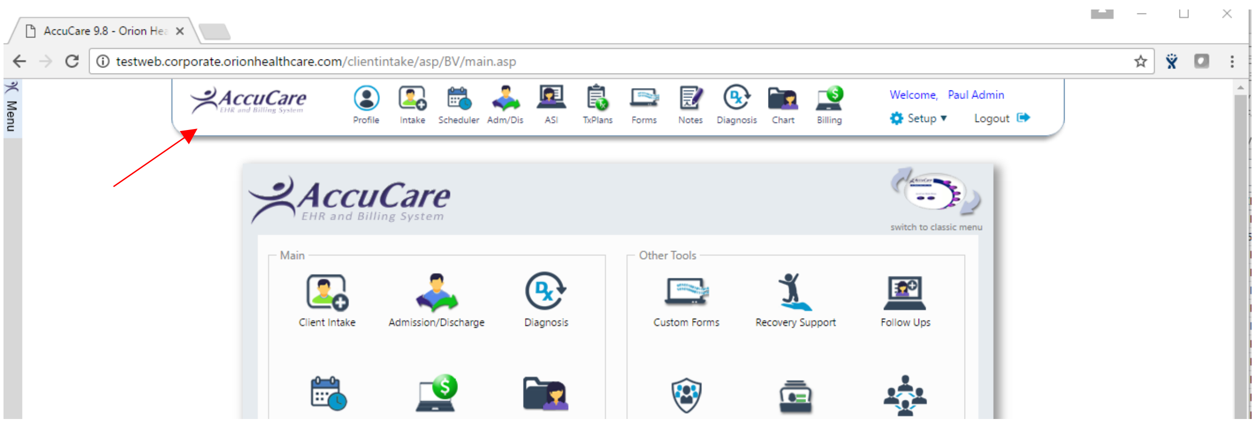
AccuCare 9.8K Release Notes

New Features and Enhancements

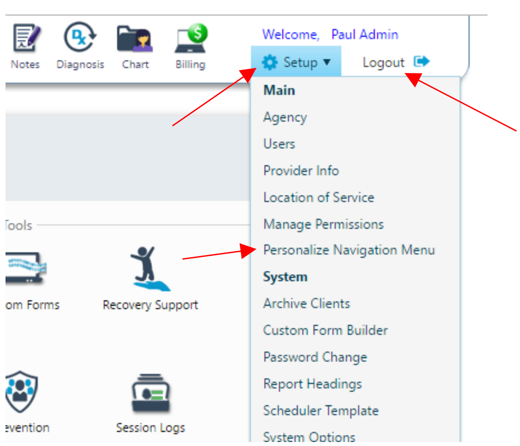
Major enhancements were made to the main navigation menu and Client Intake module, improving efficiency and workflow, along with bug fixes and overall performance improvements.

1. Ribbon Navigation Menu

A noticeable change to how you navigate through AccuCare will be the use of the Ribbon Navigation menu. Upon login to the main menu, at the top of the application, there will be a Ribbon Navigation Menu.



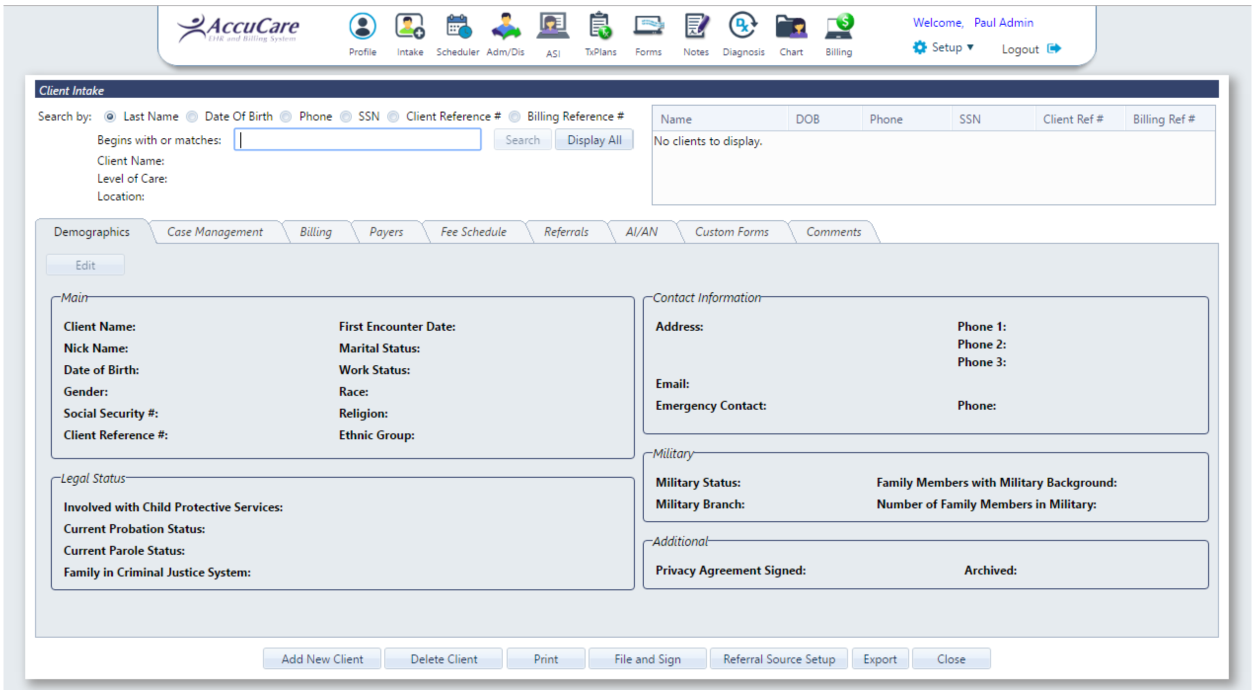
- This menu will be present on a majority of the screens in AccuCare order to assist users in navigating to different areas of AccuCare.
- Users may **Personalize** their Ribbon in order to provide the proper workflow (order of the icons). In future releases, there will be additional icons that can be used in the Ribbon.
- Access to the **Setup Menu** (formerly on the Classic Menu) as well as a **Logout** function is located on the far right of the Ribbon



