



Scheduler

User Guide

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Introduction –

AccuCare now has an updated Scheduler with new features to help streamline the process for agencies that wish to integrate their staff appointments with their clinical and billing workflow. Common features are built into this new version of Scheduler, with additional features such as:

- Checking in clients for appointments with different status levels
- Transferring appointment information into Progress Notes for quality assurance and efficiency
- Transferring appointment information directly into the billing transaction feature
- Search for staff schedules based on custom attributes (i.e. language, credentials, etc.)

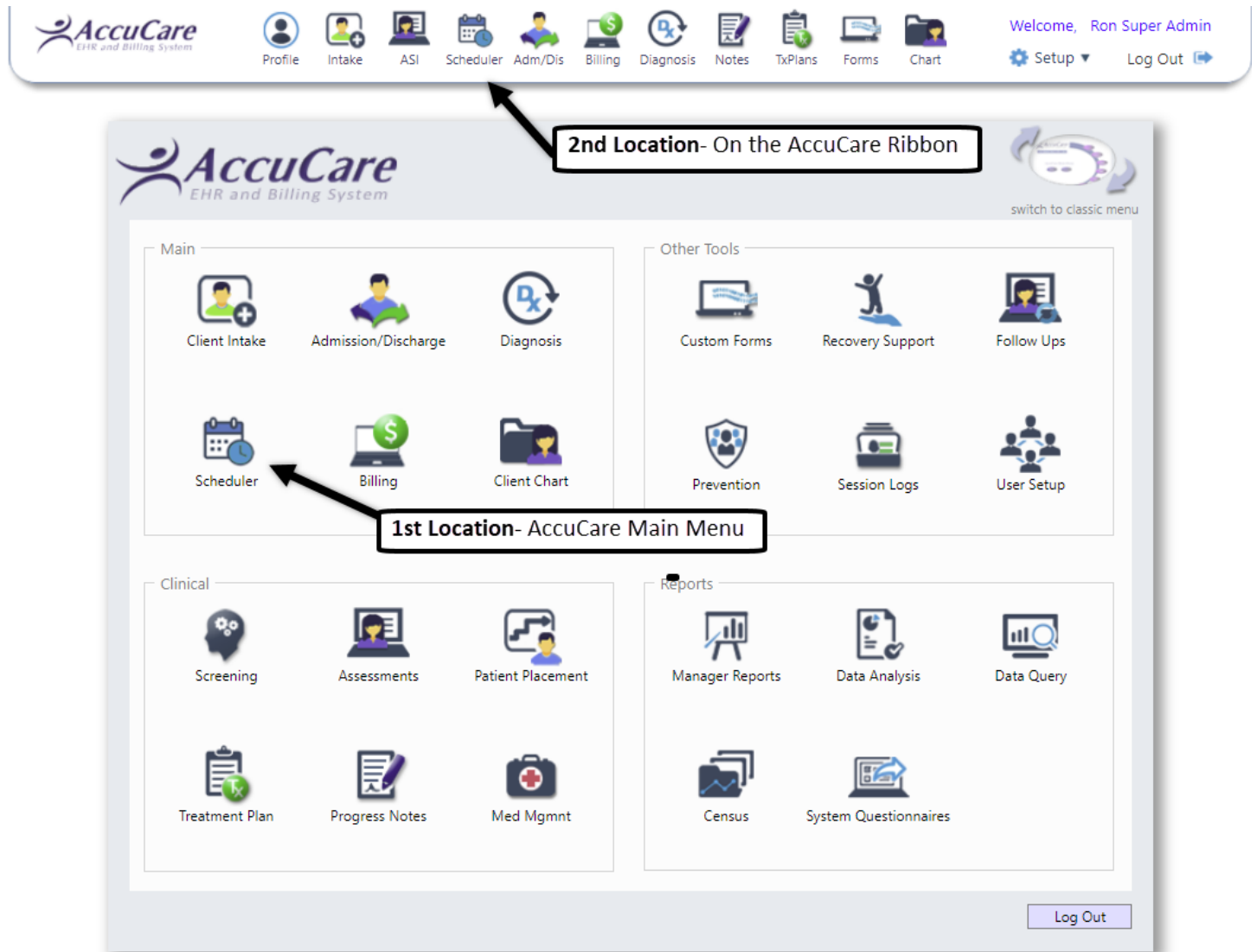
The screenshot displays the AccuCare Scheduler interface. At the top, there is a navigation bar with icons for Staff, Calendar, Client, and Reports. A search bar is located above the calendar. The calendar itself shows a grid for September 2015, with appointments for Paul Admin. The appointments are as follows:

Day	Appointment
Monday, 01 Sep	Art Therapy
Wednesday, 02 Sep	Assessment
Thursday, 03 Sep	Ind Session - to test Archivin
Friday, 04 Sep	
Saturday, 05 Sep	
Monday, 07 Sep	
Tuesday, 08 Sep	Assessment
Thursday, 10 Sep	Ind Session - to test Archivin
Friday, 11 Sep	
Saturday, 12 Sep	
Monday, 14 Sep	
Tuesday, 15 Sep	
Wednesday, 16 Sep	Anger Management
Thursday, 17 Sep	
Friday, 18 Sep	
Saturday, 19 Sep	
Monday, 21 Sep	
Tuesday, 22 Sep	Ind Session - to test Archivin
Wednesday, 23 Sep	
Thursday, 24 Sep	Anger Management
Friday, 25 Sep	
Saturday, 26 Sep	
Monday, 28 Sep	
Tuesday, 29 Sep	
Wednesday, 30 Sep	Discharge
Thursday, 01 Oct	
Friday, 02 Oct	
Saturday, 03 Oct	

At the bottom of the calendar, there are buttons for 'Appointment List' and 'Close'.

Finding Scheduler in AccuCare

Locations on where to find Scheduler in AccuCare



Scheduler Overview Introduction

Scheduler

Search

Staff Calendar Client Reports

September, 2015

Day Week Month Agenda

Add/New Appointment Client Payment

Staff Schedule

September, 2015

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Ron Clinician	30	31 Art Therapy	01 Sep	02 Anger Management	03 Intake Assessment	04 Intake Assessment	05
	06	07 Anger Management	08	09	10 Intake Assessment	11 Intake Assessment	12
	13	14 Anger Management Art Therapy	15 Group Counseling - Ange	16 Art Therapy	17 Group Counseling - Ange Intake Assessment more...	18 Intake Assessment more...	19 IOP Group Session IOP Group Session more...
	20	21 Anger Management Art Therapy more...	22 Group Counseling - Ange	23 Art Therapy	24 Group Counseling - Ange Intake Assessment more...	25 IOP Group Session	26 IOP Group Session IOP Group Session more...
	27	28 Anger Management Group Counseling - Ange	29 Group Counseling - Ange	30 Group Counseling - Ange	01 Oct Group Counseling - Ange Group Counseling - Ange	02	03 Group Counseling - Ange

Appointment List Close

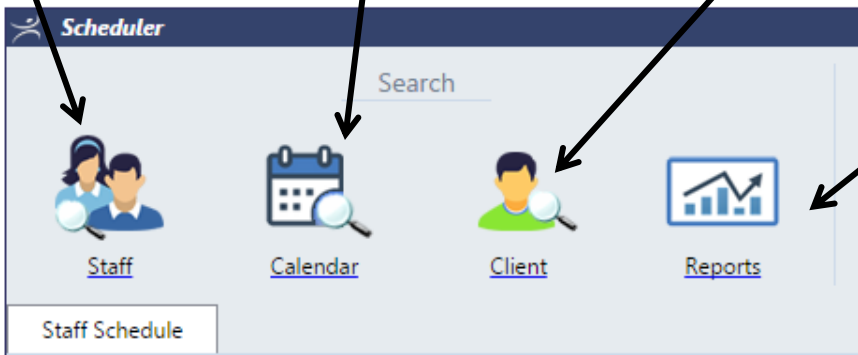
Schedule - Search Function Overview

Staff – Select other staff to see their schedule – *Level of access determines whom you can see*

Calendar – Allows you to search for an appointment using filtering dialog box

Client – Allows you to search for client's appointments. - *Level of access determines whom you can see*

Reports – Allows you run reports using filtering dialog box

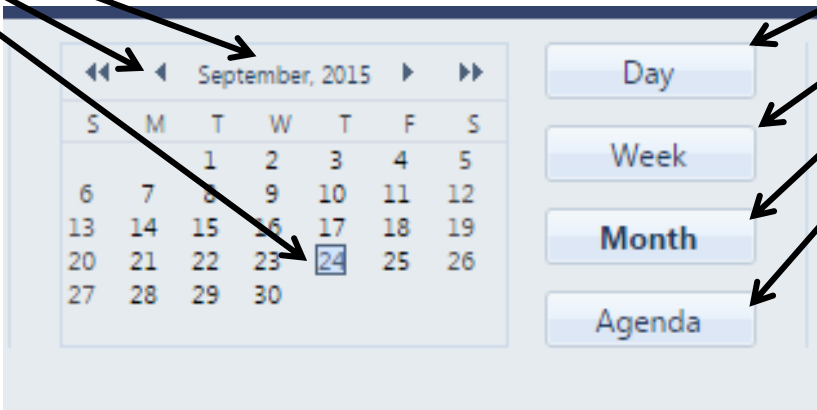


The screenshot shows the 'Scheduler' application interface. At the top, there is a 'Search' input field. Below it, four icons are displayed: 'Staff' (two people), 'Calendar' (calendar with magnifying glass), 'Client' (person with magnifying glass), and 'Reports' (bar chart with magnifying glass). Each icon has a corresponding text box above it with an arrow pointing to the icon. A 'Staff Schedule' button is visible at the bottom left of the interface.

