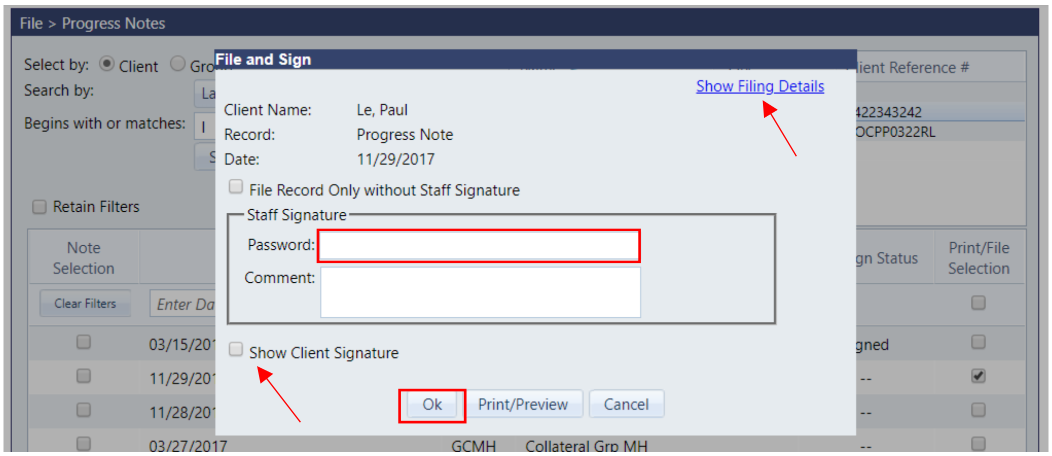
AccuCare 9.8Q Release Notes

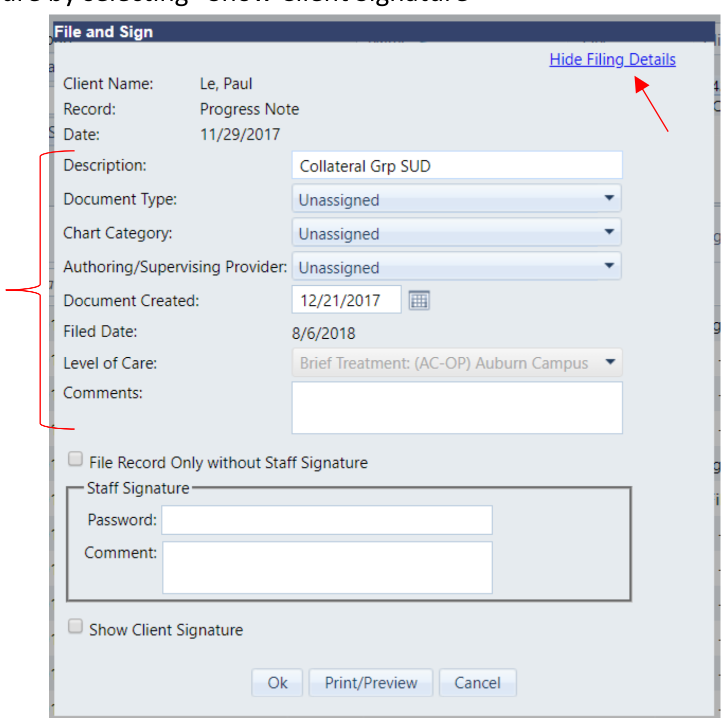
Enhancements and Bug Fixes - Summary

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.

