

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).

File and Sign

Client Name: Applesauce, Johnny
Record: Narrative Report
Date: 01/07/2020
Description: Narrative Report
Document Type: Inpatient
Chart Category: Intake/Admission
Authoring/Supervising Provider: Unassigned
Document Created: 1/7/2020
Filed Date: 4/27/2020
Level of Care: Level 3.1 - Medically monitored intensive
Comments:
 File Record Only without Staff Signature
Staff Signature
Password:
Comment:
[Show Filing Details](#)
[Show Client Signature](#)
OK Print/Preview Cancel

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

Select Client Name: Johnny Applesauce
Choose Filter(s): Intake/Admission; Outpatient
Show Columns: All items checked
Select By: Service Date
All Dates
Date Range: Enter a Start Date to Enter an End Date
Apply Filters
Clear Filters
Total Sp Remain 19.99GI

Select	Client Name	Episode	Description	Level of Care	Location	Service Date	File Date	Document Type	Chart Category	Created By	Initial Signature	Date Signed
<input type="checkbox"/>	Applesauce, Johnny	5	Narrative Report	Level 3.1 - Medically monitored intensive	(RT) The Rectory	01/07/2020	04/27/2020	Outpatient	Intake/Admission	Staff	Staff	04/27/2020

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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 NOT 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	Intake/Admission
	Residential	Screening
Treatment Plan	Outpatient	Services
	Residential	Treatment
Progress Notes	Outpatient	Services
	Residential	Treatment

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