

Orion Healthcare Technology

Setup instructions Prior to Using Admission and Discharge Module Guide Sheet

Created by Orion

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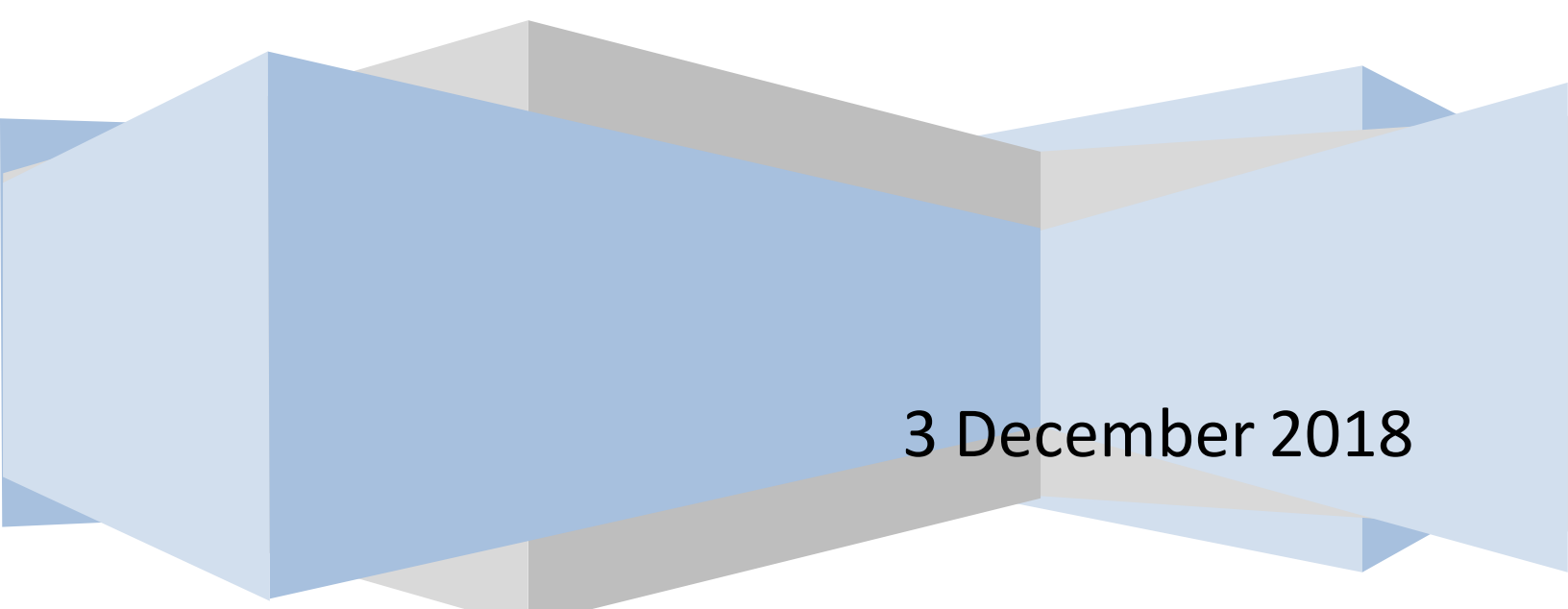


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Admission and Discharge Module – overview

Admission/Discharge and Centralized Diagnosis: This feature will provide the ability to Admit, Transfer and Discharge a client through different episodes and treatment settings. This will also incorporate centralized diagnosis, which will include DSM IV, DSM V, ICD 9 and ICD 10. The Discharge Summary will also be incorporated into the Discharge Module. Benefits include the ability to get a real-time report on number of admissions, discharges, and census.

Setup Instructions prior to using the Admission and Discharge Module

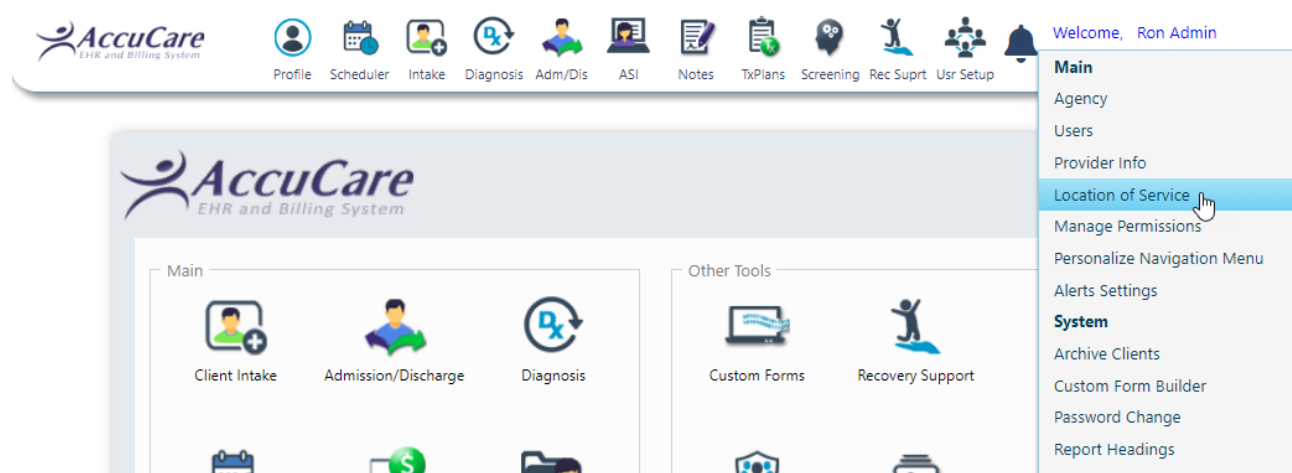
To use Admission and Discharge module you will be required to setup 2 areas within AccuCare. Please setup each area in the order given below:

- 1) Location of Service Module
- 2) Level of Care Module

Location of Service Module – Setup

Where to find Location of Services

On the Ribbon – Select Setup → Main → Location of Services



What is Location of Services?

Location of Service is where you create a picklist of all the locations where services are performed.

