

Orion Healthcare Technology

Introduction to Client Intake Module

Guide Sheet

Created By Orion

16 October 2018

Table of Contents

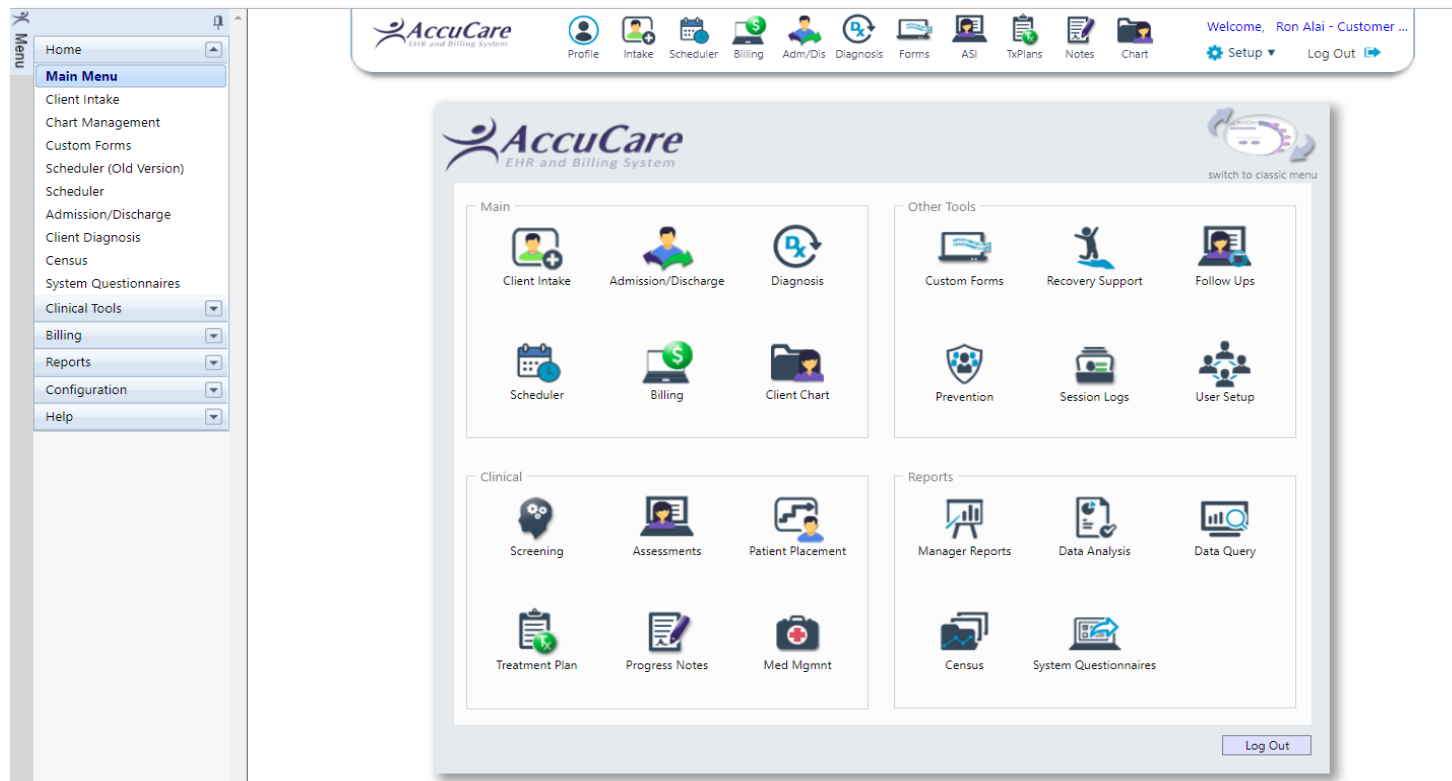
Client Intake Module – Overview	3
Where to find the Client Intake Module.....	3
Jump Navigation, Ribbon and Main Menu Client Intake Locations.....	4
Client Intake Module Overview	5
Top Part – explained	6
Middle Part – explained.....	7
Demographic Tab.....	7
Case Management Tab	9
Billing Tab.....	10
Payers Tab.....	11
Fee Schedule	14
Referrals Tab.....	15
AI/AN Tab.....	16
Custom Forms Tab	17
Multi-Dimensional Assessment Tab.....	18
Bottom Part - explained.....	20
Have questions?.....	21

Client Intake Module – Overview

Client Intake is where you would add a new client or lookup an existing one. In this tutorial, we will learn where to find the client intake module, how to search for existing clients or add new clients by filling out the tabs found in client intake. To conclude, we will do an overview of the action buttons found in this module.

