USER GUIDE

How to Archive a Client Record

Abstract

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

MyAccuCare.com

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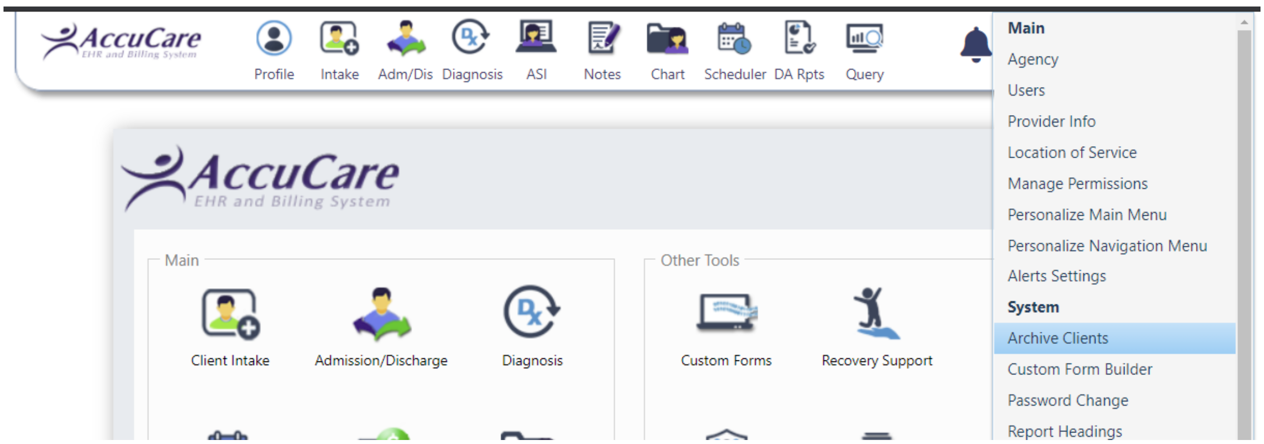
Archive Clients – overview

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.

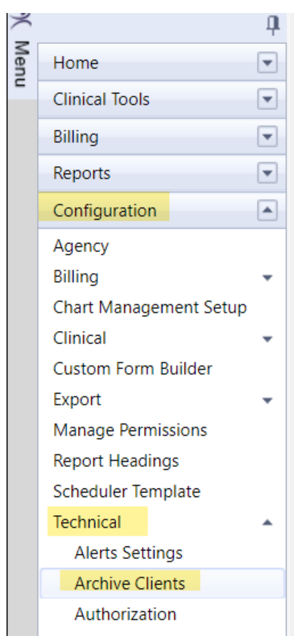
Where to find the Archive Clients module in AccuCare