Schedule - Calendar Function Overview

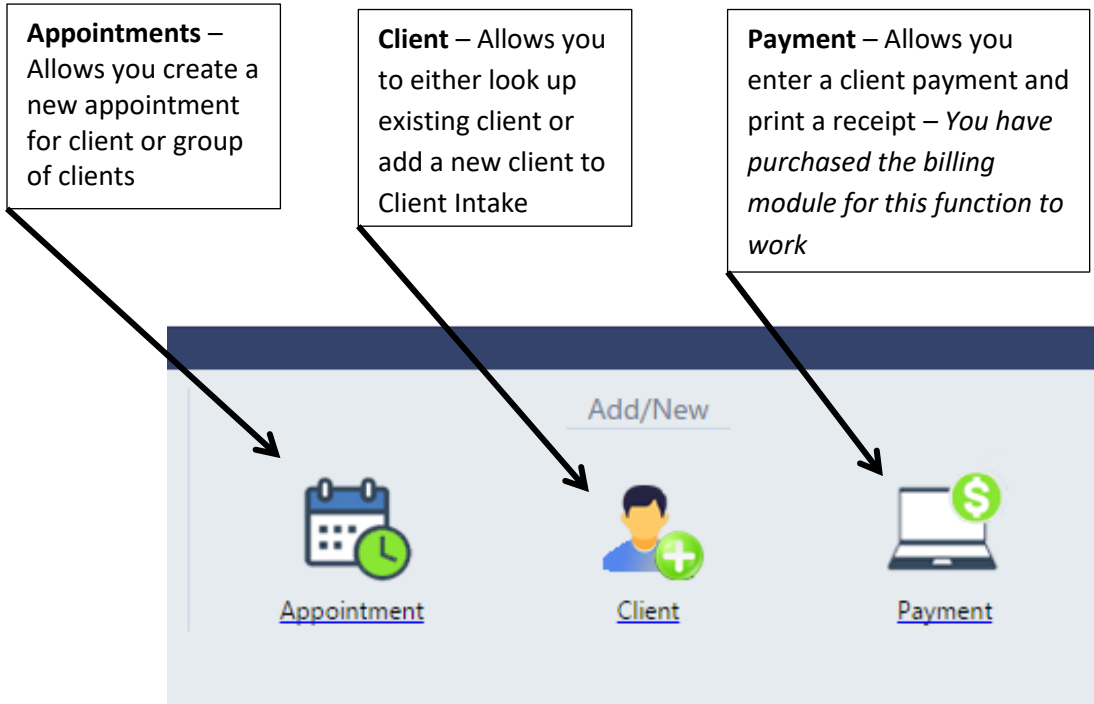
Calendar – Allows you move to a day, month or years to see appointments at those points in time.

Calendar buttons – Allows you to see a day, week, month and agenda view

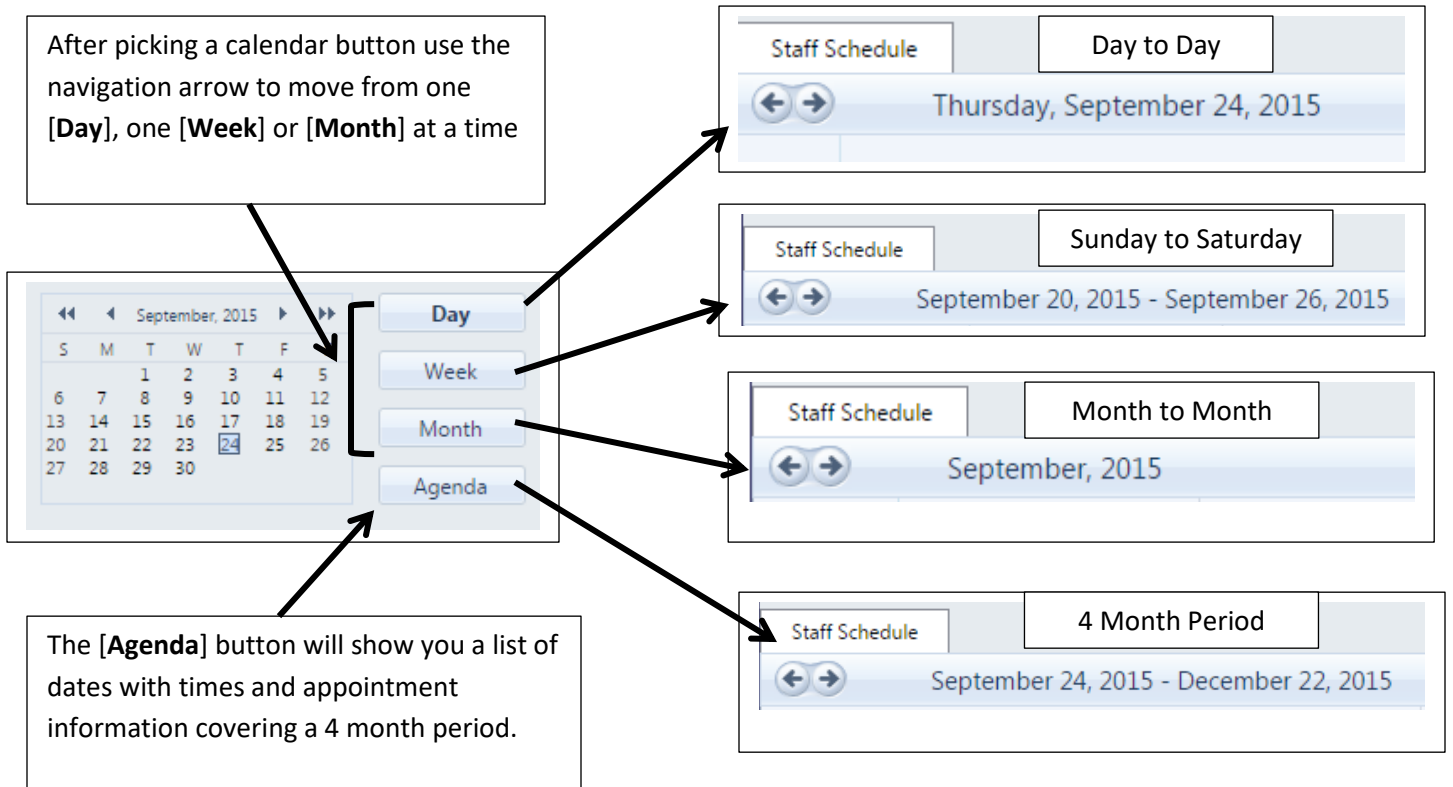


The screenshot shows a calendar interface for 'September, 2015'. The calendar grid displays days from Sunday to Saturday. The 24th is highlighted. To the right of the calendar are four buttons: 'Day', 'Week', 'Month', and 'Agenda'. Arrows from the text boxes point to the navigation arrows on the calendar and the view selection buttons.

