Orion Healthcare Technology

Introduction to Client Intake Module

Guide Sheet

Created By Orion

16 October 2018

Table of Contents

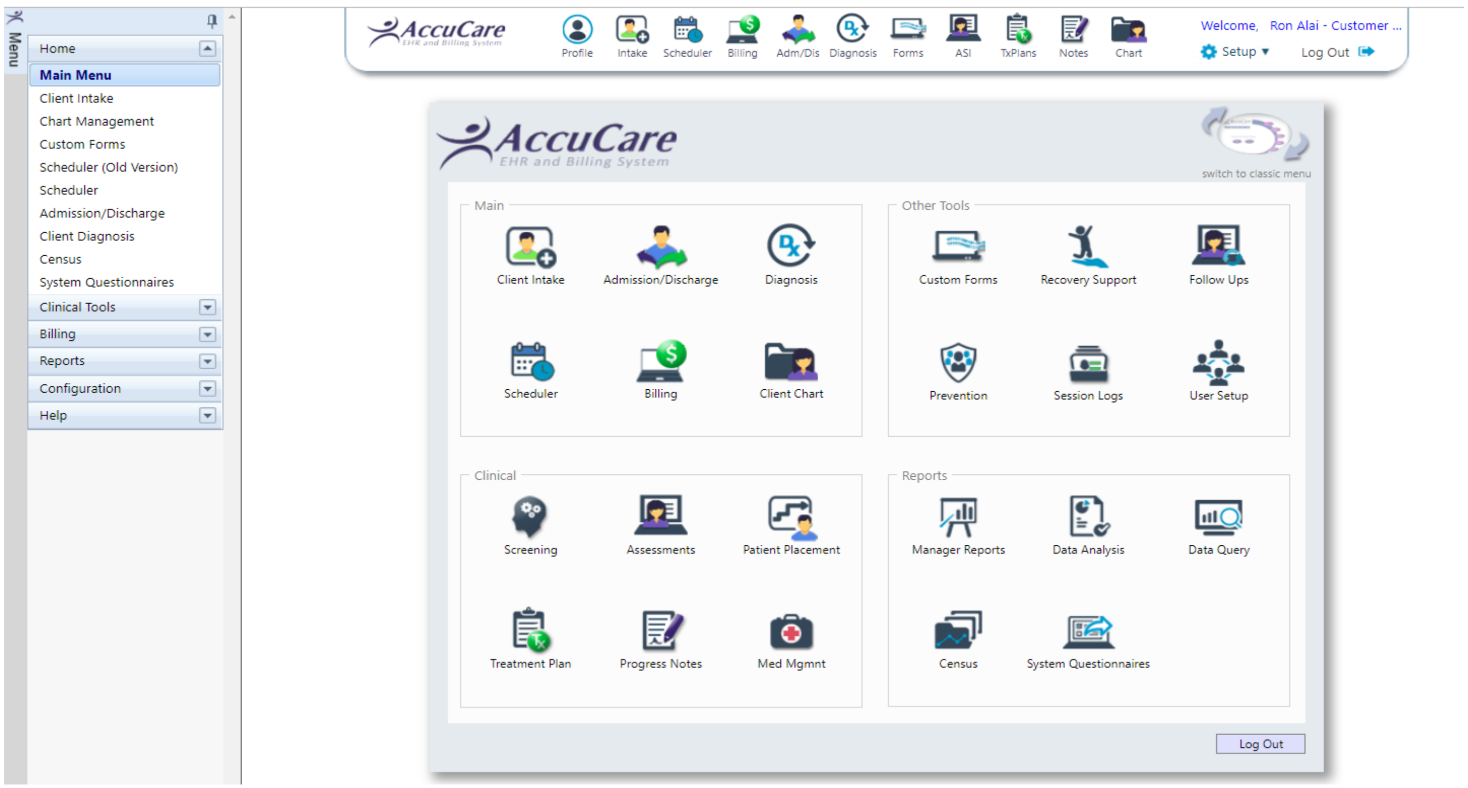
18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

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.

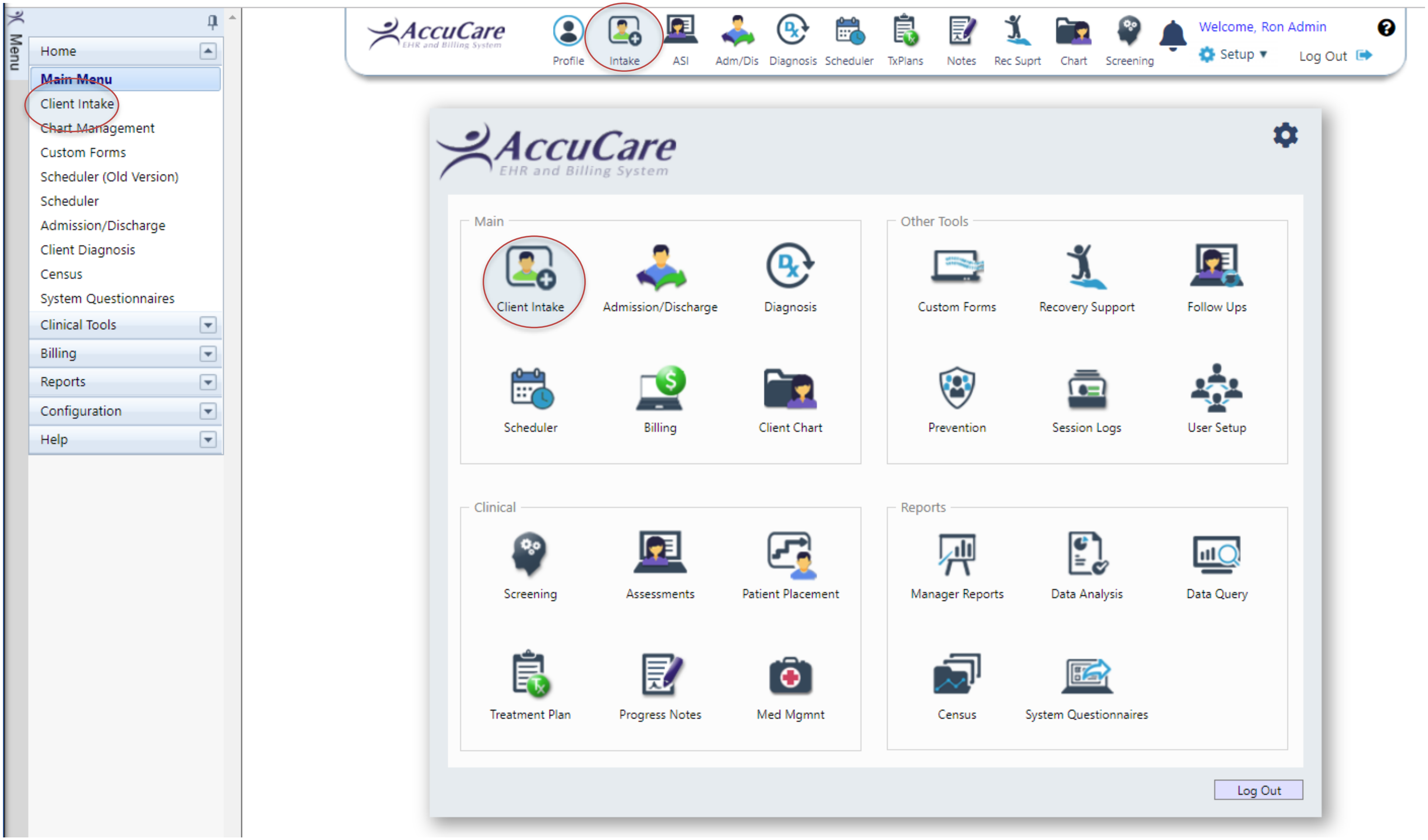
Where to find the Client Intake Module

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.