Abbreviation	Name
DCC	District Counseling Center
HVC	Hope Valley Center
LSS	Lower Street Shelter

Location Details

Location Name* District Counseling Center

Location Abbreviation* DCC

Address Line 1* 123 A Street

Address Line 2

City* Omaha

State* NE

Zip* 68136

NPI

Default Place of Service 11 - Office

Inpatient Type of Bill

Default Facility Type

Default Facility Classification

New Edit Save Cancel Delete Exit

How to add a location to Location of Services
Fill-in the following information areas (Fig.1)

- 1) Click the [New] button
- 2) Fill out Location Details and Default Place of Service
- 3) Click [Save] button

Fig.1

Setup > Location of Service

Abbreviation	Name
DCC	District Counseling Center
HVC	Hope Valley Center
LSS	Lower Street Shelter

Location Details

Location Name*

Location Abbreviation*

Address Line 1*

Address Line 2

City*

State*

Zip*

NPI

Inpatient Type of Bill

Default Facility Type

Default Facility Classification

New Edit Save Cancel Delete Exit

Example of filled out Location of Details

Location Details

Location Name*

Location Abbreviation*

Address Line 1*

Address Line 2

City*

State*

Zip*

NPI

Default Place of Service

Inpatient Type of Bill

Default Facility Type

Default Facility Classification

Level of Care Module – Setup

Where to find Level of Care

On the Ribbon – Select Setup → Clinical → Level of Care

The screenshot displays the AccuCare EHR and Billing System interface. At the top, a ribbon contains navigation icons for Profile, Scheduler, Intake, Diagnosis, Adm/Dis, ASI, Notes, TxPlans, Screening, Rec Suprt, and Usr Setup. The user is logged in as 'Ron Admin'. The main dashboard is divided into four sections: Main, Other Tools, Clinical, and Reports. The Main section includes Client Intake, Admission/Discharge, Diagnosis, Scheduler, Billing, and Client Chart. The Other Tools section includes Custom Forms, Recovery Support, Prevention, and Session Logs. The Clinical section includes Screening, Assessments, Patient Placement, Treatment Plan, Progress Notes, and Med Mgmt. The Reports section includes Manager Reports, Data Analysis, Census, and System Questionnaires. A dropdown menu is open on the right, listing various system settings and reports. The 'Level of Care' option is highlighted in blue, indicating it is the selected item.

AccuCare
EHR and Billing System

Welcome, Ron Admin

Main

- Agency
- Users
- Provider Info
- Location of Service
- Manage Permissions
- Personalize Navigation Menu
- Alerts Settings

System

- Archive Clients
- Custom Form Builder
- Password Change
- Report Headings
- Chart Management Setup
- Scheduler Template
- System Options
- System Session Log

Billing

- Business Info
- Services
- Provider Info
- Payer
- Contract Rates
- Accounting Codes
- DASA Charge Details

Clinical

- Client Categories
- Follow-up Setup
- Group Setup
- Level of Care
- Placement Review

Main

- Client Intake
- Admission/Discharge
- Diagnosis
- Scheduler
- Billing
- Client Chart

Other Tools

- Custom Forms
- Recovery Support
- Prevention
- Session Logs

Clinical

- Screening
- Assessments
- Patient Placement
- Treatment Plan
- Progress Notes
- Med Mgmt

Reports

- Manager Reports
- Data Analysis
- Census
- System Questionnaires

What is Level Care?

Level of Care is where you create your picklist of all your services. You are given a basic list which can be edited or delete. A new level or sub-level can be added. Also, your levels can be moved up or down in the order you wish to see them on the picklist.

Setup > Levels of Care

Select Questionnaire Type: Adult

Select	Description	Locations	Edit	Remove
<input checked="" type="checkbox"/>	Level 0.5 - Education	None		
<input type="checkbox"/>	Level I - Outpatient treatment	None		
<input type="checkbox"/>	Level II - Intensive outpatient/partial hospita	None		
<input type="checkbox"/>	Level III - Medically monitored intensive I	None		
<input type="checkbox"/>	Level IV - Medically managed intensive inpatient	None		

Add Level Add Sublevel Move Up Move Down Close

How to edit and delete existing levels of care and sub-levels

To edit a level of care simply check the box next to the level then click on the pencil icon

Select	Description	Locations	Edit	Remove
<input checked="" type="checkbox"/>	Level 0.5 - Education	None		

To delete a level of care simply check the box next to the level then click on the red X icon

Select	Description	Locations	Edit	Remove
<input checked="" type="checkbox"/>	Level 0.5 - Education	None		