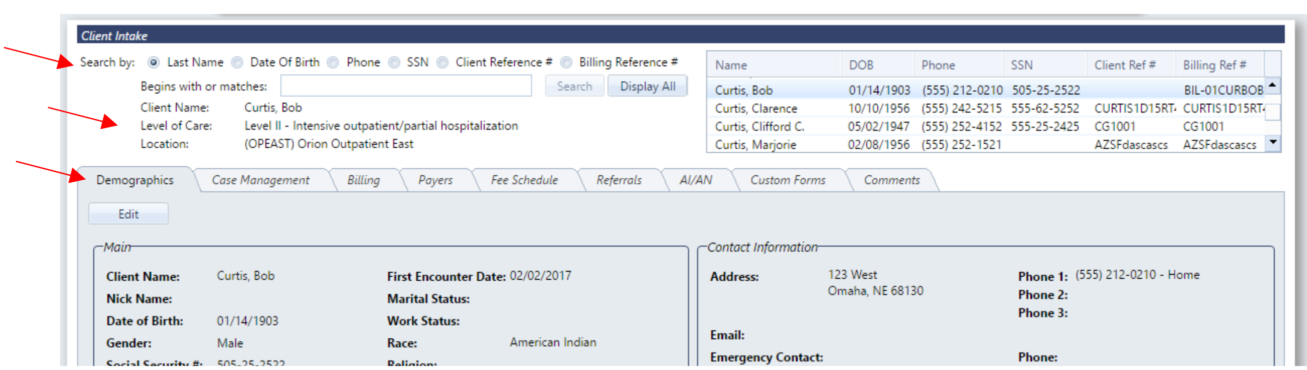
2. Client Intake – Centralized Information and Workflow

Another noticeable change to AccuCare is the update/enhancement to Client Intake. The previous design only allows the user to collect demographic information for clients spread across multiple tabs. Now, users can collect multiple types of data across multiple tabs, in addition to administering new features to the intake process, such as Referrals and Custom Forms.

NOTE: A full detailed video tutorial can be found on the www.MyAccuCare.com website to learn more about the video.



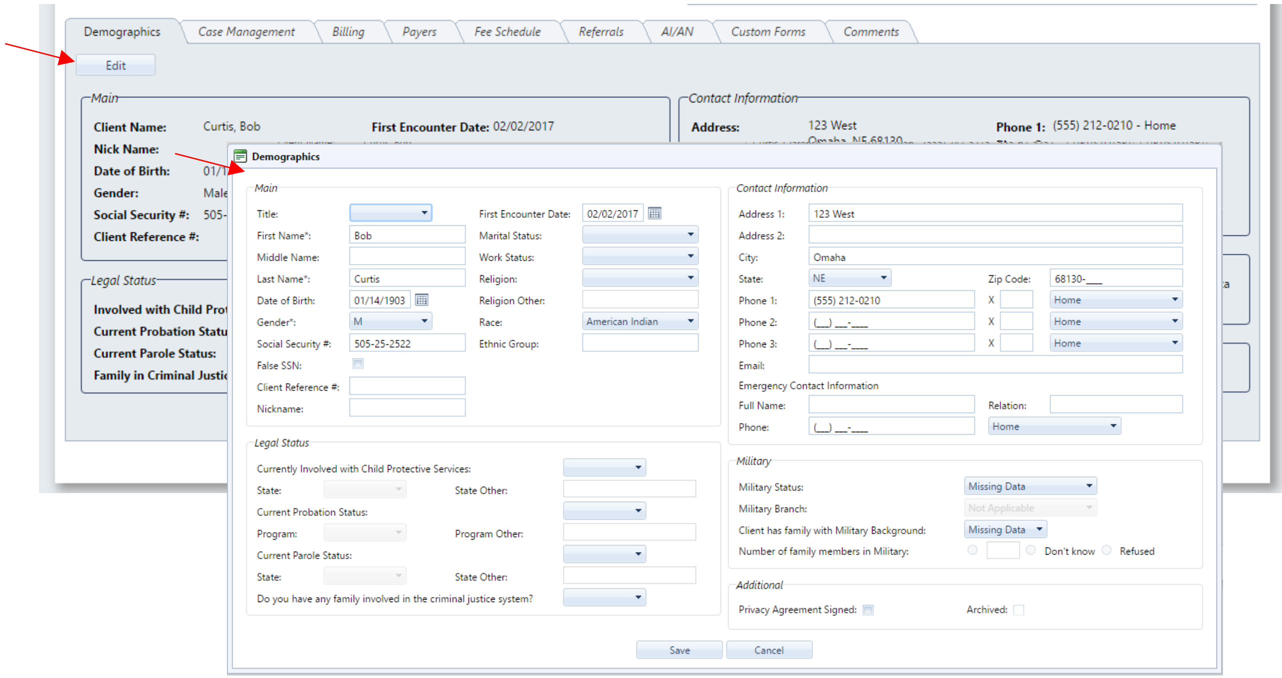
- The **Search** function in Client Intake now allows you to search for a client by Date of Birth, Phone and Billing Reference #, in addition to Last Name, SSN and Client Ref#
- The current Level of Care and Location of Service (if applicable) will display in the header of the screen when a client is selected



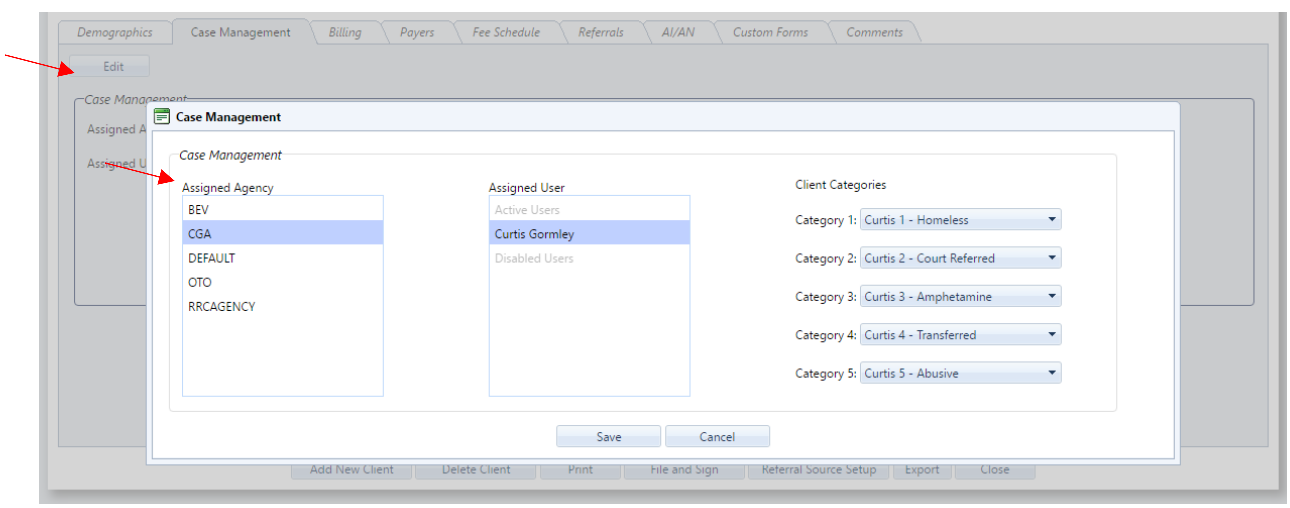
- Each Tab of the Client Intake allows the user to collect specific data points or create additional records associated to the client's full record.