18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

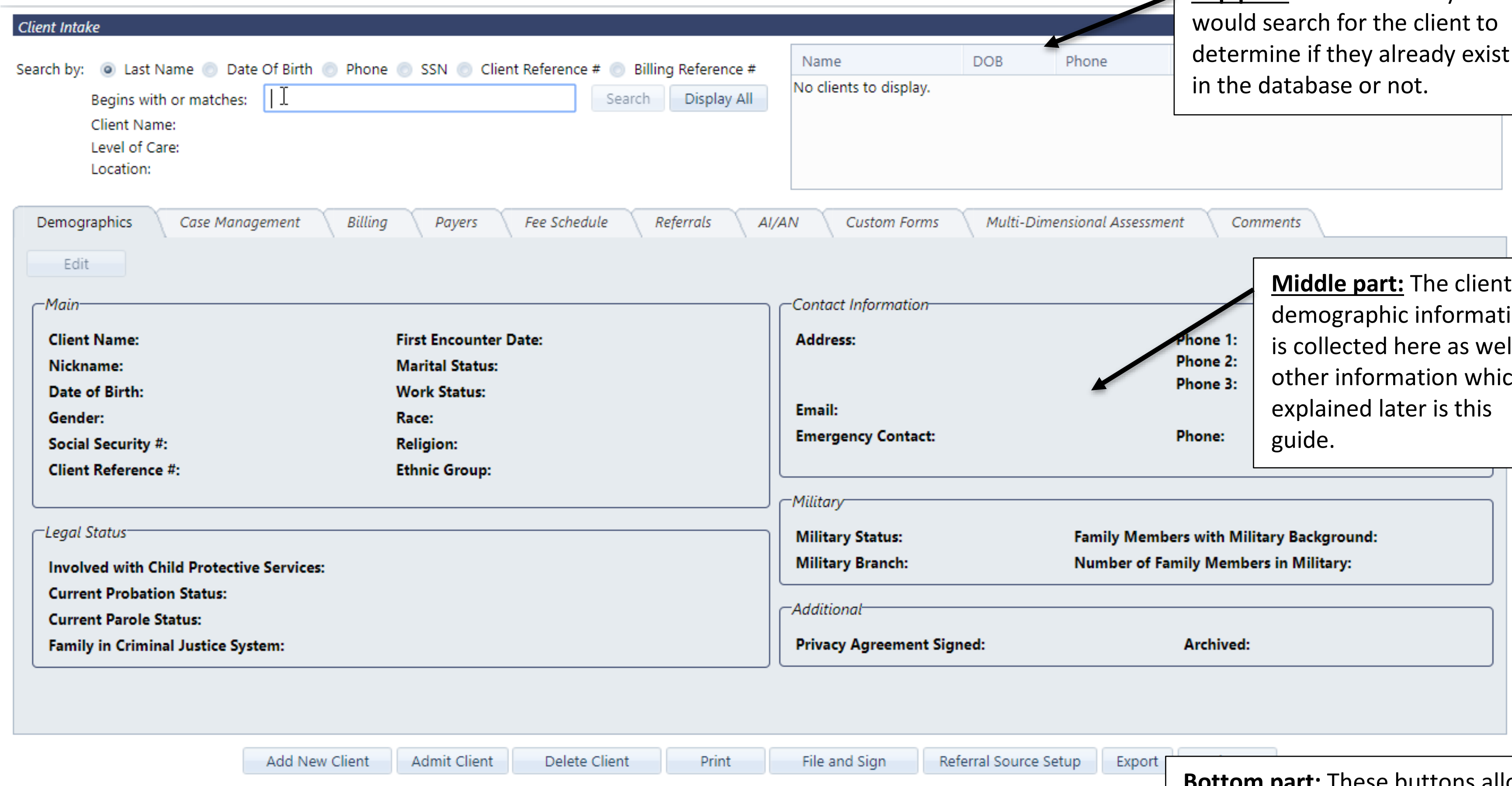
Jump Navigation, Ribbon and Main Menu Client Intake Locations



18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

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.



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 is this guide.

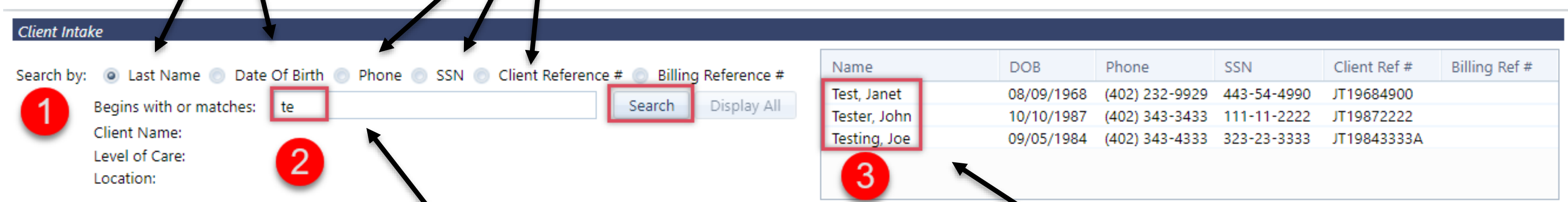
Bottom part: These buttons allow you add, admit, delete, save and other functions explained later in this guide

18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

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 #.



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

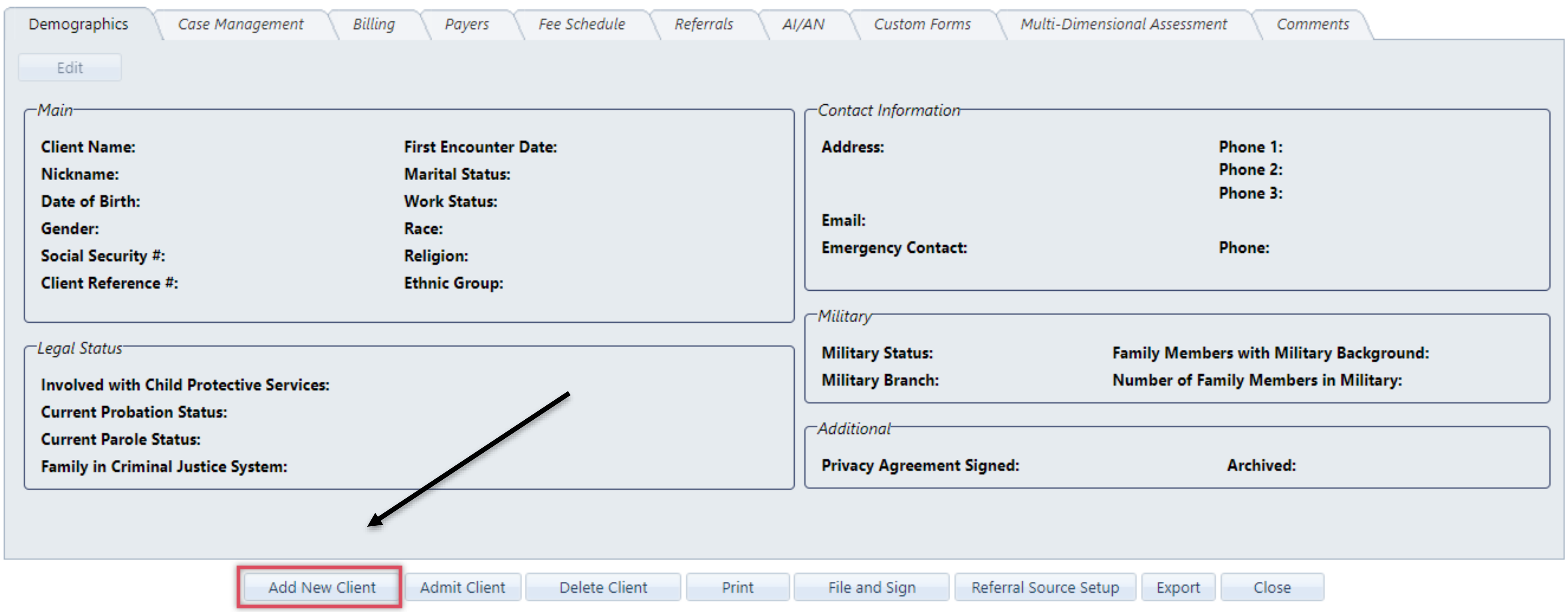
18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

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.