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**

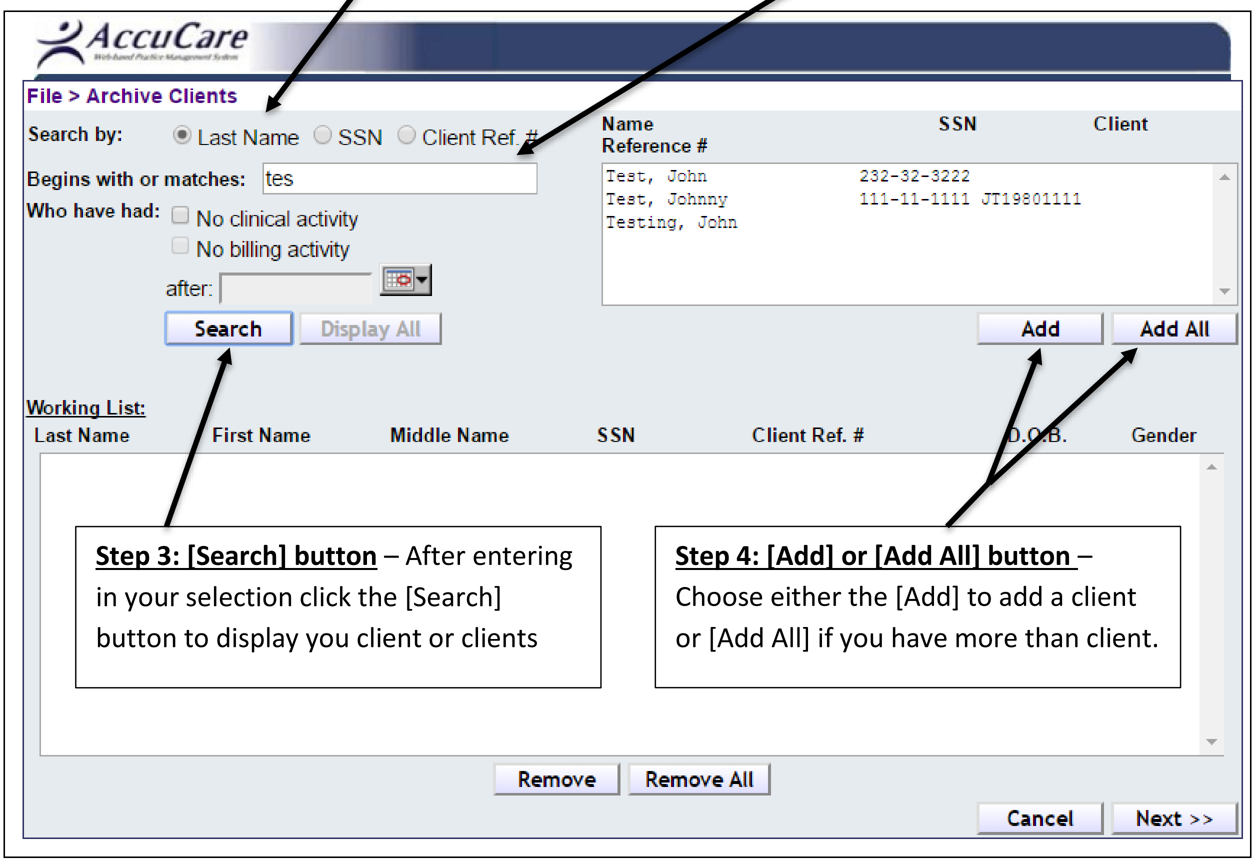


How to use Archive Clients – hiding a client's reports

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

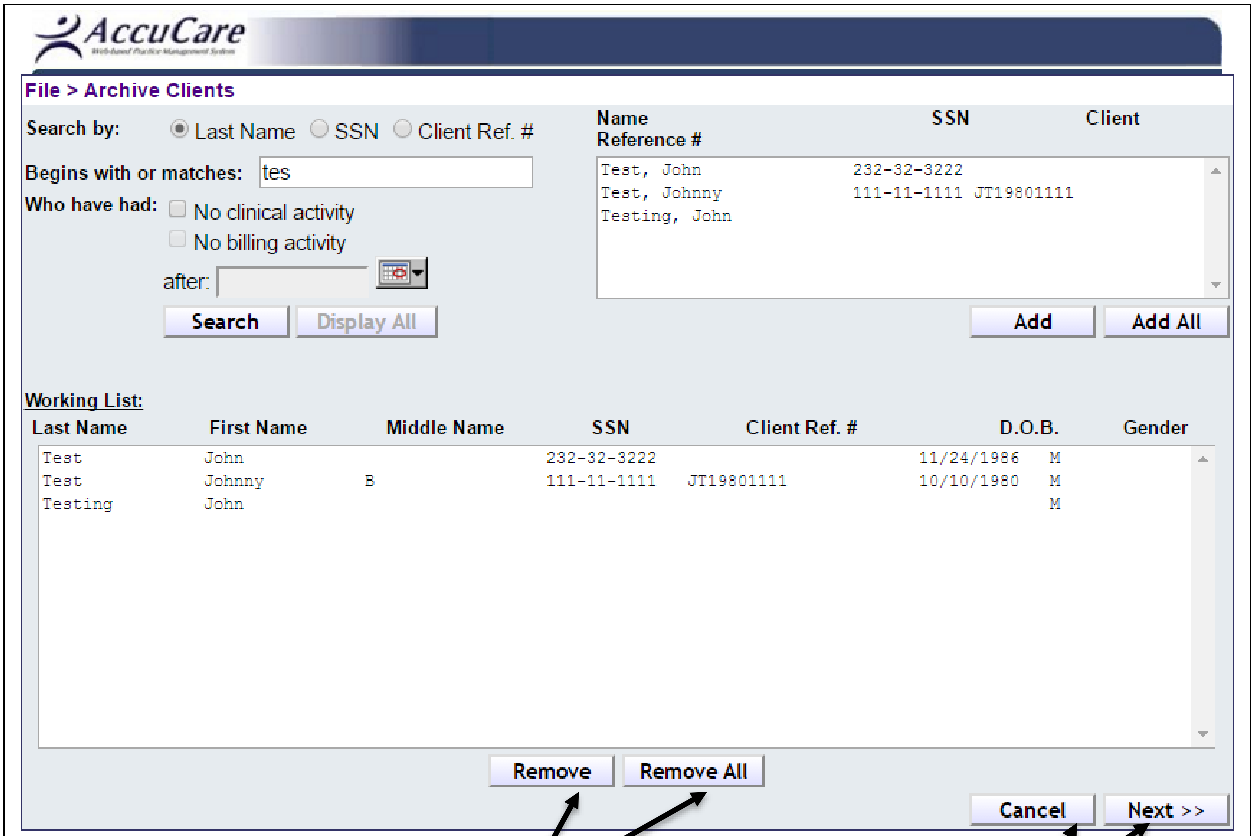
<u>Step 1: Search by</u> – Select one of the three ways to search. Last Name should work best but you may need to use SSN or Client Ref # to help you find the client.