Where to find the Client Intake Module

The Client Intake can be located on the ribbon above the main menu. Also, you will find the icon in the upper left quadrant on the new menu view. A third option is available on the jump navigation menu.



Jump Navigation, Ribbon and Main Menu Client Intake Locations

The screenshot displays the AccuCare EHR and Billing System interface. On the left is a vertical 'Main Menu' with options: Home, Main Menu (highlighted), Client Intake (circled in red), Chart Management, Custom Forms, Scheduler (Old Version), Scheduler, Admission/Discharge, Client Diagnosis, Census, System Questionnaires, Clinical Tools, Billing, Reports, Configuration, and Help. The top ribbon contains icons for Profile, Intake (circled in red), ASI, Adm/Dis, Diagnosis, Scheduler, TxPlans, Notes, Rec Suprt, Chart, Screening, and a 'Welcome, Ron Admin' notification with 'Setup' and 'Log Out' links. The main dashboard area is divided into four sections: 'Main' (Client Intake, Admission/Discharge, Diagnosis, Scheduler, Billing, Client Chart), 'Other Tools' (Custom Forms, Recovery Support, Follow Ups, Prevention, Session Logs, User Setup), 'Clinical' (Screening, Assessments, Patient Placement, Treatment Plan, Progress Notes, Med Mgmt), and 'Reports' (Manager Reports, Data Analysis, Data Query, Census, System Questionnaires). A 'Log Out' button is located at the bottom right of the dashboard.

Client Intake Module Overview

When you first open the Client Intake Module you will see this dialog box. Here is a quick breakdown of this dialog box.

The screenshot shows the Client Intake Module interface. At the top, there is a search bar with radio buttons for 'Last Name', 'Date Of Birth', 'Phone', 'SSN', 'Client Reference #', and 'Billing Reference #'. Below the search bar are input fields for 'Begins with or matches:', 'Client Name:', 'Level of Care:', and 'Location:'. To the right of the search bar is a table with columns 'Name', 'DOB', and 'Phone', and a message 'No clients to display.' Below the search bar is a horizontal menu with tabs: 'Demographics', 'Case Management', 'Billing', 'Payers', 'Fee Schedule', 'Referrals', 'AI/AN', 'Custom Forms', 'Multi-Dimensional Assessment', and 'Comments'. Below the menu is an 'Edit' button. The main content area is divided into several sections: 'Main' (Client Name, Nickname, Date of Birth, Gender, Social Security #, Client Reference #, First Encounter Date, Marital Status, Work Status, Race, Religion, Ethnic Group), 'Contact Information' (Address, Email, Emergency Contact, Phone 1, Phone 2, Phone 3, Phone), 'Military' (Military Status, Military Branch, Family Members with Military Background, Number of Family Members in Military), and 'Legal Status' (Involved with Child Protective Services, Current Probation Status, Current Parole Status, Family in Criminal Justice System). Below the main content area is a row of buttons: 'Add New Client', 'Admit Client', 'Delete Client', 'Print', 'File and Sign', 'Referral Source Setup', and 'Export'. Three callout boxes with arrows point to specific parts of the interface: the top part (search bar), the middle part (Main section), and the bottom part (button row).

Top part: Here is where you would search for the client to determine if they already exist in the database or not.

Middle part: The client's demographic information is collected here as well other information which is explained later in this guide.

Bottom part: These buttons allow you add, admit, delete, save and other functions explained later in this guide

Top Part – explained

An important rule to follow to avoid duplicates it is always good to do a search for the client to determine if they are new or exist in the database.

