

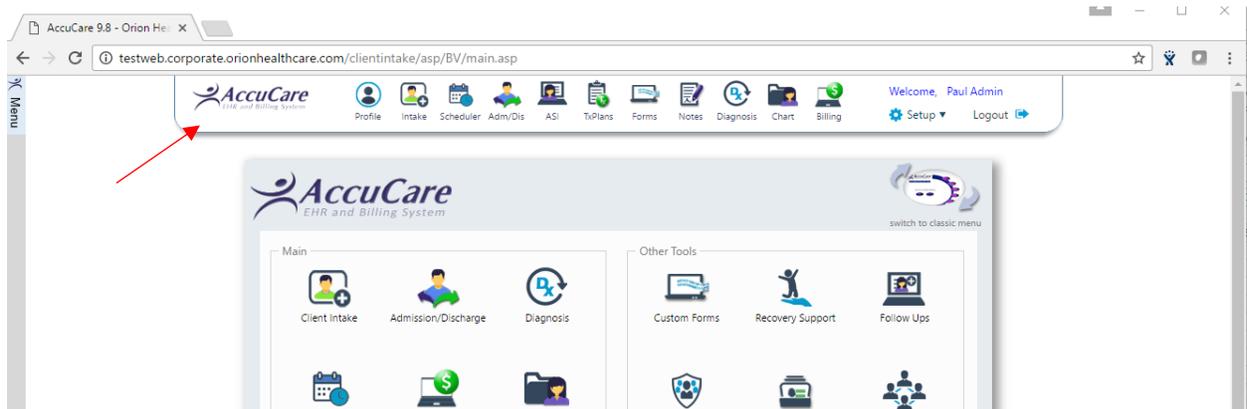
AccuCare 9.8K Release Notes

New Features and Enhancements

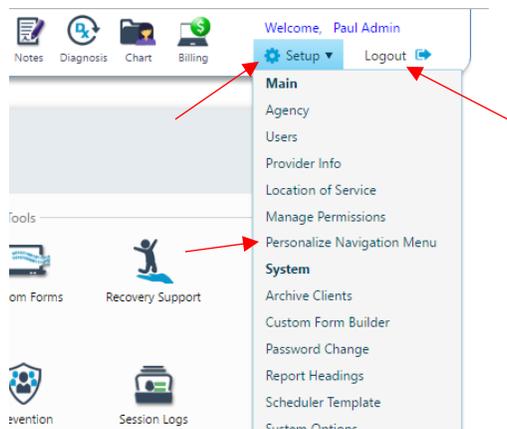
Major enhancements were made to the main navigation menu and Client Intake module, improving efficiency and workflow, along with bug fixes and overall performance improvements.

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 screenshot shows the AccuCare Client Intake interface. At the top, there is a navigation bar with icons for Profile, Intake, Scheduler, Adm/Dis, ASI, TxPlans, Forms, Notes, Diagnosis, Chart, and Billing. The user is logged in as Paul Admin. The main area is titled 'Client Intake' and features a search section with radio buttons for 'Last Name', 'Date Of Birth', 'Phone', 'SSN', 'Client Reference #', and 'Billing Reference #'. Below the search options are fields for 'Begins with or matches:', 'Client Name:', 'Level of Care:', and 'Location:'. A table on the right shows search results with columns for Name, DOB, Phone, SSN, Client Ref #, and Billing Ref #. The main content area has tabs for Demographics, Case Management, Billing, Payers, Fee Schedule, Referrals, AI/AN, Custom Forms, and Comments. The Demographics tab is active, showing a form with sections for Main, Contact Information, Legal Status, Military, and Additional information.

