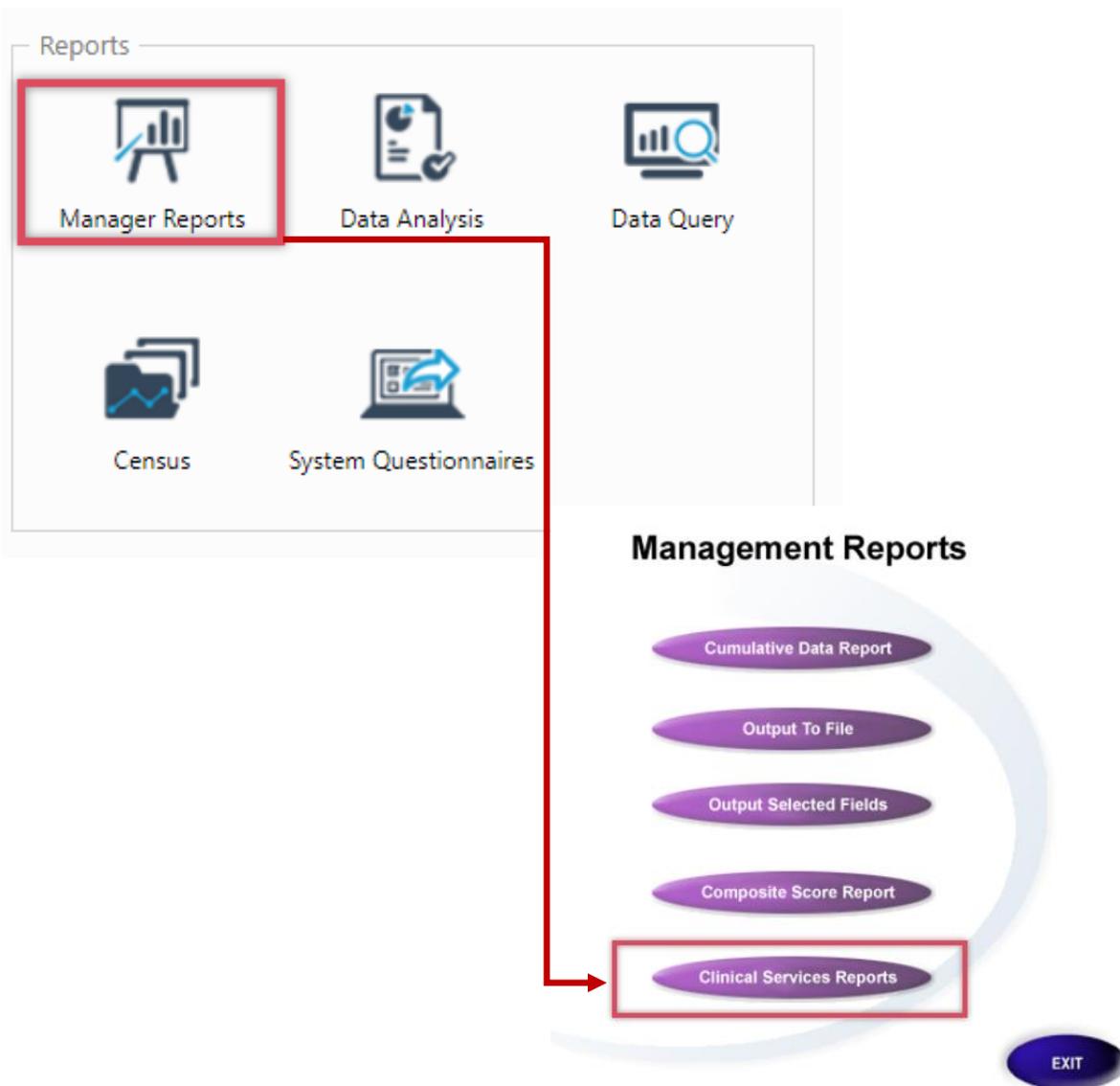


## How to use Agency Summary of Services

1. The Agency Summary of Services provides a report pulling from Progress Notes the Session Type codes with Description, duration of hours spent for each session type and charges for services provided. **Recommend using this report to summarize your search to one agency when you have a multi-agency setup.**
2. To access this report you will need to have Administrative or Super Admin level access.
3. The Summary of Services report can be found on the AccuCare Main Menu in the Reports quadrant under Manager Reports - Clinical Services Reports