1) You are given five radio button choices to find an existing client in the database. Last name which is the default should give you best option to find a client. DOB, Phone, SSN then Client Ref # will help in narrowing down your search if needed. If you have a subscription to Billing you can also use the Billing Reference #.

Client Intake

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

1 Begins with or matches:

Client Name:
Level of Care:
Location:

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Test, Janet	08/09/1968	(402) 232-9929	443-54-4990	JT19684900	
Tester, John	10/10/1987	(402) 343-3433	111-11-2222	JT19872222	
Testing, Joe	09/05/1984	(402) 343-4333	323-23-3333	JT19843333A	

3) Here are the results of my search

2) The default is set for a last name search.

I recommend entering the first 2 or 3 letters of the last name. ***It is important to remember when entering your search less is more.*** What I mean is the less information you put the longer the list. (For example by entering letter **(te)** you would likely see more clients than if you entered **(Testing)**. Click the **[Search]** button

Middle Part – explained

The tabs found in the middle part are for entering information about the client. Some are areas required and others are optional.

Demographic Tab – I recommend filling this out completely. By doing so will enable you to create better reports.

Click the **[Add New Client]** only if this client is new and does not show up in your search as explained above.

The screenshot displays a software interface for client intake. At the top, there are several tabs: Demographics, Case Management, Billing, Payers, Fee Schedule, Referrals, AI/AN, Custom Forms, Multi-Dimensional Assessment, and Comments. The 'Demographics' tab is selected. Below the tabs is an 'Edit' button. The main content area is divided into several sections:

- Main:** 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.
- Contact Information:** Fields for Address, Email, Emergency Contact, Phone 1, Phone 2, and Phone 3.
- Legal Status:** Fields for Involved with Child Protective Services, Current Probation Status, Current Parole Status, and Family in Criminal Justice System.
- Military:** Fields for Military Status, Military Branch, Family Members with Military Background, and Number of Family Members in Military.
- Additional:** Fields for Privacy Agreement Signed and Archived.

At the bottom of the form, there is a row of buttons: Add New Client (highlighted with a red box and an arrow), Admit Client, Delete Client, Print, File and Sign, Referral Source Setup, Export, and Close.

Main is where you enter the demographic information that will help identify each client as you move through AccuCare.

Contact information is another recommend tab to fill out completely – this will help when running reports on area of services.

Legal Status (optional) if you required to collect information on Child Protective Services you can enter this here.

Additional if you client has signed your Privacy agreement check this box

Military collect the client's military demographics here

Case Management Tab – presents you with a list of Agencies with assigned users for that agency.

Client Categories present you with 5 picklist which allows you to add up to 5 tags per client. (*Some setup is required prior to using client categories*)

These lists are created by your Super Admin.

The screenshot shows a modal window titled "Case Management" with the following fields:

- Assigned Agency:** A dropdown menu with "NICASA" selected.
- Assigned User:** A list of active users including Agathe Gabriel, MSW, LSW, QMHP; CARRIE CHESTERS; CHANTEL BROWN; CHRISTINE LUCHECK, MA, CADC; Clint Harris; and Curtis Gormley.
- Client Categories:** Five dropdown menus labeled Category 1 through Category 5. Category 1 is set to "DUI High - DUI High Risk" and Category 2 is set to "Adult - Adult".

Buttons for "Save" and "Cancel" are located at the bottom of the modal.

Billing Tab – (if you have a subscription to billing please review). Click the [Edit] to work on the Billing Tab. You should see the Client Reference number which is also used as the Billing Reference number. Click the [Copy from Demographics] button add the client address to the billing record then click the [Save] button.

Please Note: If you leave the Client Reference number in Demographics blank a new auto number will be created for the Billing Reference #

The screenshot shows a software interface for entering billing information. The 'Billing' tab is active. The 'Billing Reference #' field is populated with 'JT19872222'. A callout box points to this field with the text: 'Please Note: If you leave the Client Reference number in Demographics blank a new auto number will be created for the Billing Reference #'. The 'Copy from Demographics' button is highlighted with a red box. The 'Statement Information' section contains the following fields: First Name: John, Last Name: Tester, Address 1: 343 East Street, Address 2: (empty), City: Omaha, State: NE, Zip: 68990-____, Phone: (402) 343-3433, and a dropdown for Home. There are also checkboxes for 'Hold Client Statement' and 'Self Pay'. The 'Client's Condition' section has radio buttons for 'Employment', 'Other Accident', and 'Auto Accident', along with date fields for illness and hospitalization. 'Save' and 'Cancel' buttons are at the bottom.

