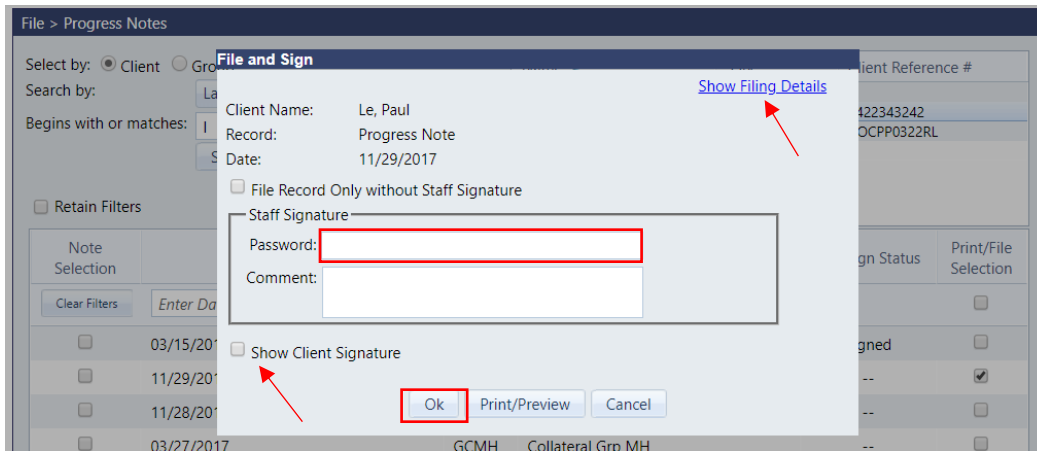


# AccuCare 9.8Q Release Notes

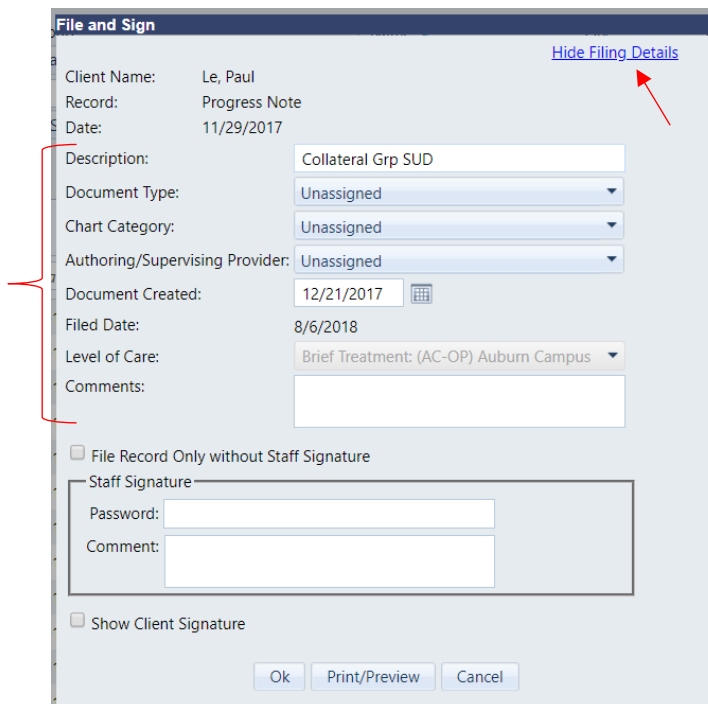
## Enhancements and Bug Fixes - Summary

**REMINDER:** It is recommended that you are operating the AccuCare Web system on Internet Explorer 11 or Chrome. Some features in AccuCare are not supported in older browsers, therefore may not function properly.

- **Quick File and Sign:** Users can electronically sign-off on AccuCare client records in a more streamlined and efficient way. Before, when signing off on a record, the user is presented with a preview of the record along with a list of details to complete. Now, when the user selects “File & Sign” they will be presented with a simple dialogue window (below) and only needs to enter the password and select OK.



