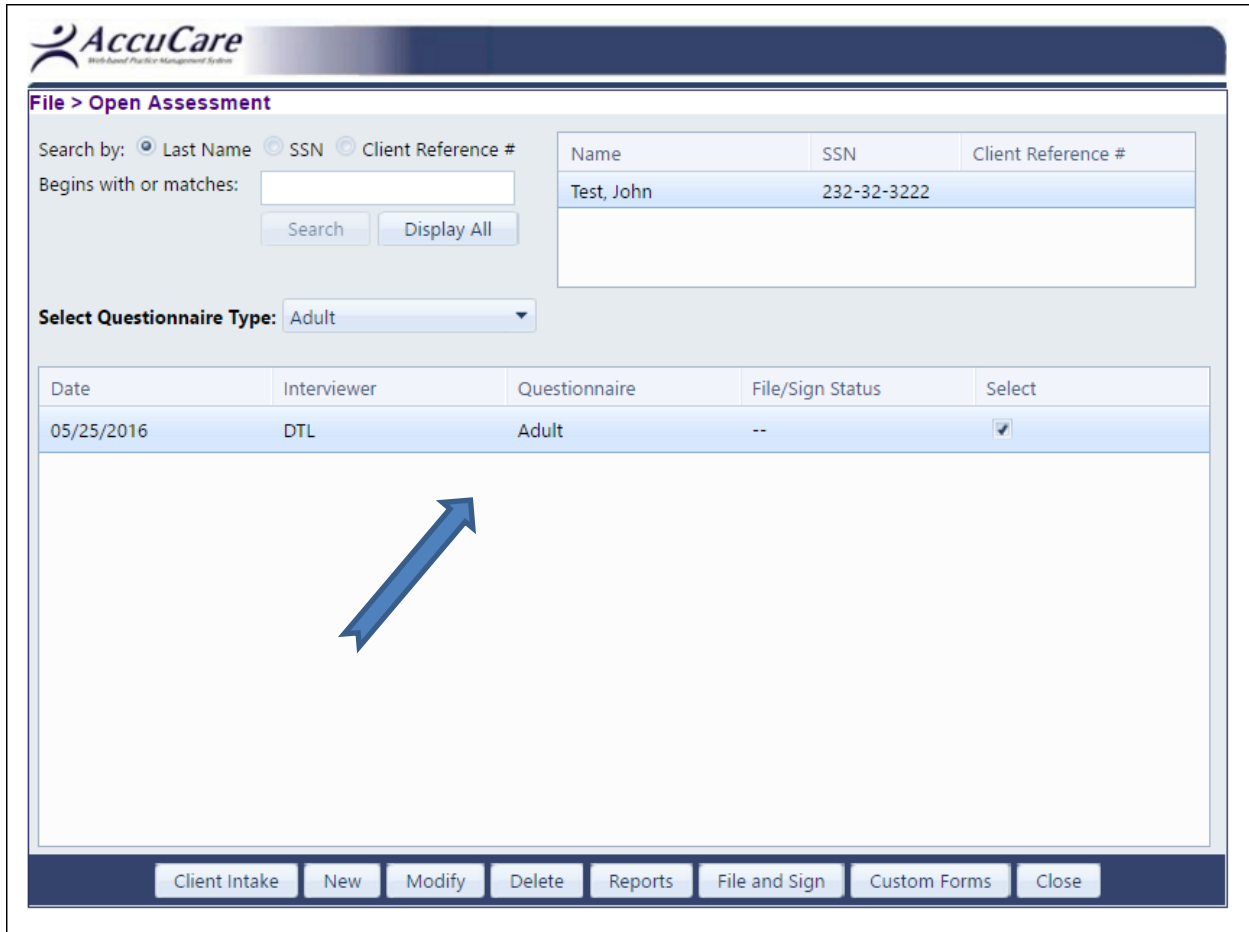


As stated earlier, the basic rule within AccuCare is you cannot work on a client until you have selected them in Client Intake. In this example I have chosen John Test. Notice the box next to the word Archived is not checked. This means the user can now see this client's reports.

The screenshot shows the AccuCare web-based practice management system interface. At the top, the logo for AccuCare is visible. Below it, the navigation bar indicates 'File > Client Intake and Administration'. The search section shows 'Search by: Last Name' selected, with a search term 'test' entered. A search results table lists three entries: 'Test, John' (SSN: 232-32-3222), 'Test, Johnny' (SSN: 111-11-1111, Client Ref: JT19801111), and 'Testing, John'. The 'John Test' entry is selected. Below the search results, the demographic form is displayed. The form includes fields for Title (Mr.), First Name (John), Middle Name, Last Name (Test), Date of Birth (11/24/1986), Gender (M), Social Security # (232-32-3222), Client Reference #, and Nickname. On the right side of the form, there are fields for First Encounter Date (12/07/2015), Marital Status (Married), Work Status (Full-time(35 hrs+/wk)), Religion (Catholic), Religion Other, Race, and Ethnic Group. At the bottom of the form, there are two checkboxes: 'Privacy Agreement Signed' (unchecked) and 'Archived' (unchecked). The 'Archived' checkbox is highlighted with a red oval. Three blue arrows point from the 'Archived' checkbox to the text box below the screenshot.

This tells the user, this client's reports can be seen throughout AccuCare

Now that the client has been set to active I am able to see their assessment.



Have questions?

Please contact AccuCare Support at the following numbers:

Ron - Director of Customer Support - 800-324-7966 ext. 6400

Dylan – Customer Support and Account Specialist - 800-324-7966 ext. 6401