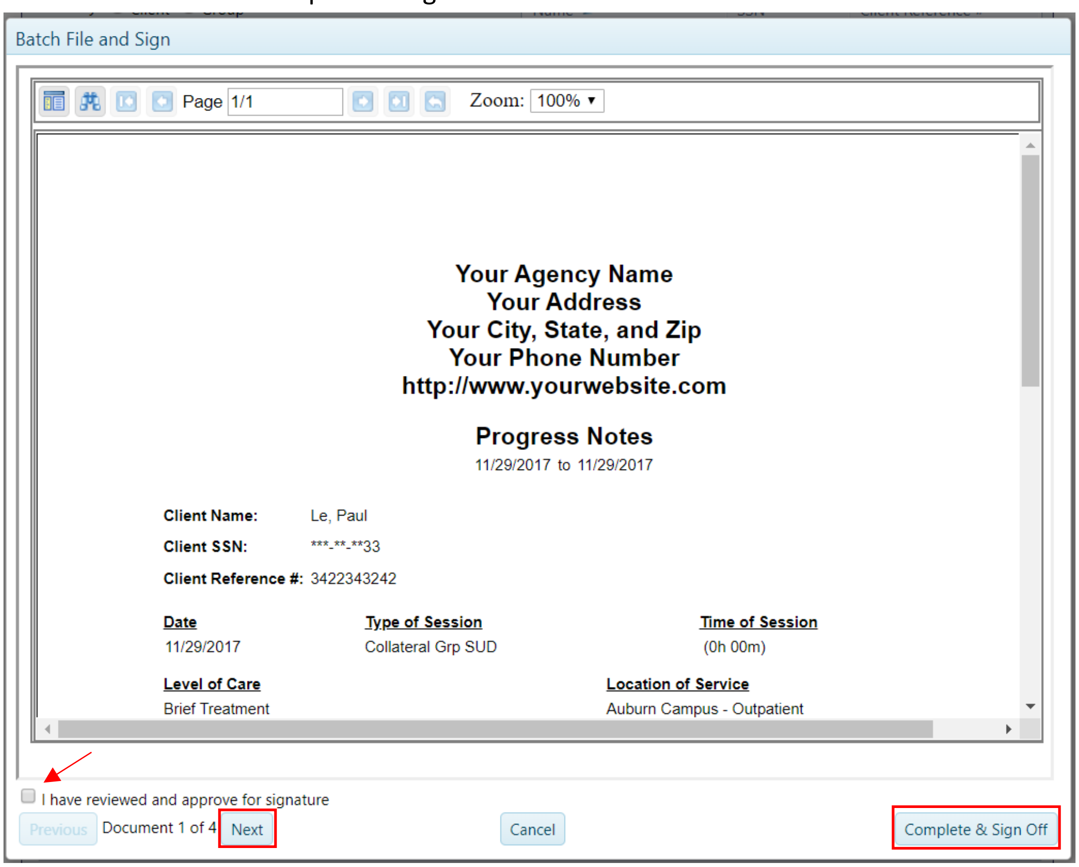


The user will have the option to see the details by selecting the "Show Filing Details" or collect a client signature by selecting "Show Client Signature"

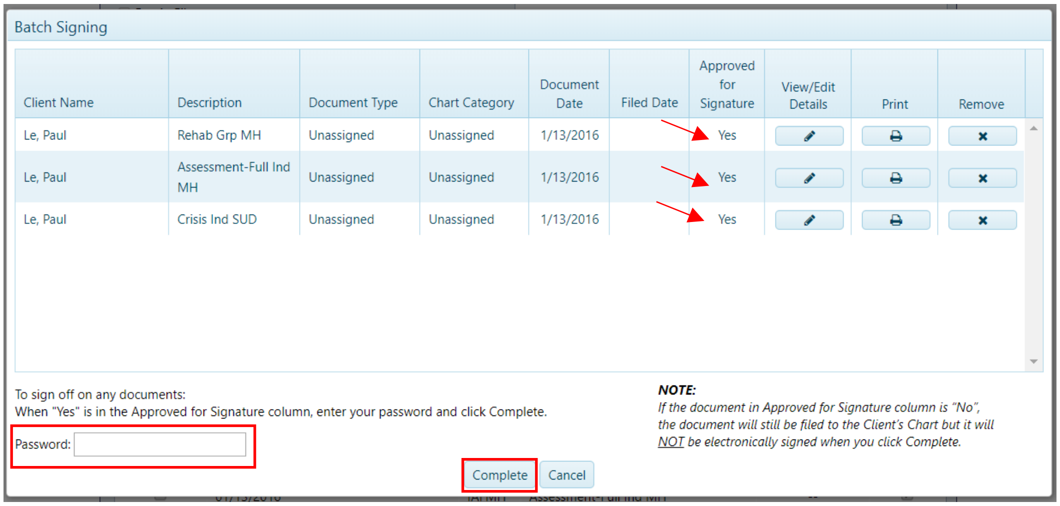


- **Batch File and Sign:** Now users are able to electronically sign off on records in a batch format in Progress Notes and in Chart Management.