The **Demographics tab** collects most of the information on the previous Client Intake, however, now in one tab.

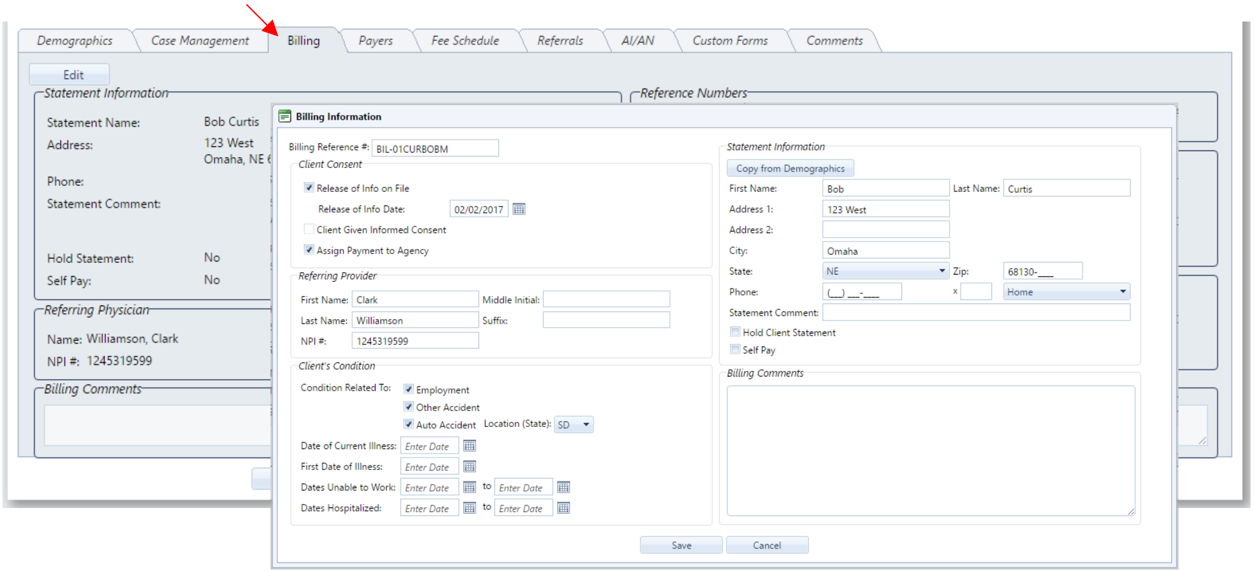
- By selecting the **Edit button** (if a client's record is selected) the Demographics dialogue window will appear, allowing the user to Edit, Save or Cancel Editing the record)



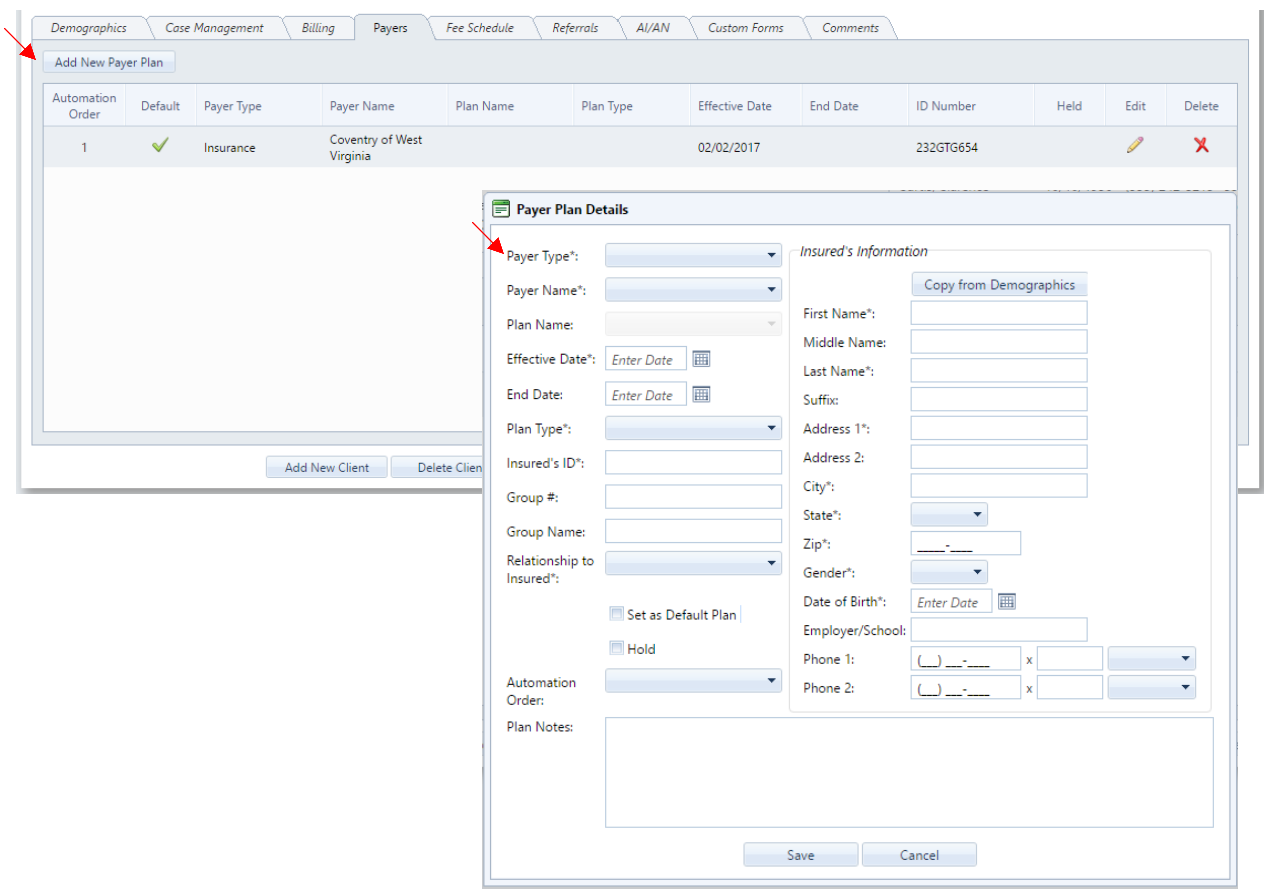
The **Case Management tab** allows the user to Assign the Agency and User for the client, as well as assign Client Categories. Similar to Demographics, selecting Edit will open the dialogue window.