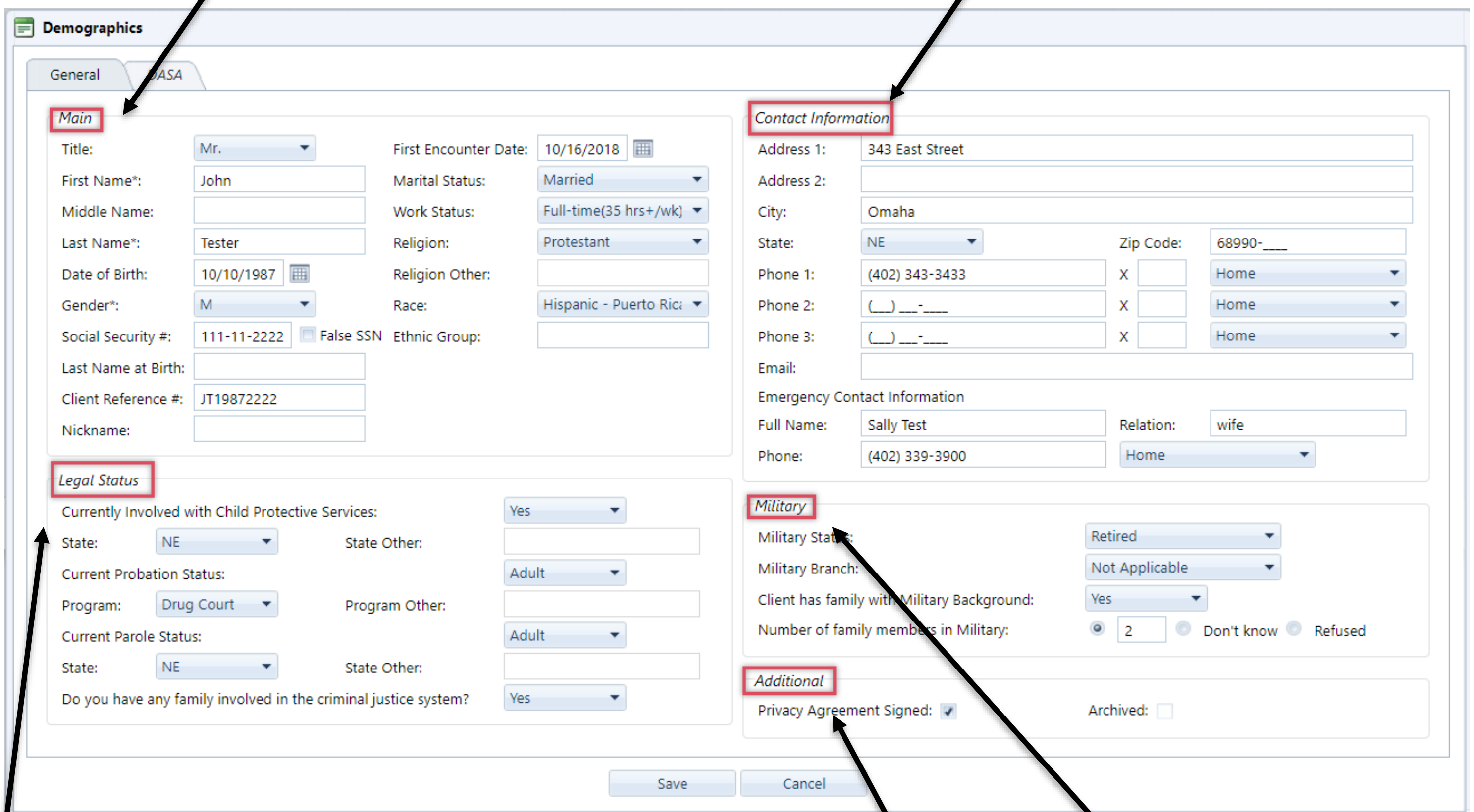
Click the [**Add New Client**] only if this client is new and does not show up in your search as explained above.



18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

__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.



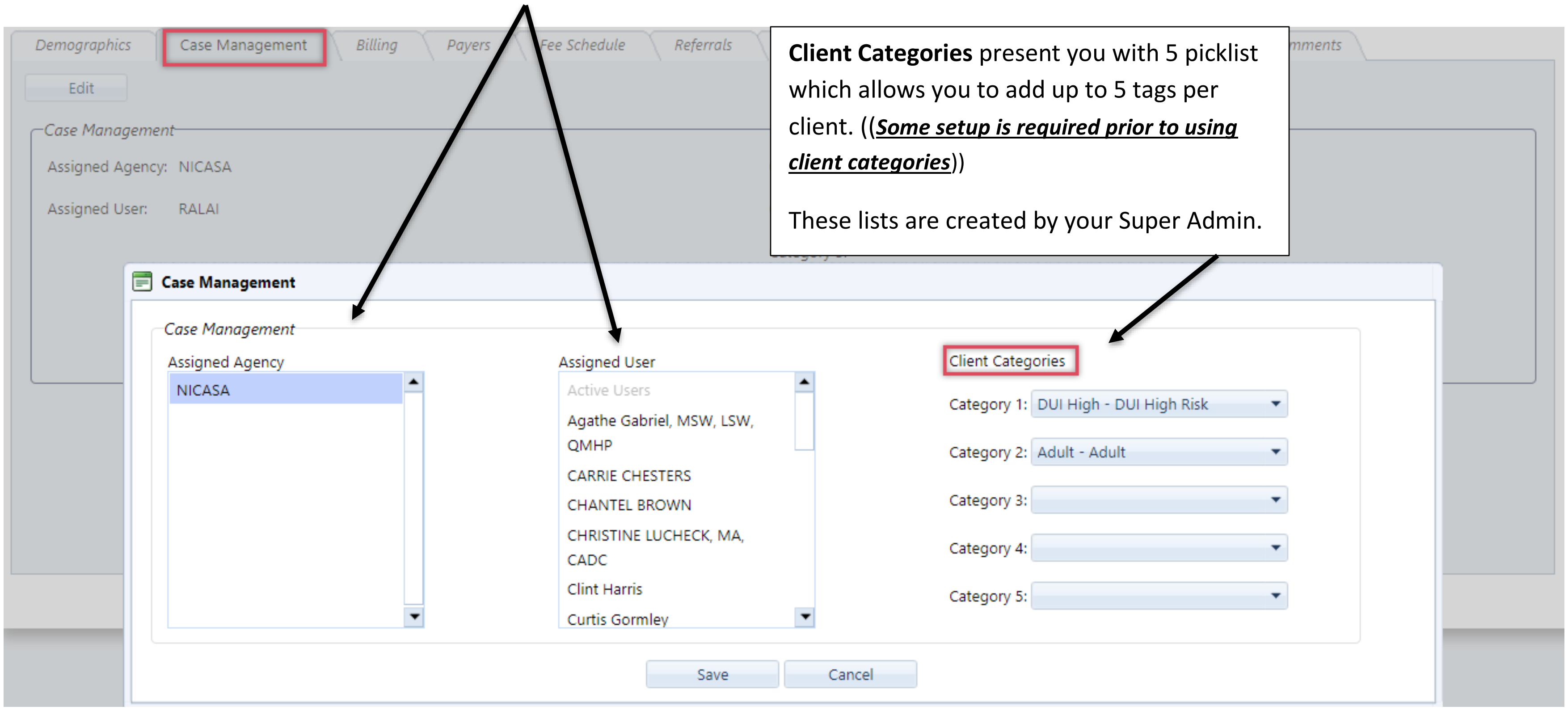
__Legal Status (optional)__ if you required to collect information on Child Protective Services you can enter this here.