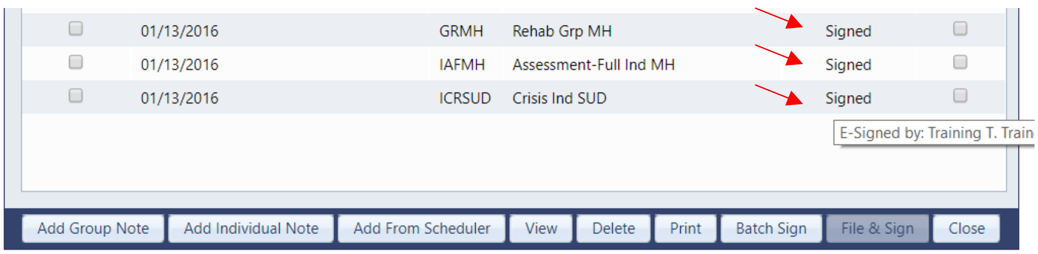
To sign off the batch of records selected, the user can toggle through each record, then check the "I have reviewed and approve for signature" box (see below). Upon completing their review, the user can select "Complete & Sign Off" button.



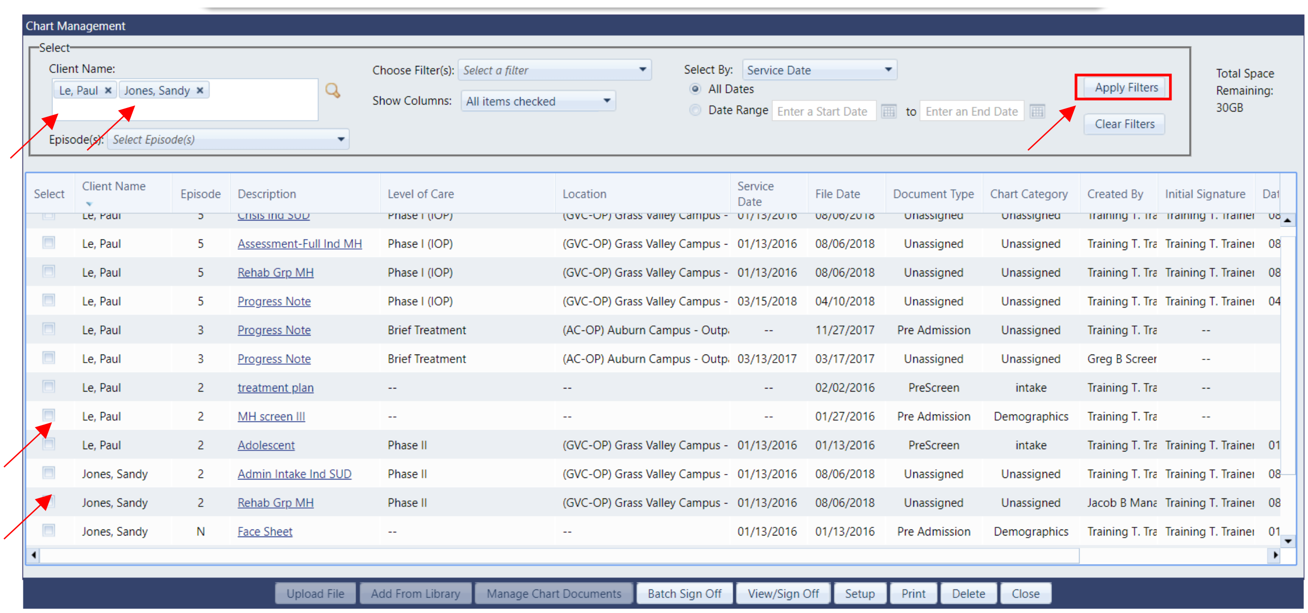
After selecting the Complete and Sign Off button, the user is presented with a summary of the filing details and sign off information. Any of the records that the user checked the "I have reviewed and approve for signature" checkbox, will be approved for signoff. The user only needs to enter their password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



