



USER GUIDE

How to Archive a Client Record

Abstract

This document will show how to change a client's status from Active to Archived

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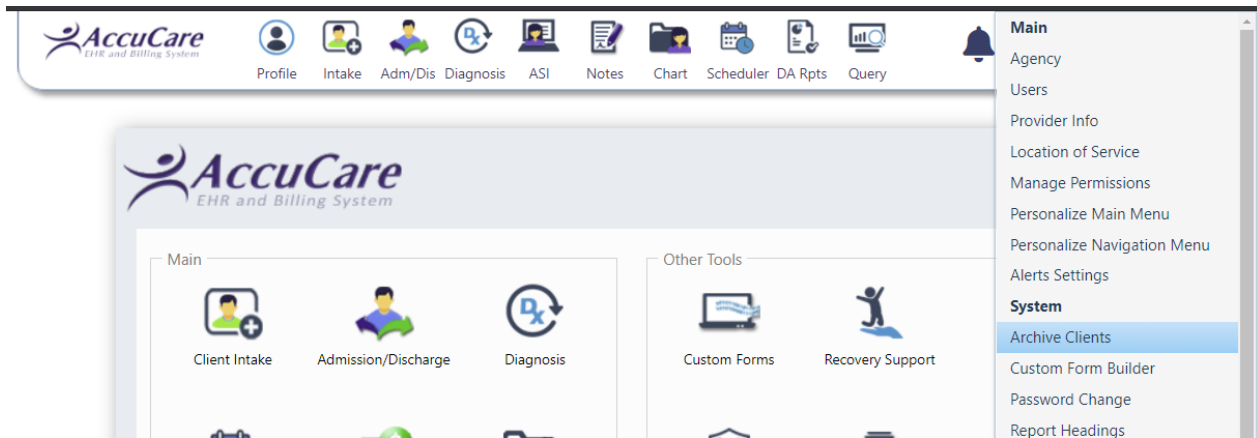
Archive Clients – overview

There many reasons you may want to archive a client. Perhaps the client is no longer receiving services from your organization. Another reason might be you have a duplicate entry of a client whose reports need to be hidden from other users. The Archive Client modules enable you to keep all your reports safe but hidden away. If a future need arises you can always unhide those reports. To use the Archive Client module, you must have super admin-level access.

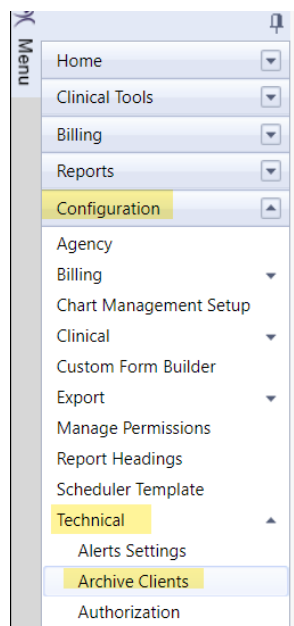
Where to find the Archive Clients module in AccuCare

There are two places you can access the Archive Clients module.

- 1) On the ribbon go to **Setup** → **Archive Clients**



- 2) Under the Jump, Navigation go to **Configuration** → **Technical** → **Archive Clients**



How to use Archive Clients – hiding a client’s reports

Steps on how to pull up a client or clients and add them to the Working List to archive

Step 1: Search by – Select one of the three ways to search. Last Name should work best but you may need to use SSN or Client Ref # to help you find the client.

Step 2: Begin with or matches – Type in the first three letter of the last name or type in the SSN or Client Ref # to match your Search By radio button selection.

The screenshot shows the AccuCare software interface. At the top, there is a navigation bar with the AccuCare logo and the text "With Smart Practice Management System". Below this, the main window is titled "File > Archive Clients".

The search section includes:

- Search by:** Three radio buttons: "Last Name" (selected), "SSN", and "Client Ref #".
- Begins with or matches:** A text input field containing "tes".
- Who have had:** Two checkboxes: "No clinical activity" and "No billing activity".
- after:** A date selection field.
- Buttons:** "Search" and "Display All".

The search results are displayed in a table:

Name Reference #	SSN	Client
Test, John	232-32-3222	
Test, Johnny	111-11-1111	JT19801111
Testing, John		

Below the search results are "Add" and "Add All" buttons. At the bottom of the search section are "Remove" and "Remove All" buttons. At the very bottom are "Cancel" and "Next >>" buttons.

The "Working List" section is a table with the following columns: Last Name, First Name, Middle Name, SSN, Client Ref. #, D.O.B., and Gender. It is currently empty.

Four callout boxes with arrows point to specific elements:

- Step 1: Points to the "Last Name" radio button.
- Step 2: Points to the "tes" text input field.
- Step 3: Points to the "Search" button.
- Step 4: Points to the "Add" and "Add All" buttons.

Step 3: [Search] button – After entering in your selection click the [Search] button to display you client or clients

Step 4: [Add] or [Add All] button – Choose either the [Add] to add a client or [Add All] if you have more than client.