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

__Military__ collect the client's military demographics here

18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

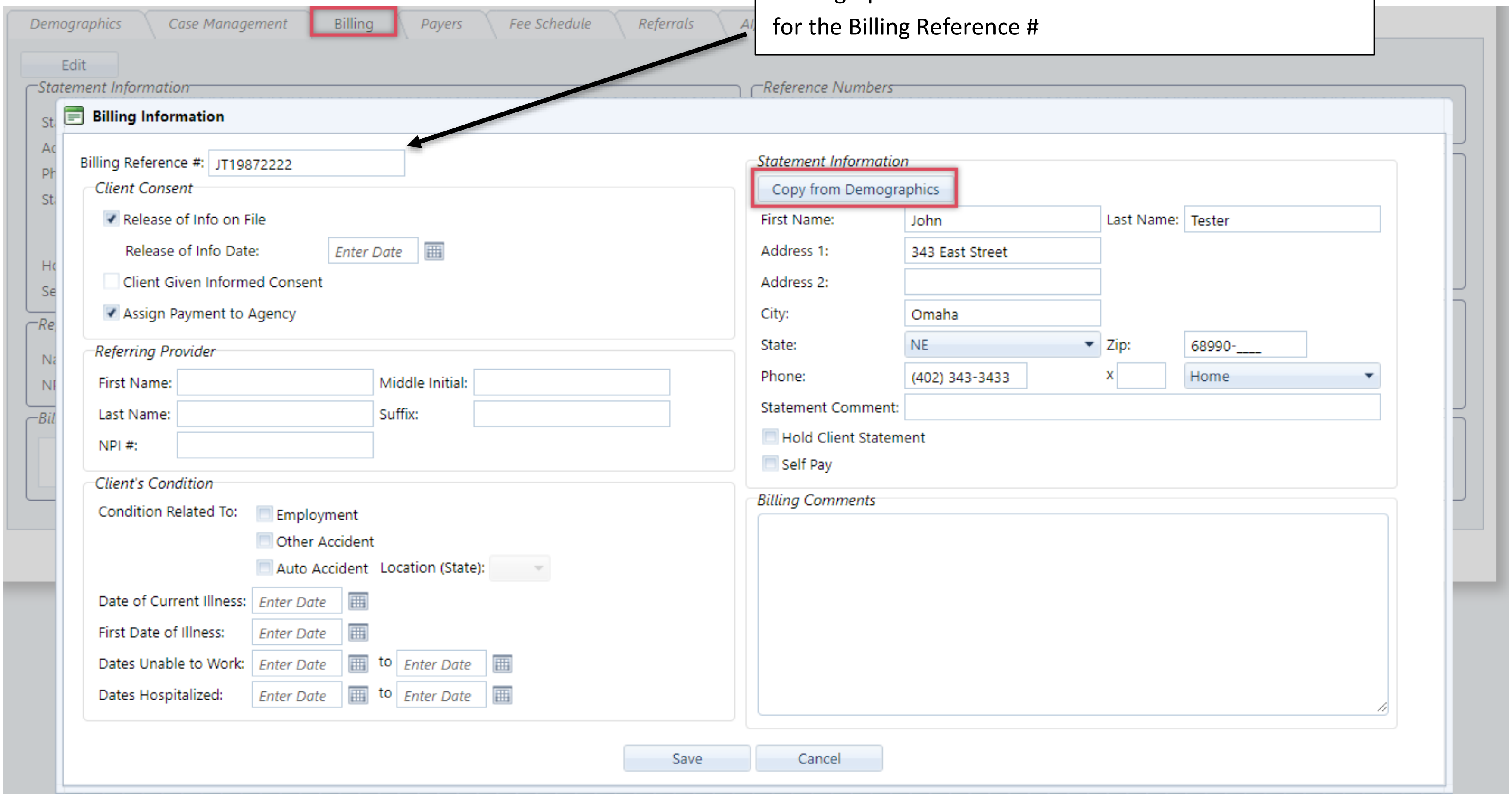
Case Management Tab – presents you with a list of Agencies with assigned users for that agency.



18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

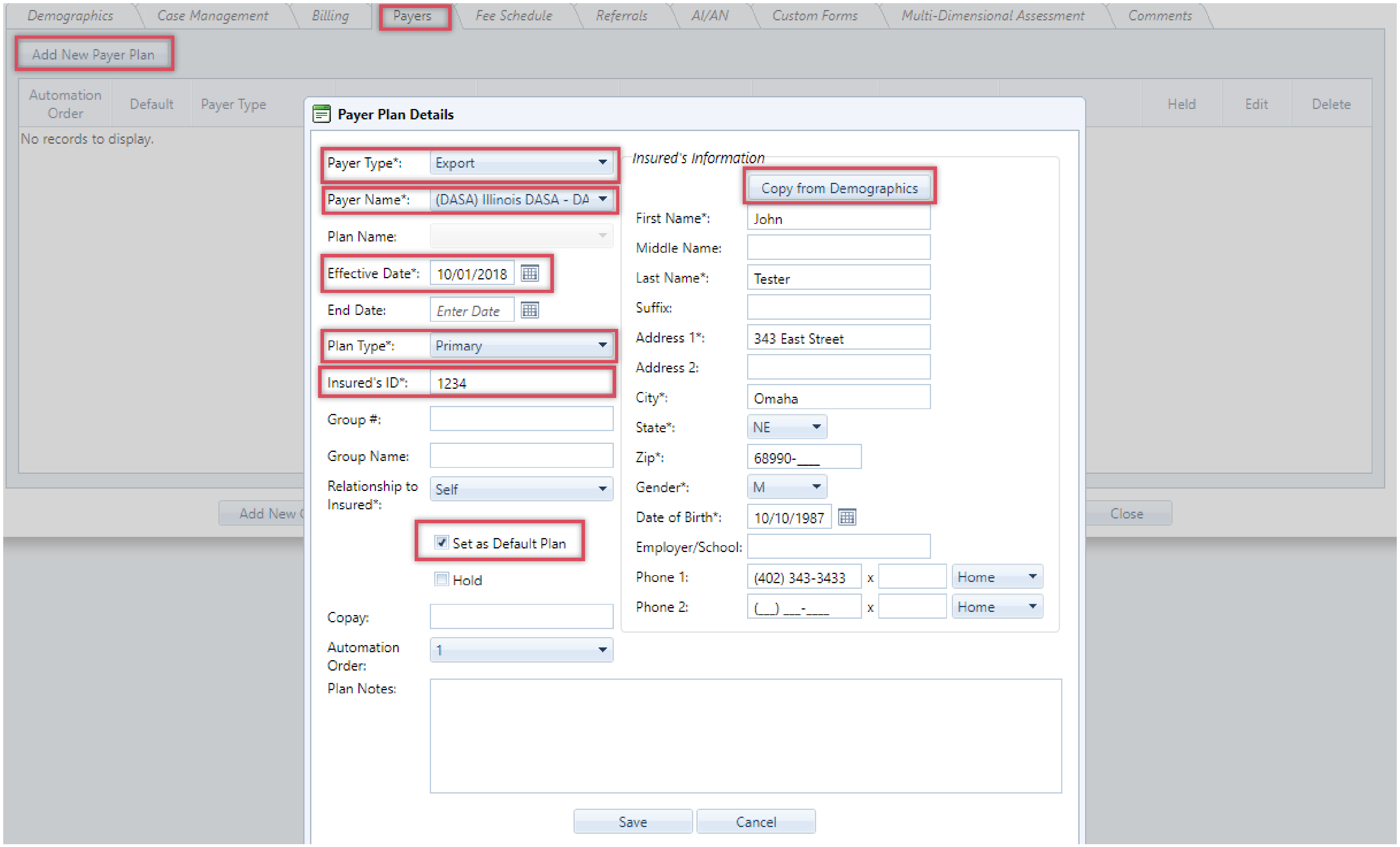
Billing Tab – (if you have a subscription to billing please review). Click the [Edit] to work on the Billing Tab. You should see the Client Reference number which is also used as the Billing Reference number. Click the [Copy from Demographics] button add the client address to the billing record then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



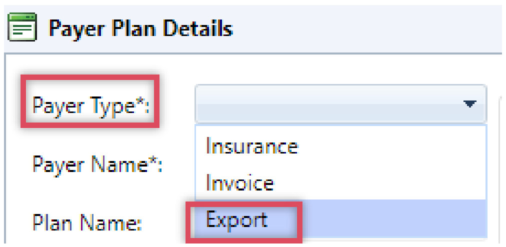
18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