How to an add levels of care

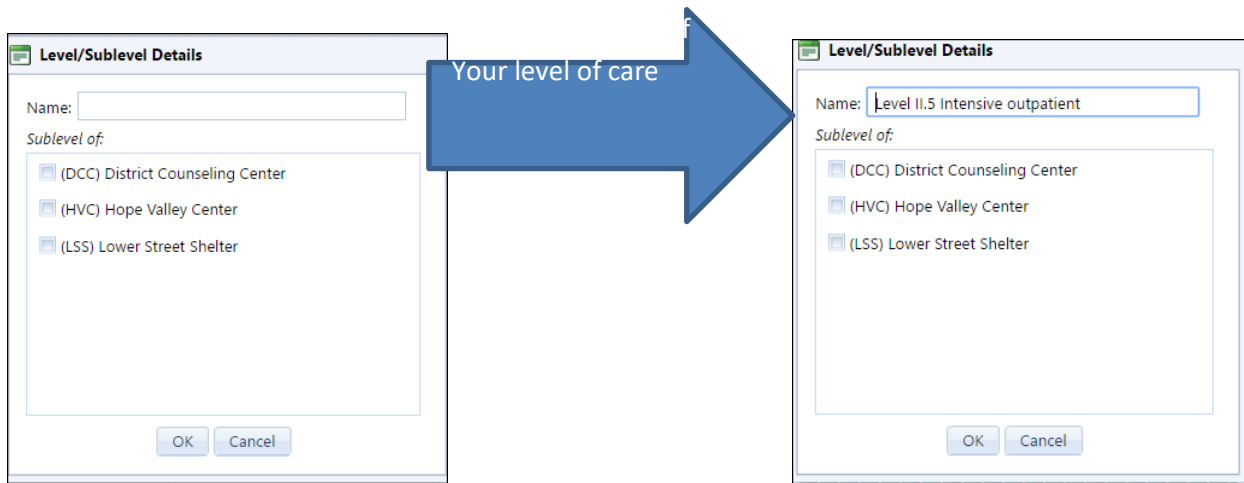
Click the [Add Level] button

Setup > Levels of Care

Select Questionnaire Type: Adult

Select	Description	Locations	Edit	Remove
<input checked="" type="checkbox"/>	Level 0.5 - Education	None		
<input type="checkbox"/>	Level I - Outpatient treatment	None		
<input type="checkbox"/>	Level II - Intensive outpatient/partial hospita	None		
<input type="checkbox"/>	Level III - Medically monitored intensive I	None		
<input type="checkbox"/>	Level IV - Medically managed intensive inpatient	None		

Add Level Add Sublevel Move Up Move Down Close



The new level of Care will automatically be added to the bottom of the list

Select	Description	Locations	Edit	Remove
<input type="checkbox"/>	Level 0.5 - Education	None		
<input type="checkbox"/>	Level I - Outpatient treatment	None		
<input type="checkbox"/>	Level II - Intensive outpatient/partial hospita	None		
<input type="checkbox"/>	Level III - Medically monitored intensive I	None		
<input type="checkbox"/>	Level IV - Medically managed intensive inpatient	None		
<input checked="" type="checkbox"/>	Level II.5 Intensive outpatient	None		

How to add a sub-level of care

Select the check box next to the level you wish to add a sub-level to. Then click on the [Sub-Level] button

Select	Description	Locations	Edit	Remove
<input type="checkbox"/>	Level 0.5 - Education	None		
<input type="checkbox"/>	Level I - Outpatient treatment	None		
<input type="checkbox"/>	Level II - Intensive outpatient/partial hospita	None		
<input checked="" type="checkbox"/>	Level III - Medically monitored intensive I	None		
<input type="checkbox"/>	Level IV - Medically managed intensive inpatient	None		
<input type="checkbox"/>	Level II.5 Intensive outpatient	None		

Level/Sublevel Details

Name:

Sublevel of: *Level III - Medically monitored intensive I*

- (DCC) District Counseling Center
- (HVC) Hope Valley Center
- (LSS) Lower Street Shelter

Type in the sub-level and click [OK] button to add the level you selected earlier.

Click on the black arrow to expand you list of sub-level. These are now part of your level of care pick-list.

Select	Description	Locations	Edit	Remove
<input type="checkbox"/>	Level 0.5 - Education	None		
<input type="checkbox"/>	Level I - Outpatient treatment	None		
<input type="checkbox"/>	Level II - Intensive outpatient/partial hospita	None		
<input checked="" type="checkbox"/>	Level III - Medically monitored intensive I	None		
<input checked="" type="checkbox"/>	Level IIIA - 23 Hour Observation	None		
<input checked="" type="checkbox"/>	Level IIIB - Crisis Stabilization and Assessment	None		
<input type="checkbox"/>	Level IV - Medically managed intensive inpatient	None		
<input type="checkbox"/>	Level II.5 Intensive outpatient	None		

How to move the levels up or down the list

To move a level up or down simply check the box next to the level you wish to move then click [**Move Up**] button to move your selection.

Setup > Levels of Care

Select Questionnaire Type:

Select	Description	Locations	Edit	Remove
<input type="checkbox"/>	Level 0.5 - Education	None		
<input type="checkbox"/>	Level I - Outpatient treatment	None		
<input type="checkbox"/>	Level II - Intensive outpatient/partial hospita	None		
<input type="checkbox"/>	Level III - Medically monitored intensive I	None		
<input type="checkbox"/>	Level IV - Medically managed intensive inpatient	None		
<input checked="" type="checkbox"/>	Level II.5 Intensive outpatient	None		

Move Up **Move Down** **Close**

Setup > Levels of Care

Select Questionnaire Type:

Select	Description	Locations	Edit	Remove
<input type="checkbox"/>	Level 0.5 - Education	None		
<input type="checkbox"/>	Level I - Outpatient treatment	None		
<input type="checkbox"/>	Level II - Intensive outpatient/partial hospita	None		
<input checked="" type="checkbox"/>	Level II.5 Intensive outpatient	None		
<input type="checkbox"/>	Level III - Medically monitored intensive I	None		
<input type="checkbox"/>	Level IV - Medically managed intensive inpatient	None		

Move Up **Move Down** **Close**

How to add a location to a level or sub-level of care

Check the level you wish to work on, then select the edit pencil

Select	Description	Locations	Edit	Remove
<input type="checkbox"/>	Level 0.5 - Education	None		
<input checked="" type="checkbox"/>	Level I - Outpatient treatment	None		

Select the location or locations where the level of care is provided.

Level/Sublevel Details

Name:








Sublevel of: N/A

- (DCC) District Counseling Center
- (HVC) Hope Valley Center
- (LSS) Lower Street Shelter

After making your selections and clicking the [OK] button. You will see your selected locations

Select	Description	Locations	Edit	Remove
<input type="checkbox"/>	Level 0.5 - Education	None		
<input checked="" type="checkbox"/>	Level I - Outpatient treatment	(DCC) District Counseling Center (HVC) Hope Valley Center (LSS) Lower Street Shelter		

Here is another example of multiple levels and sub-level selections

Select	Description	Locations	Edit	Remove
<input type="checkbox"/>	Level 0.5 - Education	None		
<input type="checkbox"/>	Level I - Outpatient treatment	(DCC) District Counseling Center (HVC) Hope Valley Center (LSS) Lower Street Shelter		
<input type="checkbox"/>	Level II - Intensive outpatient/partial hospita	(DCC) District Counseling Center (HVC) Hope Valley Center		
<input type="checkbox"/>	Level II.5 Intensive outpatient	None		
<input type="checkbox"/>	Level III - Medically monitored intensive I	(HVC) Hope Valley Center		
<input checked="" type="checkbox"/>	Level IIIA - 23 Hour Observation	(DCC) District Counseling Center		
<input type="checkbox"/>	Level III B - Crisis Stabilization and Assessment	None		