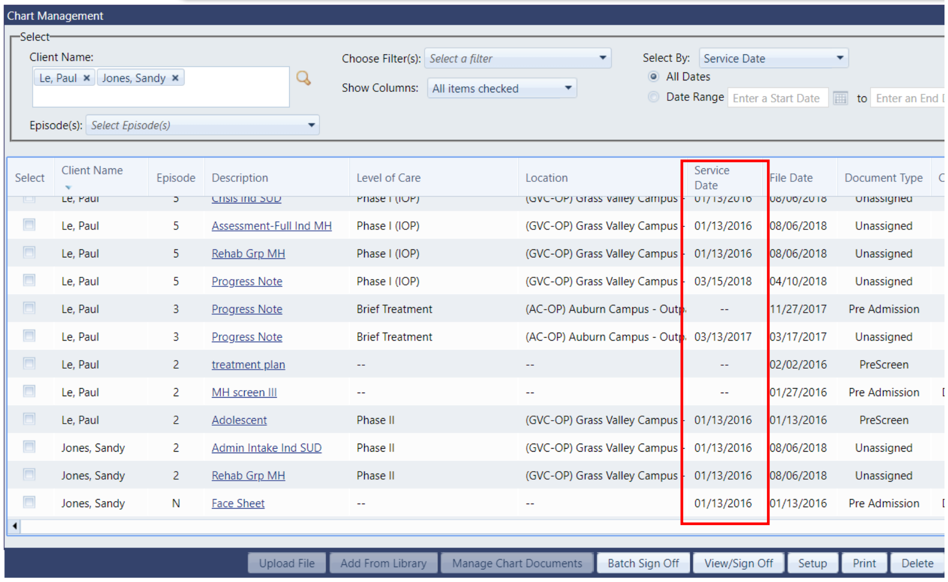
This action will apply your electronic signature onto all of the records that were reviewed and approved for signature.



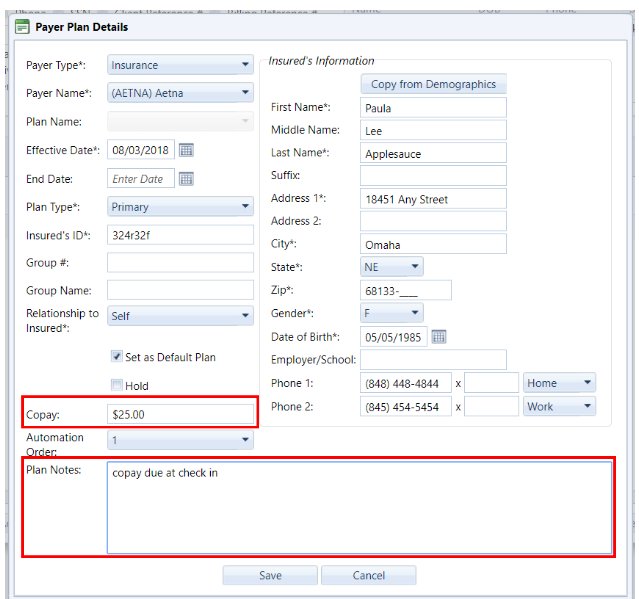
- **Multiple Client View in Chart Management**: Now users can view multiple clients at one time in Chart Management. Before users could only see records for one client at a time. Now, users will have more options in the filters, including multiple client views. After selecting clients to view, click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



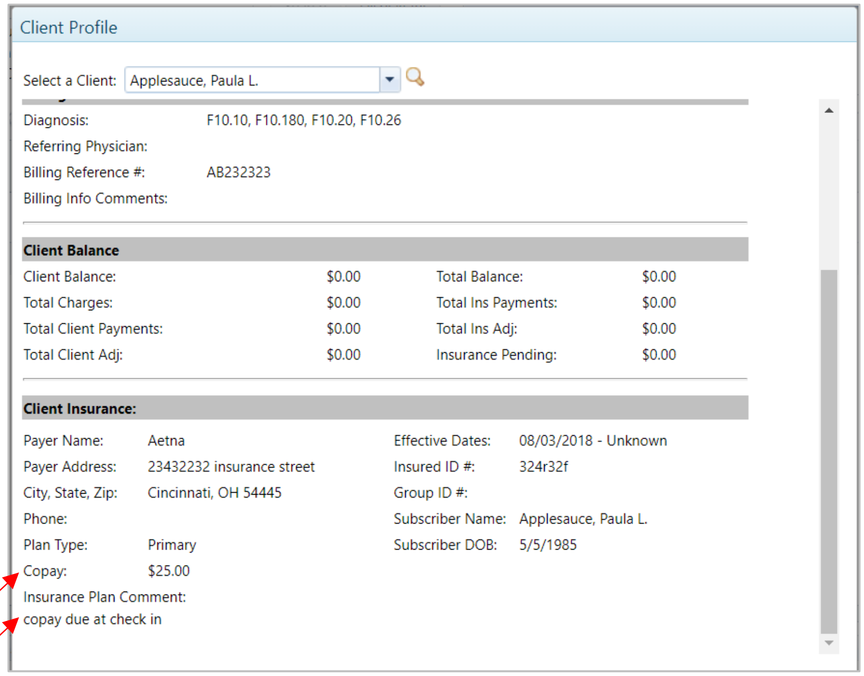
- **Service Date Added to Chart Management**: The service date column has been added to Chart Management. This includes, when possible, the date of service from a progress note, interview date of the assessment or screening and date of the treatment plan.