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

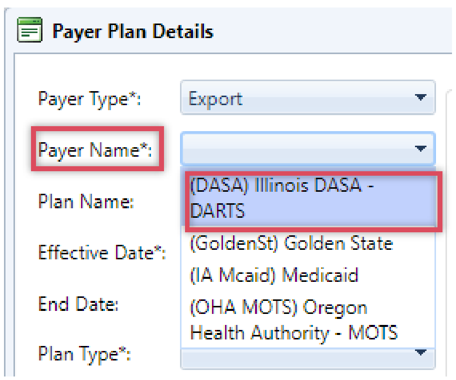


18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

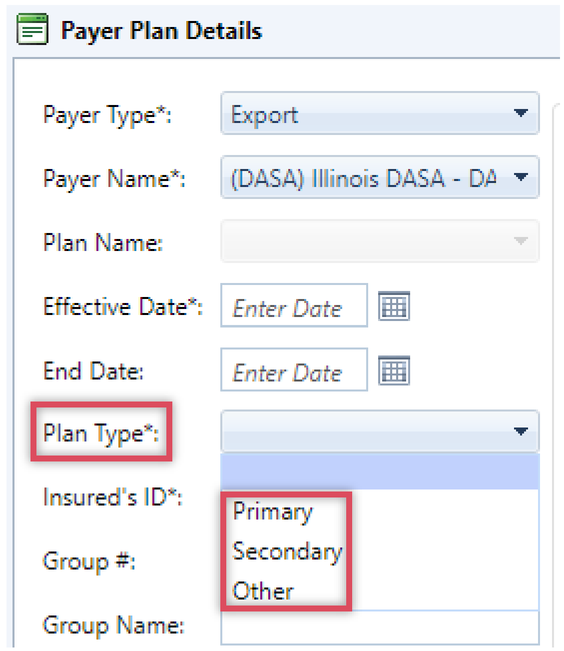
Payer Plan choices



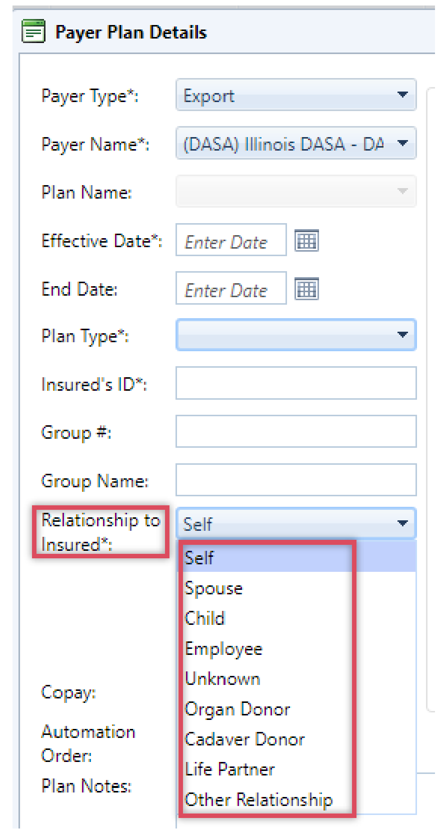
Payer Plan Details choices



Plan Type choices



Relationship to Insured choices



18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

1) **Payer Type** = Export

2) **Payer Name** = (DASA) Illinois DASA – DARTS

3) **Effective Date** = choose date

