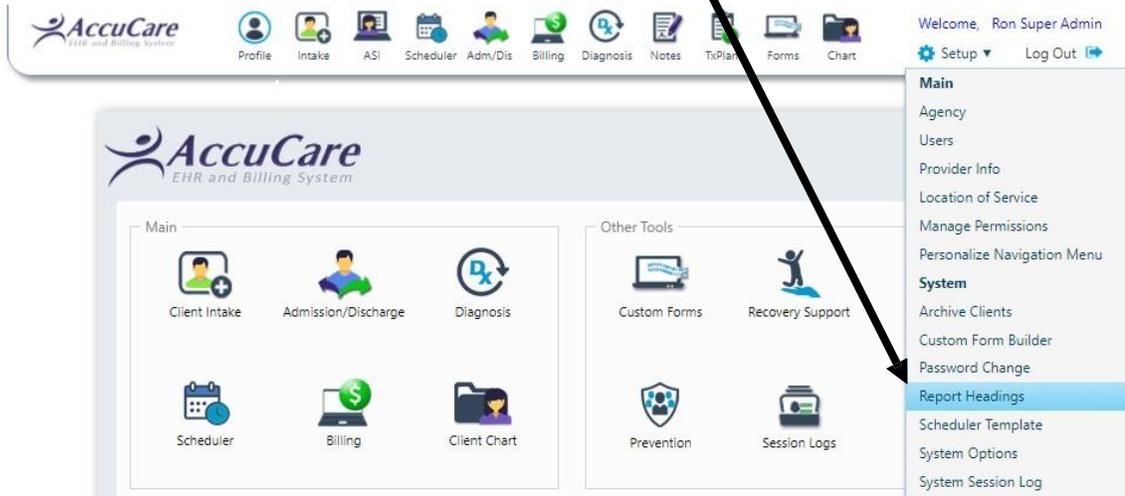


How to Create a Report Heading in AccuCare?

These instructions lay out the steps involved to set up your report heading for your organization. You will need to create a report heading for each Agency-ID created. The report heading is the heading found at the top of each report.

After signing in go to Setup → Reports over to → Report Heading



Setup of Report Header Tab

The screenshot shows the 'Setup > Report Options' window. The 'Report Header' tab is active. The 'Display Report Header' checkbox is checked. The 'Header Text' section has five lines with placeholder text: 'Your Agency Name', 'Your Address', 'Your City, State, and Zip', 'Your Phone Number', and 'http://www.yourwebsite.com'. The 'Header Appearance' section includes 'Font & Size' (Arial), 'Alignment' (Center), and 'Effect' (Bold). A dropdown menu for 'Select an Agency' is open, showing 'Default Agency' selected. A black arrow points from the 'Edit' button to the 'Step 2' callout box.

Step 2 - Click on [Edit] button to start the process of changing or editing report heading

Step 1 – For each Agency created, you will need to set up a new Report Heading

Setup of Report Header Tab (cont.)

Step 3 – Make your changes to each of the lines below

The screenshot shows the 'Setup > Report Options' dialog box with the 'Report Header' tab selected. The 'Display Report Header' checkbox is checked. The 'Header Text' section contains five input fields with the following text: Line 1: Orion Healthcare Technology, Line 2: 18047 Oak Street, Line 3: Omaha, NE. 68130, Line 4: 402-341-8880, Line 5: http://www.orionhealthcare.com. The 'Header Appearance' section includes a 'Font & Size' dropdown set to 'Arial' and '14', 'Alignment' radio buttons for 'Left', 'Center' (selected), and 'Right', and 'Effect' checkboxes for 'Italic', 'Bold' (checked), and 'Underline'. A preview window at the bottom shows the header text: 'Your Agency Name', 'Your Address', 'Your City, State, and Zip', 'Your Phone Number', and 'http://www.yourwebsite.com'. At the bottom of the dialog are buttons for 'Edit', 'Save', 'Preview', 'Cancel', and 'Close'. An arrow from the 'Step 3' box points to the 'Header Text' input fields, and another arrow from the 'Step 5' box points to the 'Header Appearance' section.

Step 4 - Recommend clicking on [Preview] button to review your report heading before saving. This will give you a good idea of how your report heading will look in your reports.

Step 5 - (optional) – While you are in Preview you can also modify the header appearance. Choose your option here then click on the [Preview Button] to receive a temporary view of your report heading.

Click on the [Save] button once you are satisfied with the preview.