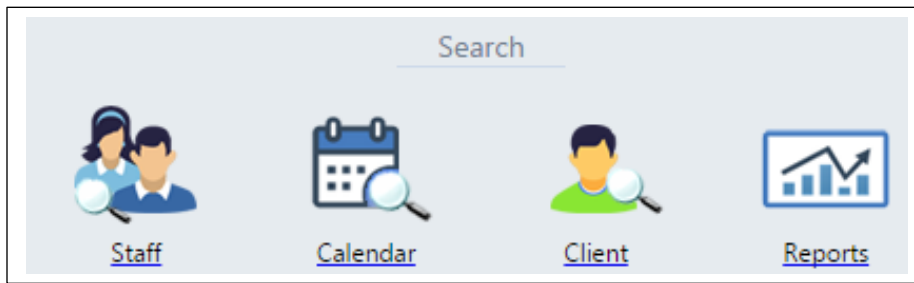
Schedule - Add/New Function Overview



Calendar Navigation arrows

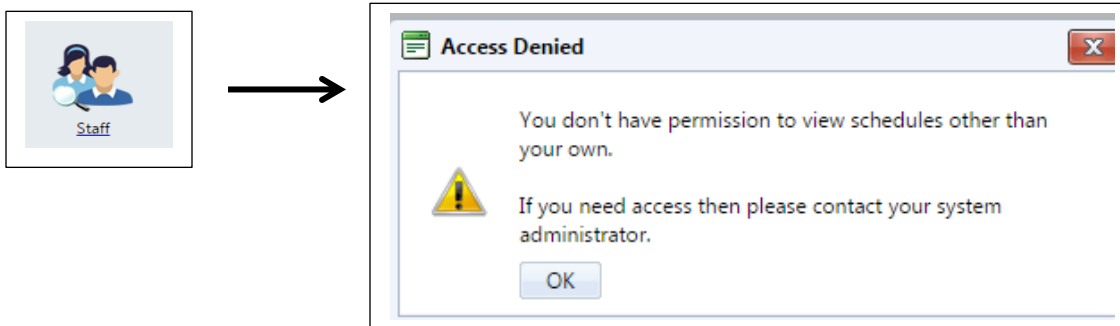


Search Functions in Detail View



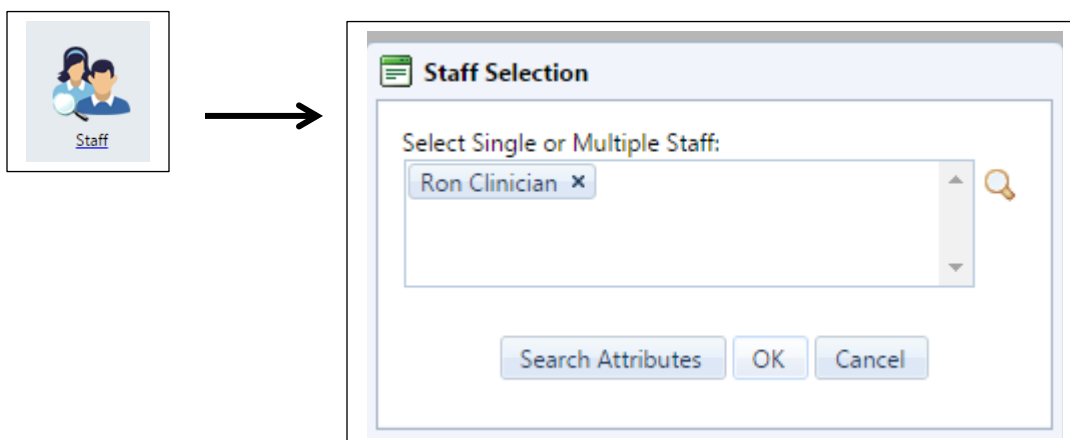
Search – Staff (View Own Schedule Only Access)

If your level of access is, clinician and you have not been given access to view all user's schedule you would be given this warning notice when you click on the Staff icon under the search

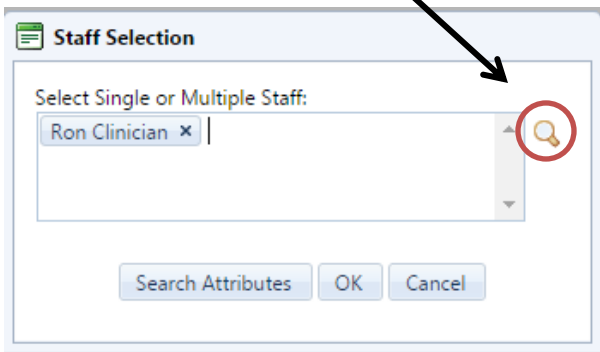


Search – Staff (View All User's Schedule Access)

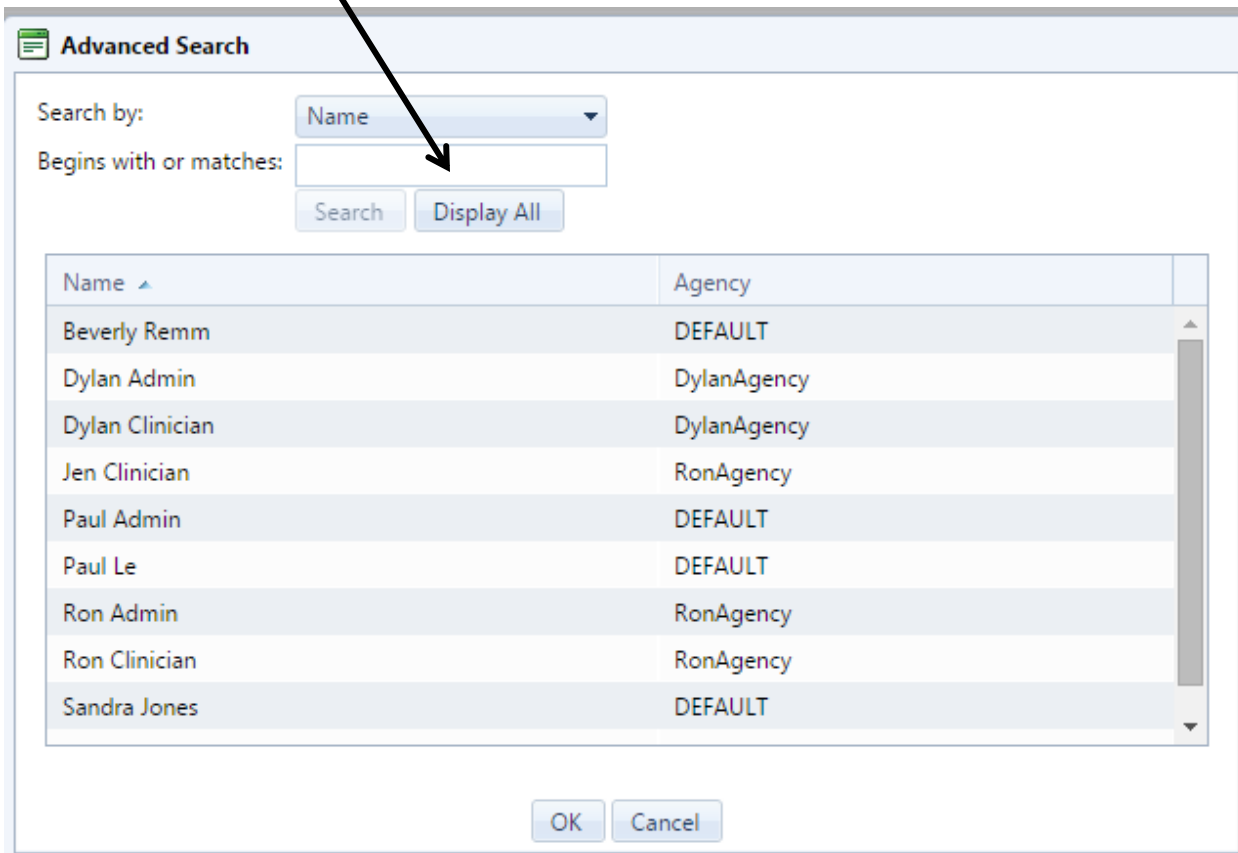
If you have been given access to view all user's schedule then you would be presented this dialog box. This dialog box would give you the ability to view other clinician's schedule



By clicking on the spyglass, you open the Advanced Search dialog box

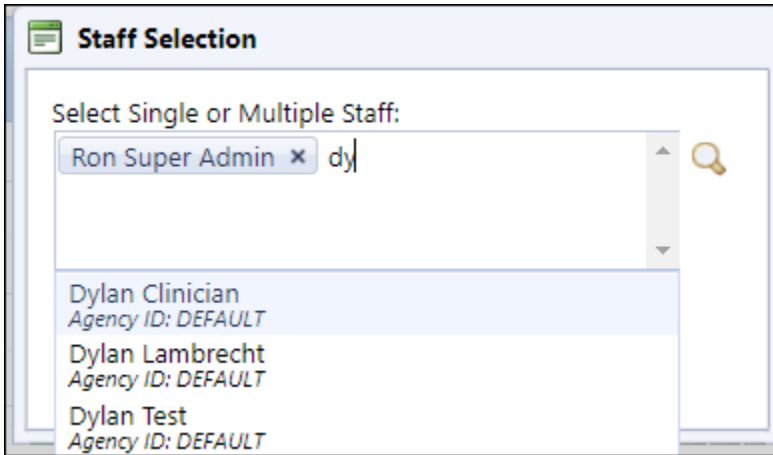


By click on the [Display All], you would be given a list of the clinicians in the database or you could use the search button to look up specific clinician.

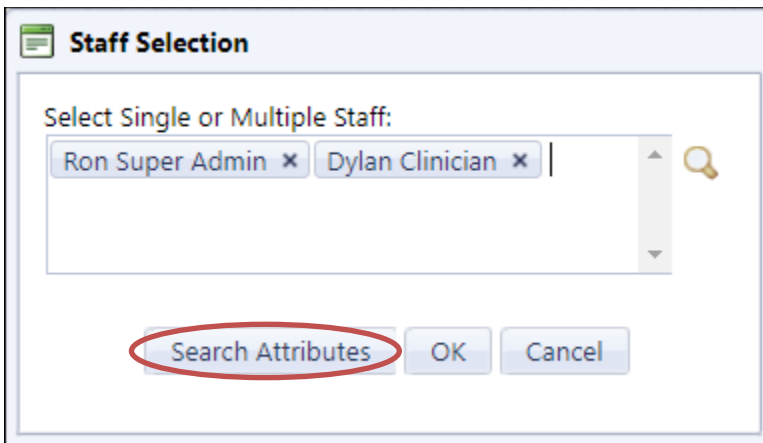


A faster way to search with this dialog box is to start typing the ***first 2 letters of the first name*** of the clinician name. This would give a quick list of anyone who met these criteria.