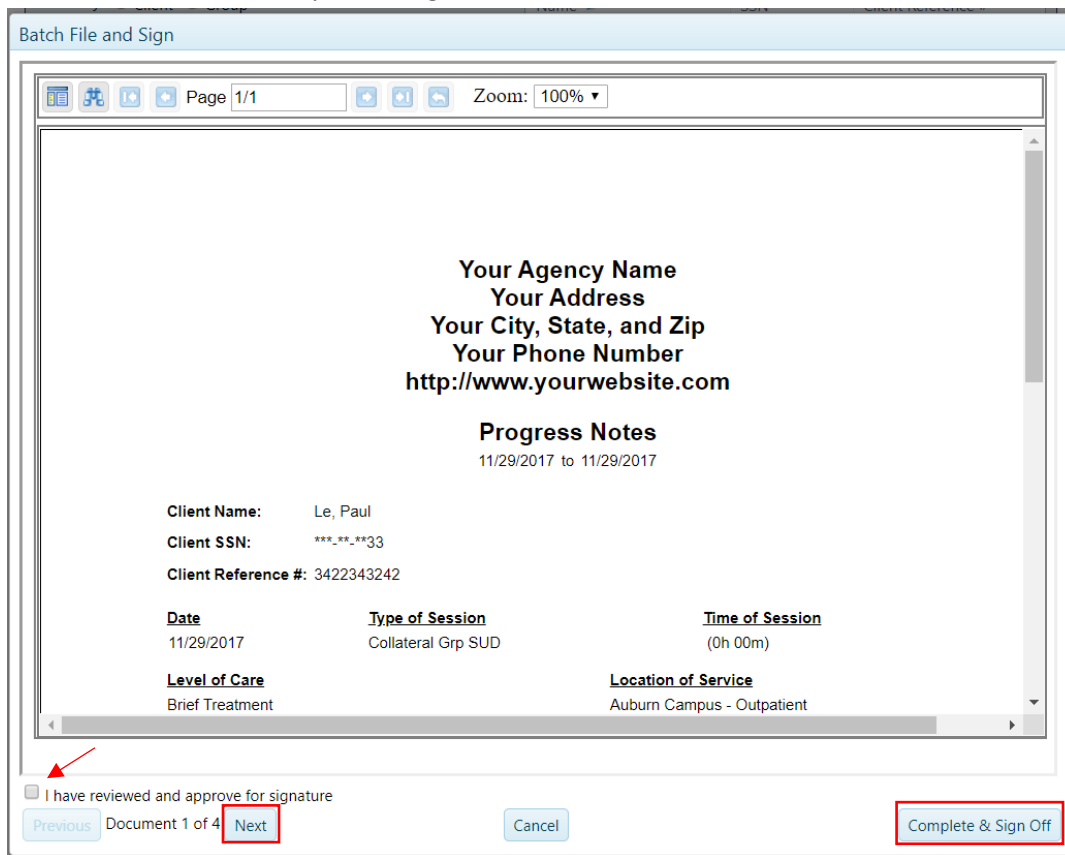
The user will have the option to see the details by selecting the “Show Filing Details” or collect a client signature by selecting “Show Client Signature”



- **Batch File and Sign:** Now users are able to electronically sign off on records in a batch format in Progress Notes and in Chart Management.



To sign off the batch of records selected, the user can toggle through each record, then check the “I have reviewed and approve for signature” box (see below). Upon completing their review, the user can select “Complete & Sign Off” button.



After selecting the Complete and Sign Off button, the user is presented with a summary of the filing details and sign off information. Any of the records that the user checked the “I have reviewed and approve for signature” checkbox, will be approved for signoff. The user only needs to enter their password ONCE, in the Password box, and select Complete.

Batch Signing

Client Name	Description	Document Type	Chart Category	Document Date	Filed Date	Approved for Signature	View/Edit Details	Print	Remove
Le, Paul	Rehab Grp MH	Unassigned	Unassigned	1/13/2016		Yes			
Le, Paul	Assessment-Full Ind MH	Unassigned	Unassigned	1/13/2016		Yes			
Le, Paul	Crisis Ind SUD	Unassigned	Unassigned	1/13/2016		Yes			

To sign off on any documents:  
When "Yes" is in the Approved for Signature column, enter your password and click Complete.

NOTE:  
If the document in Approved for Signature column is "No", the document will still be filed to the Client's Chart but it will NOT be electronically signed when you click Complete.