Setup of Report Footer Tab

AccuCare
Web-based Practice Management System

Setup > Report Options

Report Header | Page Footer | Select an Agency: Orion Healthcare Technology

Display Report Footer

Footer Text

Text: 42 C.F.R. Part 2, and the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), 45 C.F.R. Pts. 160 & 164 and cannot be disclosed without written consent unless otherwise provided for in the regulations. The Federal rules prohibit any further disclosure or dissemination of this information (including copying contents, forwarding to 2nd parties or outside entities, or printing) unless a written consent is obtained from the person to whom it pertains. The Federal rules restrict any use of this information to criminal, investigative or prosecutive any alcohol or drug abuse purposes. If you are not the intended recipient, and have received this email in error, please notify the sender by reply e-mail and/or notify our Compliance Officer and destroy all copies of this message.

Font & Size: Times New Roman, 6

Alignment: Left Center Right

Effect: Italic Bold Underline

Client Name

Display Client Name

Format: {LastName}, {FirstName} {MiddleInitial}

Alignment: Left Center Right

Page Numbers

Display Page Numbers

Format: Page {PageNumber} of {PageCount}

Alignment: Left Center Right

42 C.F.R. Part 2, and the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), 45 C.F.R. Pts. 160 & 164 and cannot be disclosed without written consent unless otherwise provided for in the regulations. The Federal rules prohibit any further disclosure or dissemination of this information (including copying contents, forwarding to 2nd parties or outside entities, or printing) unless a written consent is obtained from the person to whom it pertains. The Federal rules restrict any use of this information to criminal, investigative or prosecutive any alcohol or drug abuse purposes. If you are not the intended recipient, and have received this email in error, please notify the sender by reply e-mail and/or notify our Compliance Officer and destroy all copies of this message.

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Edit Save Preview Cancel Close

Step 1 – Footer Text – paste in the text you would see at the bottom of each page of your report.

You also change the font, change alignment and effect

Step 2 – Client Name and Page numbers –

Here you have the option to change the format of the client name and page numbers in the footer

**** Report Heading – Important points ****

When setting up your headings for reports it is important to understand the Report Heading is connected to an Agency ID which in turn connects to a user.

Fig. 1 – (Setup > Agency Administration) In this example I have created an Agency called **Rectory**

Setup > Agency Administration
Add/Delete/Change Agency Information
*Fields with an * are required.*

* Agency Name: IHS Area:
* Agency ID: IHS Service Unit:
Address1: IHS Facility:
Address2: IHS Service Type:
City, State, Zip:
Phone:

IHS Area, Facility and Service Type fields are for the use of the IHS National Data Warehouse (NDW) submission process only.

Order by: Agency Name Agency ID

Agency Name	Agency ID	Select
Administration	ADMIN	<input type="radio"/>
La Casa	CASA	<input type="radio"/>
The Rectory	REC	<input checked="" type="radio"/>
Ujima Central	CENTRAL	<input type="radio"/>
Ujima East	EAST	<input type="radio"/>
Ujima West	WEST	<input type="radio"/>

Fig. 2 – (Setup > Report Options) The Agency called **Rectory** will also show up in the dropdown list in Report Headings. This enables you to connect the Agency ID to a specific Report Heading.

Setup > Report Options

Report Header | Page Footer | Select an Agency:

Display Report Header

Header Text

Line 1:
Line 2:
Line 3:
Line 4:
Line 5:

Header Appearance

Font & Size: The Rectory
Alignment: Left Center Right
Effect: Italic Bold Underline

Fig. 3 – (Setup > User Administration) After you have created a Report Heading to each Agency ID the next step is to connect each user to one of the Agency IDs in User Administration as seen in this example.

When a user generates a report, it prints the Report Heading associate the Agency found in User Administration.

The Rectory
 123 West Lane Street
 Omaha Ne. 68999
 Phone: (402) 333-2222
 Fax: (402) 444-5566

Progress Notes
 04/29/2020 to 04/29/2020

Client Name: Test, practice
 Client SSN:
 Client Reference #:

Date	Type of Session	Time of Session
04/29/2020	Individual Counseling	9:00 AM - 9:30 AM (0h 30m)

Notes
 This is test note

Acute Intoxication and Withdrawal; the client is managing withdrawal effectively in level 3.1
 Biomedical Conditions; The Client is making all prenatal appointments and eating balanced meals, exercising, and taking medications as prescribed.

Emotional Behavioral or Cognitive; the client is meeting with the on-site therapist and discussing her trauma issues.
 Readiness To Change; the client is participating and is engaged in her recovery process by completing her homework packets, attending groups, attending social support groups, and meeting her treatment plan goals.
 Relapse, Continued Use; the client is identifying her triggers and warning signs.

Jack Smith Date

**For additional questions, contact AccuCare Support at 800-324-7966
 support@orionhealthcare.com and we will be happy to assist you!**