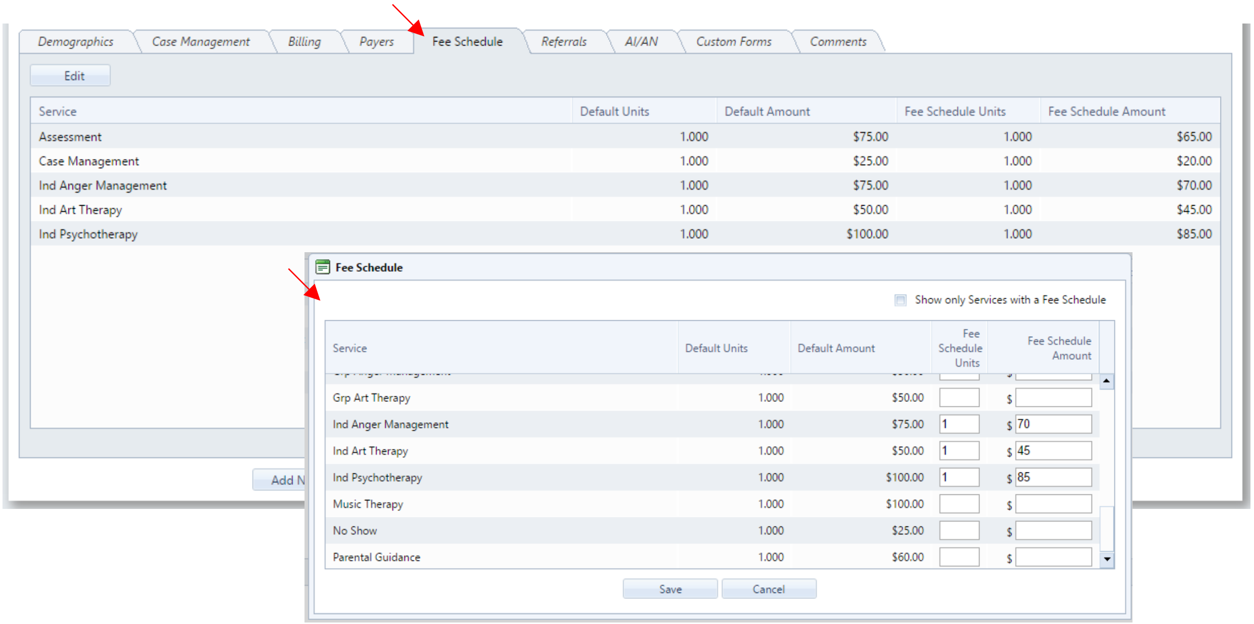
The **Billing tab** allows the user to collect Billing Information for the client. This was formerly known as Billing Info and accessible only in the Billing module in AccuCare. Now it has been consolidated into the Client Intake, along with Payers and Fee Schedule.



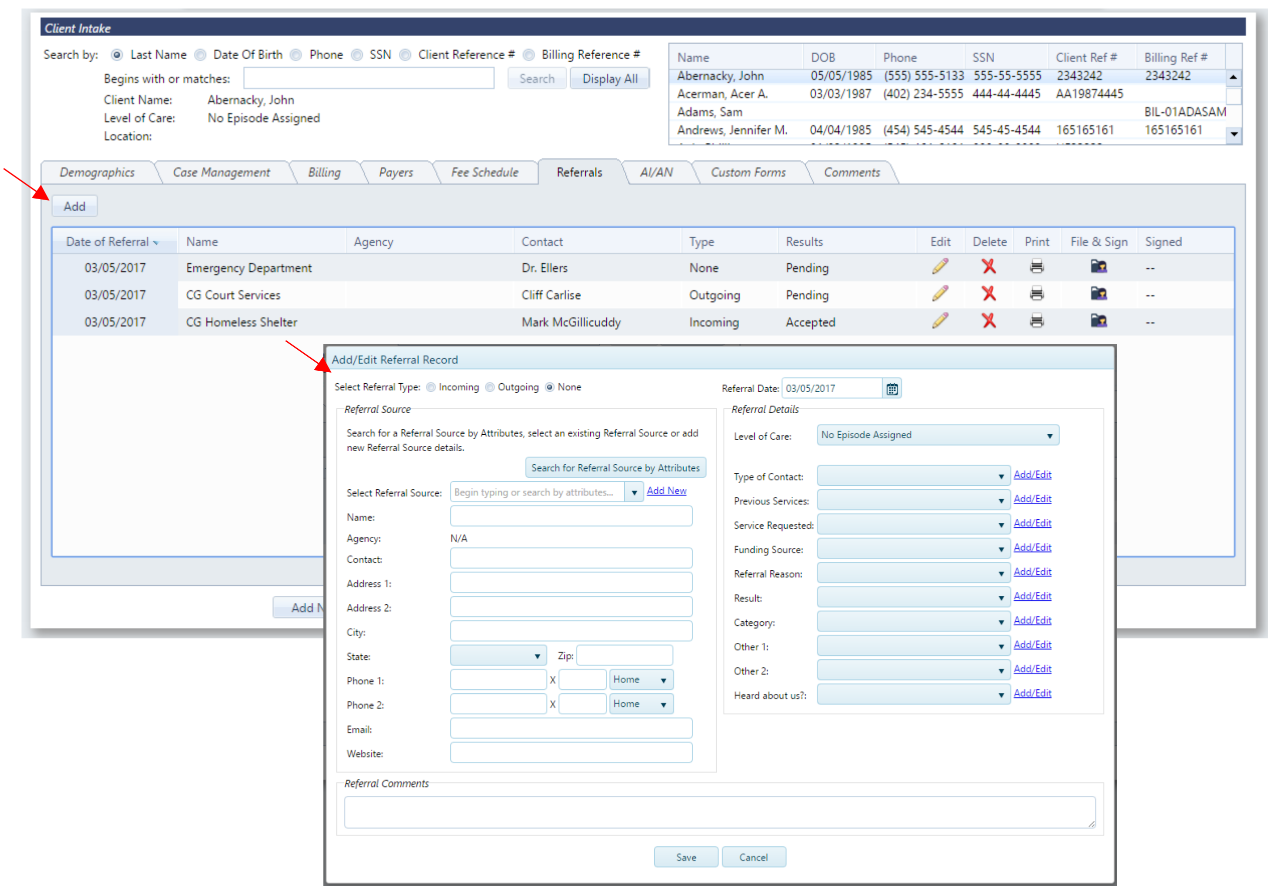
The **Payers tab** allows agencies to create different types of payers such as insurance, private, contract, etc. Select **Add New Payer Plan** to add a new Payer, or edit an existing one using the icons in the grid.