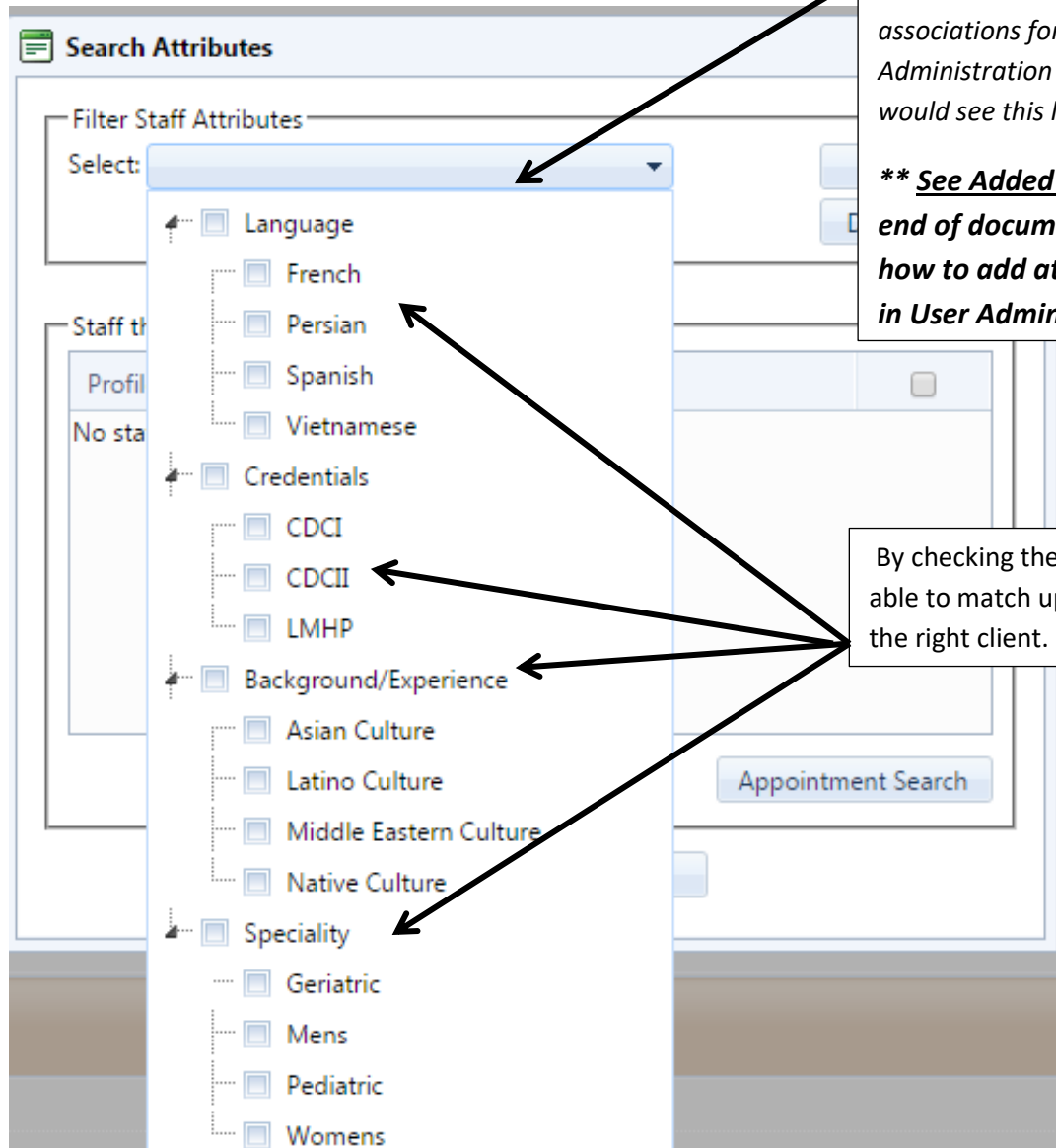
Example



The [Search Attributes] button gives another layer to find the clinician who would be the best fit for the client.



After opening the Search Attributes, click the down arrow to see the list of attributes for the clinician that meet the needs of your client or clients.



**** Special Note:** The Super Admin would create this list and create associations for each user in the User Administration dialog box before you would see this list.

**** See Added Reference # 1 at the end of document for instructions on how to add attributes to a clinician in User Administration.**

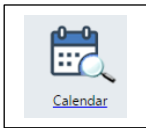
By checking the attributes, you are able to match up the right clinician to the right client.

Search - Calendar

When you click on the Calendar icon, you open the option to do a Calendar Search. This dialog box allows you to search the entire schedule using filters to narrow down your search. Simply fill your filter options and click the [Apply Filters] button to get your results.

Special Note: To receive the best results from calendar search we recommend setup both the Attributes Tab and Schedule Tab.

**** See Added References # 1 and #2 at the end of document for instructions on how to setup attributes and schedule for each clinician in User Administration Module.**



Calendar Search

Filter

Time Classification:

Duration: hours minutes

Date Range: to

Session Type:

Staff:

Location:

Appointment Times

Date	Staff Name	Location	Type	Session Type	Open
No appointment times found matching the selected filters.					

Calendar Filter Options

Time Classification: Here are given a list of different times like All Times, Reserved, Open Time and Scheduled Times

Staff: Allows you to look for certain staff of one or more. You can either type in the first 2 letter of the first name or use the advanced spyglass to the right search box to search.

Duration: would give you a further filter to finds times within a certain time length. For example 1 hour / 30 minutes

[Search Staff by Attributes] button: Allow you to search for assigned attributes to help narrow down your choices more closely.

The screenshot shows the 'Calendar Search' interface. On the left, there is a 'Filter' section with the following options: 'Time Classification' (dropdown menu set to 'All Times'), 'Duration' (input fields for 'hours' and 'minutes'), 'Date Range' (calendar icons showing '02/07/2018' to '02/07/2018'), and 'Session Type' (dropdown menu). On the right, there is a 'Staff' search box with a 'Search Staff by Attributes' button above it and a search icon to its right. Below the search box is a 'Location' dropdown menu. At the bottom right of the search area are two buttons: 'Apply Filters' and 'Clear Filters'. Arrows from callout boxes point to each of these elements.

Session Types: You can also filter on session types to narrow you results.

[Apply Filters] or [Clear Filters] buttons – activate your filter selections or clears them to start a new filter search

Date Range: Please take note of the defaulted date range given. It is set to give a today's date and is changeable.

Location: If you have setup your location of services you will be able to use this search to narrow down the location.

When you set up then apply your filters a list of your results are displayed under Appointment Times

Calendar Search

Filter

Time Classification: Reserved

Duration: [] hours [] minutes

Date Range: 02/07/2018 to 02/07/2018

Session Type: Group Counseling

Search Staff by Attributes

Staff: Ron Senior Clinician

Location: (AAP) Ashley Adams Place

Apply Filters

Clear Filters

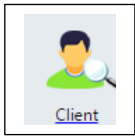
Appointment Times

Date	Staff Name	Location	Type	Session Type	Open
02/07/2018 9:00 AM	Ron Senior Clinician	AAP	Reserved	Group Counseling	
02/07/2018 9:15 AM	Ron Senior Clinician	AAP	Reserved	Group Counseling	
02/07/2018 9:30 AM	Ron Senior Clinician	AAP	Reserved	Group Counseling	

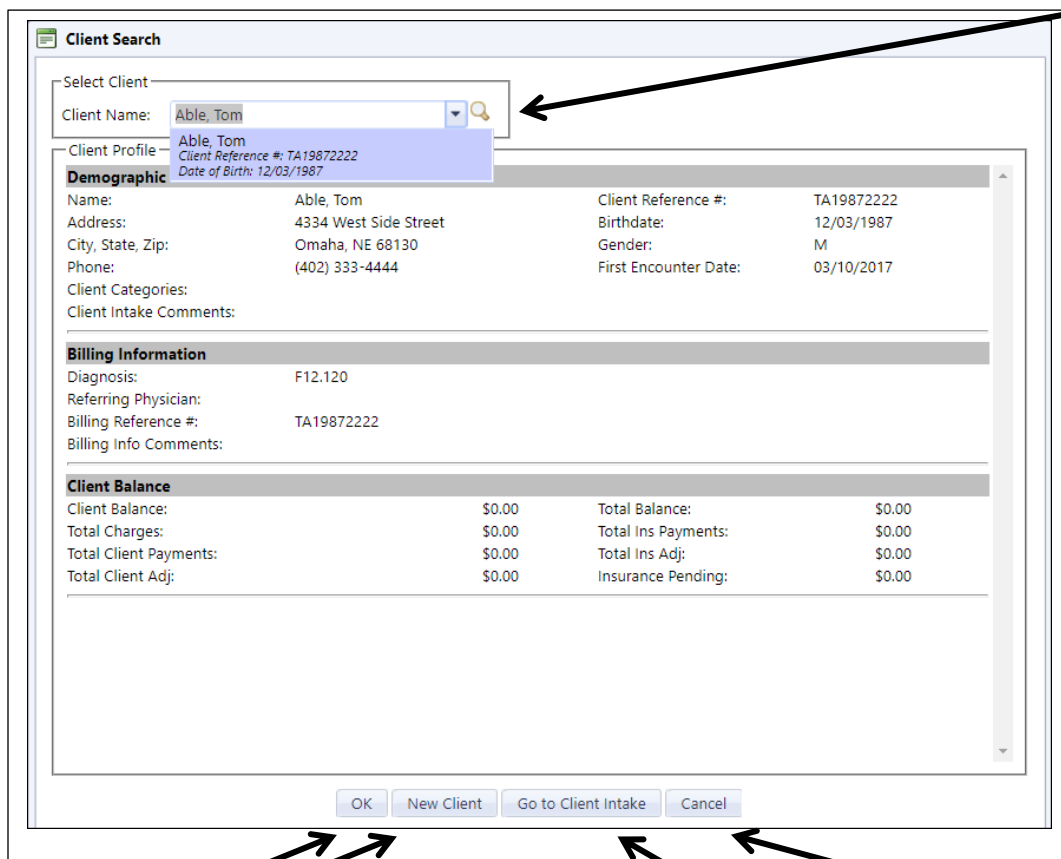
Close

Search - Client

When you click on the Client icon you are given a dialog box to search for client already in the database or given an option to add a new client