File > Archive Clients

Search by: Last Name SSN Client Ref. #

Begins with or matches:

Who have had: No clinical activity

No billing activity

after:

Name Reference #	SSN	Client
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Test, John	232-32-3222	
Test, Johnny	111-11-1111	JT19801111
Testing, John		

Working List:

Last Name	First Name	Middle Name	SSN	Client Ref. #	D.O.B.	Gender
Test	John		232-32-3222		11/24/1986	M
Test	Johnny	B	111-11-1111	JT19801111	10/10/1980	M
Testing	John					M

[Remove or Remove all] (Other option)

– To use the [Remove] button you will first need to highlight a client. The [Remove All] button does not require everyone to be selected to remove all clients from the Working List.

Step 5: [Cancel] or [Next] – If you

changed your mind you can [Cancel] or click [Next] to continue.

AccuCare
Web-Based Practice Management System

File > Archive Clients

Last Name	First Name	SSN	Client Ref. #	All Active	All Archived
Test	John	232-32-3222		<input checked="" type="radio"/> Active	<input type="radio"/> Archived
Test	Johnny	111-11-1111	JT19801111	<input checked="" type="radio"/> Active	<input type="radio"/> Archived
Testing	John			<input checked="" type="radio"/> Active	<input type="radio"/> Archived

Step 6: Active or Archive –

- 1) If this is the first time the Archive Clients module has been used, you will see all clients with radio button next to Active.
- 2) Simply click the Archive radio button(s) corresponding the client(s) you want to hide then click the [Finish] button.

<< Back Cancel Finish

In this example, I have chosen to archive John Test.

AccuCare
Web-Based Practice Management System

File > Archive Clients

Last Name	First Name	SSN	Client Ref. #	All Active	All Archived
Test	John	232-32-3222		<input type="radio"/> Active	<input checked="" type="radio"/> Archived
Test	Johnny	111-11-1111	JT19801111	<input checked="" type="radio"/> Active	<input type="radio"/> Archived
Testing	John			<input checked="" type="radio"/> Active	<input type="radio"/> Archived

How your users can tell if a client has been archived

A basic rule within AccuCare is you cannot work on a client until you have selected them in Client Intake. In this example, I have chosen Alan Able. **Notice the word Yes next to Archived.**

Client Intake

Search by: Last Name Date Of Birth Phone SSN Client Reference # Billing Reference #

Begins with or matches:

Client Name: Able, Alan A.
Level of Care: Level I - Outpatient treatment
Location: (AOBH) Orion Behavioral Health

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Able, Alan A.	08/23/1987	(402) 543-3478	343-93-2993	AA19872993	BIL-01ABLALAN
Able, Anna	08/14/1965	(402) 453-3499	892-34-9222	AA19659222	AA19659222
Able, Jane	08/08/1989	(402) 322-2211	455-22-1111	JA19891111	
Able, John	10/09/1980	(402) 345-6777	445-44-1111	JA19801111	

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

Main

Client Name: Able, Alan A. **First Encounter Date:** 08/14/2018
Nickname: none **Marital Status:** Married

Contact Information

Address: 456 West Howard St
Apt #4A
Omaha, NE 68996
Phone 1: (402) 543-3478 - Cell
Phone 2: (402) 334-9953 - Home

Involved with Child Protective Services: yes, NE
Current Probation Status: Adult, Tribal Probation
Current Parole Status: Juvenile, NE
Family in Criminal Justice System: Yes

Military Branch: Air Force **Number of Family Members in Military:**

Additional

Privacy Agreement Signed: Yes **Archived:** Yes

Users will see all clients in Client Intake – if they select a client that has been archived and attempt to see a report like their assessment, treatment plan, progress note, etc. it will display as if there are no records to be found.

Here is an example of what it would look like if I select an archived client and exited to the open assessments. The report is hidden so it cannot be accessed or updated.

AccuCare
Web-based Practice Management System

File > Open Assessment

Search by: Last Name SSN Client Reference #

Begins with or matches:

Select Questionnaire Type: Adult

Name	SSN	Client Reference #
No records to display.		

Date	Interviewer	Questionnaire	File/Sign Status	Select
No records to display.				

How to Unarchive Clients – show a client’s reports

Steps on how to pull up a client or clients and add them to the Working List to unarchive

Step 1: Search by – select the one of the three ways to search. Last Name should work best but you may need to use SSN or Client Ref # to help you find the client.

Step 2: Begin with or matches – Type in the first three letter of the last name or type in the SSN or Client Ref # to match your Search By radio button selection.