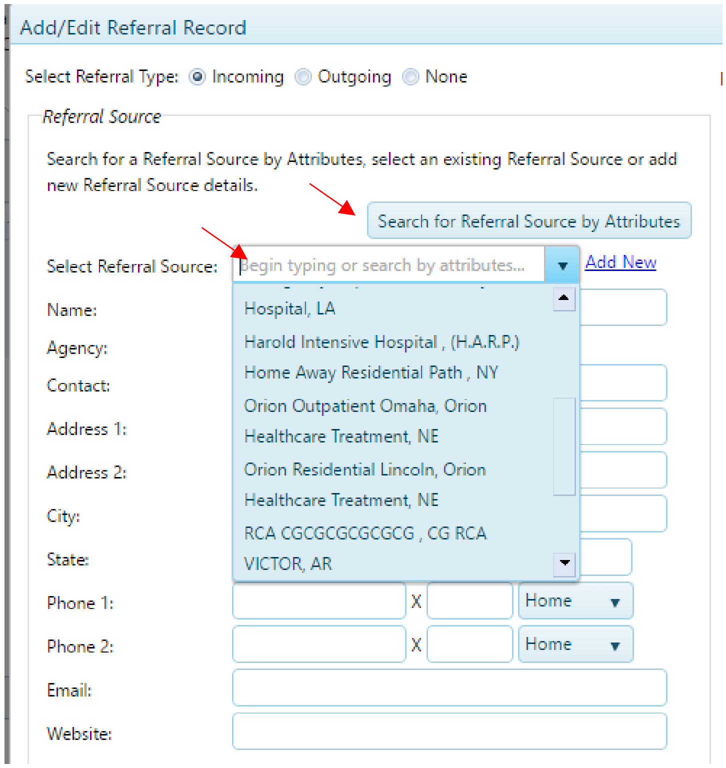
The **Fee Schedule tab** allows agencies to override contract pricing based on each client. Select **Add New Payer Plan** to add a new Payer, or edit an existing one using the icons in the grid.



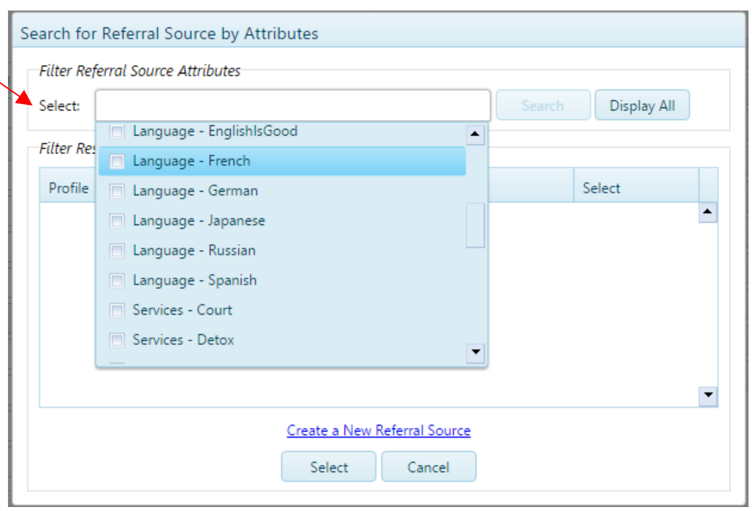
The **Referrals tab** allows users to track incoming and outgoing referrals for clients. To Add a new referral record, select **Add** in the top left corner of the Referral tab.



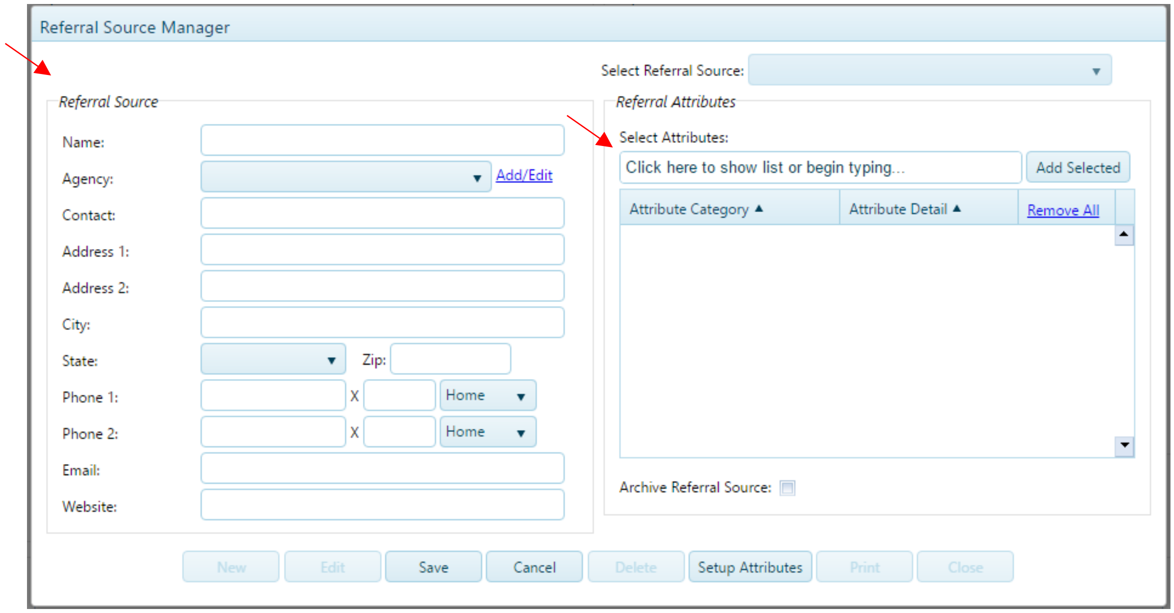
- Users can add a referral record and select from a **list of Referral Sources** (which are customized by the Agency). This allows the user to select an existing referral source without having to enter all of the contact information each time.