**** Insure you have completed these prior to using the Admission and Discharge Module ****

Location of Service and Level of Care

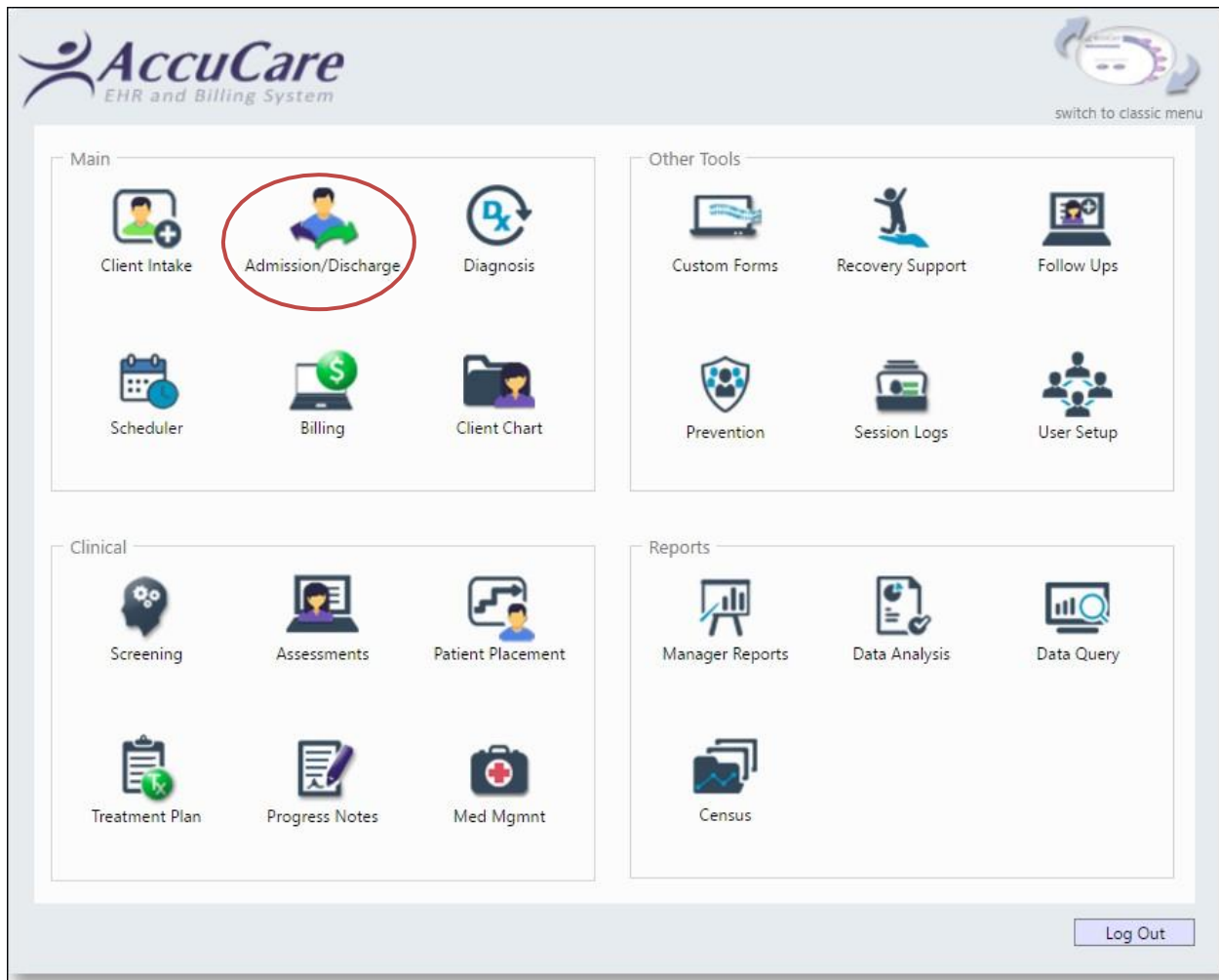
**** Insure you have completed these prior to using the Admission and Discharge Module ****

Admission and Discharge Module – Creating an Episode

Admission/Discharge This feature will provide the ability to Admit, Transfer and Discharge a client through different episodes and treatment settings. This will also incorporate centralized diagnosis, which will include DSM IV, DSM V, ICD 9 and ICD 10. The Discharge Summary will also be incorporated into the Discharge Module. Benefits include the ability to get a real-time report on number of admissions, discharges, and census.

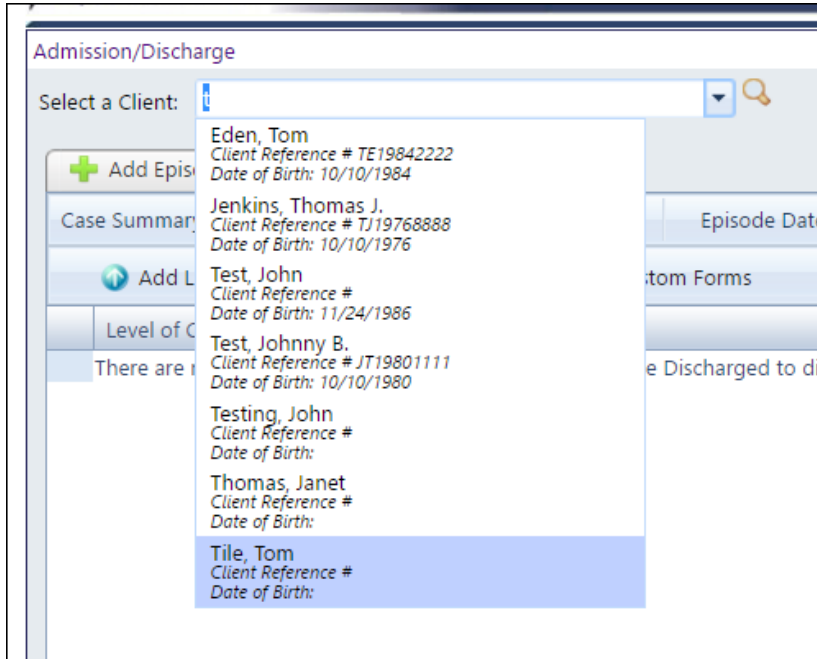
Where to find the Admission and Discharge Module

