

# AccuCare 9.8V Release Notes

## Enhancements - Summary

### New Custom Merge Fields added to Custom Form Builder

In our continuing pursuit to enhance the Custom Form Builder, we have created a list of seven new merge fields. They are Admission Date, Date, Location of Service, Referral Reason, Referral Source, Service Requested and User. These new merge fields were created to allow users to merge values that contain lists as well as dates to provide more options when building their forms.

#### What is different about these custom merge fields from other merge fields?

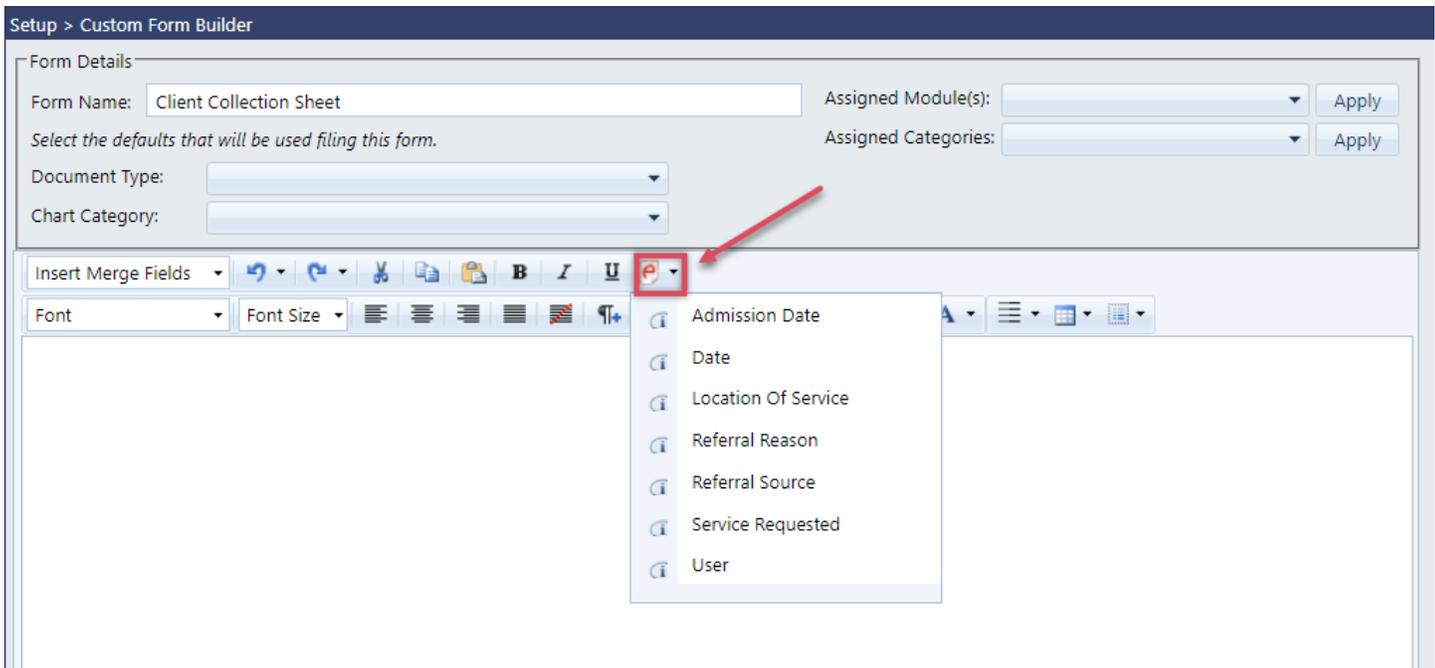
Custom merge fields are a list of data fields that contain a default value (usually from a custom setup list that the user sets up or a date) that is automatically displayed when administering the published form, in addition to having the option to over-ride the value by selecting from the custom list or typing a value.

#### Where do I find the custom merge fields?

When you create or edit a Custom Form click on the small letter (e) with the drop arrow.



- Place your cursor where you like to see custom merge field on your form
- Next select merge field from the drop-down list



# AccuCare 9.8V Release Notes

## Example Screen Shots

Here is an example of fields add in the Custom Form Builder prior to publishing this form

Fig. 1

The screenshot shows a web-based form builder interface. At the top, there is a toolbar with various icons for text formatting (bold, italic, underline), alignment, and other editing functions. Below the toolbar, the form is titled "Client Data Collection Sheet". The form contains several fields, each with a "Select" button next to it, indicating they are picklist fields. The fields are: "Client Name" (with merge fields ##FirstName## and ##LastName##), "User", "Date Created", "Referral Source Address" (with a sub-field "Referral Source"), "Referral Reason", "Service Requested", "Location of Service", and "Admit Date with assigned Level of Care" (with a sub-field "Admission Date"). At the bottom of the form, there is a dark blue bar with four buttons: "Demo Form", "Preview Report", "Save", and "Cancel".