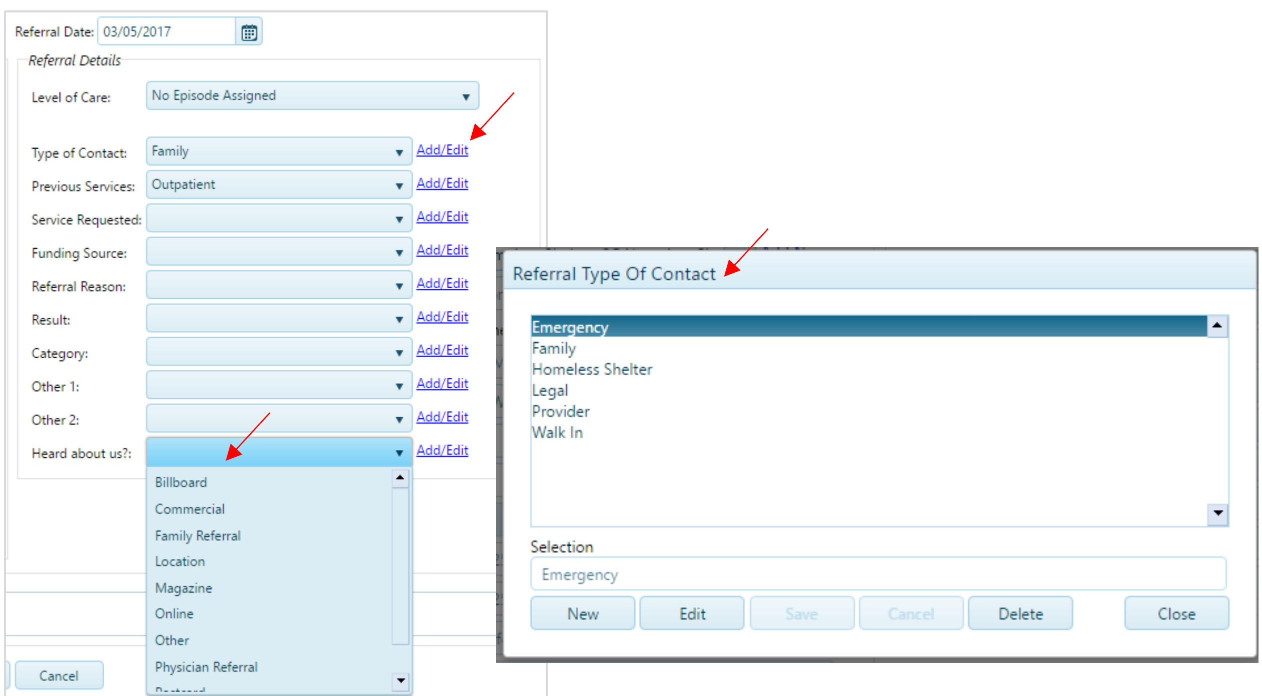
- Users can also search for a referral source by Attributes, which are also defined by the agencies.



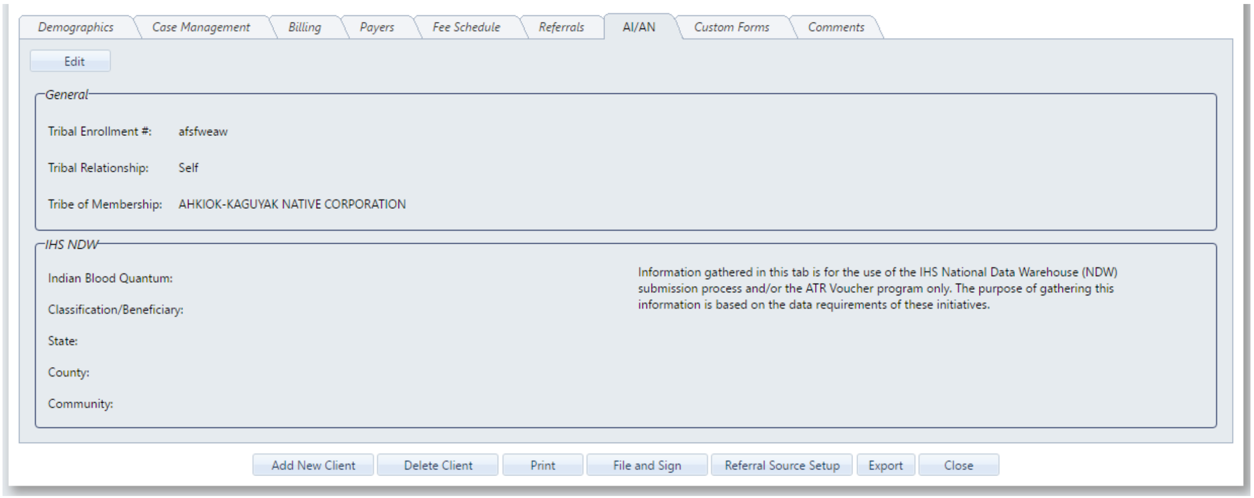
- Both the Directory/List of Referral Sources and the Attributes can be setup by the agency in a separate Setup area in AccuCare



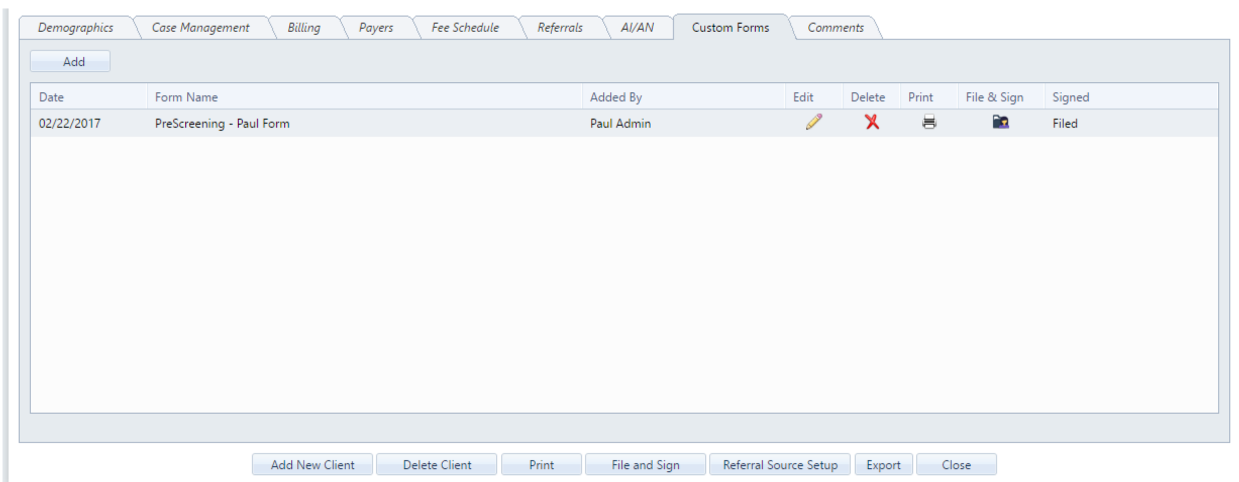
- Details of the referral record can be recorded via selections from a drop down list for 10 different categories. Each list is customizable by the agency by selecting the Add/Edit link for each category.