<u>Step 2: Begin with or matches</u> – 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.



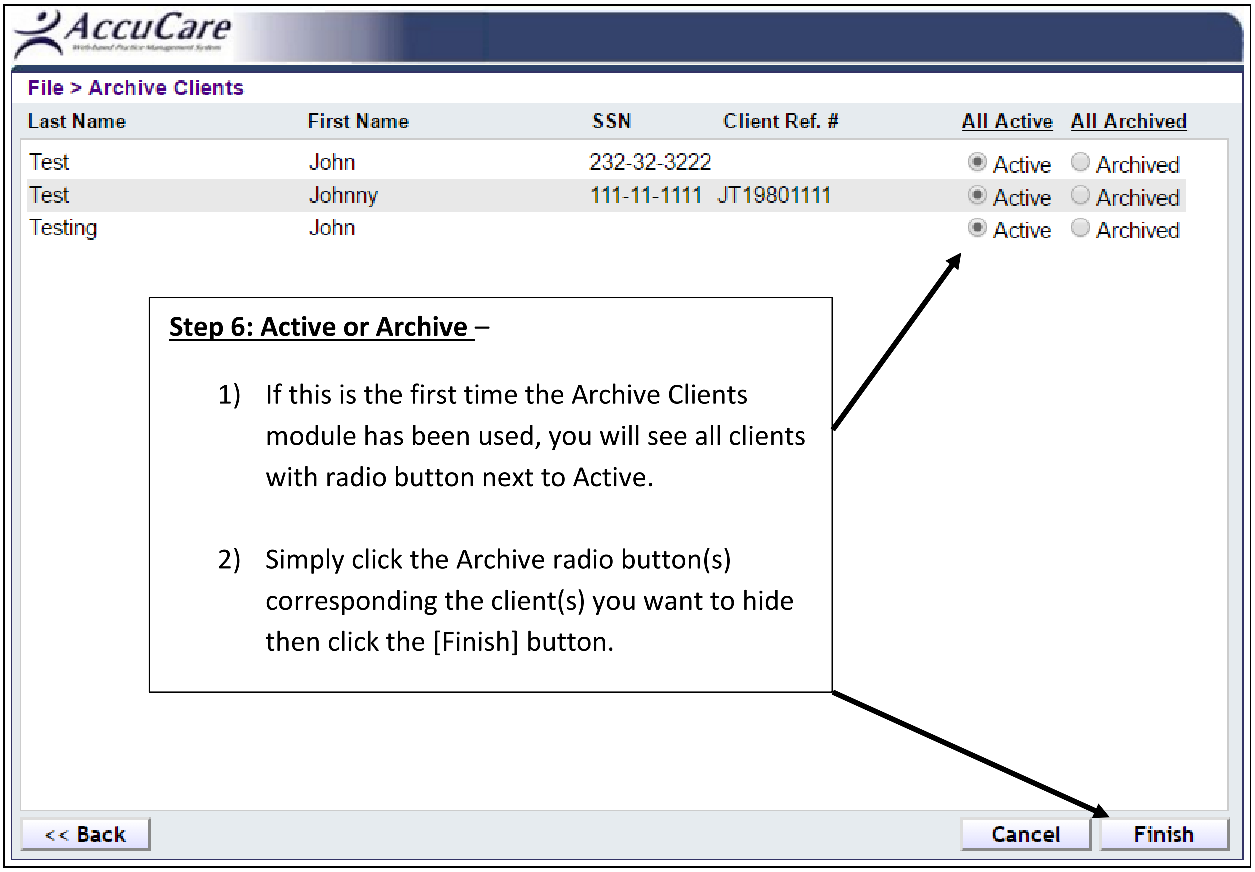
<u>Step 3: [Search] button</u> – After entering in your selection click the [Search] button to display you client or clients