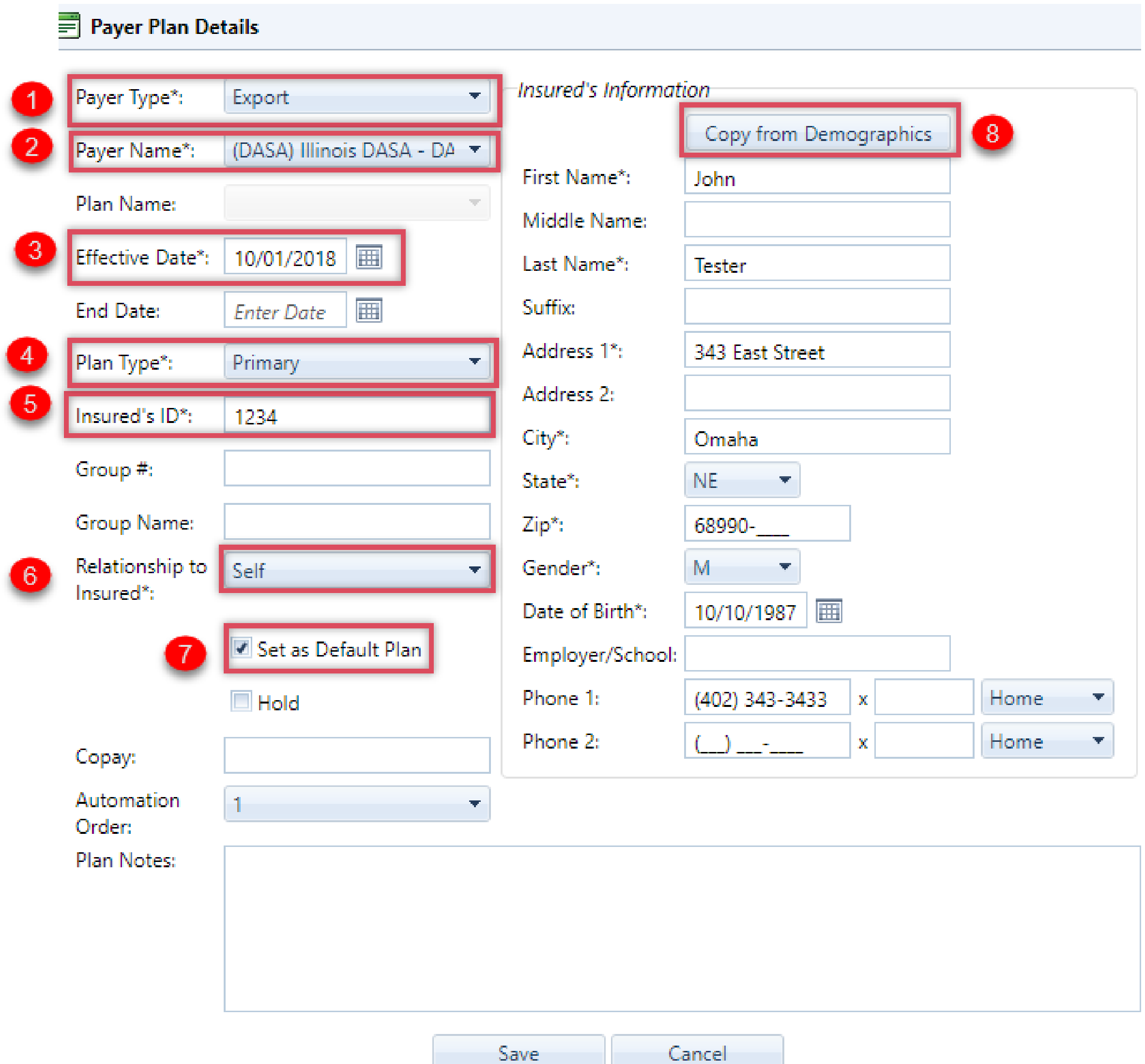
4) **Plan Type** = Choose from list

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

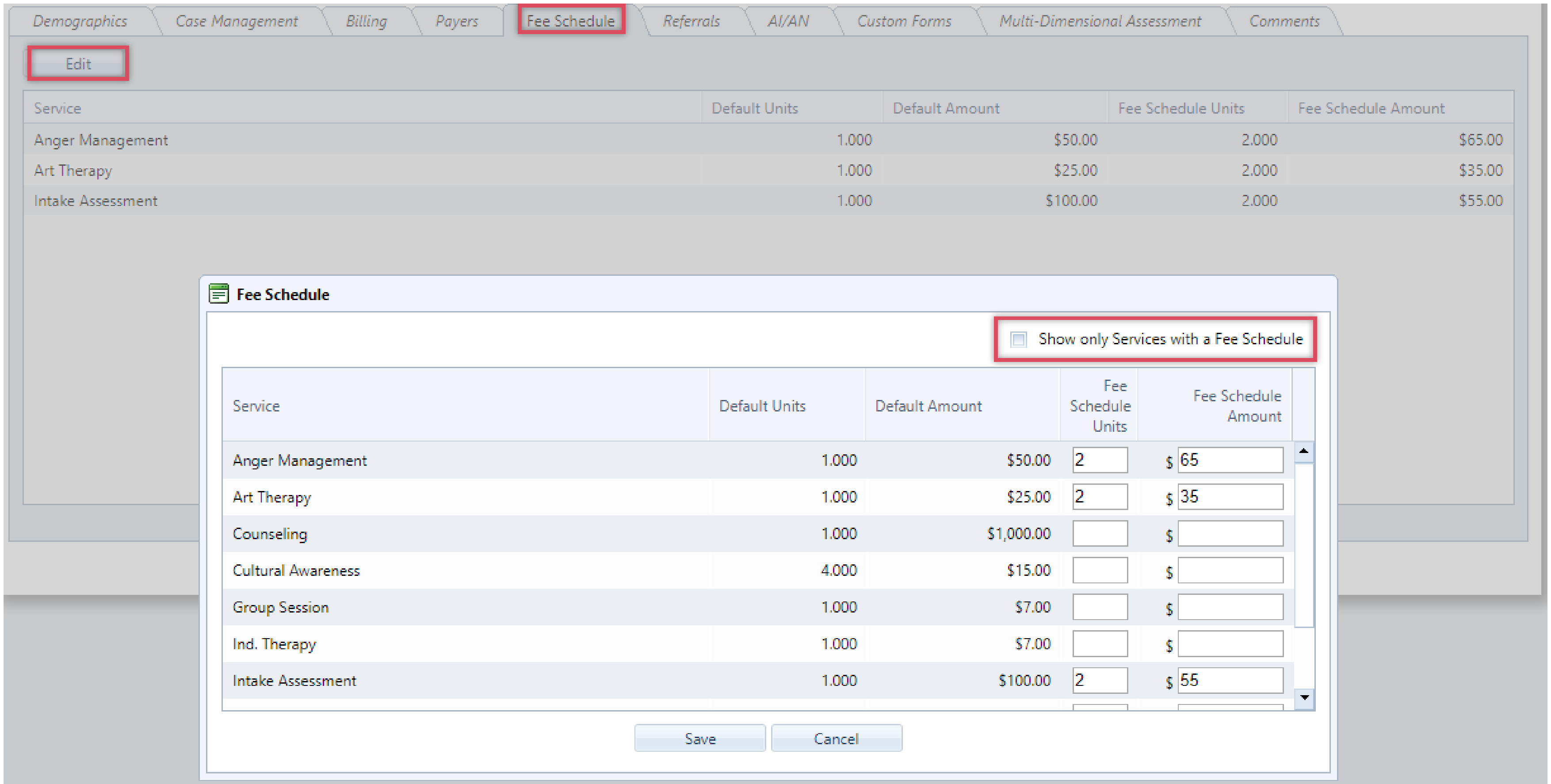


18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

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

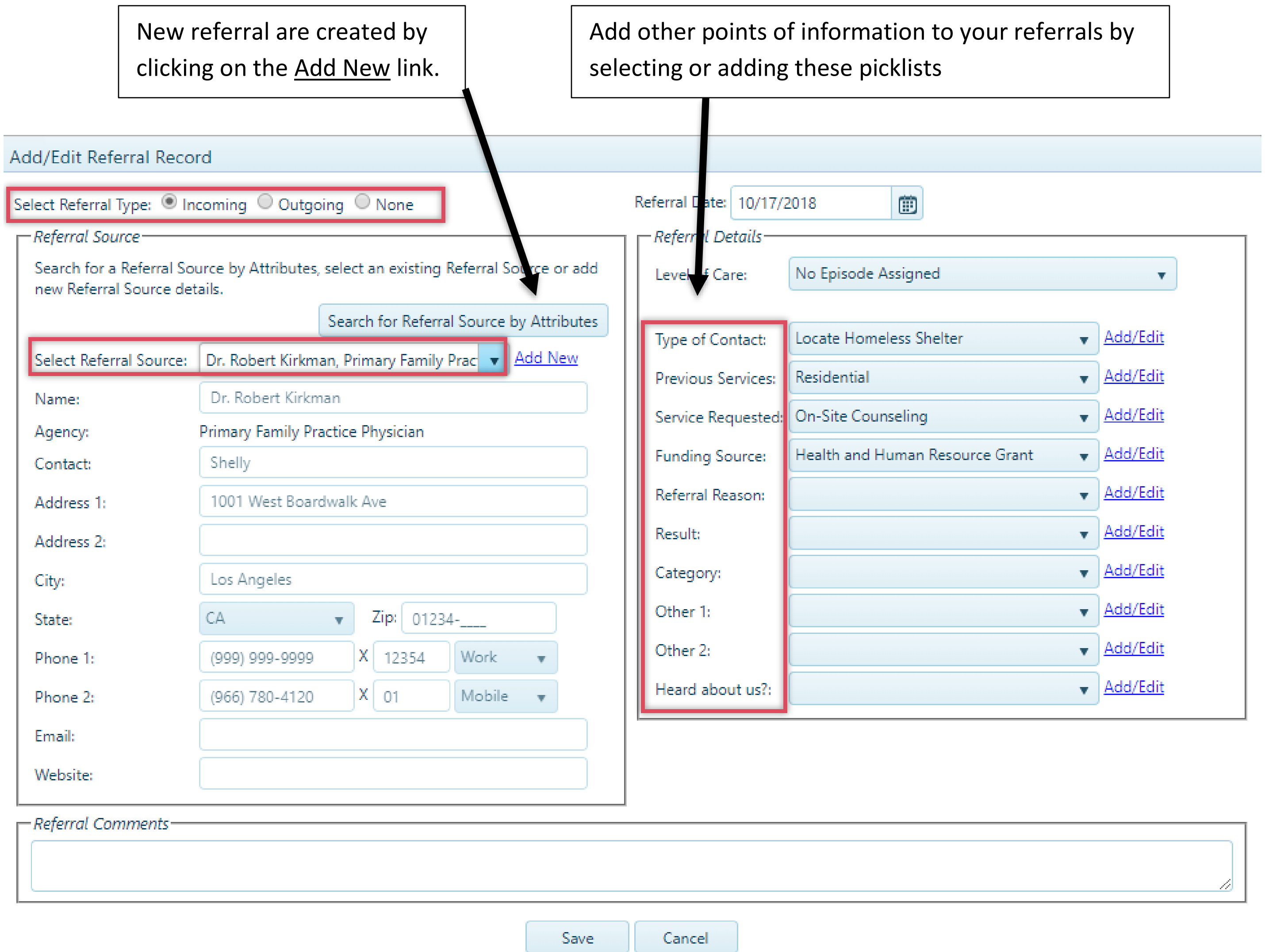
<u>Please note</u>: Contract Rate under Billing Setup must be completed before you can assign fee schedule for an individual client.

((Setup for your clients if applicable))