- **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.



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:	

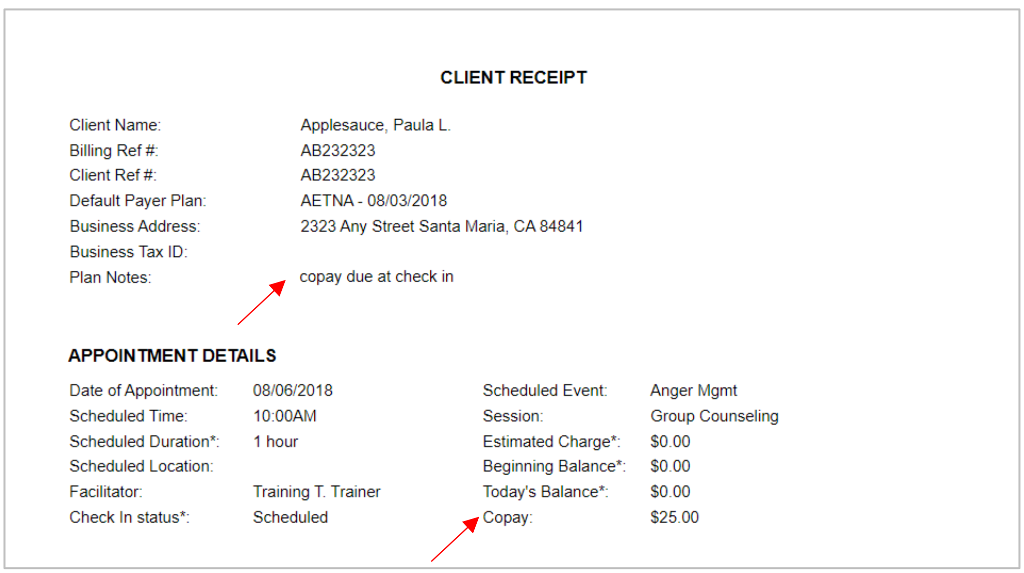
Client Balance

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

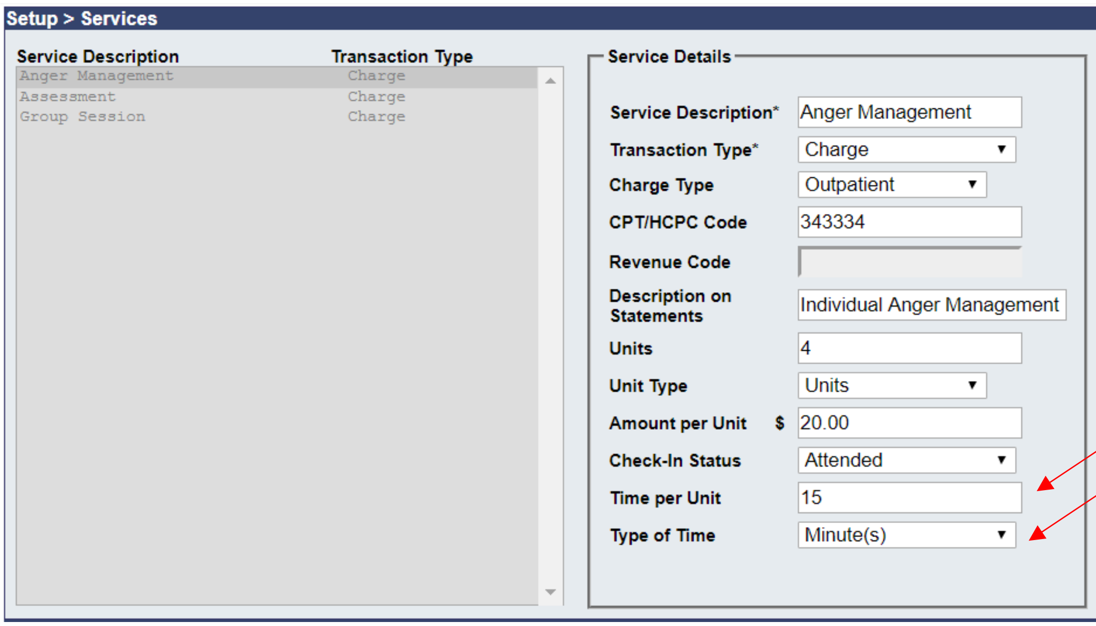
Client Name:	Applesauce, Paula L.
Billing Ref #:	AB232323
Client Ref #:	AB232323
Default Payer Plan:	AETNA - 08/03/2018
Business Address:	2323 Any Street Santa Maria, CA 84841
Business Tax ID:	
Plan Notes:	copay due at check in