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

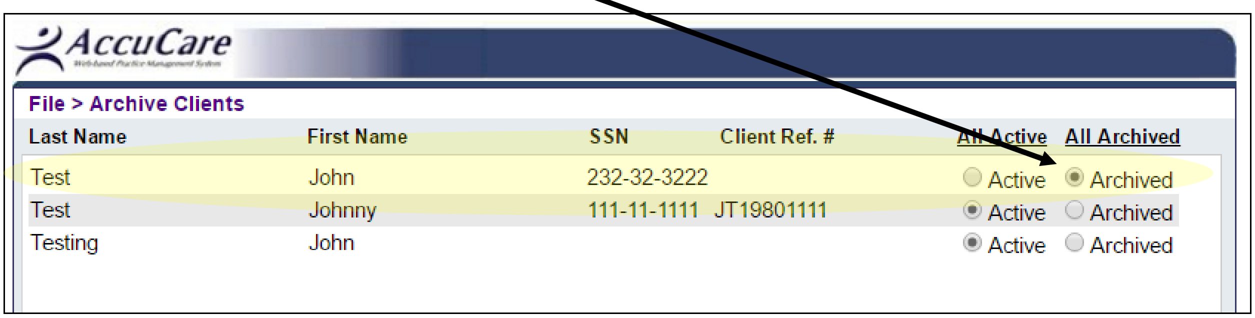


[Remove or Remove all] (Other option) – To use the [Remove] button you will first need to highlight a client. The [Remove All] button does not require everyone to be selected to remove all clients from the Working List.

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

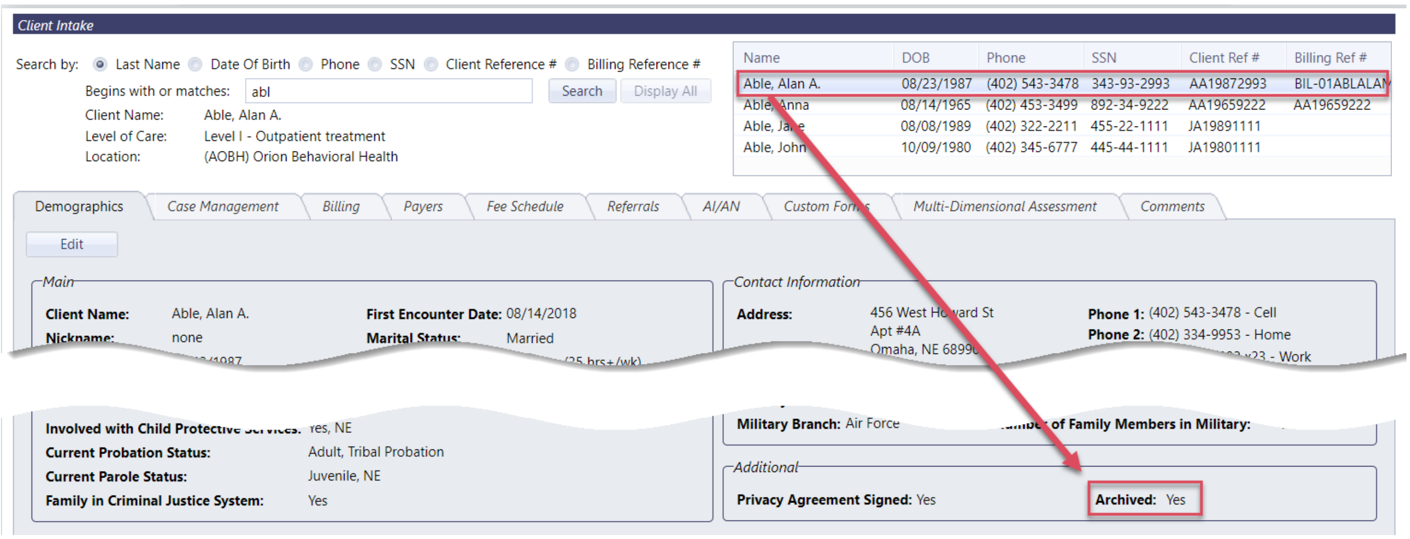


In this example, I have chosen to archive John Test.



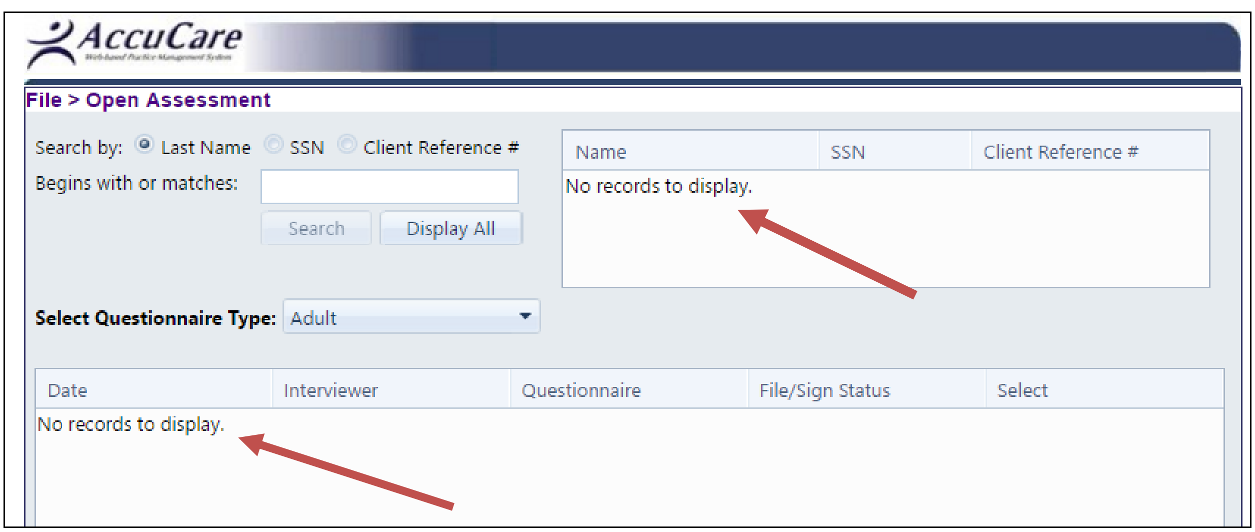
How your users can tell if a client has been archived