- 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

This screenshot is similar to the previous one but shows search results. Red arrows point to the search options, the search results table, and the Demographics tab. The search results table has the following data:

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Curtis, Bob	01/14/1903	(555) 212-0210	505-25-2522		BIL-01CURBOB
Curtis, Clarence	10/10/1956	(555) 242-5215	555-62-5252	CURTIS1D15RT	CURTIS1D15RT
Curtis, Clifford C.	05/02/1947	(555) 252-4152	555-25-2425	CG1001	CG1001
Curtis, Marjorie	02/08/1956	(555) 252-1521		AZSFdascasc	AZSFdascasc

The Demographics tab is active, showing the profile for Curtis, Bob. The Level of Care is 'Level II - Intensive outpatient/partial hospitalization' and the Location is '(OPEAST) Orion Outpatient East'.

- 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 screenshot shows the 'Demographics' dialog box with the following fields and values:

- Main:** Title: [Dropdown], First Name: Bob, Middle Name: [Empty], Last Name: Curtis, Date of Birth: 01/14/1903, Gender: M, Social Security #: 505-25-2522, Client Reference #: [Empty], Nickname: [Empty], First Encounter Date: 02/02/2017, Marital Status: [Dropdown], Work Status: [Dropdown], Religion: [Dropdown], Religion Other: [Empty], Race: American Indian, Ethnic Group: [Empty]
- Legal Status:** Currently Involved with Child Protective Services: [Dropdown], State: [Dropdown], State Other: [Empty], Current Probation Status: [Dropdown], Program: [Dropdown], Program Other: [Empty], Current Parole Status: [Dropdown], State: [Dropdown], State Other: [Empty], Do you have any family involved in the criminal justice system?: [Dropdown]
- Contact Information:** Address 1: 123 West, Address 2: [Empty], City: Omaha, State: NE, Zip Code: 68130-____, Phone 1: (555) 212-0210, Phone 2: [Empty], Phone 3: [Empty], Email: [Empty], Emergency Contact Information: Full Name: [Empty], Relation: [Empty], Phone: [Empty]
- Military:** Military Status: Missing Data, Military Branch: Not Applicable, Client has family with Military Background: Missing Data, Number of family members in Military: [Radio] Don't know [Radio] Refused

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 screenshot shows the 'Case Management' dialog box with the following fields and values:

- Assigned Agency:** BEV, CGA, DEFAULT, OTO, RRCAGENCY
- Assigned User:** Active Users, Curtis Gormley, Disabled Users
- Client Categories:** Category 1: Curtis 1 - Homeless, Category 2: Curtis 2 - Court Referred, Category 3: Curtis 3 - Amphetamine, Category 4: Curtis 4 - Transferred, Category 5: Curtis 5 - Abusive

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 screenshot shows the 'Billing Information' form with the following sections:

- Client Consent:** Includes checkboxes for 'Release of Info on File', 'Client Given Informed Consent', and 'Assign Payment to Agency'. A 'Release of Info Date' field is set to 02/02/2017.
- Referring Provider:** Fields for First Name (Clark), Middle Initial, Last Name (Williamson), Suffix, and NPI # (1245319599).
- Client's Condition:** Includes checkboxes for 'Employment', 'Other Accident', and 'Auto Accident'. A 'Location (State)' dropdown is set to SD. There are also fields for 'Date of Current Illness', 'First Date of Illness', 'Dates Unable to Work', and 'Dates Hospitalized'.
- Statement Information:** Includes a 'Copy from Demographics' button and fields for First Name (Bob), Last Name (Curtis), Address 1 (123 West), Address 2, City (Omaha), State (NE), Zip (68130-____), and Phone.

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 screenshot shows the 'Payers' tab with the following elements:

- Add New Payer Plan:** A button highlighted with a red arrow.
- Payer Plan Grid:** A table with columns: Automation Order, Default, Payer Type, Payer Name, Plan Name, Plan Type, Effective Date, End Date, ID Number, Held, Edit, Delete. One row is visible with ID 232GTG654.
- Payer Plan Details Form:**
 - Payer Information:** Fields for Payer Type, Payer Name, Plan Name, Effective Date, End Date, Plan Type, Insured's ID, Group #, Group Name, Relationship to Insured, and Automation Order.
 - Insured's Information:** Fields for First Name, Middle Name, Last Name, Suffix, Address 1, Address 2, City, State, Zip, Gender, Date of Birth, Employer/School, Phone 1, and Phone 2.
 - Options:** Checkboxes for 'Set as Default Plan' and 'Hold'.
 - Plan Notes:** A text area for additional notes.