Go to the New menu (4-quadrant view) – Look in the upper left quadrant to find this Admission / Discharge Icon

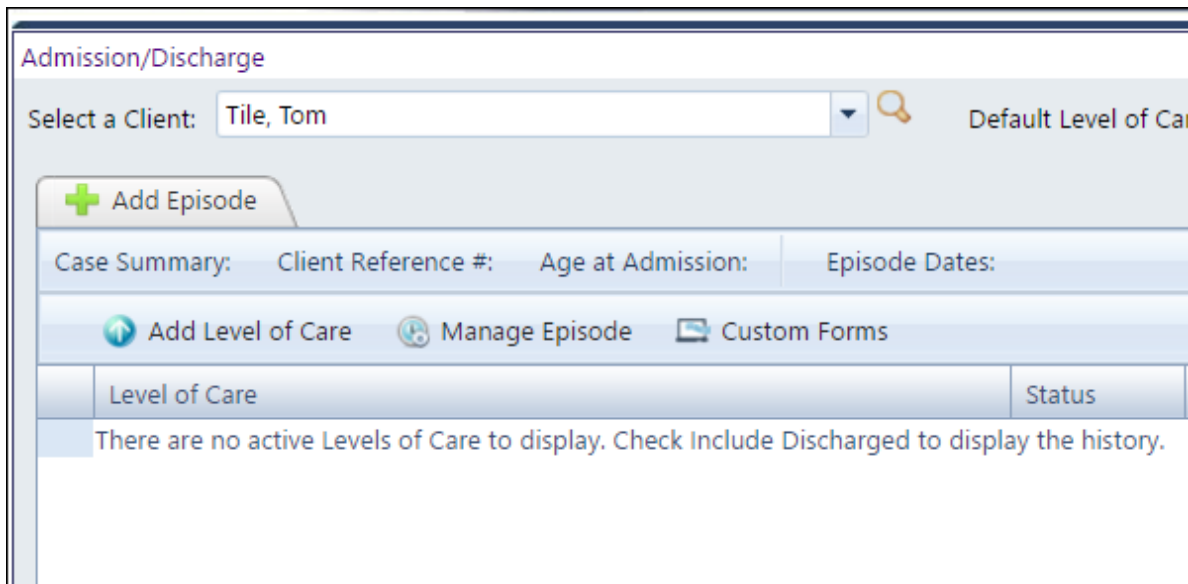


Creating an Episode in Admissions and Discharge

Upon opening the Admission and Discharge module you will need to select a client by typing in the first couple letters of the last name. A list of clients that match your request will display.



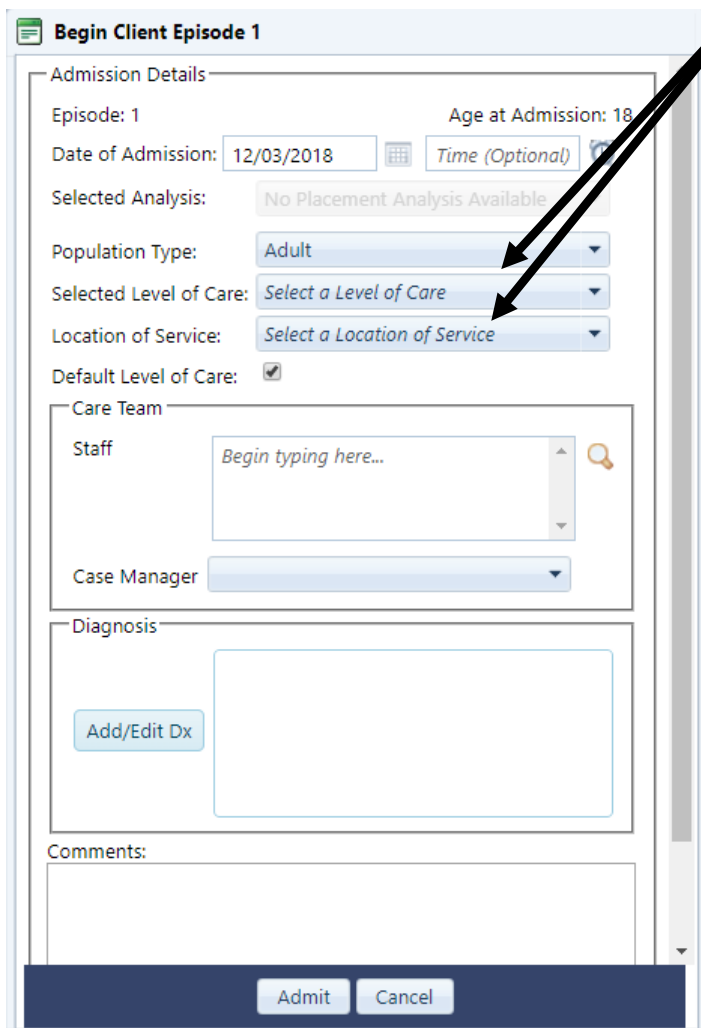
Here I have chosen to work on creating an Episode of Care for Tom Tile



Once the client has been selected you simply click on the  tab to bring up the Client Episode dialog box