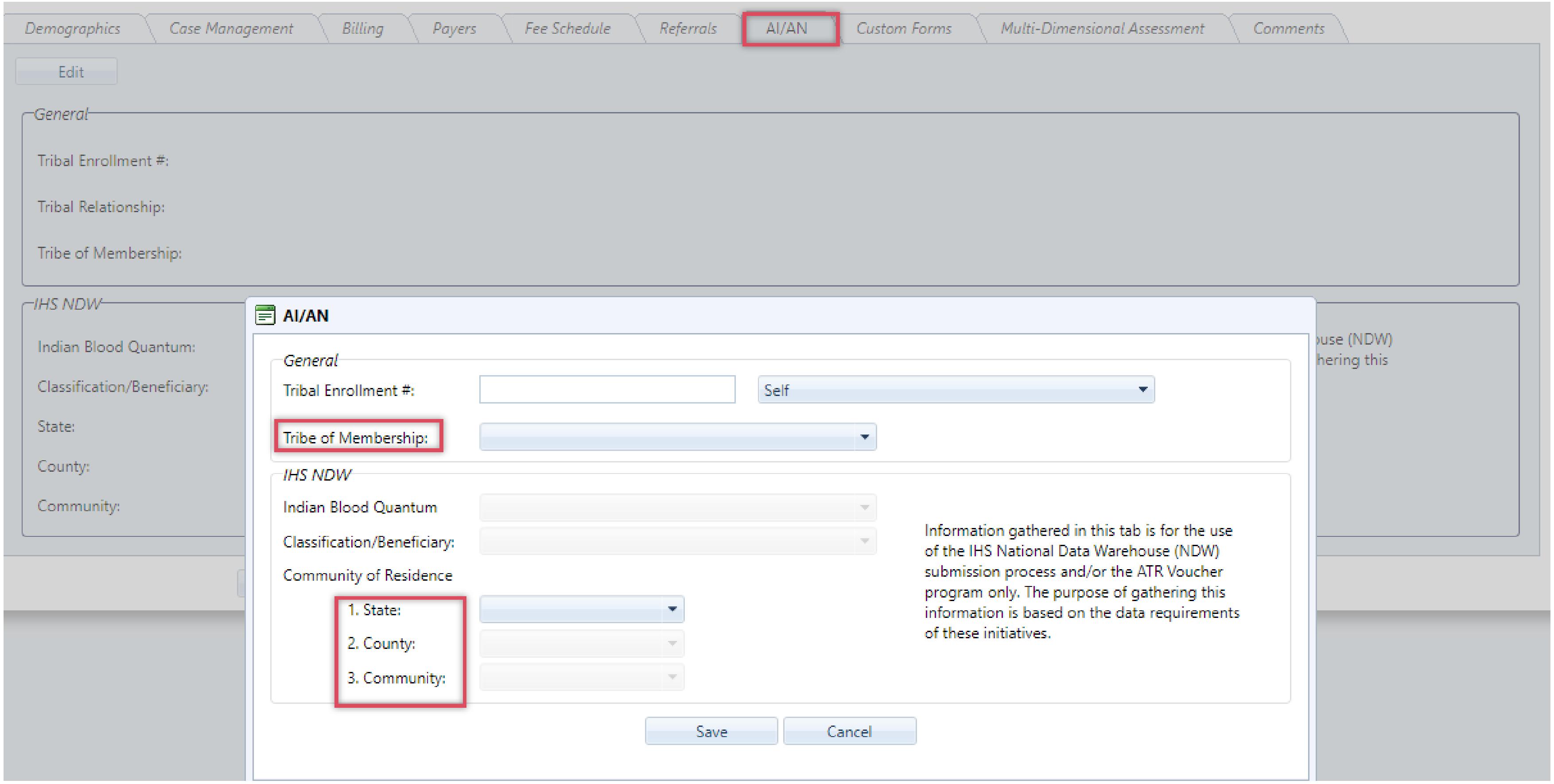
18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

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.



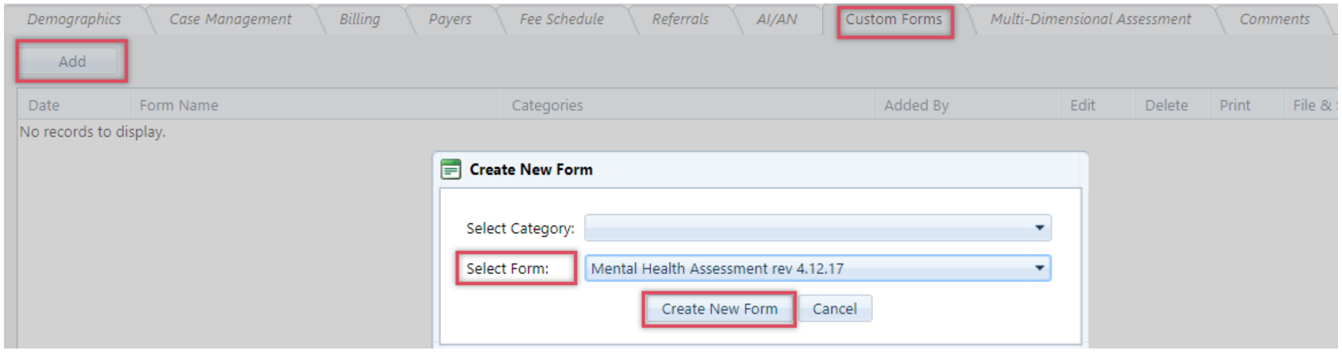
18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

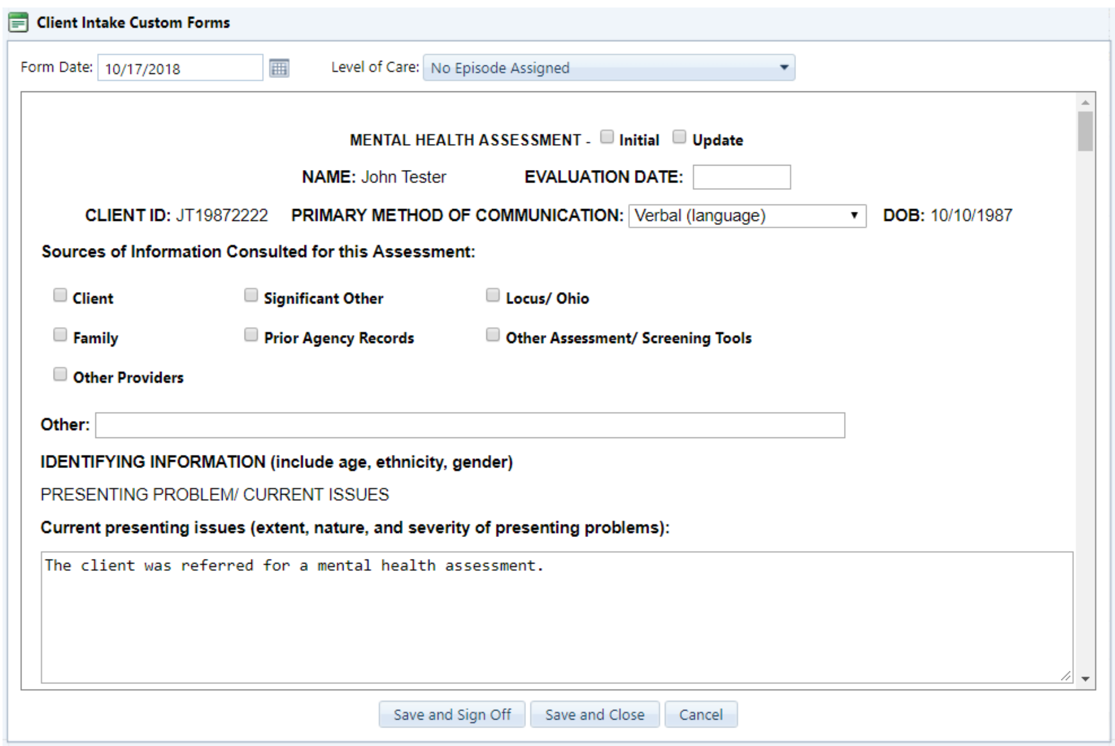
AI/AN Tab – if you work with the American Indian or Alaskan Native refer to this tab to collect tribal membership and residence



18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

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.