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 screenshot displays the 'Fee Schedule' tab within a software application. The main window contains a table with the following data:

Service	Default Units	Default Amount	Fee Schedule Units	Fee Schedule Amount
Assessment	1.000	\$75.00	1.000	\$65.00
Case Management	1.000	\$25.00	1.000	\$20.00
Ind Anger Management	1.000	\$75.00	1.000	\$70.00
Ind Art Therapy	1.000	\$50.00	1.000	\$45.00
Ind Psychotherapy	1.000	\$100.00	1.000	\$85.00

An 'Add New Payer Plan' modal window is overlaid on the main window. It features a table with columns: Service, Default Units, Default Amount, Fee Schedule Units, and Fee Schedule Amount. The modal window also includes a 'Show only Services with a Fee Schedule' checkbox and 'Save' and 'Cancel' buttons at the bottom.

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.

The screenshot displays the 'Referrals' tab within a software application. The main window contains a table with the following data:

Date of Referral	Name	Agency	Contact	Type	Results	Edit	Delete	Print	File & Sign	Signed
03/05/2017	Emergency Department		Dr. Ellers	None	Pending					--
03/05/2017	CG Court Services		Cliff Carlise	Outgoing	Pending					--
03/05/2017	CG Homeless Shelter		Mark McGillicuddy	Incoming	Accepted					--

An 'Add/Edit Referral Record' modal window is overlaid on the main window. It features a 'Select Referral Type' section with radio buttons for 'Incoming', 'Outgoing', and 'None'. The 'Referral Source' section includes fields for Name, Agency, Contact, Address 1, Address 2, City, State, Zip, Phone 1, Phone 2, Email, and Website. The 'Referral Details' section includes a 'Level of Care' dropdown, 'Type of Contact', 'Previous Services', 'Service Requested', 'Funding Source', 'Referral Reason', 'Result', 'Category', 'Other 1', 'Other 2', and 'Heard about us?' dropdowns. There is also a 'Referral Comments' text area and 'Save' and 'Cancel' buttons at the bottom.

- 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.

The screenshot shows the 'Add/Edit Referral Record' form. At the top, there are radio buttons for 'Select Referral Type: Incoming', 'Outgoing', and 'None'. Below this is the 'Referral Source' section, which includes a search bar labeled 'Search for Referral Source by Attributes'. A dropdown menu is open, showing a list of referral sources such as 'Hospital, LA', 'Harold Intensive Hospital, (H.A.R.P.)', 'Home Away Residential Path, NY', 'Orion Outpatient Omaha, Orion Healthcare Treatment, NE', 'Orion Residential Lincoln, Orion Healthcare Treatment, NE', and 'RCA CGCGCGCGCGCG, CG RCA'. The dropdown also includes an 'Add New' link. The form also contains fields for Name, Agency, Contact, Address 1, Address 2, City, State, Phone 1, Phone 2, Email, and Website.

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

The screenshot shows the 'Search for Referral Source by Attributes' dialog box. It features a 'Filter Referral Source Attributes' section with a 'Select:' dropdown menu. The dropdown menu is open, displaying a list of attributes with checkboxes: 'Language - EnglishIsGood', 'Language - French', 'Language - German', 'Language - Japanese', 'Language - Russian', 'Language - Spanish', 'Services - Court', and 'Services - Detox'. The 'Language - French' option is currently selected. There are 'Search' and 'Display All' buttons at the top right of the dialog. At the bottom, there are 'Select' and 'Cancel' buttons, and a link to 'Create a New Referral Source'.

- 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.