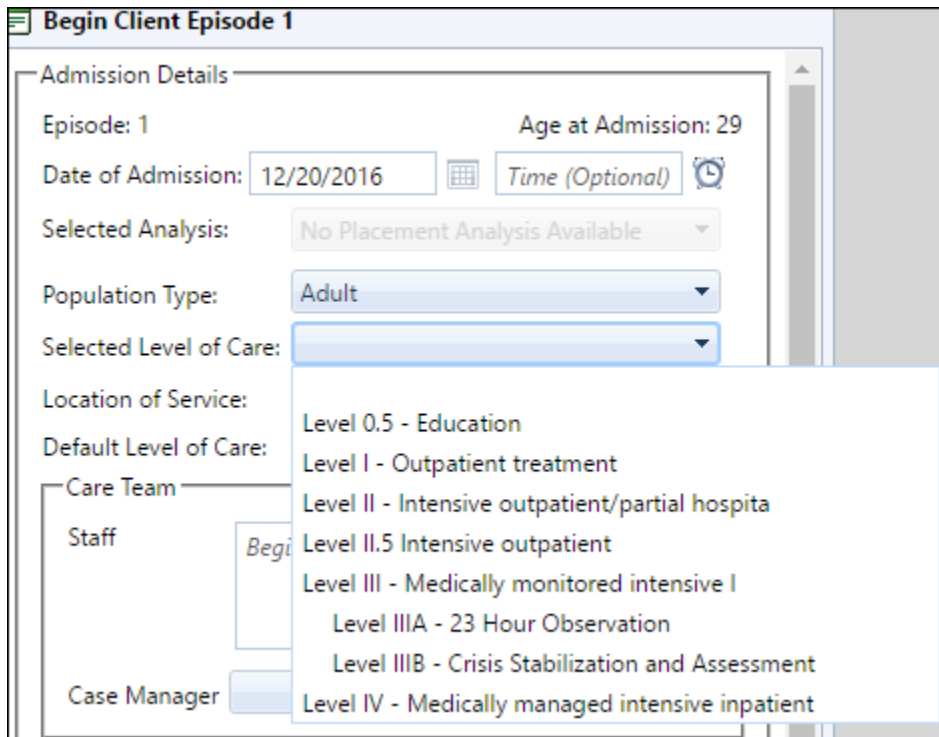
Client Episode Dialog (Screen Shot)

A screenshot of a dialog box titled 'Begin Client Episode 1'. It contains several sections: 'Admission Details' with fields for 'Episode: 1', 'Age at Admission: 18', 'Date of Admission: 12/03/2018', and 'Selected Analysis: No Placement Analysis Available'; 'Population Type: Adult'; 'Selected Level of Care: Select a Level of Care'; 'Location of Service: Select a Location of Service'; 'Default Level of Care: [checked]'; 'Care Team' with 'Staff' (Begin typing here...) and 'Case Manager' (dropdown); 'Diagnosis' with an 'Add/Edit Dx' button; and 'Comments' with a text area. At the bottom are 'Admit' and 'Cancel' buttons. Two black arrows point from the text box on the right to the 'Selected Level of Care' and 'Location of Service' dropdowns.

You should now be able to create an Episode now that you have setup both Location of Services and Levels of Care.

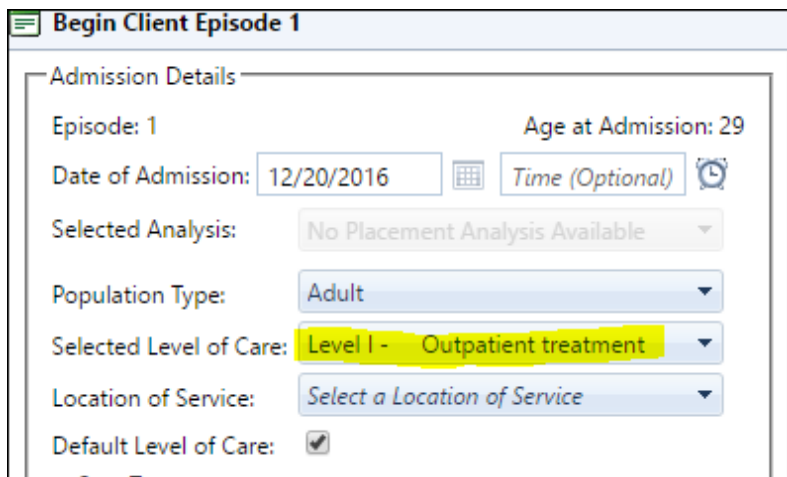
Client Episode Dialog – Select Level of Care

Select your Level of Care for your client



The screenshot shows the 'Begin Client Episode 1' dialog box. The 'Admission Details' section includes: Episode: 1, Age at Admission: 29, Date of Admission: 12/20/2016, and Time (Optional). The 'Selected Analysis' is 'No Placement Analysis Available'. The 'Population Type' is 'Adult'. The 'Selected Level of Care' dropdown menu is open, showing the following options: Level 0.5 - Education, Level I - Outpatient treatment, Level II - Intensive outpatient/partial hospita, Level II,5 Intensive outpatient, Level III - Medically monitored intensive I, Level IIIA - 23 Hour Observation, Level IIIB - Crisis Stabilization and Assessment, and Level IV - Medically managed intensive inpatient. The 'Location of Service' is 'Select a Location of Service'. The 'Default Level of Care' is checked. The 'Care Team' section includes 'Staff' and 'Case Manager'.

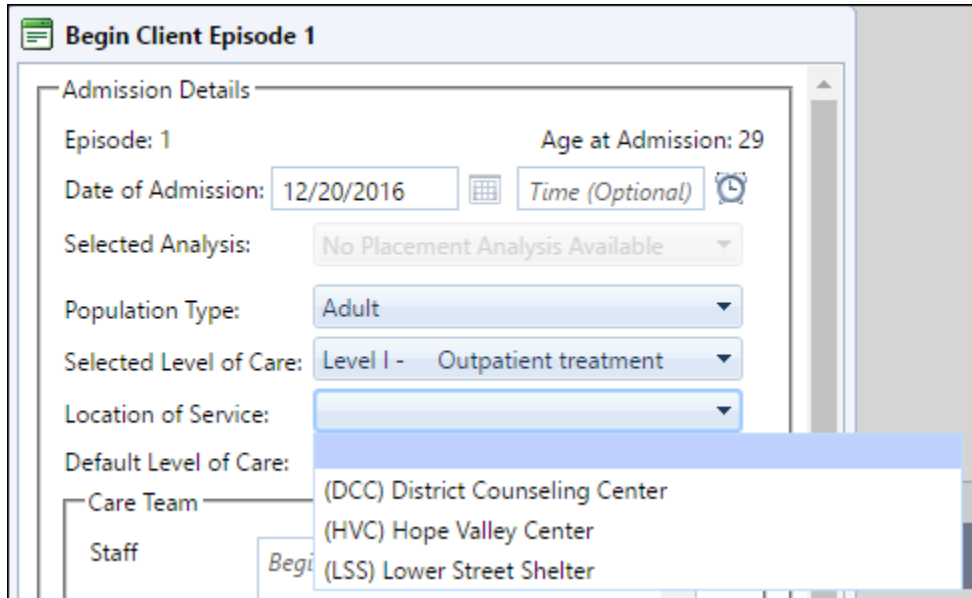
In this example I picked Level I – Outpatient treatment – since I know from my previous setup locations of service are associated to this services.