Here you have given an option to search for client by entering in their name. You could use the spyglass to access the [Advance Search] dialog box



Client Search

Select Client

Client Name: Able, Tom

Client Profile: Able, Tom
Client Reference #: TA19872222
Date of Birth: 12/03/1987

Demographic

Name:	Able, Tom	Client Reference #:	TA19872222
Address:	4334 West Side Street	Birthdate:	12/03/1987
City, State, Zip:	Omaha, NE 68130	Gender:	M
Phone:	(402) 333-4444	First Encounter Date:	03/10/2017

Client Categories:
Client Intake Comments:

Billing Information

Diagnosis:	F12.120
Referring Physician:	
Billing Reference #:	TA19872222
Billing Info Comments:	

Client Balance

Client Balance:	\$0.00	Total Balance:	\$0.00
Total Charges:	\$0.00	Total Ins Payments:	\$0.00
Total Client Payments:	\$0.00	Total Ins Adj:	\$0.00
Total Client Adj:	\$0.00	Insurance Pending:	\$0.00

OK New Client Go to Client Intake Cancel

[OK] button will open another tab on the scheduler to give the selected client's appointment agenda

[New Client] button opens the Quick Add Client dialog box to search for existing clients or add a new client (see next page for more information)

[Go to Client Intake] button takes you to the Client Intake dialog box to search or add a new client

[Cancel] closes this dialog box and takes you back to the schedule view

Client Search – [OK] Button

After selecting a client in your client search click on the [OK] button, this will give you a view of this client’s agenda

Staff Schedule Client: Scoter, Sarah

September 27, 2015 - September 25, 2015

Date	Time	Appointment
28 Monday September, 2015	9:00 AM - 10:00 AM	Anger Management Session Type: Ind Session Anger Management Client(s): Able, Ada; Howie, Manny; Langley, Jack; Mandy, Ralph; Rose, Dala; Scoter, Sarah; Thompson, Moe; Weathers, Todd Staff: Ron Clinician
	3:00 PM - 5:30 PM	Group Counseling - Anger Management Session Type: Group Counseling - Anger Management Client(s): Able, Ada; Belcourt, Cindy; Howie, Manny; Langley, Jack; Mandy, Ralph; Rose, Dala; Rose, Dale; Scoter, Sarah; Thompson, Moe; Weathers, Todd; Zehpher, Allen Staff: Ron Clinician
30 Wednesday September, 2015	12:00 PM - 2:00 PM	Intake Assessment Session Type: Intake Assessment Client(s): Able, Ada; Howie, Manny; Langley, Jack; Mandy, Ralph; Rose, Dala; Scoter, Sarah; Thompson, Moe; Weathers, Todd Staff: Ron Admin
1 Thursday October, 2015	9:00 AM - 11:30 AM	Group Counseling - Anger Management Session Type: Group Counseling - Anger Management Client(s): Able, Ada; Howie, Manny; Langley, Jack; Mandy, Ralph; Rose, Dala; Scoter, Sarah; Thompson, Moe; Weathers, Todd Staff: Jen Clinician

Client Search – [New Client] Button

This will open the Quick Add Client dialog box

Quick Add Client

Use Existing File

Client Name:

Create New Master File

First Name:*

Last Name:*

Gender:*

Date Of Birth:

Phone: x

SSN:

Client Reference #:

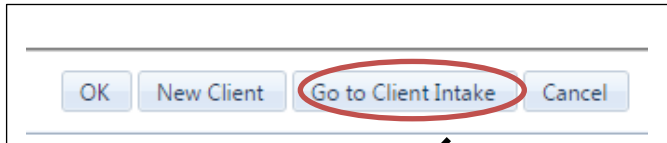
Use Existing File – This upper portion also will give you the chance to select an existing client to open the client’s agenda. (See screen shot above)

Create New Master File – If this client is new to your database, you can add them quickly to list of client in Client Intake without having to exit to Client Intake. This action will allow you continue with scheduling appointments.

Important Note: Insure to go back to Client Intake to complete the demographics

Client Search – [Go to Client Intake] Button

This exits the Scheduler and opens the Client Intake Administration dialog box. You can add either a new client or lookup an existing client.



Client Intake

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

Begins with or matches: Search Display All

Client Name: Able, Tom
Level of Care: Level III.3 Monitored inpatient
Location: (ABCT) ABC Treatment

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Able, Tom	12/03/1987	(402) 333-4444	232-32-2222	TA19872222	TA19872222

Demographics Case Management Billing Payers Fee Schedule Referrals AI/AN Custom Forms Multi-Dimensional Assessment Comments

Edit

Main

Client Name: Able, Tom **First Encounter Date:** 03/10/2017
Nickname: **Marital Status:** Married
Date of Birth: 12/03/1987 **Work Status:** Full-time (35 hrs+/wk)
Gender: Male **Race:** White (Not of Hispanic Origin)
Social Security #: 232-32-2222 **Religion:** Protestant
Client Reference #: TA19872222 **Ethnic Group:**

Contact Information

Address: 4334 West Side Street **Phone 1:** (402) 333-4444 - Home
Omaha, NE 68130 **Phone 2:**
Phone 3:
Email:
Emergency Contact: **Phone:**

Legal Status

Involved with Child Protective Services:
Current Probation Status:
Current Parole Status:
Family in Criminal Justice System:

Military

Military Status: Missing Data **Family Members with Military Background:** Missing Data
Military Branch: Not Applicable **Number of Family Members in Military:**

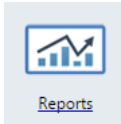
Additional

Privacy Agreement Signed: No **Archived:** No

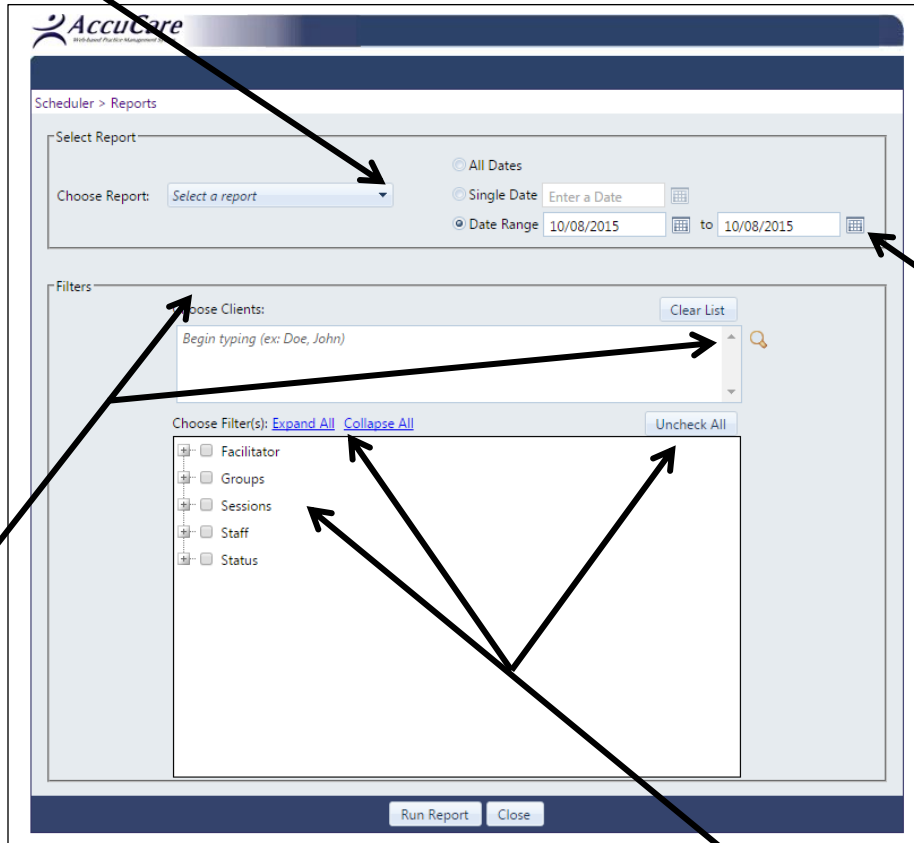
Add New Client Delete Client Print File and Sign Referral Source Setup Export Close

Search – Reports

The Reports Button has a multitude of options and filters to pull the reports you need from your schedule. Start with the Report you want then continue with the rest of the filter.