Password:

This action will apply your electronic signature onto all of the records that were reviewed and approved for signature.

<input type="checkbox"/>	01/13/2016	GRMH	Rehab Grp MH	Signed	<input type="checkbox"/>
<input type="checkbox"/>	01/13/2016	IAFMH	Assessment-Full Ind MH	Signed	<input type="checkbox"/>
<input type="checkbox"/>	01/13/2016	ICRSUD	Crisis Ind SUD	Signed	<input type="checkbox"/>

E-Signed by: Training T. Train

- Multiple Client View in Chart Management:** Now users can view multiple clients at one time in Chart Management. Before users could only see records for one client at a time. Now, users will have more options in the filters, including multiple client views. After selecting clients to view, click on the Apply Filters button and the chart will display all of your filter results.

Chart Management

Select Client Name: Le, Paul x Jones, Sandy x

Choose Filter(s): Select a filter

Show Columns: All items checked

Select By: Service Date

All Dates

Date Range: Enter a Start Date to Enter an End Date

Total Space Remaining: 30GB

Select	Client Name	Episode	Description	Level of Care	Location	Service Date	File Date	Document Type	Chart Category	Created By	Initial Signature	Date
<input type="checkbox"/>	Le, Paul	5	Crisis Ind SUD	Phase I (IOP)	(GVC-OP) Grass Valley Campus	01/13/2016	08/06/2018	Unassigned	Unassigned	Training T. Train	Training T. Train	08
<input type="checkbox"/>	Le, Paul	5	Assessment-Full Ind MH	Phase I (IOP)	(GVC-OP) Grass Valley Campus	01/13/2016	08/06/2018	Unassigned	Unassigned	Training T. Train	Training T. Train	08
<input type="checkbox"/>	Le, Paul	5	Rehab Grp MH	Phase I (IOP)	(GVC-OP) Grass Valley Campus	01/13/2016	08/06/2018	Unassigned	Unassigned	Training T. Train	Training T. Train	08
<input type="checkbox"/>	Le, Paul	5	Progress Note	Phase I (IOP)	(GVC-OP) Grass Valley Campus	03/15/2018	04/10/2018	Unassigned	Unassigned	Training T. Train	Training T. Train	04
<input type="checkbox"/>	Le, Paul	3	Progress Note	Brief Treatment	(AC-OP) Auburn Campus - Outp.	--	11/27/2017	Pre Admission	Unassigned	Training T. Train	--	--
<input type="checkbox"/>	Le, Paul	3	Progress Note	Brief Treatment	(AC-OP) Auburn Campus - Outp.	03/13/2017	03/17/2017	Unassigned	Unassigned	Greg B Screer	--	--
<input type="checkbox"/>	Le, Paul	2	treatment plan	--	--	--	02/02/2016	PreScreen	intake	Training T. Train	--	--
<input type="checkbox"/>	Le, Paul	2	MH screen III	--	--	--	01/27/2016	Pre Admission	Demographics	Training T. Train	--	--
<input type="checkbox"/>	Le, Paul	2	Adolescent	Phase II	(GVC-OP) Grass Valley Campus	01/13/2016	01/13/2016	PreScreen	intake	Training T. Train	Training T. Train	01
<input type="checkbox"/>	Jones, Sandy	2	Admin Intake Ind SUD	Phase II	(GVC-OP) Grass Valley Campus	01/13/2016	08/06/2018	Unassigned	Unassigned	Training T. Train	Training T. Train	08
<input type="checkbox"/>	Jones, Sandy	2	Rehab Grp MH	Phase II	(GVC-OP) Grass Valley Campus	01/13/2016	08/06/2018	Unassigned	Unassigned	Jacob B Mana	Training T. Train	08
<input type="checkbox"/>	Jones, Sandy	N	Face Sheet	--	--	01/13/2016	01/13/2016	Pre Admission	Demographics	Training T. Train	Training T. Train	01

- Service Date Added to Chart Management:** The service date column has been added to Chart Management. This includes, when possible, the date of service from a progress note, interview date of the assessment or screening and date of the treatment plan.

