

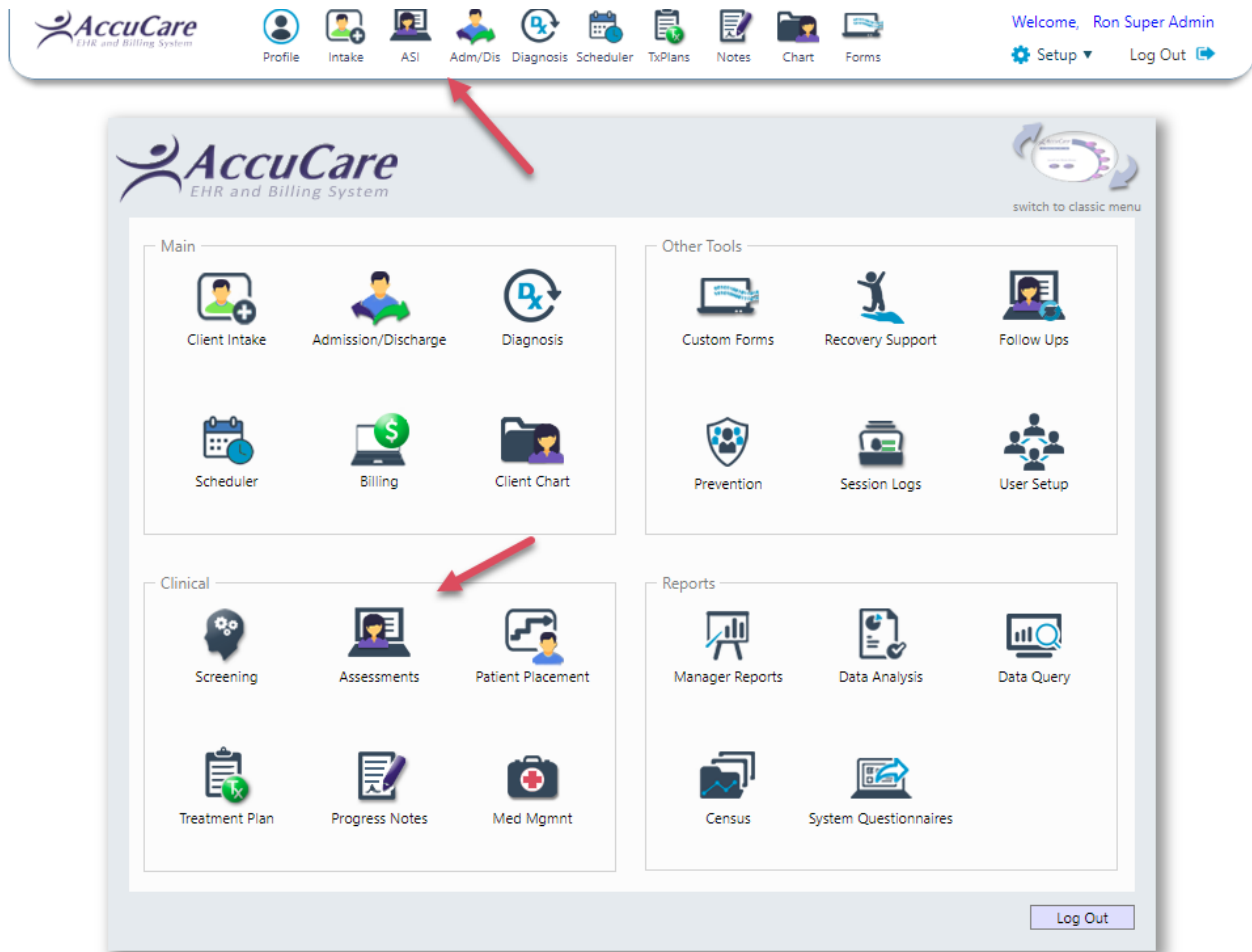
How to start an Assessment

Once you have signed into AccuCare look for this icon



to open up the Assessment module.

You will find this icon on the AccuCare main menu and ribbon



After click on either of these icons you will be presented with the Open Assessment module

The screenshot shows the 'Open Assessment' module interface. At the top, there is a header 'File > Open Assessment'. Below this, there are several sections:

- Section 1:** A search area with a 'Search by:' dropdown menu set to 'Last Name', a text input field for 'Begins with or matches:', and two buttons: 'Search' and 'Display All'.
- Section 2:** A table with columns 'Name', 'SSN', and 'Client Reference #'. The table is currently empty, displaying 'No records to display.'
- Section 3:** A 'Select Questionnaire Type:' dropdown menu currently set to 'Adult'.
- Section 4:** A larger table with columns 'Date', 'Interviewer', 'Questionnaire', 'File/Sign Status', and 'Select'. This table is also empty, displaying 'No records to display.'
- Section 5:** A navigation bar at the bottom containing buttons for 'Client Intake', 'New', 'Modify', 'Delete', 'Reports', 'File and Sign', 'Custom Forms', and 'Close'.

Section #1 – Search by: Last Name, SSN or Client Reference # (Click on the drop down area to make your selection. Next type-in the appropriate value to match the search by (I.E. first three letter of last name, the beginning of the SSN or Client reference #. Click the [Search] button to results in Box#2 or just click the [Display All] button.

Section #2 – Shows you the results of your search or all clients

Section #3 – Shows the default Questionnaire Type you will use the most when creating Assessments. If you require another questionnaire click the down arrow to make your selection. Only the ones subscribed by your organization will allow you to create the selected questionnaire.

Section #4 – Displays a list of all created assessment

File > Open Assessment

Search by:
Begins with or matches:

Name	SSN	Client Reference #
Doe, Jane	123-45-6789	

Select Questionnaire Type:

Date	Interviewer	Questionnaire	File/Sign Status	Select
06/21/2018	RBA	Adult	--	<input checked="" type="checkbox"/>
03/02/2018	EXT	Adult	--	<input type="checkbox"/>
02/12/2018	EXT	Adult	--	<input type="checkbox"/>

Section #5

- **[Client Intake]** button takes you back to Client Intake module to look up or add a new client
- **[New]** button starts a brand new assessment
- **[Modify]** button opens the existing assessment for editing
- **[Delete]** button deletes the selected assessment but is only active for certain levels of access.
- **[Reports]** button opens Report Options to print or preview narrative and other reports
- **[File & Sign]** button allow for copy to recorded in Chart Management
- **[Custom Forms]** button opens Custom Forms module where you fill-out and save to the clients record
- **[Close]** button returns you to back to the main menu