Payers Tab – (if you have a subscription to billing please review). Click [Add New Payer Plan] button.

Payer Plan Details

Payer Information

Payer Type*: Export

Payer Name*: (DASA) Illinois DASA - DA

Plan Name:

Effective Date*: 10/01/2018

End Date: Enter Date

Plan Type*: Primary

Insured's ID*: 1234

Group #:

Group Name:

Relationship to Insured*: Self

Set as Default Plan

Hold

Copyay:

Automation Order: 1

Plan Notes:

Insured's Information

Copy from Demographics

First Name*: John

Middle Name:

Last Name*: Tester

Suffix:

Address 1*: 343 East Street

Address 2:

City*: Omaha

State*: NE

Zip*: 68990-___

Gender*: M

Date of Birth*: 10/10/1987

Employer/School:

Phone 1: (402) 343-3433 x Home

Phone 2: () - - - - x Home

Save Cancel

Payer Plan choices

Payer Plan Details

Payer Type*: Insurance
Payer Name*: Invoice
Plan Name: Export

Payer Plan Details choices

Payer Plan Details

Payer Type*: Export
Payer Name*: (DASA) Illinois DASA - DARTS
Plan Name: (GoldenSt) Golden State (IA Mcaid) Medicaid
Effective Date*: (OHA MOTS) Oregon Health Authority - MOTS
End Date:
Plan Type*:

Plan Type choices

Payer Plan Details

Payer Type*: Export
Payer Name*: (DASA) Illinois DASA - DA
Plan Name:
Effective Date*: Enter Date
End Date: Enter Date
Plan Type*: Primary
Insured's ID*:
Group #:
Group Name:

Relationship to Insured choices

Payer Plan Details

Payer Type*: Export
Payer Name*: (DASA) Illinois DASA - DA
Plan Name:
Effective Date*: Enter Date
End Date: Enter Date
Plan Type*:
Insured's ID*:
Group #:
Group Name:
Relationship to Insured*: Self
Self
Spouse
Child
Employee
Unknown
Organ Donor
Cadaver Donor
Life Partner
Other Relationship
Copay:
Automation Order:
Plan Notes:

- 1) **Payer Type** = Export
- 2) **Payer Name** = (DASA) Illinois DASA – DARTS
- 3) **Effective Date** = choose date
- 4) **Plan Type** = Choose from list
- 5) **Insured's ID** = Type in
- 6) **Relationship to Insured** = choose from List
- 7) **Set as Default Plan** = check box
- 8) **[Copy from Demographics]** = Click this button

Payer Plan Details

1 Payer Type*: Export	Insured's Information 8 Copy from Demographics First Name*: John Middle Name*: Last Name*: Tester Suffix*: Address 1*: 343 East Street Address 2*: City*: Omaha State*: NE Zip*: 68990-____ Gender*: M Date of Birth*: 10/10/1987 Employer/School: Phone 1: (402) 343-3433 x Home Phone 2: () - - x Home
2 Payer Name*: (DASA) Illinois DASA - DA	
Plan Name*: 3 Effective Date*: 10/01/2018	
End Date: Enter Date	
4 Plan Type*: Primary	
5 Insured's ID*: 1234	
Group #: Group Name:	
6 Relationship to Insured*: Self	
7 <input checked="" type="checkbox"/> Set as Default Plan <input type="checkbox"/> Hold	
Copay:	
Automation Order: 1	
Plan Notes:	

Save Cancel

Fee Schedule – (if you have a subscription to billing please review). Click [Edit] button.

Please note: Contract Rate under Billing Setup must be completed before you can assign fee schedule for an individual client.