The screenshot shows the 'Chart Management' window. At the top, there are filters for Client Name (Le, Paul; Jones, Sandy), a filter dropdown, and a 'Select By' dropdown set to 'Service Date'. Below the filters is a table with columns: Select, Client Name, Episode, Description, Level of Care, Location, Service Date, File Date, and Document Type. The 'Service Date' column is highlighted with a red box. The table contains 12 rows of data for two clients: Le, Paul and Jones, Sandy.


Select	Client Name	Episode	Description	Level of Care	Location	Service Date	File Date	Document Type
	Le, Paul	4	<a href="#">Admin Intake SUD</a>	Phase I (IOP)	(GVC-OP) Grass Valley Campus	01/13/2016	08/06/2018	Unassigned
	Le, Paul	5	<a href="#">Assessment-Full Ind MH</a>	Phase I (IOP)	(GVC-OP) Grass Valley Campus	01/13/2016	08/06/2018	Unassigned
	Le, Paul	5	<a href="#">Rehab Grp MH</a>	Phase I (IOP)	(GVC-OP) Grass Valley Campus	01/13/2016	08/06/2018	Unassigned
	Le, Paul	5	<a href="#">Progress Note</a>	Phase I (IOP)	(GVC-OP) Grass Valley Campus	03/15/2018	04/10/2018	Unassigned
	Le, Paul	3	<a href="#">Progress Note</a>	Brief Treatment	(AC-OP) Auburn Campus - Outp	--	11/27/2017	Pre Admission
	Le, Paul	3	<a href="#">Progress Note</a>	Brief Treatment	(AC-OP) Auburn Campus - Outp	03/13/2017	03/17/2017	Unassigned
	Le, Paul	2	<a href="#">treatment plan</a>	--	--	--	02/02/2016	PreScreen
	Le, Paul	2	<a href="#">MH screen III</a>	--	--	--	01/27/2016	Pre Admission
	Le, Paul	2	<a href="#">Adolescent</a>	Phase II	(GVC-OP) Grass Valley Campus	01/13/2016	01/13/2016	PreScreen
	Jones, Sandy	2	<a href="#">Admin Intake Ind SUD</a>	Phase II	(GVC-OP) Grass Valley Campus	01/13/2016	08/06/2018	Unassigned
	Jones, Sandy	2	<a href="#">Rehab Grp MH</a>	Phase II	(GVC-OP) Grass Valley Campus	01/13/2016	08/06/2018	Unassigned
	Jones, Sandy	N	<a href="#">Face Sheet</a>	--	--	01/13/2016	01/13/2016	Pre Admission

- Client Copay Information and Plan Notes:** Now a copay amount can be recorded in the Payer Plan Details. This will appear on the Client Profile and Receipts as well as the Plan Notes from the Payer Plan Details.

The screenshot shows the 'Payer Plan Details' form. The 'Payer Type' is set to 'Insurance' and the 'Payer Name' is '(AETNA) Aetna'. The 'Effective Date' is '08/03/2018'. The 'Insured's ID' is '324r32f'. The 'Relationship to Insured' is 'Self'. The 'Copay' field is highlighted with a red box and contains '\$25.00'. The 'Plan Notes' field is also highlighted with a red box and contains 'copay due at check in'. The 'Insured's Information' section includes fields for First Name (Paula), Middle Name (Lee), Last Name (Applesauce), Address (18451 Any Street), City (Omaha), State (NE), Zip (68133-), Gender (F), and Date of Birth (05/05/1985). There are also phone number fields for Home and Work.

Information from Payer Plan Details will display on the Client Profile and Receipts.

**Client Profile**

Select a Client: Applesauce, Paula L. 