The screenshot shows the 'Begin Client Episode 1' dialog box. The 'Admission Details' section includes: Episode: 1, Age at Admission: 29, Date of Admission: 12/20/2016, and Time (Optional). The 'Selected Analysis' is 'No Placement Analysis Available'. The 'Population Type' is 'Adult'. The 'Selected Level of Care' dropdown menu is open, and 'Level I - Outpatient treatment' is selected. The 'Location of Service' is 'Select a Location of Service'. The 'Default Level of Care' is checked. The 'Care Team' section includes 'Staff' and 'Case Manager'.

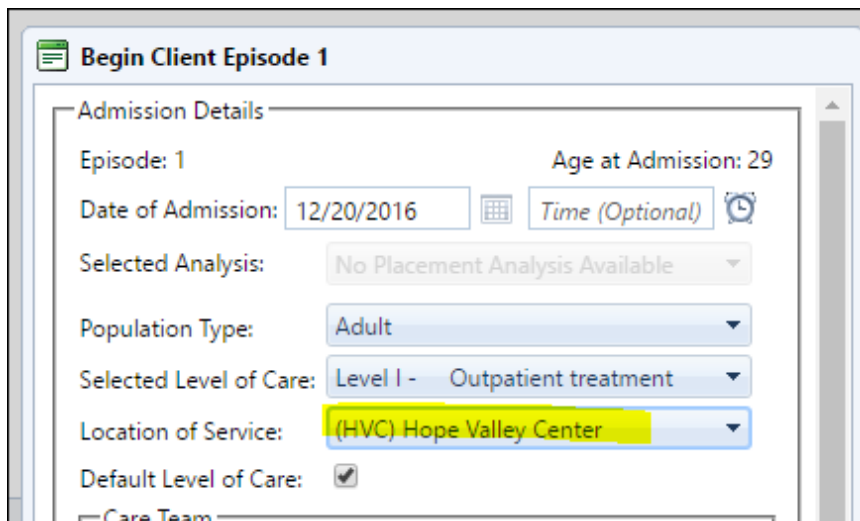
Client Episode Dialog – Select Location of Service

A list of locations presented themselves for me to choose one.



The screenshot shows the 'Begin Client Episode 1' dialog box. The 'Admission Details' section includes: Episode: 1, Age at Admission: 29, Date of Admission: 12/20/2016, Time (Optional), Selected Analysis: No Placement Analysis Available, Population Type: Adult, Selected Level of Care: Level I - Outpatient treatment, and Location of Service: (HVC) Hope Valley Center. The 'Care Team' section includes Staff: Begi.

I have chosen (HVC) Hope Valley Center



The screenshot shows the 'Begin Client Episode 1' dialog box. The 'Admission Details' section includes: Episode: 1, Age at Admission: 29, Date of Admission: 12/20/2016, Time (Optional), Selected Analysis: No Placement Analysis Available, Population Type: Adult, Selected Level of Care: Level I - Outpatient treatment, and Location of Service: (HVC) Hope Valley Center. The 'Default Level of Care' checkbox is checked. The 'Care Team' section includes Staff: Begi.

While you are creating this Episode of Care you want to pick the staff who will be their Care Team. Here I have select three staff and chosen a case manager.

Begin Client Episode 1

Admission Details

Episode: 1 Age at Admission: 29

Date of Admission: 12/20/2016 Time (Optional)

Selected Analysis: No Placement Analysis Available

Population Type: Adult

Selected Level of Care: Level I - Outpatient treatment

Location of Service: (HVC) Hope Valley Center

Default Level of Care:

Care Team

Staff: Ron Alai, CCII, Dylan Lambrecht, CCII, Curtis Gormley

Case Manager: Dylan Lambrecht, CCII

Client Episode Dialog – Select Diagnosis

Care Team

Staff: Ron Admin

Case Manager: Ron Admin

Diagnosis

Add/Edit Dx

- F14.20 Cocaine use disorder, Severe (DSM-5 (ICD-10))
- F12.121 Cannabis intoxication delirium, With mild use disorder (DSM-5 (ICD-10))

Comments:

Admit Cancel

If you have already added diagnosis earlier then you would see them here.

Click on the **[Add/Edit Dx]** button to open the Select Diagnosis pop up window if you wish add for the first time, modify or add to the diagnosis

Add Client's Diagnosis while in the Admission and Discharge Module

When admitting a client to Admission and Discharge you given to the option to directly add their diagnosis.

To start click **[Add/Edit Dx]** button

Begin Client Episode 1

Admission Details

Episode: 1 Age at Admission: 38

Date of Admission: 12/04/2018 Time (Optional)

Selected Analysis: No Placement Analysis Available

Population Type: Adult

Selected Level of Care: Level I - Outpatient treatment

Location of Service: (BG - SA) Nicasa Buffalo Grove - SA

Default Level of Care:

Care Team

Staff: Ron Admin, Roy Able, Sam Trainer

Case Manager: Ron Admin

Diagnosis

Add/Edit Dx

Comments:

Admit Cancel

Click the **[Add New]** button to start

Diagnosis Manager

Client Name: Adams, Jessie Show Active Only

Select	Code ▲	Description ▲	Coding System	Primary	Admitting	Status	Archived	Edit	Delete
--------	--------	---------------	---------------	---------	-----------	--------	----------	------	--------

Add New OK Cancel

Under Coding System choose one the option given. In this example I have chosen DSM-5 (ICD-10) used by most of customers

The screenshot shows the 'Add/Edit Diagnosis' form. The 'Coding System' dropdown menu is open, displaying a list of options: ICD-9, ICD-10, DSM-IV, DSM-5 (ICD-9), and DSM-5 (ICD-10). The 'DSM-5 (ICD-10)' option is highlighted in blue, and a mouse cursor is pointing at it. Other fields like 'Axis:', 'Use DSM 5 Sub', 'Code:', and 'Description:' are visible but not the focus of this step.