((Setup for your clients if applicable))

The screenshot shows a software interface with several tabs: Demographics, Case Management, Billing, Payers, Fee Schedule (highlighted), Referrals, AI/AN, Custom Forms, Multi-Dimensional Assessment, and Comments. An 'Edit' button is highlighted in the top left. Below the tabs is a table with the following data:

Service	Default Units	Default Amount	Fee Schedule Units	Fee Schedule Amount
Anger Management	1.000	\$50.00	2.000	\$65.00
Art Therapy	1.000	\$25.00	2.000	\$35.00
Intake Assessment	1.000	\$100.00	2.000	\$55.00

A modal window titled 'Fee Schedule' is open, showing a filtered list of services. A checkbox 'Show only Services with a Fee Schedule' is checked and highlighted. The modal table has the following data:

Service	Default Units	Default Amount	Fee Schedule Units	Fee Schedule Amount
Anger Management	1.000	\$50.00	2	\$ 65
Art Therapy	1.000	\$25.00	2	\$ 35
Counseling	1.000	\$1,000.00		\$
Cultural Awareness	4.000	\$15.00		\$
Group Session	1.000	\$7.00		\$
Ind. Therapy	1.000	\$7.00		\$
Intake Assessment	1.000	\$100.00	2	\$ 55

Buttons for 'Save' and 'Cancel' are at the bottom of the modal.

Referrals Tab – Start collecting you incoming and outgoing referrals by allowing your users to record referrals. Once a referral has been created it can be used over and over from the Select Referral Source picklist.

New referral are created by clicking on the Add New link.

Add other points of information to your referrals by selecting or adding these picklists

Add/Edit Referral Record

Select Referral Type: Incoming Outgoing None

Referral Date: 10/17/2018

Referral Source

Search for a Referral Source by Attributes, select an existing Referral Source or add new Referral Source details.

Search for Referral Source by Attributes

Select Referral Source: Dr. Robert Kirkman, Primary Family Prac [Add New](#)

Name: Dr. Robert Kirkman

Agency: Primary Family Practice Physician

Contact: Shelly

Address 1: 1001 West Boardwalk Ave

Address 2:

City: Los Angeles

State: CA Zip: 01234-____

Phone 1: (999) 999-9999 X 12354 Work

Phone 2: (966) 780-4120 X 01 Mobile

Email:

Website:

Referral Details

Level of Care: No Episode Assigned

Type of Contact: Locate Homeless Shelter [Add/Edit](#)

Previous Services: Residential [Add/Edit](#)

Service Requested: On-Site Counseling [Add/Edit](#)

Funding Source: Health and Human Resource Grant [Add/Edit](#)

Referral Reason: [Add/Edit](#)

Result: [Add/Edit](#)

Category: [Add/Edit](#)

Other 1: [Add/Edit](#)

Other 2: [Add/Edit](#)

Heard about us?: [Add/Edit](#)

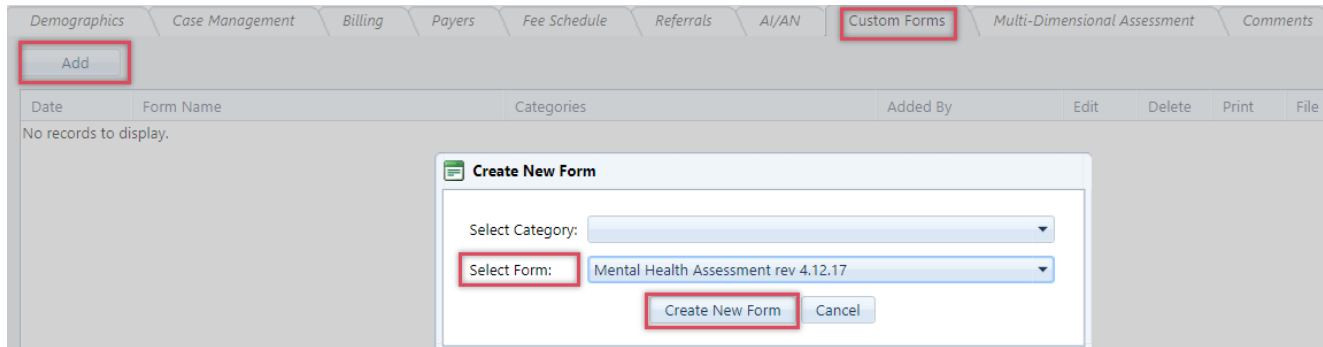
Referral Comments

Save Cancel

AI/AN Tab – if you work with the American Indian or Alaskan Native refer to this tab to collect tribal membership and residence