<b>Merge Field Name</b>	<b>What it displays after Custom Form has been published</b>
User	Picklist of all users who have access or disabled created in User Administration Module
Date	The date the form was created
Referral Source	Picklist of Referral Sources created in the Referral Tab created in Client Intake Module
Referral Reason	Picklist of Reasons created in the Referral Tab created in Client Intake Module
Service Requested	Picklist of Service Requests created in the Referral Tab created in Client Intake Module
Location	Picklist of all Locations created Location of Services Setup area (Displays the Abbreviation entered)
Admission Date	The defaultPicklist of the client's most current Admission Date along wiwith assigned Level of Care

# AccuCare 9.8V Release Notes

Here is an example after publishing the form adding the custom forms client's record  
Fig. 2

The screenshot shows a software window titled "Client Intake Custom Forms". At the top, there are two input fields: "Form Date:" with the value "09/12/2019" and "Level of Care:" with a dropdown menu showing "Level II.1 - Intensive outpatient : (AOBH) Orion Beha". The main content area is titled "Client Data Collection Sheet" and contains several fields:

- Client Name:** Alan Able
- User:** Ron Admin (with a "Select" button)
- Date Created:** 09/12/2019
- Referral Source Address:** (ANF) Abacus Whole Family, Abacus Family Service, 82 South 6th Street, Allan Town, NJ 68934 (with a "Select" button)
- Referral Reason:** Doctor referred (with a "Select" button)
- Service Requested:** Clinical Evaluation (with a "Select" button)
- Location of Service:** (AOBH) Orion Behavioral H (with a "Select" button)
- Admit Date with assigned Level of Care:** 7/4/2019 - (Level II.1 - Inten (with a "Select" button)

At the bottom of the window, there are three buttons: "Save and Sign Off", "Save and Close", and "Cancel".

Here is an example of the picklist hidden behind the [Select] button

This diagram illustrates the relationship between a form field and its underlying picklist. On the left, the "Referral Source Address:" field contains the text "(ANF) Abacus Whole Family, Abacus Family Service, 82 South 6th Street, Allan Town, NJ 68934" and a "Select" button. An orange arrow points from the "Select" button to a "Referral Source" picklist window on the right. The picklist window has a title bar "Referral Source" and a scrollable list of options:

- (CME) Channel my energy
- (FAC) Facility Acquisition Center
- (FAC) Facility Acquisition Center
- (LCA) Lake County Adult Probation
- (LCA) Lake County Adult Probation
- (LCA) Lake County Adult Probation
- Hope for All
- Self Admitted
- Toni Petropoulos
- Youth Project

At the bottom of the picklist window, there are two buttons: "Use" and "Close".

# AccuCare 9.8V Release Notes

Here are some examples for picklist behind the [Select] buttons

Referral Reason: Doctor referred Select

Referral Reason

Doctor referred

Level of care not supported at initial facility

Required Evaluation from Probation

Self admitting

Transfer to Probation - evaluation required

Use Close

Admission Date with assigned Level of Care: 7/4/2019 - (Level II.1 - Inten Select

Admission Date

07/04/2019 (Level II.1 - Intensive outpatient )

12/04/2018 (Level I - Outpatient treatment)

12/04/2018 (Level II.1 - Intensive outpatient )

Use Close

# AccuCare 9.8V Release Notes

Here is an example of the printout

**Orion Behavioral Health Services**  
**18047 Oak Street**  
**Omaha, Ne. 68130**  
**Phone: 402-341-8880**  
**Fax: 402-341-8911**

## Client Data Collection Sheet

**Client Name:** Alan Able

**User:** Ron Admin **Date Created:** 09/12/2019

**Referral Source Address:**

(AWF) Abacus Whole Family Abacus Family Service 82 South 6th Street Allan Town , NJ 68934

**Referral Reason:** Doctor referred

**Service Requested:** Clinical Evaluation

**Location of Service:** (AOBH) Orion Behavioral Health

**Admit Date with assigned Level of Care:** 7/4/2019 - (Level II.1 - Intensive outpatient - (AOBH) Orion Behavioral Health)

42 CFR Part 2 applies to any individual or entity that is federally assisted and holds itself out as providing, and provides, alcohol or drug abuse diagnosis, treatment or referral for treatment (42 CFR § 2.11). Most drug and alcohol treatment programs are federally assisted.

*Able, Alan A.*

*Page 1 of 1*