

How to use Clinician Summary of Services by Client

1. The Clinician Summary of Services by Client provides a report pulling from Progress Notes the, Session Type codes with Description, Date, Client, Duration of hours spent for each session type and charges for services provided. **Recommend using this report to summarize a list of all client notes created within a date range created by a clinician.**
2. To access these reports you will need to have Administrative or Super Admin level access.
3. The Summary of Services by Client report can be found on the AccuCare Main Menu in the Reports quadrant under Manager Reports - Clinical Services Reports



How to use Clinician Summary of Services by Client

4. Upon opening the Clinical Services Report select Clinician Summary of Services by Client from the dropdown.



The screenshot shows the 'Reports > Progress Notes Reports' section. A dropdown menu is open for '1. Select Report:'. The menu items are: 'Clinician Summary of Services (by Client)' (highlighted with a red box), 'Cumulative Summary of Services (All Agencies)', 'Agency Summary of Services', 'Clinician Summary of Services', 'Clinician Summary of Services (by Client)' (highlighted with a blue bar), and 'Client Summary of Services'. Below the dropdown, there is a label 'Active Users'.

5. Next Select a Clinician



The screenshot shows the 'Reports > Progress Notes Reports' section. The '1. Select Report:' dropdown is set to 'Clinician Summary of Services (by Client)'. The '2. Select Agency:' dropdown is set to 'Default Agency'. The '3. Select Clinician:' dropdown is open, showing a list of 'Active Users': 'CHANTEL BROWN', 'Elizabeth Thielen', 'Jane M. Fox, BS, CADC', 'John B. Trainer', 'Linda Snelten', 'Rob Allan, CCIII', and 'Ron Admin' (highlighted with a blue bar).

How to use Clinician Summary of Services by Client

- Both select agency and select a client are grayed out for this option since the focus is on the clinician for this report. Enter a Date Range then click the [View] button for your report.

Reports > Progress Notes Reports

1. Select Report: Clinician Summary of Services (by Client) ← 1

2. Select Agency: Default Agency

3. Select Clinician:

- Active Users
- CHANTEL BROWN
- Elizabeth Thielen
- Jane M. Fox, BS, CADC
- John B. Trainer
- Linda Snelten
- Rob Allan, CCIII
- Ron Admin**
- Ray Able, BS, CADC

Select a Client: Begin typing 2 letters of last name...

4. Select Date Range: 05/01/2018 to 11/21/2018 ← 4

View Close

How to use Clinician Summary of Services by Client

7. Here is an example of the report. You can preview to print, export to PDF or Word.

Orion Behavioral Health Services
18047 Oak Street
Omaha, Ne. 68130
Phone: 402-341-8880
Fax: 402-341-8911

Clinician Summary of Services by Client

05/01/2018 to 03/06/2020

Clinician Name: Roy Able, BS, CADC (RABLE)

Code	Description	Date	Client	Duration(Hrs)	Charges (\$)
100	Art	10/23/2018	Appleseed, Johnny	1:00	\$0.00
		10/23/2018	Doe, Jane	1:00	\$0.00
		10/23/2018	Marshal, Kelly	1:00	\$0.00
		Art Subtotal:		3:00	\$0.00
Code	Description	Date	Client	Duration(Hrs)	Charges (\$)
1425	Group -IOP	12/17/2018	Appleseed, Johnny	1:00	\$28.00
		12/17/2018	Doe, Jane	1:00	\$28.00
		12/17/2018	Griffith, Laurie	1:00	\$28.00
		09/04/2019	Able, Anna	1:00	\$28.00
		09/04/2019	Jones, Jack	1:00	\$28.00
		09/04/2019	Young, Jane	1:00	\$28.00
		08/17/2018	Appleseed, Johnny	3:00	\$84.00
		08/17/2018	Doe, Jane	3:00	\$84.00
		08/17/2018	Griffith, Laurie	3:00	\$84.00
		08/17/2018	Hale, Tammy	3:00	\$84.00
		08/17/2018	Haley, Kendall	3:00	\$84.00
		08/17/2018	Hatter, Charles	3:00	\$84.00
		08/17/2018	Marks, Paul	3:00	\$84.00
		08/17/2018	Marshal, Kelly	3:00	\$84.00
		Group -IOP Subtotal:		30:00	\$840.00
Code	Description	Date	Client	Duration(Hrs)	Charges (\$)
1452	Individual -IOP	12/12/2018	Doe, Jane	3:00	\$300.00
		Individual -IOP Subtotal:		3:00	\$300.00
Code	Description	Date	Client	Duration(Hrs)	Charges (\$)
1253	Youth Individual	12/12/2018	Able, Alan A.	2:00	\$200.00

Print
Export to PDF
Export to Word
Close