1st Choose Report- When you click on the drop down arrow, you will be giving a list of report you can pull from the scheduler. ***See next page for list of reports.***



To narrow or increase your search we give the option to select a date range or multiple days.

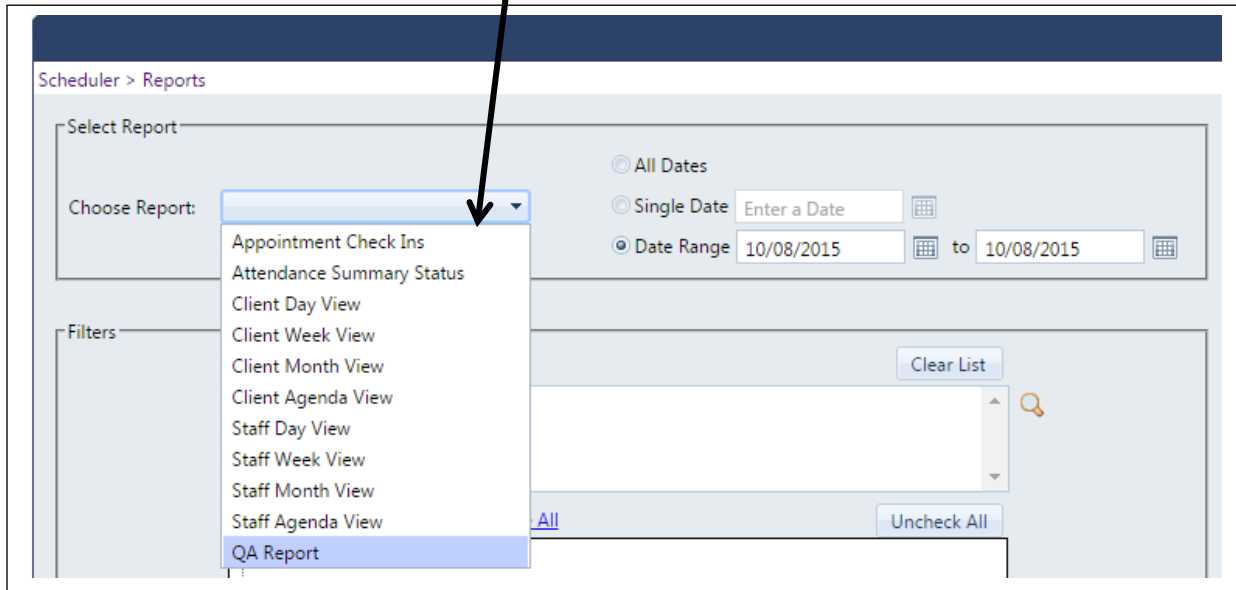
Note: The default date is set for today date

3rd Choose Clients- This has the same functionality as other areas within the scheduler. You can either start typing in the name of your clients or use the spyglass to bring up the advanced search dialog box

4th Choose Filters – Check the filters that apply to search and report selected. You can expand and collapse your list then check all that apply. To reset your check box click on the [Uncheck All] button

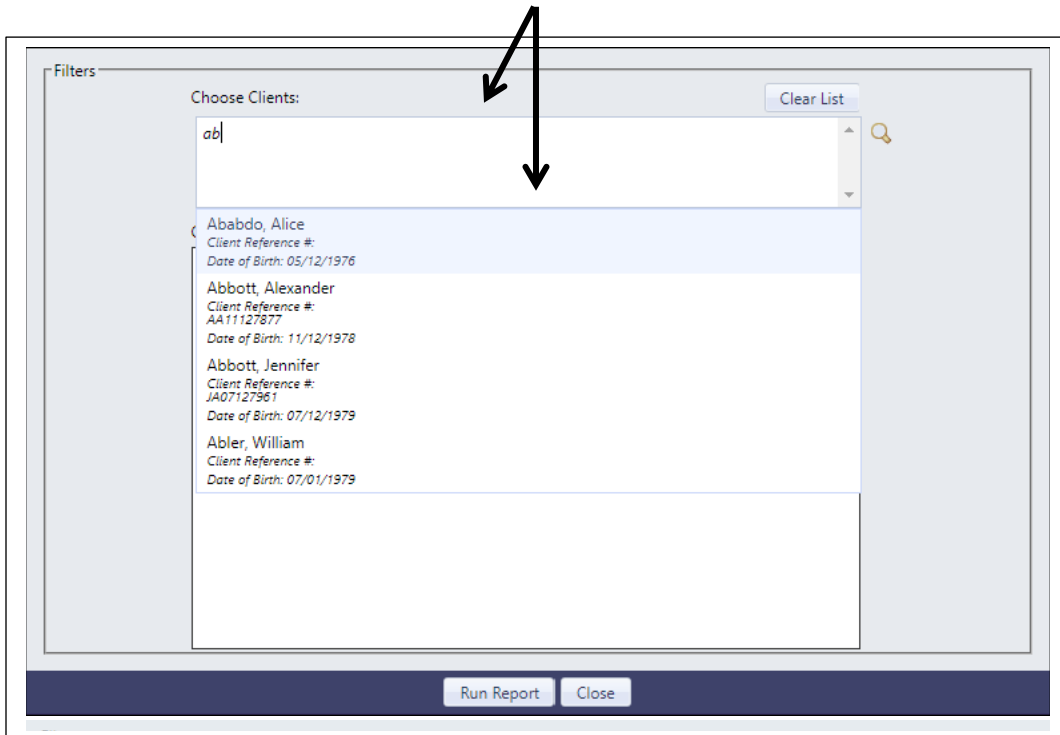
Select Report

Here is the list of Scheduler reports you can run after you have set your filters.



Filters – Choose Clients

Under the filters section, all you need to do is begin typing 2 letters of the client's last name. In this example, I typed the letter (ab) which gives me a list of clients whose name begins with the letters (ab).



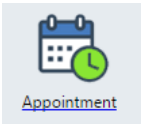
Filters – Choose Filter(s)

After choosing your Clients, you are given the opportunity to filter your output by Facilitator, Group, Sessions, Staff, and Status. In this example, I choose Status → Attended

Here is a sample of the report create from selections.

Appointment Check-Ins 09/01/2015 - 10/08/2015						
Client	Date	Status	Event	Facilitator	Session	Group
Able, Ada	09/21/2015 9:00 AM to 10:00 AM	Attended	Anger Management	Ron Clinician	Ind Session Anger Management	
Able, Ada	09/19/2015 10:00 AM to 11:00 AM	Attended	IOP Group Session	Sandra Jones	IOP Group Session	
Able, Ada	09/17/2015 3:00 PM to 5:30 PM	Attended	Group Counseling - Anger Management	Ron Clinician	Group Counseling - Anger Management	
Able, Ada	09/17/2015 10:00 AM to 11:00 AM	Attended	IOP Group Session	Sandra Jones	IOP Group Session	
Able, Ada	09/17/2015 9:00 AM to 10:00 AM	Attended	Group Counseling - Anger Management	Ron Clinician	Group Counseling - Anger Management	
Able, Ada	09/17/2015 9:00 AM to 11:30 AM	Attended	Group Counseling - Anger Management	Jen Clinician	Group Counseling - Anger Management	
Able, Ada	09/14/2015 12:00 PM to 1:00 PM	Attended	Art Therapy	Ron Clinician	Art Therapy	
John, Applebee	09/14/2015 9:00 AM to 10:00 AM	Attended	Assessment	Staff		
Able, Ada	09/14/2015 9:00 AM to 10:00 AM	Attended	Anger Management	Ron Clinician	Ind Session Anger Management	
Able, Ada	09/14/2015 1:00 AM to 3:00 AM	Attended	General	Staff	General	
Able, Ada	09/09/2015 12:00 PM to 2:00 PM	Attended	Intake Assessment	Ron Admin	Intake Assessment	
Able, Ada	09/07/2015 9:00 AM to 10:00 AM	Attended	Anger Management	Ron Clinician	Ind Session Anger Management	
Scoter, Sarah	09/07/2015 9:00 AM to 10:00 AM	Attended	Anger Management	Ron Clinician	Ind Session Anger Management	
Scoter, Sarah	09/03/2015 6:00 PM to 7:00 PM	Attended	Ind Session - to test Archiving	Paul Admin	Ind Session - to test Archiving (Archived)	

Add/New - Appointments



After selecting the above 'Appointment' icon, you will be brought to the below page:

The 'Staff' field allows you to either free type the first few letters of the staff member's last name or you can select the magnifying glass to do an advanced search and find the staff member.

The 'Facilitator' drop down allows you to select the organizer for the appointment or main staff member for the appointment. These names are populated by the staff members entered directly above this drop down.