## How to use Agency Summary of Services

4. Upon opening the Clinical Services Report select Agency Summary of Services from the dropdown.



The screenshot shows the 'Reports > Progress Notes Reports' section. The '1. Select Report:' dropdown menu is open, displaying the following options: 'Agency Summary of Services', 'Cumulative Summary of Services (All Agencies)', 'Agency Summary of Services', 'Clinician Summary of Services', 'Clinician Summary of Services (by Client)', and 'Client Summary of Services'. The 'Agency Summary of Services' option is highlighted in blue. A red box highlights the '1. Select Report:' label. Below the dropdown, the '2. Select Agency:' and '3. Select Clinician:' fields are visible, with 'Active Users' listed under the clinician field.

5. Next Select an Agency.



The screenshot shows the 'Reports > Progress Notes Reports' section. The '2. Select Agency:' dropdown menu is open, displaying the following options: 'Orion Behavioral Health Services' and 'Default Agency'. The 'Orion Behavioral Health Services' option is highlighted in blue. A red box highlights the '2. Select Agency:' label. Below the dropdown, the '3. Select Clinician:' field is visible, with 'Orion Behavioral Health Services' listed as an option. A red box highlights the 'Orion Behavioral Health Services' option in the clinician dropdown. Below the clinician field, 'Active Users' is listed.

## How to use Agency Summary of Services

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

The screenshot shows a software interface for generating reports. The title bar reads "Reports > Progress Notes Reports". The interface includes several fields and buttons:

- 1. Select Report:** A dropdown menu with "Agency Summary of Services" selected. A red box highlights the dropdown, and a red arrow labeled "1" points to it.
- 2. Select Agency:** A dropdown menu with "Orion Behavioral Health Services" selected. A red box highlights the dropdown, and a red arrow labeled "2" points to it.
- 3. Select Clinician:** A list box titled "Active Users" containing names: CHANTEL BROWN, Elizabeth Thielen, Jane M. Fox, BS, CADAC, John B. Trainer, Linda Snelten, Rob Allan, CCIII, Ron Admin, and Roy Able, BS, CADAC. A red arrow labeled "3" points to the list box.
- Select a Client:** A search field with the placeholder text "Begin typing 2 letters of last name...". A red arrow labeled "4" points to this field.
- 4. Select Date Range:** Two date input fields with calendar icons. The first field contains "05/01/2018" and the second contains "11/21/2018", with "to" between them. A red box highlights both date fields, and a red arrow labeled "4" points to the "View" button.
- View and Close buttons:** Two buttons at the bottom of the form. A red box highlights the "View" button, and a red arrow labeled "4" points to it.

## How to use Agency Summary of Services

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**

**Agency Summary of Services**

05/01/2018 to 11/21/2018  
 Agency Name: Orion Behavioral Health Services (NICASA)

Code	Description	Duration(Hrs)	Charges (\$)
100	Art	47:00	\$0.00
1720	Client Centered Consult	12:00	\$1,200.00
105	DUI Evaluation	4:30	\$450.00
1150	FAC Assessment	11:00	\$0.00
1152	FAC Individual	2:00	\$0.00
1756	Family Therapy - Group	9:00	\$252.00
1070	Gambling Admission (Intake)	2:00	\$250.00
1071	Gambling Assessment	11:00	\$1,100.00
1072	Gambling Outpatient Group	15:00	\$420.00
572	Group -Basic Outpatient	6:00	\$168.00
1425	Group -IOP	81:00	\$2,268.00
952	Individual -Basic Outpatient	9:15	\$925.00
1452	Individual -IOP	11:15	\$1,125.00
1470	IOP Intake	12:00	\$1,500.00
125	Jail Evaluation	4:45	\$1,187.50
1705	Mental Health Assessment	1:00	\$100.00
1722	Mental Health Case Management	8:00	\$0.00
1752	Mental Health Individual Counseling/Therapy	4:00	\$400.00
204	Narrative Follow-Up	3:00	\$0.00
205	Narrative/Non-DUI Evaluation	3:00	\$300.00
1522	Peer Recovery Group	9:00	\$252.00
1502	Peer Recovery Individual	3:00	\$300.00
1253	Youth Individual	4:00	\$400.00
<b>Totals:</b>		<b>272:45</b>	<b>\$12,597.50</b>

Print
Export to PDF
Export to Word
Close