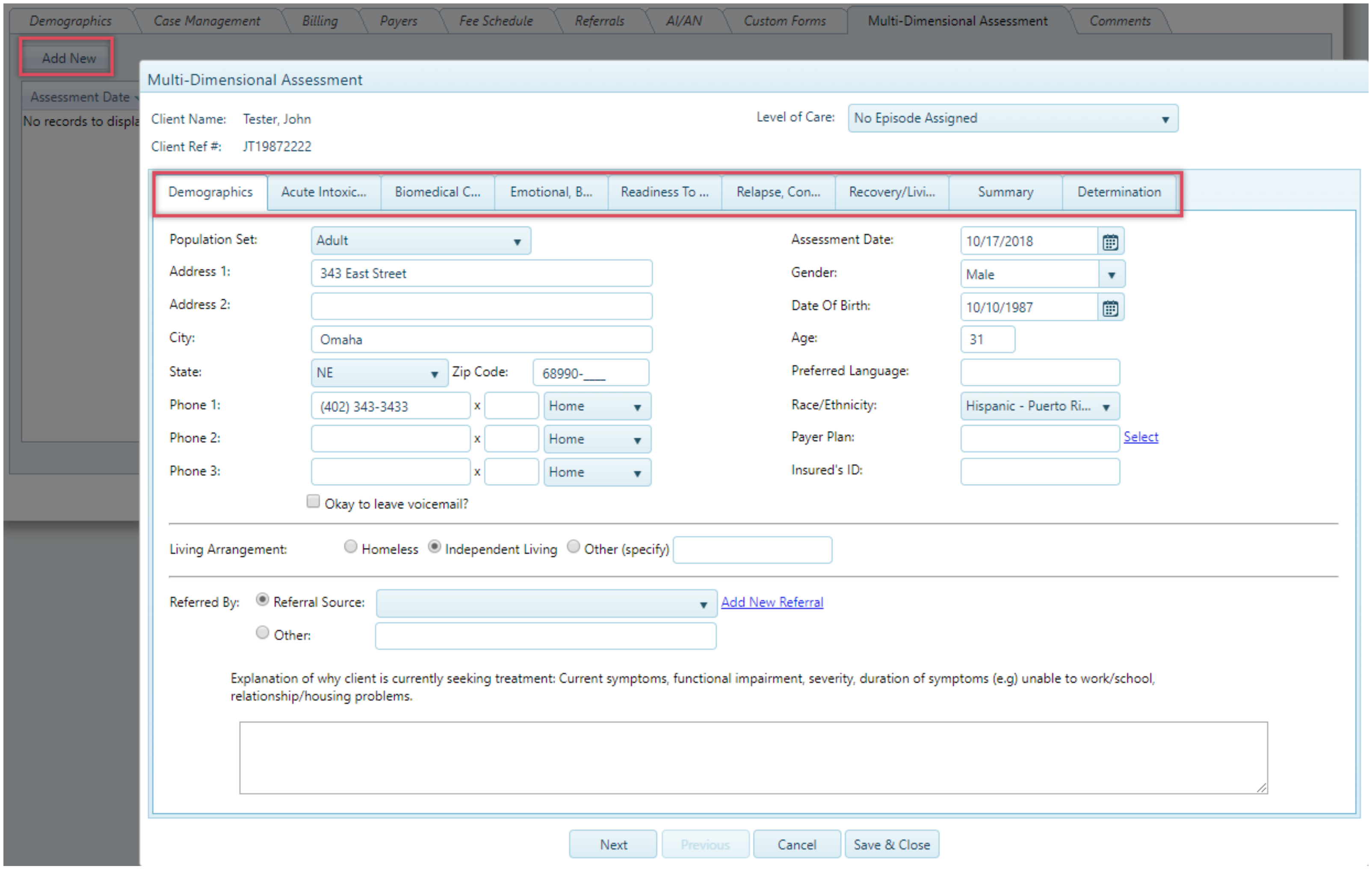




18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

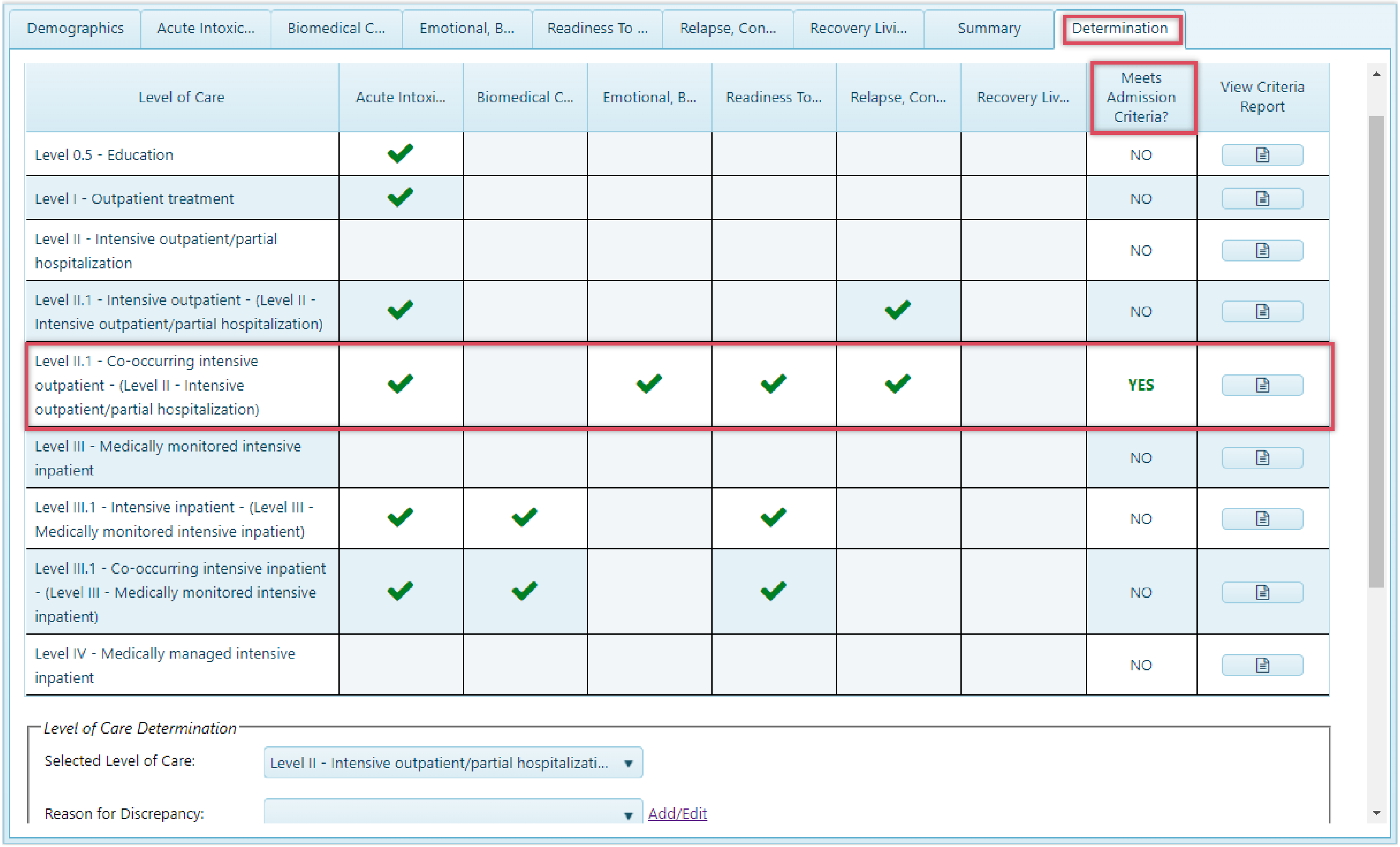
Multi-Dimensional Assessment Tab – Accommodates ASAM or other admission criteria. Use this tab to collect information and develop a level of care for your clients. Review and fill out the six domains to establish risk levels and criteria. This will help develop the client's level of care seen in the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

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



18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

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

18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

Bottom Part - explained

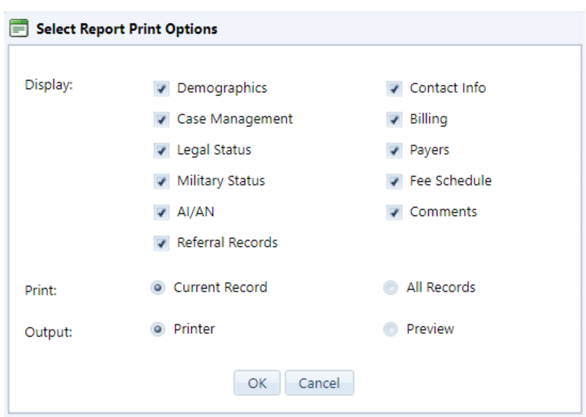
[Delete Client] button - (**this is a destructive action**) Recommend ***archiving*** (hiding) client instead of deleting client's record entirely.

[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



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

18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com

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

18047 Oak Street • Omaha, Nebraska 68130
Toll Free: (800) 324-7966 • Phone: (402) 341-8880 • Fax: (402) 341-8911
www.orionhealthcare.com