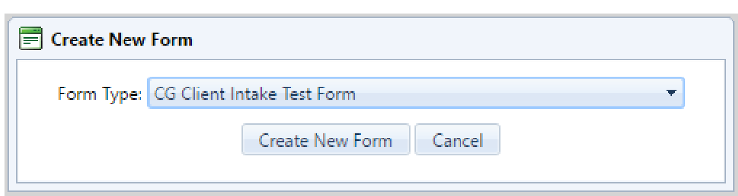


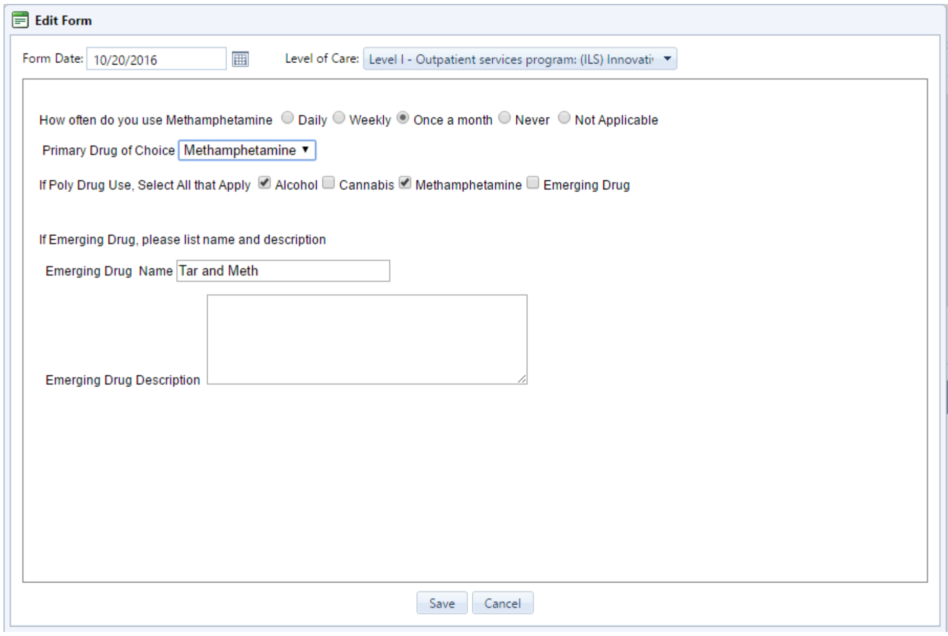
The **AI/AN tab** allows users to enter in tribal information if applicable. There is also a section for information necessary if the agency is participating in the IHS NDW data export project. This information was in the former Client Intake module and has been carried over to the new Client Intake.



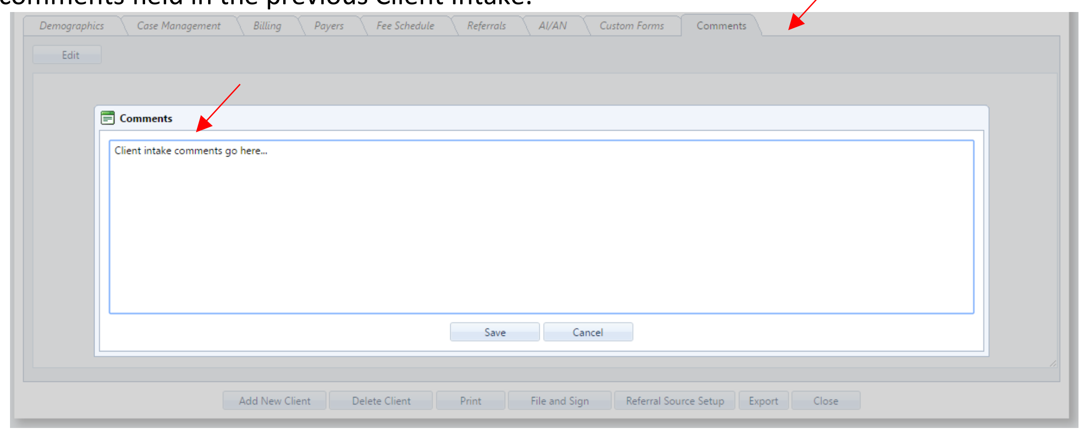
The **Custom Forms tab** allows users to administer a Custom Form that the agency created (in the Custom Forms Builder). By selecting Add, the user will be able to directly open the Custom Form through the Client Intake module, and return to the Client Intake module when complete. In the previous Client Intake, the user is taken to the Custom Forms module, rather than a more seamless workflow through the new Client Intake.