Next check the box **Use DSM 5 Substance Use Criteria** – this will present you list of symptoms and Substance to choose. Check two or more symptoms that apply then click the [Search Results] button

This screenshot shows the 'Add/Edit Diagnosis' form with the 'Use DSM 5 Substance Use Criteria' checkbox checked. The 'Coding System' is set to 'DSM-5 (ICD-10)' (marked with a red '1'). The 'Substance' dropdown is set to 'Alcohol' (marked with a red '2'). Below the substance selection, there is a list of symptoms with checkboxes. Several symptoms are checked, including 'There is a persistent desire or unsuccessful efforts to cut down or control substance use.', 'Craving or a strong desire or urge to use the substance.', 'Continued substance use despite having persistent or recurrent social or interpersonal problems caused or exacerbated by the effects of the substance.', and 'Important social, occupational or recreational activities are given up or reduced because of substance use.' At the bottom, the 'Search Results' button is highlighted with a red box and a red '3' (marked with a red '3').

Select one of the choices given then click [Ok] button

DSM-5 Substance Use Criteria Diagnosis Results

Substance: Alcohol - Moderate

Select One

- F10.20 - Alcohol use disorder, Moderate
- F10.221 - Alcohol intoxication delirium, With moderate or severe use disorder
- F10.229 - Alcohol intoxication, With moderate or severe use disorder
- F10.24 - Alcohol-induced bipolar and related disorder, With moderate or severe use disorder
- F10.24 - Alcohol-induced depressive disorder, With moderate or severe use disorder
- F10.259 - Alcohol-induced psychotic disorder, With moderate or severe use disorder
- F10.26 - Alcohol-induced major neurocognitive disorder, Amnestic confabulatory type, With moderate or severe use disorder
- F10.27 - Alcohol-induced major neurocognitive disorder, Nonamnestic confabulatory type, With moderate or severe use disorder
- F10.280 - Alcohol-induced anxiety disorder, With moderate or severe use disorder

OK Cancel

Next Check if this diagnosis is a Primary or Admitting or Both, then click [Save] button to add to Client's list of diagnoses

Search Results

Code: F10.221

Description: Alcohol intoxication delirium, With moderate or severe use disorder

Details

Diagnosed By: Ron Admin

Diagnosis Date: 12/04/2018

Primary:

Admitting:

Archived:

Save Cancel

Here is the results of my selection. To add more diagnosis click the [Add New] button, [OK] to accept diagnosis or [Cancel] button to start over.

Diagnosis Manager

Client Name: Adams, Jessie

Show Active Only

Select	Code ▲	Description ▲	Coding System	Primary	Admitting	Status	Archived	Edit	Delete
<input checked="" type="checkbox"/>	F10.221	Alcohol intoxication delirium, With moderate or severe use disorder	DSM-5 (ICD-10)	✓		Active Update	No		

Here I click to [Add New] to repeat my steps to add another diagnosis.

Diagnosis Manager

Client Name: Adams, Jessie

Show Active Only

Select	Code ▲	Description ▲	Coding System	Primary	Admitting	Status	Archived	Edit	Delete
<input checked="" type="checkbox"/>	F10.221	Alcohol intoxication delirium, With moderate or severe use disorder	DSM-5 (ICD-10)	✓		Active Update	No		
<input checked="" type="checkbox"/>	F18.229	Inhalant intoxication, With moderate or severe use disorder	DSM-5 (ICD-10)		✓	Active Update	No		

Client Episode Dialog –Filled out

Here is screen shot of my client episode. All I need to do is click the **[Admit]** button create the record.

Begin Client Episode 1

Admission Details

Episode: 1 Age at Admission: 38

Date of Admission: 12/04/2018 Time (Optional)

Selected Analysis: No Placement Analysis Available

Population Type: Adult

Selected Level of Care: Level I - Outpatient treatment

Location of Service: (BG - SA) Nicasa Buffalo Grove - SA

Default Level of Care:

Care Team

Staff: Ron Admin x, Roy Able x, Sam Trainer x

Case Manager: Ron Admin

Diagnosis

Add/Edit Dx

- F10.221 Alcohol intoxication delirium, With moderate or severe use disorder (DSM-5 (ICD-10))
- F18.229 Inhalant intoxication, x

Comments:

Admit Cancel

Here is what the Episode looks like once I have admitted to Admissions and Discharge

Admission/Discharge

Select a Client: Doe, Jane Default Level of Care for New Records: Level I - Outpatient treatment - (BG - SA) Nicasa Buffalo Grove - SA [Change](#)

Episode 2 - Admitted 12/03/2018 Episode 1 - Discharged 02/19/2018 + Add Episode

Case Summary: Doe, Jane Client Reference #: Age at Admission: 63 Episode Dates: 12/03/2018 - Current

+ Add Level of Care Manage Episode Custom Forms Include Discharged

Level of Care	Status	Location of Service	Admit Date	Discharge Date	Transfer	Discharge	Edit	Chart	Report
Treatment from: 12/03/2018 onward									
Level I - Outpatient treatment	Active	(BG - SA) Nicasa Buffalo Grove - SA	12/03/2018						

If You Have Question, Please Contact Orion Support

Support Contact number

**Ron Alai – Director of Customer Support
Contact number 800-324-7966 ext. 6400**

**Dylan Lambrecht Account Specialist
Contact number 800-324-7966 ext. 6401**