APPOINTMENT DETAILS

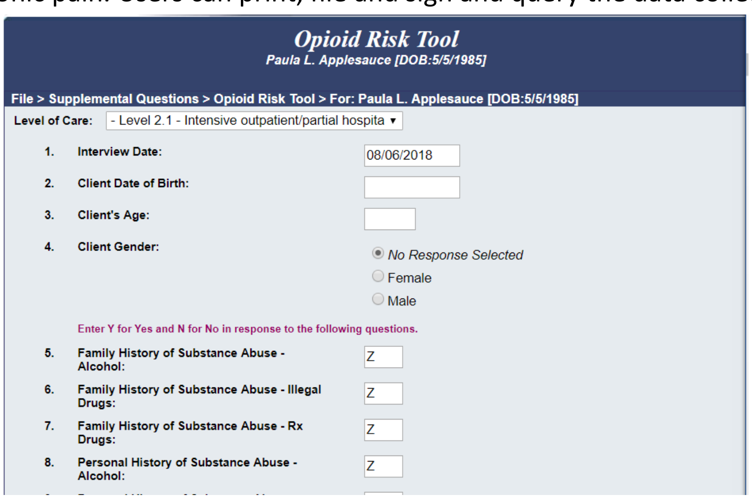
Date of Appointment:	08/06/2018	Scheduled Event:	Anger Mgmt
Scheduled Time:	10:00AM	Session:	Group Counseling
Scheduled Duration*:	1 hour	Estimated Charge*:	$0.00
Scheduled Location:		Beginning Balance*:	$0.00
Facilitator:	Training T. Trainer	Today's Balance*:	$0.00
Check In status*:	Scheduled	Copay: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