Diagnosis: F10.10, F10.180, F10.20, F10.26  
Referring Physician:  
Billing Reference #: AB232323  
Billing Info Comments:

---


**Client Balance**

Client Balance:	\$0.00	Total Balance:	\$0.00
Total Charges:	\$0.00	Total Ins Payments:	\$0.00
Total Client Payments:	\$0.00	Total Ins Adj:	\$0.00
Total Client Adj:	\$0.00	Insurance Pending:	\$0.00

---


**Client Insurance:**

Payer Name:	Aetna	Effective Dates:	08/03/2018 - Unknown
Payer Address:	23432232 insurance street	Insured ID #:	324r32f
City, State, Zip:	Cincinnati, OH 54445	Group ID #:	
Phone:		Subscriber Name:	Applesauce, Paula L.
Plan Type:	Primary	Subscriber DOB:	5/5/1985
Copay:	\$25.00		
Insurance Plan Comment:	copay due at check in		




**CLIENT RECEIPT**

Client Name: Applesauce, Paula L.  
Billing Ref #: AB232323  
Client Ref #: AB232323  
Default Payer Plan: AETNA - 08/03/2018  
Business Address: 2323 Any Street Santa Maria, CA 84841  
Business Tax ID:  
Plan Notes: copay due at check in



**APPOINTMENT DETAILS**

Date of Appointment:	08/06/2018	Scheduled Event:	Anger Mgmt
Scheduled Time:	10:00AM	Session:	Group Counseling
Scheduled Duration*:	1 hour	Estimated Charge*:	\$0.00
Scheduled Location:		Beginning Balance*:	\$0.00
Facilitator:	Training T. Trainer	Today's Balance*:	\$0.00
Check In status*:	Scheduled	Copay:	\$25.00



- **Improvements to Billing Transfer and how Units and Amounts are converted** from Scheduler appointments and/or Progress Notes. Users can determine how service times, recorded in Progress Notes, are transferred into billing, based on time and dollar amount, in different increments.

Two additional fields were added to further define units and how they convert: Time per Unit and Type of Time. For example, if an agency bills, at a default, 1 hour for Anger Management, but in 15 minute increments, then the agency can setup the Service Details in this way. This allows users to use both a default billing amount AND have the ability to break down the billing into increments (if needed) based on the Scheduler Appointment or Progress Note. So if the progress note indicates only 45 minutes spend on Anger Management, (rather than an hour) the exact amount can be automatically transferred to billing (through Billing Transfer) without other audit measures (previous process).

**Setup > Services**

Service Description	Transaction Type
Anger Management	Charge
Assessment	Charge
Group Session	Charge

**Service Details**

Service Description\* Anger Management

Transaction Type\* Charge

Charge Type Outpatient

CPT/HCPC Code 343334

Revenue Code

Description on Statements Individual Anger Management

Units 4

Unit Type Units

Amount per Unit \$ 20.00

Check-In Status Attended

Time per Unit 15

Type of Time Minute(s)

- **New Opioid Risk Tool** added to Screening/Supplements: The Opioid Risk Tool (ORT) was designed to predict the probability of a patient displaying aberrant behaviors when prescribed opioids for chronic pain. Users can print, file and sign and query the data collected in this tool

**Opioid Risk Tool**  
Paula L. Applesauce [DOB:5/5/1985]

File > Supplemental Questions > Opioid Risk Tool > For: Paula L. Applesauce [DOB:5/5/1985]

Level of Care: - Level 2.1 - Intensive outpatient/partial hospita

1. Interview Date: 08/06/2018

2. Client Date of Birth:

3. Client's Age:

4. Client Gender:  No Response Selected  
 Female  
 Male

Enter Y for Yes and N for No in response to the following questions.

5. Family History of Substance Abuse - Alcohol: Z

6. Family History of Substance Abuse - Illegal Drugs: Z

7. Family History of Substance Abuse - Rx Drugs: Z

8. Personal History of Substance Abuse - Alcohol: Z

- Additional Categories added for Custom Forms:** Now users can place additional filters on where Custom Forms appear in AccuCare. Previously, if a custom form was added, the user could determine if the form would appear in Intake, Scheduler, Assessments, etc. Now the user can place additional filters on custom made forms, using the “Manage Forms” feature in the Custom Forms Builder, to allow for more organized selection of forms.

