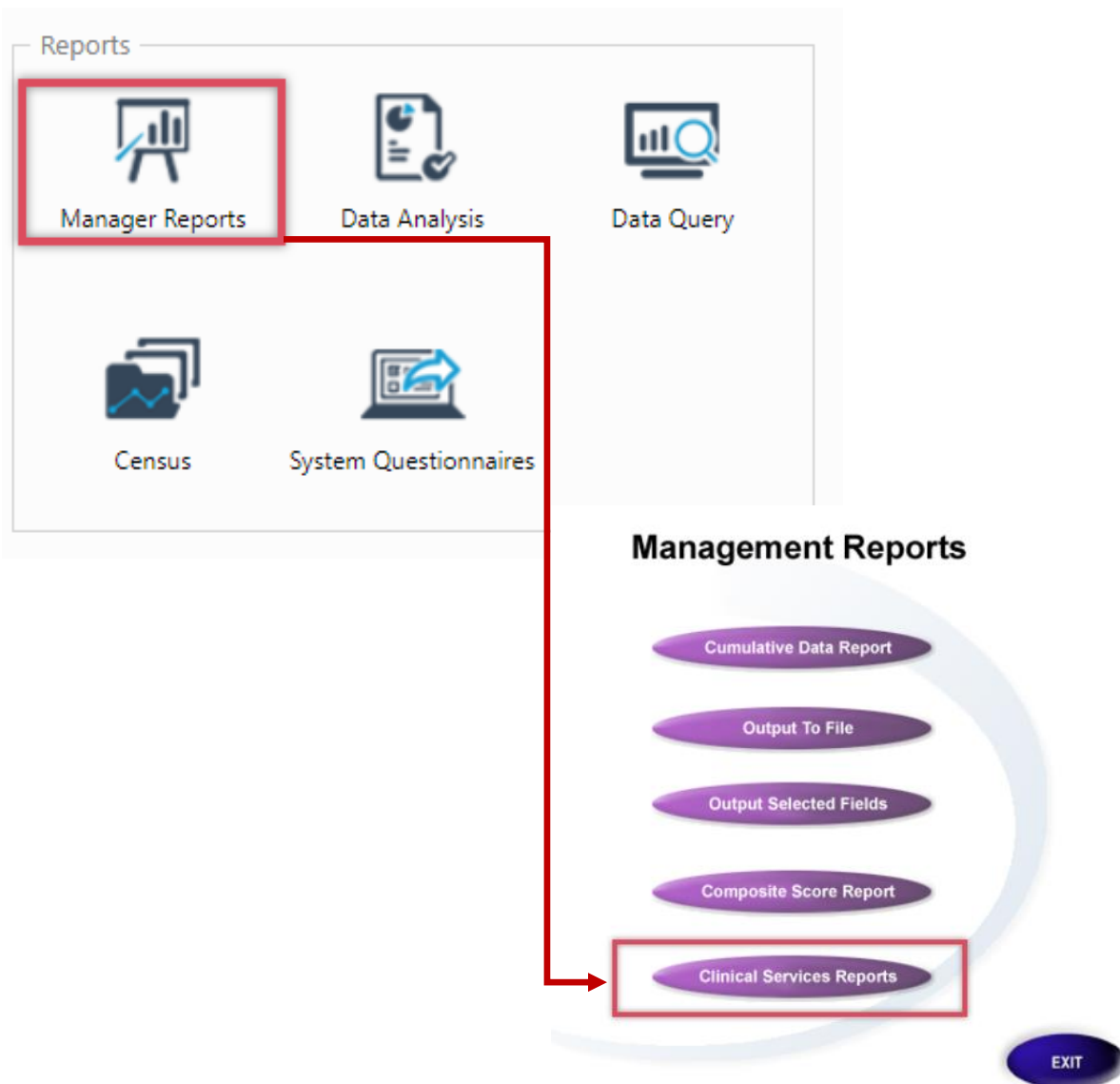


How to use Client Summary of Services

1. The Client Summary of Services provides a report pulling from Progress Notes the, Session Type codes with Description, Date, Clinician, Co-Facilitator, Duration of hours spent for each session type and charges for services provided. **Recommend using this report to provide a summary of your search of the client's notes created by clinicians within a date range.**
2. To access these reports you will need to have Administrative or Super Admin level access.
3. The Client 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 Client Summary of Services

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

Reports > Progress Notes Reports

1. Select Report: Client Summary of Services

2. Select Agency:

3. Select Clinician: Linda Snelten

Cumulative Summary of Services (All Agencies)

Agency Summary of Services

Clinician Summary of Services

Clinician Summary of Services (by Client)

Client Summary of Services

5. Next Select a Client by type in their last name in the dialog box or search for a client by clicking the spyglass icon

Select a Client:

Able, Alan A.

Able, Alan A.
Client Ref #: AA19872993
Date of Birth: 08/23/1987

4. Se to 03/06/2020

spy glass icon

How to use Client Summary of Services

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

Reports > Progress Notes Reports

1. Select Report: ← 1

2. Select 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

Select a Client: 2

4. Select Date Range: to 3

4

How to use Client 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

Client Summary of Services

05/01/2018 to 03/06/2020

Client Name: Able, Alan A.

Code	Description	Date	Clinician	Co-Facilitator	Duration (Hrs)	Charges (\$)
1152	FAC Individual	01/22/2020	Ron Admin	Elizabeth Thielen	2:00	\$0.00
	FAC Individual Subtotal:				2:00	\$0.00
1072	Gambling Outpatient Group	01/22/2020	Ron Admin	CHANTEL BROWN	2:00	\$56.00
1072	Gambling Outpatient Group	09/11/2018	Ron Alai		3:00	\$84.00
	Gambling Outpatient Group Subtotal:				5:00	\$140.00
572	Group -Basic Outpatient	08/20/2018	Ron Alai		2:00	\$56.00
	Group -Basic Outpatient Subtotal:				2:00	\$56.00
1425	Group -IOP	09/14/2018	Ron Alai		2:00	\$56.00
1425	Group -IOP	08/14/2018	Ron Alai		2:00	\$56.00
	Group -IOP Subtotal:				4:00	\$112.00
1452	Individual -IOP	01/21/2020	Ron Admin	John B. Trainer	1:00	\$100.00
	Individual -IOP Subtotal:				1:00	\$100.00
125	Jail Evaluation	08/06/2018	Ron Alai		3:00	\$750.00
	Jail Evaluation Subtotal:				3:00	\$750.00
1522	Peer Recovery Group	09/12/2018	Ron Alai		3:00	\$84.00
	Peer Recovery Group Subtotal:				3:00	\$84.00
1253	Youth Individual	12/12/2018	Roy Able	Ron Admin	2:00	\$200.00
1253	Youth Individual	08/15/2018	Ron Alai		3:00	\$300.00
	Youth Individual Subtotal:				5:00	\$500.00
Totals:					25:00	\$1,742.00

Print

Export to PDF

Export to Word

Close