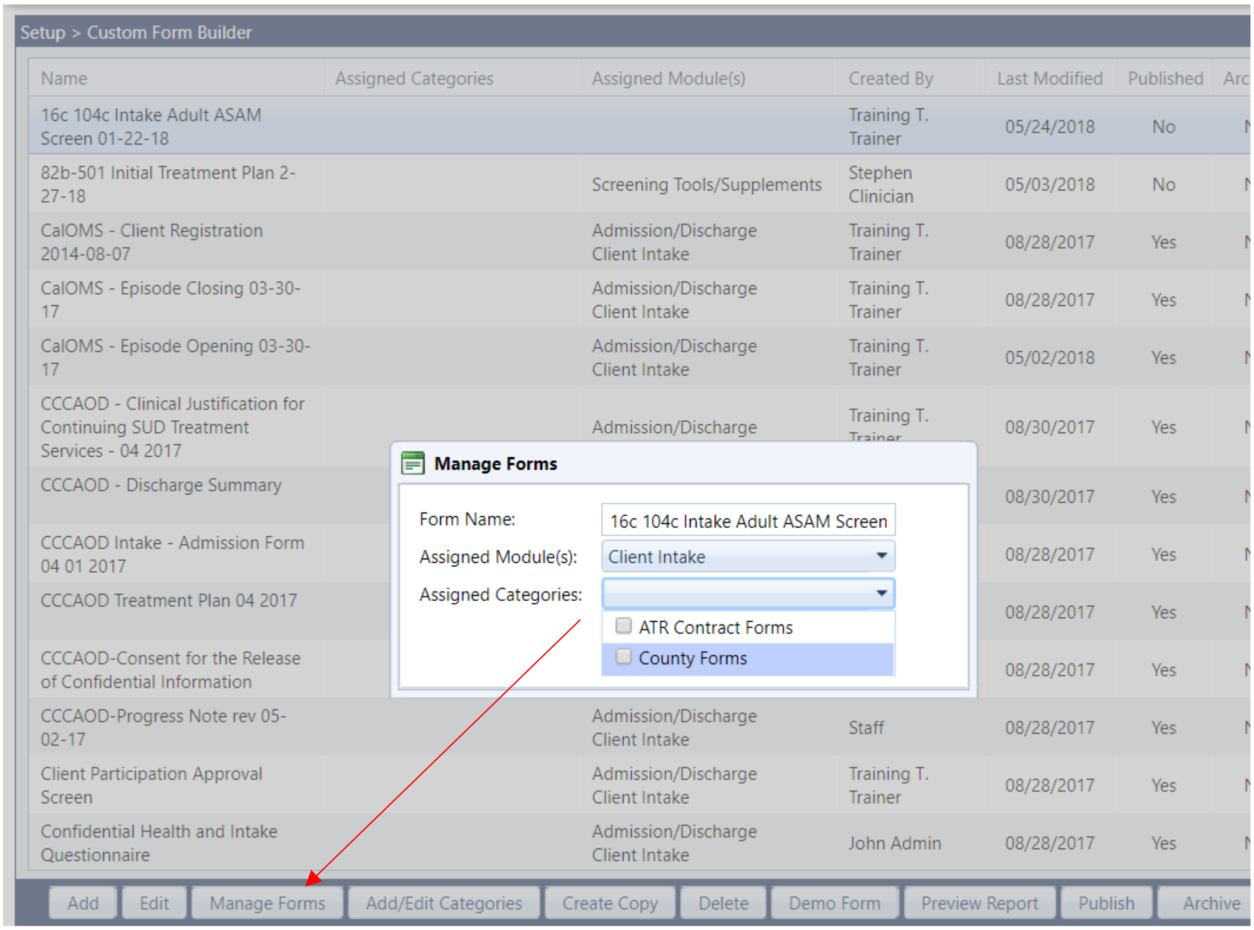
  Two additional fields were added to further define units and how they convert: Time per Unit and Type of Time. For example, if an agency bills, at a default, 1 hour for Anger Management, but in 15 minute increments, then the agency can setup the Service Details in this way. This allows users to use both 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).



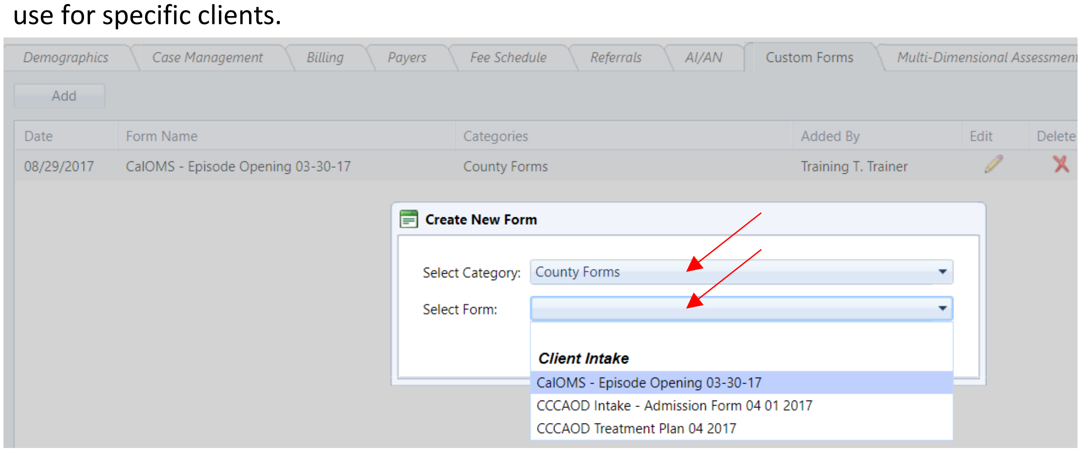
- **New Opioid Risk Tool** added to Screening/Supplements: The Opioid Risk Tool (ORT) was designed to predict the probability of a patient displaying aberrant behaviors when prescribed opioids for chronic pain. Users can print, file and sign and query the data collected in this tool