The screenshot shows the 'New Appointment' form with the following fields and buttons:

- Staff:** A search field containing 'Dylan Lambrecht, CCI, ' with a magnifying glass icon.
- Facilitator:** A dropdown menu showing 'Dylan Lambrecht, CCI,'.
- Clients:** A search field containing 'Bailey, Bill ' with a magnifying glass icon.
- Buttons:** 'New Client', 'Clear List', and 'Add From Group'.
- Max Attendance:** A numeric input field.
- Template:** A dropdown menu.
- Session Type:** A dropdown menu showing 'Review of Assessment'.
- Event:** A dropdown menu showing 'Review of Assessment'.
- Start Time:** A date and time selector showing '09/25/2015 1:00 PM'.
- End Time:** A date and time selector showing '09/25/2015 2:00 PM'.
- Color:** A color selection dropdown.
- Transfer:** Checkboxes for 'Transfer To Billing' and 'Transfer To Progress Notes'.
- Recurrence:** A section with radio buttons for 'Daily', 'Weekly', 'Monthly', and 'Yearly'. It includes a 'Recur every' field set to '1' week(s) on, and checkboxes for days of the week (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday). There are also options for 'No end date', 'End after 10 occurrences', and 'End by 9/25/2015'.
- Buttons:** 'Save' and 'Cancel' at the bottom.

The 'Clients' field allows you to either free type the first few letters of the client's last name or you can select the magnifying glass to do an advanced search and find the staff member.

'New Client' button: Brings you to the 'Quick Add Client' screen where you can create a new client and then tie that created client to the 'Clients' field on this 'New Appointment' screen. You also have the option to select and use an existing client on the 'Quick Add Client' screen.

'Clear List' button: Clears all clients from the 'Clients' field directly above this button.

'Add From Group' button: Allows you to add a particular client or clients from a specific group to the 'Clients' field above this button.

The 'Max Attendance' field allows you to select the max amount of clients that are part of an appointment. This works in conjunction with the 'Scheduler Templates' allowing you to limit attendees. For example, if you input a value of 2 in 'Max Attendance' and add 3 clients you will get a message stating you have exceeded the max amount of attendees. The message will then allow you to continue adding or cancel.

The 'Template' dropdown lets you select a template that you have already created. Creating and selecting a template is useful because when you select a template it will pre-fill certain fields in such as Session Type, Event Name, end-time based on duration value, color, max attendance, and toggles for Transfer To Billing and Transfer to Progress Notes.

The screenshot shows the 'New Appointment' form with the following fields and callouts:

- Staff:** Dylan Lambrecht, CCII
- Facilitator:** Dylan Lambrecht, CCII
- Clients:** Bailey, Bill
- Buttons:** New Client, Clear List, Add From Group
- Max Attendance:** A numeric input field with up/down arrows.
- Template:** A dropdown menu.
- Session Type:** Review of Assessment
- Event:** Review of Assessment
- Start Time:** 09/25/2015 1:00 PM
- End Time:** 09/25/2015 2:00 PM
- Color:** A color selection dropdown.
- Transfer:** Checkboxes for Transfer To Billing and Transfer To Progress Notes.
- Recurrence:** Radio buttons for Daily, Weekly, Monthly, and Yearly. A section for 'Recur every 1 week(s) on' with checkboxes for Sunday through Saturday. Saturday is checked. Below this are options for 'No end date', 'End after 10 occurrences', and 'End by 9/25/2015'.
- Buttons:** Save, Cancel

Callout boxes are connected to the form as follows:

- Top-left box points to the 'Max Attendance' field.
- Top-right box points to the 'Template' dropdown.
- Bottom-left box points to the 'Session Type' dropdown.
- Bottom-right box points to the 'Event' field.

The 'Session Type' dropdown is where you would select the session type that is used when you transfer client check-ins from this appointment to progress notes. Session Types are used when creating progress notes and creating new scheduler appointments.

The 'Event' field pre-fills in whatever the session type description is for the appointment. You have the option of changing the event name to whatever you would like. It is a required field.

The 'Start Time/End Time' fields are where you would enter the dates and times for this appointment. If you setup a recurrence then this same time will be used.

The 'Color' dropdown lets you select a color for this appointment or the series of this appointment. This will display a special color for this appointment on the main scheduler screen.

The screenshot shows the 'New Appointment' form with the following fields and callouts:

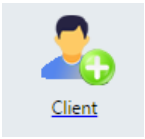
- Staff:** Dylan Lambrecht, CCII, ×
- Facilitator:** Dylan Lambrecht, CCII
- Clients:** Bailey, bin ×
- Buttons:** New Client, Clear List, Add From Group
- Max Attendance:** [input field]
- Template:** [dropdown menu]
- Session Type:** Review of Assessment
- Event:** Review of Assessment
- Start Time:** 09/25/2015 1:00 PM
- End Time:** 09/25/2015 2:00 PM
- Color:** [dropdown menu]
- Transfer:**
 - Transfer To Billing
 - Transfer To Progress Notes
- Recurrence:**
 - Recurrence
 - Daily
 - Weekly
 - Monthly
 - Yearly
 - Recur every 1 week() on
 - Sunday Monday Tuesday
 - Wednesday Thursday Friday
 - Saturday
 - No end date
 - End after 10 occurrences
 - End by 9/25/2015
- Buttons:** Save, Cancel

The 'Transfer To Billing' and 'Transfer To Progress Notes' checkboxes control whether or not the check ins for this appointment will be transferred to either the billing or progress notes areas of AccuCare. Un-checking these boxes will default in NOT to send the check-ins for this appointment to those modules.

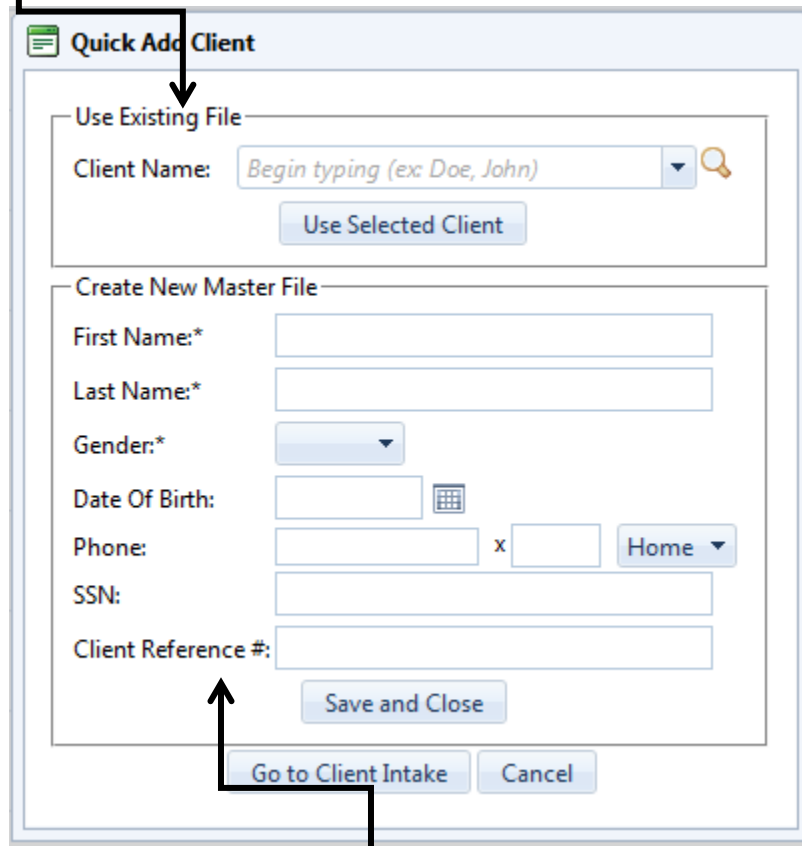
The 'Recurrence' area lets you set this appointment up to be a recurring appointment. You have the option of having this appointment recur daily, weekly, monthly, or yearly. To begin, you would select the 'Recurrence' checkbox and then select how you would like this appointment to recur. At the bottom of this area, you have the option of deciding when you want the recurrence to end for this series of appointments.

The 'Save' button will save the appointment and add this appointment to the calendar if all the fields have been entered correctly. Cancel will discard any changes.

Add/New - Client

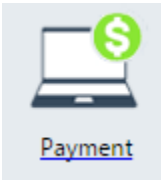


The 'Quick Add Client' screen is opened by selecting the 'Client' link under the 'Add/New' area. This area has two parts. If you search or begin typing a client's name under 'Use Existing File' you can then select 'Use Selected Client' button and essentially pull up that client's appointment within 'Agenda View'.