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.**



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.

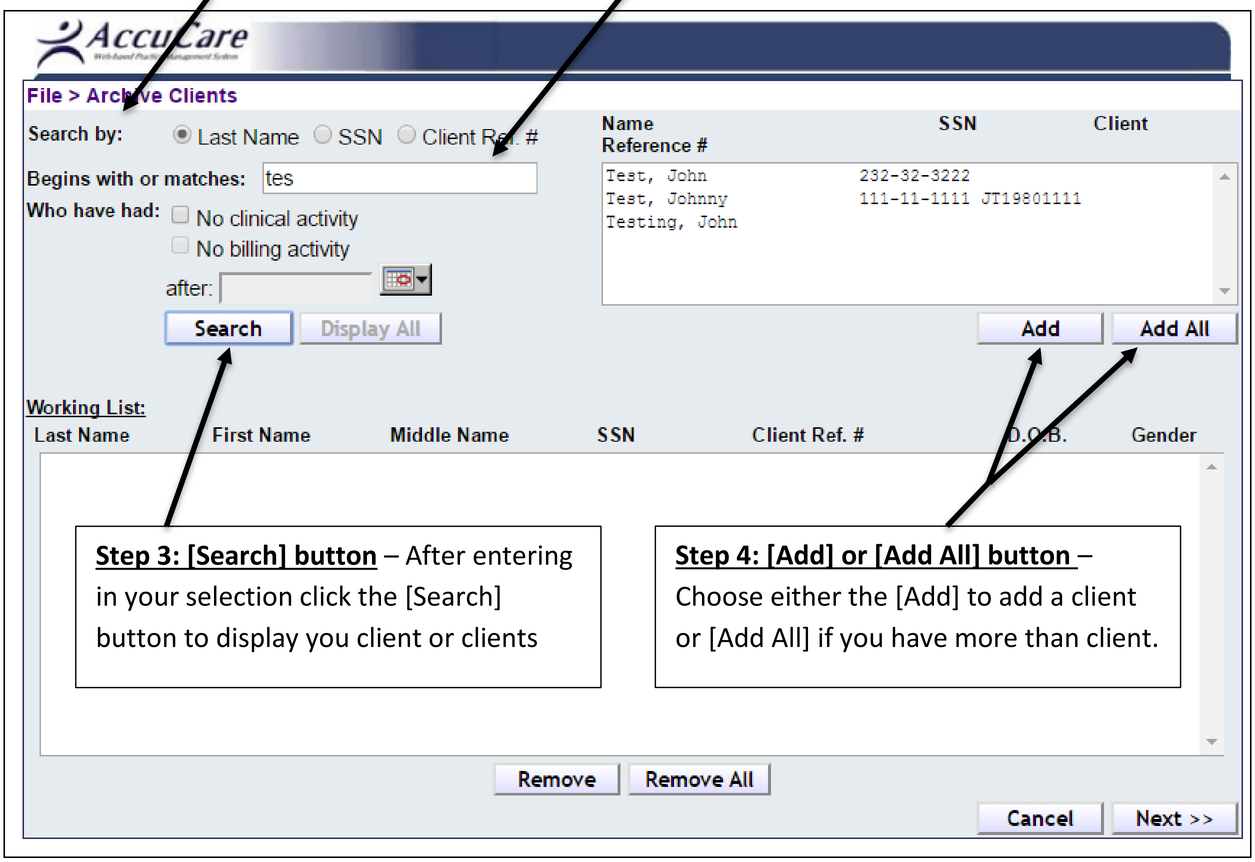


How to Unarchive Clients – show a client’s reports

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

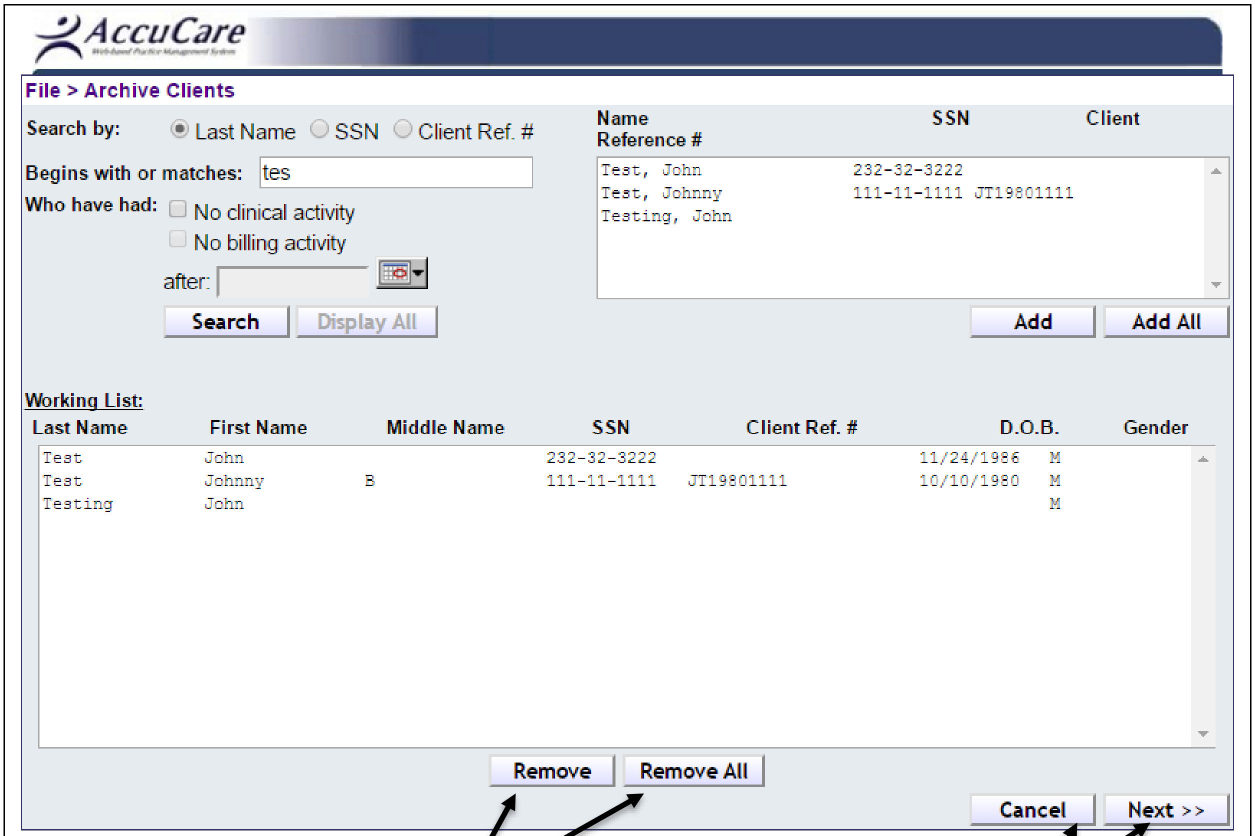
Step 1: Search by – select the one of the three ways to search. Last