The screenshot shows the 'AccuCare' software interface. At the top, there is a menu bar with 'File > Archive Clients'. Below this, there are search options: 'Search by:' with radio buttons for 'Last Name' (selected), 'SSN', and 'Client Ref. #'. A text field 'Begins with or matches:' contains 'tes'. There are also checkboxes for 'Who have had:' with options 'No clinical activity' and 'No billing activity', and an 'after:' field with a calendar icon. Two buttons, 'Search' and 'Display All', are visible. Below the search area is a table with columns: 'Name Reference #', 'SSN', and 'Client'. The table contains three rows of data:

Name Reference #	SSN	Client
Test, John	232-32-3222	
Test, Johnny	111-11-1111	JT19801111
Testing, John		

Buttons 'Add' and 'Add All' are located to the right of the table. Below the search area is a 'Working List' section with columns: 'Last Name', 'First Name', 'Middle Name', 'SSN', 'Client Ref. #', 'D.O.B.', and 'Gender'. At the bottom of the interface are buttons for 'Remove', 'Remove All', 'Cancel', and 'Next >>'.

Step 3: [Search] button – After entering in your selection click the [Search] button to display you client or clients

Step 4: [Add] or [Add All] button – Choose either the [Add] to add a client or [Add All] if you have more than client.


File > Archive Clients

Search by: Last Name SSN Client Ref. #

Begins with or matches:

Who have had: No clinical activity

No billing activity

after: 

Name Reference #	SSN	Client
------------------	-----	--------

Test, John	232-32-3222	
Test, Johnny	111-11-1111	JT19801111
Testing, John		

Working List:

Last Name	First Name	Middle Name	SSN	Client Ref. #	D.O.B.	Gender
Test	John		232-32-3222		11/24/1986	M
Test	Johnny	B	111-11-1111	JT19801111	10/10/1980	M
Testing	John					M

[Remove or Remove all] (other option)

– To use the [Remove] button you will first need to highlight a client. The [Remove All] button does not require everyone to be selected to remove all clients from the Working List.

Step 5: [Cancel] or [Next] – If you changed your mind you can [Cancel] or click[Next] to continue.

In this example, you see John Test archived.

Last Name	First Name	SSN	Client Ref. #	All Active	All Archived
Test	John	232-32-3222		<input type="radio"/> Active	<input checked="" type="radio"/> Archived
Test	Johnny	111-11-1111	JT19801111	<input checked="" type="radio"/> Active	<input type="radio"/> Archived
Testing	John			<input checked="" type="radio"/> Active	<input type="radio"/> Archived

Simply click the radio button for Active then click the [Finish]

Last Name	First Name	SSN	Client Ref. #	All Active	All Archived
Test	John	232-32-3222		<input checked="" type="radio"/> Active	<input type="radio"/> Archived
Test	Johnny	111-11-1111	JT19801111	<input checked="" type="radio"/> Active	<input type="radio"/> Archived
Testing	John			<input checked="" type="radio"/> Active	<input type="radio"/> Archived

<< Back Cancel Finish

As stated earlier, the basic rule within AccuCare is you cannot work on a client until you have selected them in Client Intake. In this example, I have chosen Alan Able. Notice No next to the word Archived. This means the user can now see this client's reports.

Client Intake

Search by: Last Name Date Of Birth Phone SSN Client Reference # Billing Reference #

Begins with or matches:

Client Name: Able, Alan A.
 Level of Care: Level I - Outpatient treatment
 Location: (AOBH) Orion Behavioral Health

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Able, Alan A.	08/23/1987	(402) 543-3478	343-93-2993	AA19872993	BIL-01ABLABLAN
Able, Anna	08/14/1965	(402) 453-3499	892-34-9222	AA19659222	AA19659222
Able, Jane	08/08/1989	(402) 322-2211	455-22-1111	JA19891111	
Able, John	10/09/1980	(402) 345-6777	445-44-1111	JA19801111	

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

Main | Contact Information

Involved with Criminal Justice System

Current Probation Status: Adult, Tribal Probation
Current Parole Status: Juvenile, NE
Family in Criminal Justice System: Yes

Military Branch:
 Family Members:
 Additional:
Privacy Agreement Signed: Yes **Archived:** No

Now that the client has been set to active I can see their assessment.

File > Open Assessment

Search by:

Begins with or matches:

Select Questionnaire Type:

Name	SSN	Client Reference #
Able, Alan A.	343-93-2993	AA19872993

Date Created	Interviewer	Questionnaire	File/Sign Status	Select
12/13/2019	RBA	Adult	--	<input checked="" type="checkbox"/>
10/18/2019	RBA	Adult	--	<input type="checkbox"/>
06/27/2019	RBA	Adult	Signed	<input type="checkbox"/>
04/12/2019	RBA	Adult	--	<input type="checkbox"/>
01/15/2019	RBA	Adult	--	<input type="checkbox"/>
11/16/2018	RBA	Adult	--	<input type="checkbox"/>
09/26/2018	RBA	Adult	--	<input type="checkbox"/>
09/26/2018	RBA	Adult	--	<input type="checkbox"/>
08/14/2018	RBA	Adult	--	<input type="checkbox"/>

Have questions?

Please contact AccuCare Support at the following numbers or email address:

Ron - Director of Customer Support - 800-324-7966 ext. 6400

Dylan – Customer Support and Account Specialist - 800-324-7966 ext. 6401

Email: support@orionhealthcare.com