Setup > Custom Form Builder

Name	Assigned Categories	Assigned Module(s)	Created By	Last Modified	Published	Arch
16c 104c Intake Adult ASAM Screen 01-22-18			Training T. Trainer	05/24/2018	No	M
82b-501 Initial Treatment Plan 2-27-18		Screening Tools/Supplements	Stephen Clinician	05/03/2018	No	M
CalOMS - Client Registration 2014-08-07		Admission/Discharge Client Intake	Training T. Trainer	08/28/2017	Yes	M
CalOMS - Episode Closing 03-30-17		Admission/Discharge Client Intake	Training T. Trainer	08/28/2017	Yes	M
CalOMS - Episode Opening 03-30-17		Admission/Discharge Client Intake	Training T. Trainer	05/02/2018	Yes	M
CCCAOD - Clinical Justification for Continuing SUD Treatment Services - 04 2017		Admission/Discharge	Training T. Trainer	08/30/2017	Yes	M
CCCAOD - Discharge Summary				08/30/2017	Yes	M
CCCAOD Intake - Admission Form 04 01 2017				08/28/2017	Yes	M
CCCAOD Treatment Plan 04 2017				08/28/2017	Yes	M
CCCAOD-Consent for the Release of Confidential Information				08/28/2017	Yes	M
CCCAOD-Progress Note rev 05-02-17		Admission/Discharge Client Intake	Staff	08/28/2017	Yes	M
Client Participation Approval Screen		Admission/Discharge Client Intake	Training T. Trainer	08/28/2017	Yes	M
Confidential Health and Intake Questionnaire		Admission/Discharge Client Intake	John Admin	08/28/2017	Yes	M

**Manage Forms**

Form Name: 16c 104c Intake Adult ASAM Screen

Assigned Module(s): Client Intake

Assigned Categories:

- ATR Contract Forms
- County Forms

Add   Edit   **Manage Forms**   Add/Edit Categories   Create Copy   Delete   Demo Form   Preview Report   Publish   Archive

For example, If an agency wanted to place certain forms in Client Intake AND separate them as County or a special contract, they would be able to. When selecting a form in Client Intake, the user will be presented with the filters, where they could select the category of where the form belongs. It allows administrators to provide more specific ways to guide users on what forms to use for specific clients.

Demographics   Case Management   Billing   Payers   Fee Schedule   Referrals   AI/AN   Custom Forms   Multi-Dimensional Assessment

Add

Date	Form Name	Categories	Added By	Edit	Delete
08/29/2017	CalOMS - Episode Opening 03-30-17	County Forms	Training T. Trainer		

**Create New Form**

Select Category: County Forms

Select Form:

- Client Intake**
- CalOMS - Episode Opening 03-30-17
- CCCAOD Intake - Admission Form 04 01 2017
- CCCAOD Treatment Plan 04 2017

- Save and Sign Off from the Live Record:** Users can now save a record and go directly to signing off. Previously a user would need to create/edit a record (i.e. Progress Note) then save the record, returning them to the main menu for that module (i.e. Progress Note Main Screen). Then the user would select the record from the grid, and click on “File and Sign”. Now, the user can be in the record editing, and from the editing mode, select “Save and Sign Off”. This will take them directly to the electronic signature dialogue, allowing the user to sign off and complete that task. This optional workflow can save the user time when performing this task.

File > Progress Notes > Edit Note



Note Info

Client: Applesauce, Paula L. Level of Care: - Level 2.1 - Intensive outpatient/partial hosp

Clinician: Training T. Trainer Co-Facilitator:

Session Type: 203 - Client with child in program  Sort by Description

Session Date: 08/30/2017  Time: Start: 11:00 AM to End: 11:30 AM Duration: 0:30

Diagnosis:  

Note:

Paula came into office today stated that she lost her housing last night due to her roommates being evicted. She has no family and no where to go. She is afraid of relapsing because all her friends are using

Statements Edit **Save and Sign Off** Save Cancel Print Delete Close

File and Sign [Show Filing Details](#)

Client Name: Applesauce, Paula L.

Record: Progress Note

Date: 8/30/2017

File Record Only without Staff Signature

Staff Signature

Password:

Comment:

- Improved workflow for collecting Illinois DASA demographic information, with auto fill into the system questionnaire.
- Minor bug fixes to Meskwaki Export module for submitting billing information to external systems
- Minor bug fixes to Billing Transfer, Service Processing, Submit Services, Accounting reports
- Minor fixes and improvements to Multi-Dimensional Assessment, Client Intake and Scheduler