Name should work best but you may need to use SSN or Client Ref # to help you find the client.

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.



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

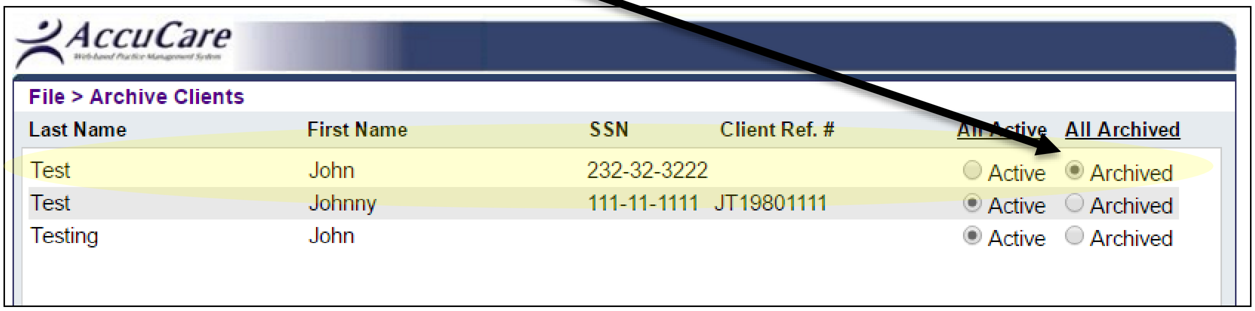
Step 4: [Add] or [Add All] button – Choose either the [Add] to add a client or [Add All] if you have more than client.