The screenshot displays a software interface with a top navigation bar containing tabs: Demographics, Case Management, Billing, Payers, Fee Schedule, Referrals, AI/AN, Custom Forms, Multi-Dimensional Assessment, and Comments. The AI/AN tab is highlighted with a red box. Below the navigation bar is an 'Edit' button and a 'General' section with fields for Tribal Enrollment #, Tribal Relationship, and Tribe of Membership. A modal window titled 'AI/AN' is open, showing a 'General' section with Tribal Enrollment #, Tribal Relationship (set to 'Self'), and Tribe of Membership (highlighted with a red box). Below this is an 'IHS NDW' section with fields for Indian Blood Quantum, Classification/Beneficiary, and Community of Residence (with sub-fields for 1. State, 2. County, and 3. Community, all highlighted with a red box). A text box on the right side of the modal explains that the information is for the IHS National Data Warehouse (NDW) submission process and/or the ATR Voucher program only. At the bottom of the modal are 'Save' and 'Cancel' buttons.

Custom Forms Tab – (if you have a subscription to Custom Forms please review) – With a subscription, you are able to build your own custom forms and assign them to various modules within AccuCare for easy access. Click the [Add] button to begin then select a custom form.



The screenshot displays the 'Client Intake Custom Forms' form. At the top, it shows 'Form Date: 10/17/2018' and 'Level of Care: No Episode Assigned'. The main title is 'MENTAL HEALTH ASSESSMENT -' with radio buttons for 'Initial' and 'Update'. The form contains the following fields and sections:

- NAME:** John Tester
- EVALUATION DATE:** [Empty text box]
- CLIENT ID:** JT19872222
- PRIMARY METHOD OF COMMUNICATION:** Verbal (language)
- DOB:** 10/10/1987
- Sources of Information Consulted for this Assessment:**
 - Client
 - Significant Other
 - Locus/ Ohio
 - Family
 - Prior Agency Records
 - Other Assessment/ Screening Tools
 - Other Providers
- Other:** [Empty text box]
- IDENTIFYING INFORMATION (include age, ethnicity, gender)**
- PRESENTING PROBLEM/ CURRENT ISSUES**
- Current presenting issues (extent, nature, and severity of presenting problems):**
The client was referred for a mental health assessment.

At the bottom of the form, there are three buttons: 'Save and Sign Off', 'Save and Close', and 'Cancel'.

Multi-Dimensional Assessment Tab – Accommodates ASAM or other admission criteria. Use this tab to collect information and develop a level of care for your clients. Review and fill out the six domains to establish risk levels and criteria. This will help develop the client’s level of care seen in the Determination Tab.

Click the [Add New] to start. Starting with the Demographic tab then continue to fill out the other domain questions.

The screenshot shows a software interface for a 'Multi-Dimensional Assessment'. At the top, there is a navigation bar with tabs: Demographics, Case Management, Billing, Payers, Fee Schedule, Referrals, AI/AN, Custom Forms, Multi-Dimensional Assessment, and Comments. The 'Multi-Dimensional Assessment' tab is active. On the left side, there is a sidebar with an 'Add New' button highlighted in red. Below the sidebar, there is a search area for 'Assessment Date' with the text 'No records to display'. The main form area is titled 'Multi-Dimensional Assessment' and contains the following fields and sections:

