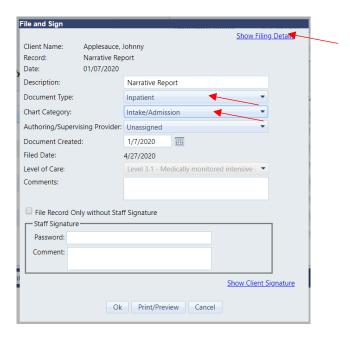# Chart Management – Type and Category Guide

Much like a "file cabinet" you may have filed away a client's physical folder, into different sections, so you can find them easier. (I.E. you might have outpatient file cabinets separate from residential, you also may have each client's file, separated into different levels of care or processes).

Chart management allows you to organize your client's records into 2 different layers called "**type**" and "**category**". The names of the "type" and "category" values are customizable, so you can use whatever terminology makes sense to your organization. The main benefit to this is when you sign off and send records to Chart Management, these "types" and "categories" allow you another filter to find records.

When a user files and signs a record, they can assign a type and/or category to the record. So after signing off on an assessment, I could assign the record to be an "outpatient" for Type, and "intake/admission" for category (for example).

Then let's say you went to Chart Management to look for a client's assessment that was done a few years ago, while he was in outpatient treatment. You could filter your search results for all assessments OR all records in outpatient, for that client, and narrow down results more efficiently. As time goes on, and clients' records are large, this additional way of organizing their records can be extremely helpful.
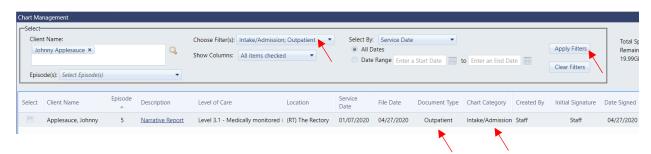
Chart Management – Type and Category Guide

The following table can help you determine what values to use for Type and Category labels when you file them into Chart Management.

Example: let's say I wanted to use "Type" to indicate the level of care and for "Category" I'll indicate a document type. So for Assessments, this could be filed under outpatient OR residential. So I wrote down both. For Category, this would probably be under Intake/Admission. For treatment plans, this also could be either outpatient or residential. A category is maybe "services" or "treatment".

NOTE: You do <u>NOT</u> need to list each form. The purpose of the exercise below is to begin to think of how you would normally categorize forms and records and build a list of possible Types and Categories. Once completed, you can go to your System Setup and add those values using your terminology. The following are just examples of values you can use.

Module Name	Possible Type(s)	Possible Category(s)
ASI Assessments	Outpatient Residential	Intake/Admission Screening
Treatment Plan	Outpatient Residential	Services Treatment
Progress Notes	Outpatient Residential	Services Treatment

For additional questions, contact AccuCare Support at 800-324-7966
Or
Email support@orionhealthcare.com