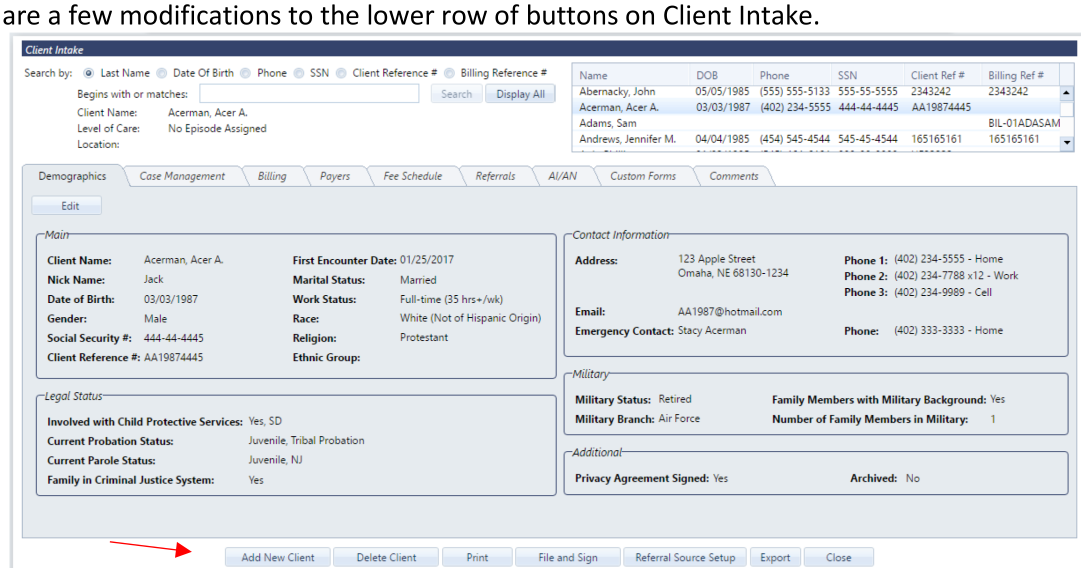




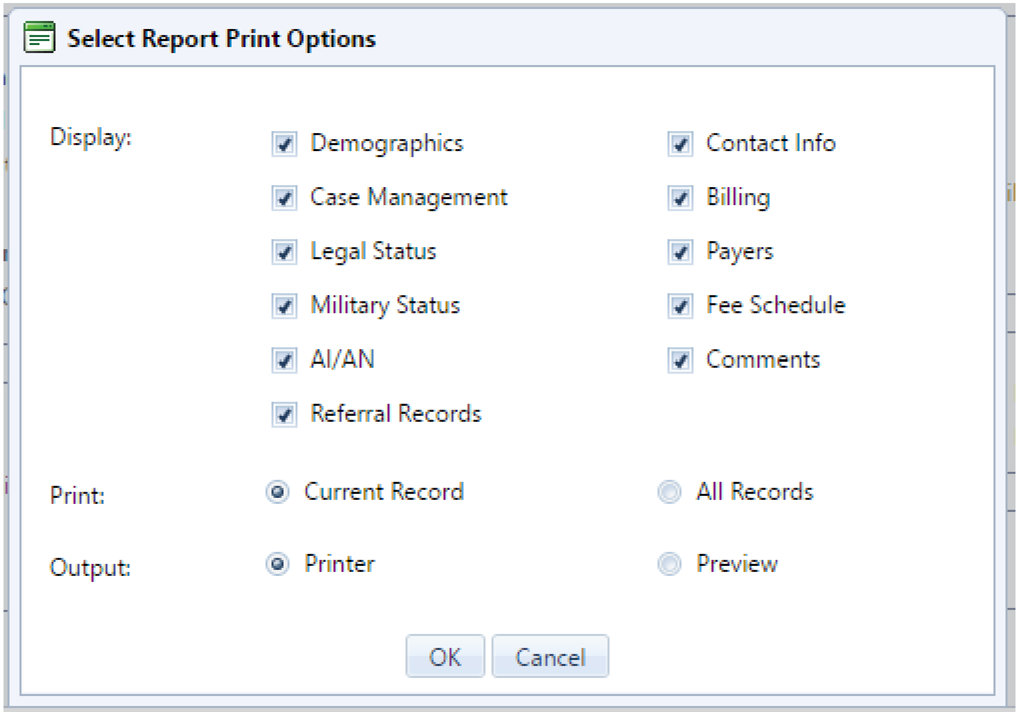
The Comments tab allows the user to enter any comments for the client's Intake process. This is similar to the comments field in the previous Client Intake.



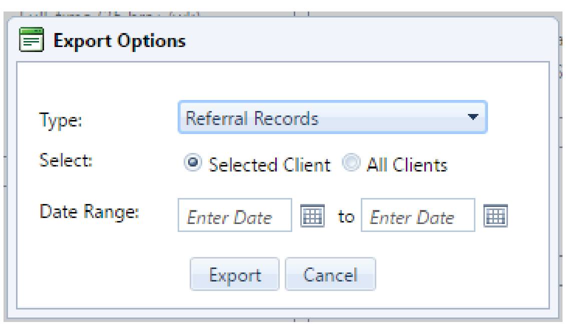
There are a few modifications to the lower row of buttons on Client Intake.

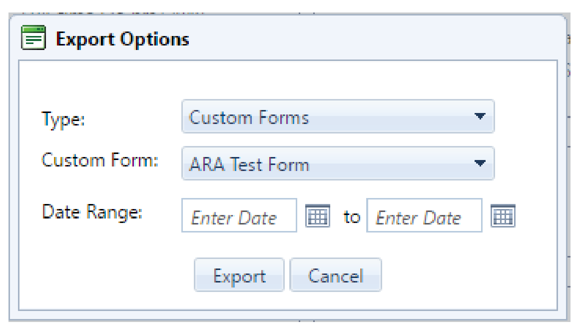


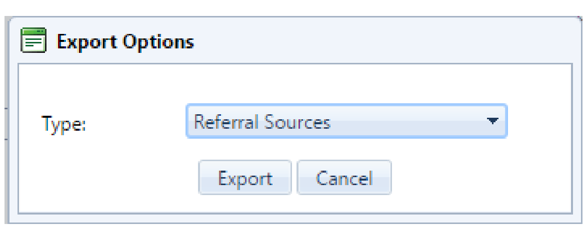
- To add a new client, select **Add New Client**. The first dialogue window will be the first tab (Demographic) where users can add clients into AccuCare.
- The **Print** feature now includes options to print the Additional information gathered at Client Intake such as Billing, Payers, Fee Schedule and Referral Records.



- Users can File and Sign the intake record as they did before, but now with the additional data gathered at Client Intake
- Users can setup Referral Sources from this screen (as well as from the Referral tab)
- There are new Export features from Client Intake. These include exporting Referral Records, Referral Source List and data values from Custom Forms.







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.

- When Filing a record to the Client's Chart in AccuCare, the Description field is auto populated using the name of the module it came from, to improve efficiency in data entry time
- Minor enhancements to Billing module to improve Payer labeling, client statements, Service Processing performance, Accounting reports, Client Billing Activity and other minor bug fixes
- Applied fixes to Quick Search and Multi Search controls to improve performance
- Improved how Scheduler and other areas of AccuCare handle different time zones
- Minor fixes to how Patient Placement handles domains and setting up Levels of Care
- Improved performance in Custom Forms, Custom Form Builder and Client Chart