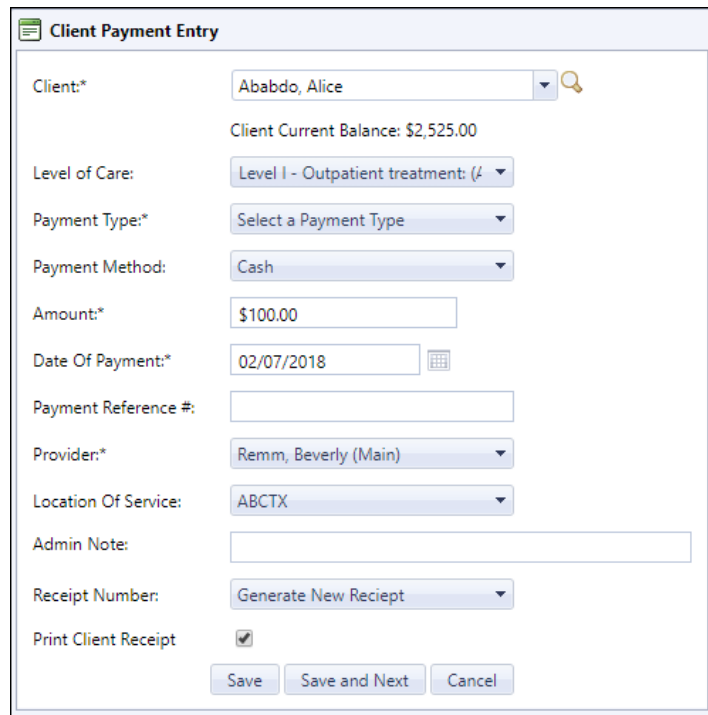


The 'Create New Master File' area allows you to quickly create a new client to be added to the 'Client Intake' area of AccuCare. You would enter the client details and then select the 'Save and Close' button. Prior to creating the client it is best practice to first select the 'Go to Client Intake' button to first search to make sure the client is not already entered in the database.


Add/New - Payments





The 'Client Payment Entry' screen is opened by selecting the 'Payment' link under the 'Add/New' area. This screen is an easy way to take a customer payment and have those payment details recorded within the 'Billing Transfer' module. From this screen, you also have the option of printing a client receipt while also saving the record within AccuCare. To be able to utilize this functionality you would need to have subscribed to our billing module. Next, you would need to setup a service within the billing services screen that has a transaction type of 'Customer Payment'. Lastly, you would need to set up a provider or providers under the billing provider info screen. Optionally you can set up location of services as well as that information is also gathered from this screen. Once this is done you can navigate to this screen and enter the necessary fields to record a payment and select either 'Save' or 'Save and Next'. 'Save and Next' will save the transaction to the 'Billing Transfer' area of AccuCare but will then allow you to enter a new customer payment by clearing the fields.




Client Payment Entry


Client:* Ababdo, Alice 
Client Current Balance: \$2,525.00

Level of Care: Level I - Outpatient treatment: (4) 


Payment Type:* Select a Payment Type 


Payment Method: Cash 

Amount:* \$100.00


Date Of Payment:* 02/07/2018 

Payment Reference #:

Provider:* Remm, Beverly (Main) 

Location Of Service: ABCTX 

Admin Note:

Receipt Number: Generate New Receipt 

Print Client Receipt

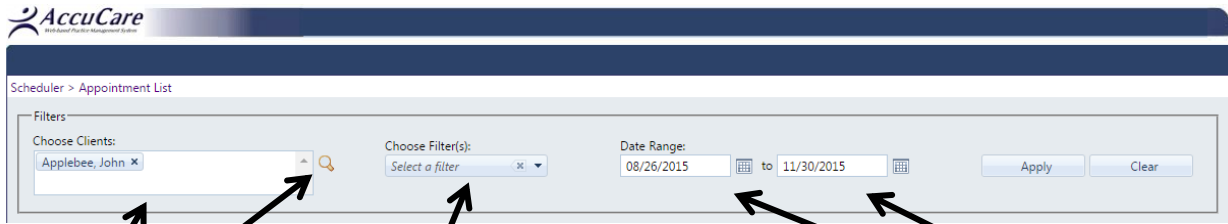
Appointment List Button

Appointment List button allows you to search client appointments using filters and date ranges

The screenshot displays the Scheduler application interface. At the top, there is a navigation bar with the title "Scheduler" and a "Search" section. Below the search bar are icons for "Staff", "Calendar", "Client", and "Reports". To the right of these icons is a calendar for February 2018, showing the current date as Wednesday, February 07, 2018. Further right are buttons for "Day", "Week", "Month", and "Agenda". On the far right of the top bar are "Add/New" options for "Appointment", "Client", and "Payment".

The main area of the interface is a "Staff Schedule" view for "Wednesday, February 07, 2018". It shows a grid with time slots from 8 am to 7 pm. The name "Ron Super Admin" is listed at the top of the grid. At the bottom of the interface, there are three buttons: "Appointment List", "Custom Forms", and "Close". A black arrow points from the top left towards the "Appointment List" button.

Appointment Filters - overview

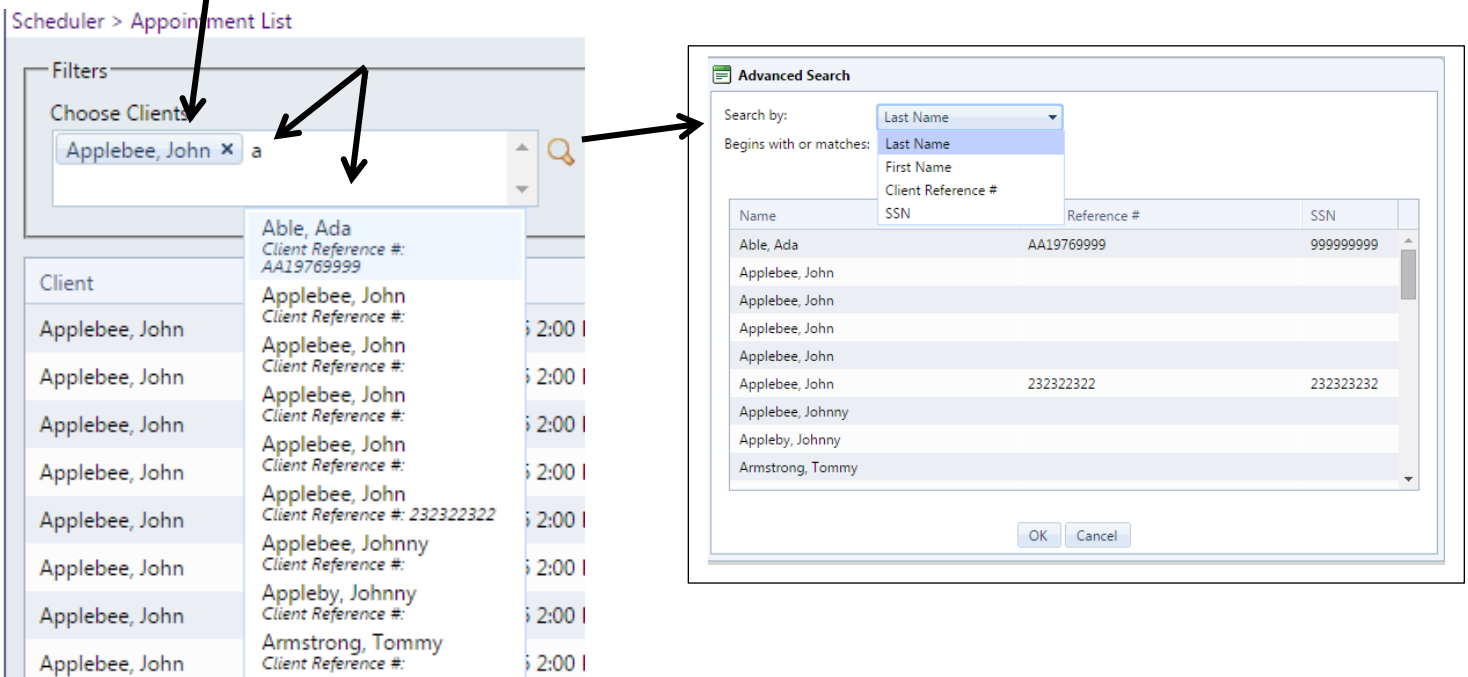


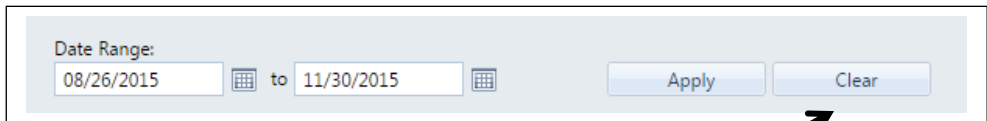
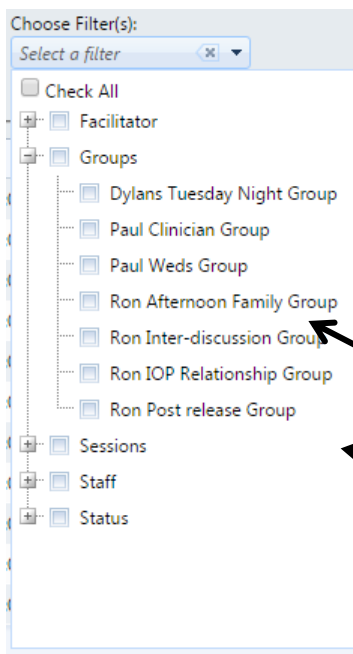
Choose Filters will further sort your search to look for specific conditions

Choose you client or clients using this part of the filter. You can type in the name of client or use the spyglass to search by last name, first name, Client Ref# or SSN.

Date Range defaults to today date but can change to encompass a date range of couple of days to weeks to months.

Either start typing in the name of the client or use the spyglass to search for the client





Put in you date range then click the [Apply] button
To make a new selections click on [Clear] button

Additional filters have been added to help narrow you search when look for a client appoints

For additional questions, contact AccuCare Support at 800-324-7966 or email support@orionhealthcare.com and we will be happy to assist you!