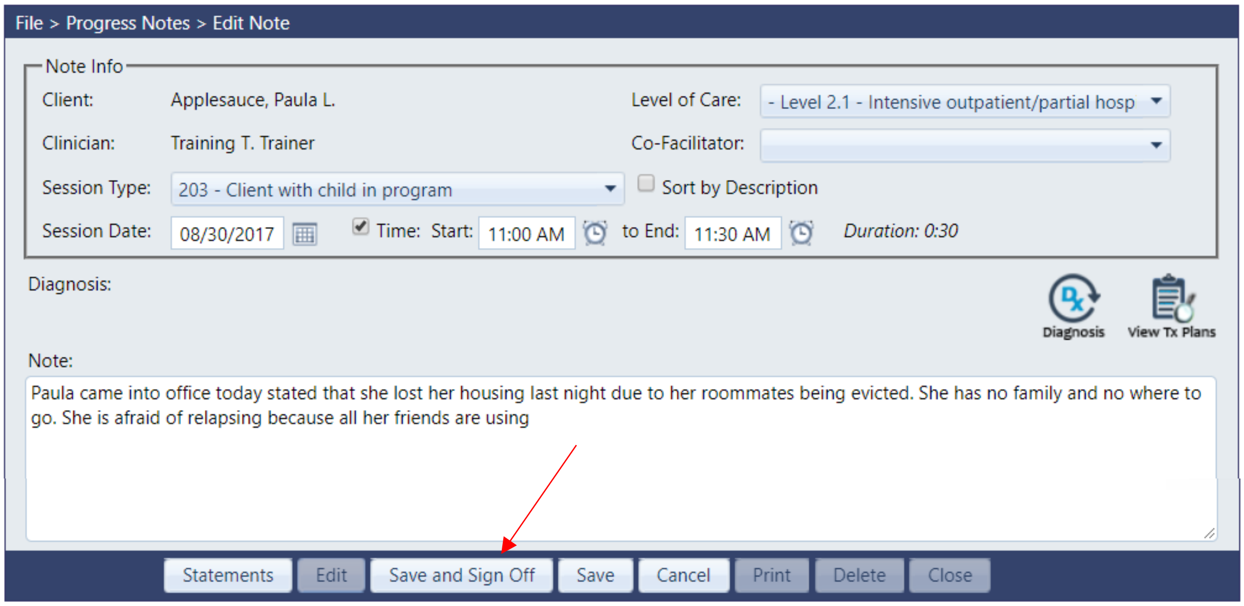
- **Additional Categories added for Custom Forms**: Now users can place additional filters on where Custom Forms appear in AccuCare. Previously, if a custom form was added, the user could determine if the form would appear in Intake, Scheduler, Assessments, etc. Now the user can place additional filters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

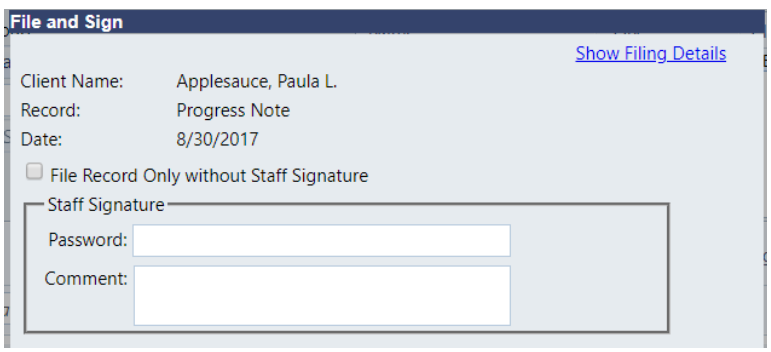


For example, If an agency wanted to place certain forms in Client Intake AND separate them as County or a special contract, they would be able to. When selecting a form in Client Intake, the user will be presented with the filters, where they could select the category of where the form belongs. It allows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



- **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.





- 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