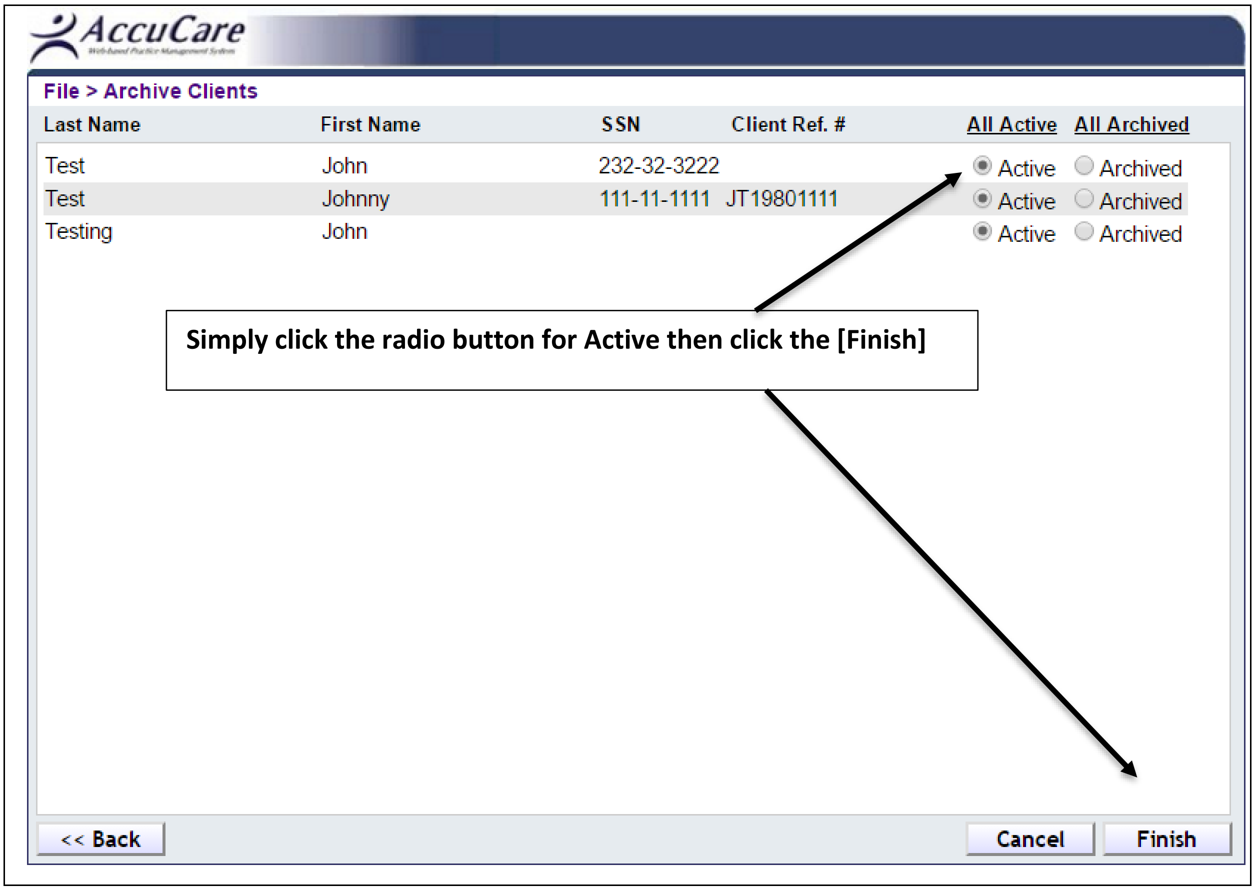


[Remove or Remove all] (other option) – To use the [Remove] button you will first need to highlight a client. The [Remove All] button does not require everyone to be selected to remove all clients from the Working List.

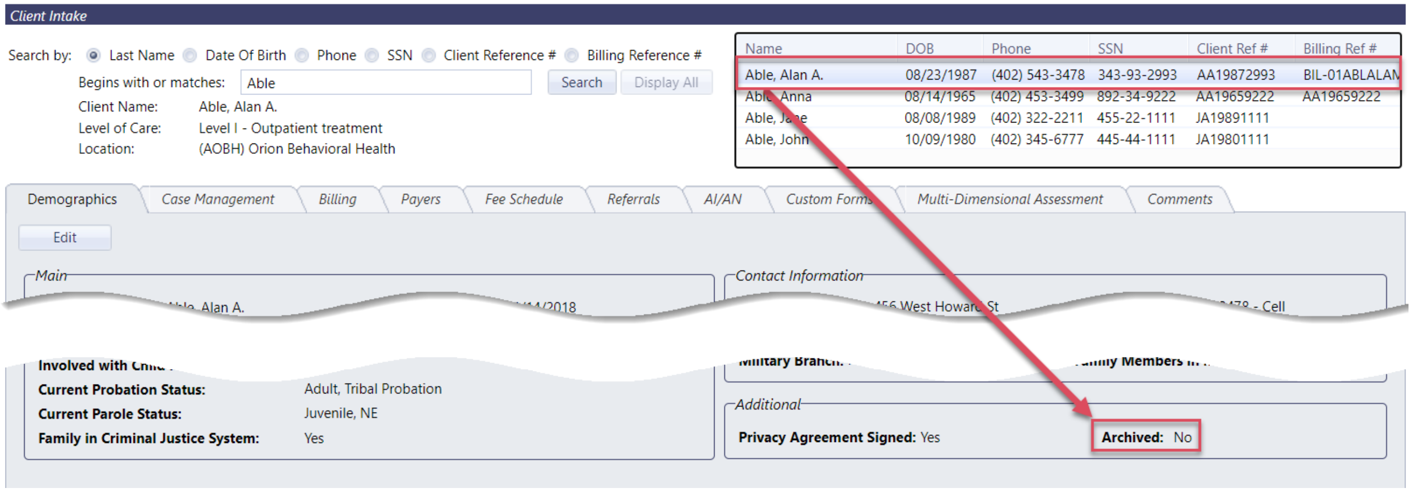
Step 5: [Cancel] or [Next] – If you changed your mind you can [Cancel] or click[Next] to continue.