AI/AN

Edit

General

Tribal Enrollment #: afsfweaw

Tribal Relationship: Self

Tribe of Membership: AHKIOK-KAGUYAK NATIVE CORPORATION

IHS NDW

Indian Blood Quantum: _____

Classification/Beneficiary: _____

State: _____

County: _____

Community: _____

Information gathered in this tab is for the use of the IHS National Data Warehouse (NDW) submission process and/or the ATR Voucher program only. The purpose of gathering this information is based on the data requirements of these initiatives.

Add New Client Delete Client Print File and Sign Referral Source Setup Export Close

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.

Custom Forms

Add

Date	Form Name	Added By	Edit	Delete	Print	File & Sign	Signed
02/22/2017	PreScreening - Paul Form	Paul Admin					Filed

Add New Client Delete Client Print File and Sign Referral Source Setup Export Close

Create New Form

Form Type: CG Client Intake Test Form

Create New Form Cancel

Edit Form

Form Date: 10/20/2016 Level of Care: Level I - Outpatient services program: (ILS) Innovati

How often do you use Methamphetamine Daily Weekly Once a month Never Not Applicable

Primary Drug of Choice: **Methamphetamine**

If Poly Drug Use, Select All that Apply Alcohol Cannabis Methamphetamine Emerging Drug

If Emerging Drug, please list name and description

Emerging Drug Name: **Tar and Meth**

Emerging Drug Description:

Save Cancel

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.

Demographics Case Management Billing Payers Fee Schedule Referrals AI/AN Custom Forms **Comments**

Edit

Comments

Client intake comments go here...

Save Cancel

Add New Client Delete Client Print File and Sign Referral Source Setup Export Close

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

Client Intake

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

Begins with or matches: Search Display All

Client Name: Acerman, Acer A.
Level of Care: No Episode Assigned
Location:

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Abernacky, John	05/05/1985	(555) 555-5133	555-55-5555	2343242	2343242
Acerman, Acer A.	03/03/1987	(402) 234-5555	444-44-4445	AA19874445	
Adams, Sam					BIL-01ADASAM
Andrews, Jennifer M.	04/04/1985	(454) 545-4544	545-45-4544	165165161	165165161

Demographics Case Management Billing Payers Fee Schedule Referrals AI/AN Custom Forms Comments

Edit

Main

Client Name: Acerman, Acer A. **First Encounter Date:** 01/25/2017
Nick Name: Jack **Marital Status:** Married
Date of Birth: 03/03/1987 **Work Status:** Full-time (35 hrs+/wk)
Gender: Male **Race:** White (Not of Hispanic Origin)
Social Security #: 444-44-4445 **Religion:** Protestant
Client Reference #: AA19874445 **Ethnic Group:**

Contact Information

Address: 123 Apple Street
Omaha, NE 68130-1234 **Phone 1:** (402) 234-5555 - Home
Phone 2: (402) 234-7788 x12 - Work
Phone 3: (402) 234-9989 - Cell

Email: AA1987@hotmail.com
Emergency Contact: Stacy Acerman **Phone:** (402) 333-3333 - Home

Military

Military Status: Retired **Family Members with Military Background:** Yes
Military Branch: Air Force **Number of Family Members in Military:** 1

Legal Status

Involved with Child Protective Services: Yes, SD
Current Probation Status: Juvenile, Tribal Probation
Current Parole Status: Juvenile, NJ
Family in Criminal Justice System: Yes

Additional

Privacy Agreement Signed: Yes **Archived:** No

Add New Client Delete Client Print File and Sign Referral Source Setup Export Close

- 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.

Select Report Print Options

Display:

- Demographics
- Case Management
- Legal Status
- Military Status
- AI/AN
- Referral Records
- Contact Info
- Billing
- Payers
- Fee Schedule
- Comments

Print:

- Current Record
- All Records

Output:

- Printer
- Preview

OK Cancel

- 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.

Export Options

Type: Referral Records

Select: Selected Client All Clients

Date Range: Enter Date to Enter Date

Export Cancel

Export Options

Type: Custom Forms

Custom Form: ARA Test Form

Date Range: Enter Date to Enter Date

Export Cancel

Export Options

Type: Referral Sources

Export Cancel

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