- Client Name: Tester, John
- Client Ref #: JT1987222
- Level of Care: No Episode Assigned (dropdown menu)
- Demographics tab (highlighted in red)
- Population Set: Adult (dropdown menu)
- Address 1: 343 East Street
- Address 2: (empty)
- City: Omaha
- State: NE (dropdown menu) | Zip Code: 68990-__ (text input)
- Phone 1: (402) 343-3433 | x: (empty) | Home (dropdown menu)
- Phone 2: (empty) | x: (empty) | Home (dropdown menu)
- Phone 3: (empty) | x: (empty) | Home (dropdown menu)
- Assessment Date: 10/17/2018 (calendar icon)
- Gender: Male (dropdown menu)
- Date Of Birth: 10/10/1987 (calendar icon)
- Age: 31
- Preferred Language: (empty)
- Race/Ethnicity: Hispanic - Puerto Ri... (dropdown menu)
- Payer Plan: (empty) | Select (button)
- Insured's ID: (empty)
- Okay to leave voicemail? (checkbox)
- Living Arrangement: Homeless Independent Living Other (specify) (text input)
- Referred By: Referral Source: (dropdown menu) | Add New Referral (button) Other: (text input)
- Explanation of why client is currently seeking treatment: Current symptoms, functional impairment, severity, duration of symptoms (e.g) unable to work/school, relationship/housing problems. (text area)

At the bottom of the form, there are four buttons: Next, Previous, Cancel, and Save & Close.

Here is an example of the Determination Tab outcome level of care - Level II.1 meets the admission criteria.

Demographics Acute Intoxic... Biomedical C... Emotional, B... Readiness To ... Relapse, Con... Recovery Livi... Summary Determination								
Level of Care	Acute Intoxi...	Biomedical C...	Emotional, B...	Readiness To...	Relapse, Con...	Recovery Liv...	Meets Admission Criteria?	View Criteria Report
Level 0.5 - Education	✓						NO	
Level I - Outpatient treatment	✓						NO	
Level II - Intensive outpatient/partial hospitalization							NO	
Level II.1 - Intensive outpatient - (Level II - Intensive outpatient/partial hospitalization)	✓				✓		NO	
Level II.1 - Co-occurring intensive outpatient - (Level II - Intensive outpatient/partial hospitalization)	✓		✓	✓	✓		YES	
Level III - Medically monitored intensive inpatient							NO	
Level III.1 - Intensive inpatient - (Level III - Medically monitored intensive inpatient)	✓	✓		✓			NO	
Level III.1 - Co-occurring intensive inpatient - (Level III - Medically monitored intensive inpatient)	✓	✓		✓			NO	
Level IV - Medically managed intensive inpatient							NO	

Level of Care Determination

Selected Level of Care: Level II - Intensive outpatient/partial hospitalizati...

Reason for Discrepancy: [Add/Edit](#)

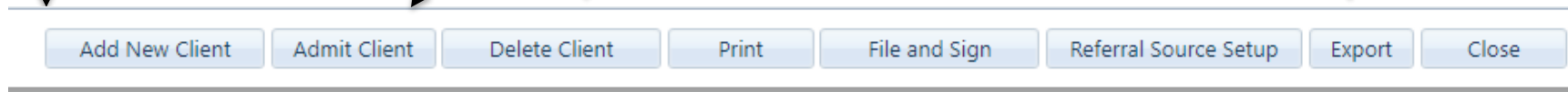
Bottom Part - explained

[Delete Client] button - (this is a destructive action)
Recommend archiving (hiding) client instead of deleting client's record entirely.

[Admit Client] button – Takes you directly to the Admission and Discharge module

[Add New Client] button - Add new client to your AccuCare database

[Export] button allows you to export data from the client intake tabs. For example: Referral Record, Custom Forms , Intake Demographics and Multi-Dimensional Assessment



Print – offers you the opportunity to print out the current client's intake or all intakes

The screenshot shows a dialog box titled 'Select Report Print Options'. It has three sections: 'Display', 'Print', and 'Output'. Each section has several options with checkboxes or radio buttons. 'Display' options include Demographics, Case Management, Legal Status, Military Status, AI/AN, Referral Records, Contact Info, Billing, Payers, and Fee Schedule. 'Print' options are 'Current Record' (selected) and 'All Records'. 'Output' options are 'Printer' (selected) and 'Preview'. 'OK' and 'Cancel' buttons are at the bottom.

File & Sign – This button allows you send a copy of the client intake in electronic form to Chart Management if you have a subscription to this module.
Recommend reviewing Chart Management Guide for details.

[Referral Source Setup] button – Quick button to add a referral source to the list of source without having to associate it to client

Have questions?

Please contact AccuCare Support at the following numbers or email address:

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

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

Email: support@orionhealthcare.com