In this example, you see John Test archived.

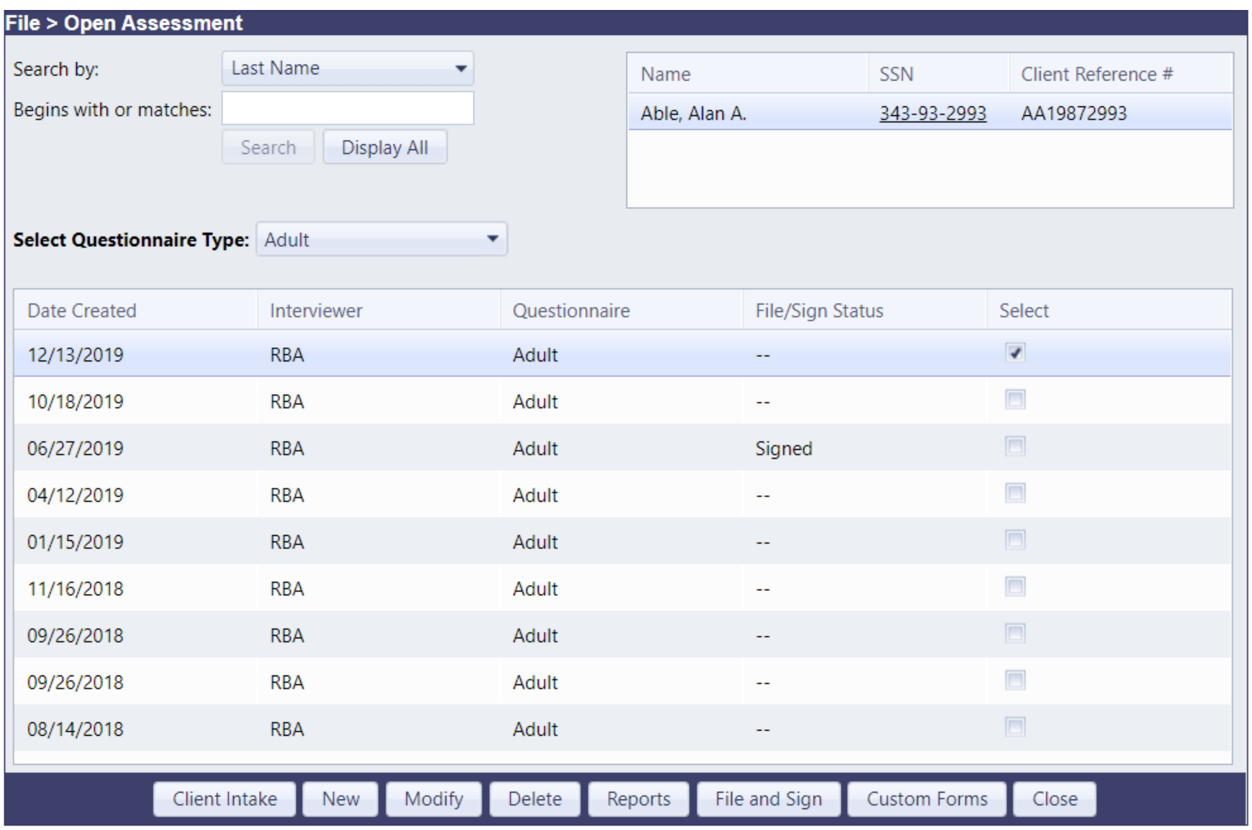




As stated earlier, the basic rule within AccuCare is you cannot work on a client until you have selected them in Client Intake. In this example, I have chosen Alan Able. Notice No next to the word Archived. This means the user can now see this client's reports.



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



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