

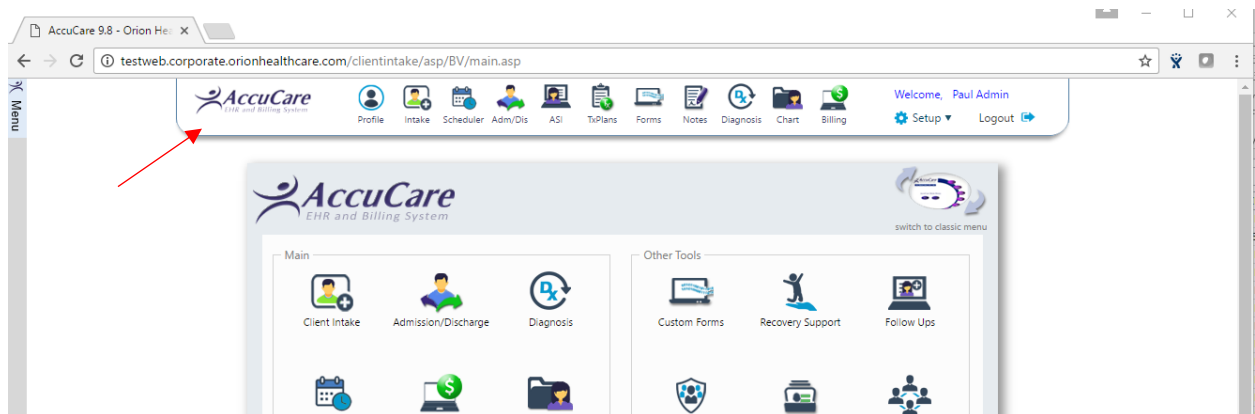
AccuCare 9.8K Release Notes

New Features and Enhancements

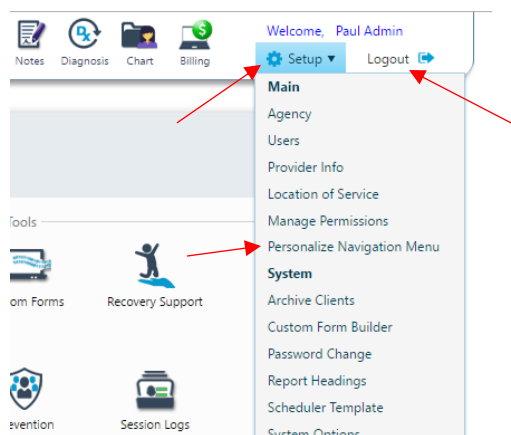
Major enhancements were made to the main navigation menu and Client Intake module, improving efficiency and workflow, along with bug fixes and overall performance improvements.

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's a navigation bar with icons for Profile, Intake, Scheduler, Adm/Dis, ASI, TxPlans, Forms, Notes, Diagnosis, Chart, and Billing. A welcome message for Paul Admin is visible. The main section is titled 'Client Intake' and includes a search bar with options to search by Last Name, Date Of Birth, Phone, SSN, Client Reference #, and Billing Reference #. Below the search bar, there are fields for Client Name, Level of Care, and Location. The 'Demographics' tab is selected, showing fields for Client Name, Nick Name, Date of Birth, Gender, Social Security #, Client Reference #, First Encounter Date, Marital Status, Work Status, Race, Religion, Ethnic Group, Address, Phone 1, Phone 2, Phone 3, Email, Emergency Contact, Military Status, Military Branch, Family Members with Military Background, Number of Family Members in Military, Privacy Agreement Signed, and Archived. Buttons at the bottom include Add New Client, Delete Client, Print, File and Sign, Referral Source Setup, Export, and Close.

- 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 shows the same AccuCare Client Intake interface, but with a client search result displayed. The search bar is highlighted with a red arrow. The search results table shows 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 highlighted with a red arrow. The client details for 'Curtis, Bob' are displayed in the main form area, including fields for Client Name, Nick Name, Date of Birth, Gender, Social Security #, Client Reference #, First Encounter Date, Marital Status, Work Status, Race, Religion, Ethnic Group, Address, Phone 1, Phone 2, Phone 3, Email, Emergency Contact, Military Status, Military Branch, Family Members with Military Background, Number of Family Members in Military, Privacy Agreement Signed, and Archived.

- 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' tab selected in the top navigation bar. The 'Edit' button is highlighted with a red arrow. The 'Demographics' dialog box is open, displaying the following information:

- Main:** Client Name: Curtis, Bob; Nick Name: Bob; Date of Birth: 01/14/1903; Gender: Male; Social Security #: 505-25-2522; Client Reference #: 505-25-2522; First Encounter Date: 02/02/2017.
- Contact Information:** Address: 123 West; Phone 1: (555) 212-0210 - Home.
- Legal Status:** Currently Involved with Child Protective Services: No; State: NE; Current Probation Status: No; Program: No; Current Parole Status: No; State: NE; Do you have any family involved in the criminal justice system? No.
- Military:** Military Status: Missing Data; Military Branch: Not Applicable; Client has family with Military Background: Missing Data; Number of family members in Military: 0; Don't know; Refused.

The 'Save' and 'Cancel' buttons are located at the bottom of the dialog box.

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' tab selected in the top navigation bar. The 'Edit' button is highlighted with a red arrow. The 'Case Management' dialog box is open, displaying the following information:

- 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 'Save' and 'Cancel' buttons are located at the bottom of the dialog box.

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' tab selected in the top navigation bar. The 'Billing Information' form is open, displaying various fields for client and provider information. The form is divided into several sections: 'Statement Information', 'Client Consent', 'Referring Provider', 'Client's Condition', and 'Billing Comments'. The 'Client Consent' section includes checkboxes for 'Release of Info on File', 'Client Given Informed Consent', and 'Assign Payment to Agency'. The 'Referring Provider' section includes fields for 'First Name', 'Last Name', 'Middle Initial', 'Suffix', and 'NPI #'. The 'Client's Condition' section includes checkboxes for 'Employment', 'Other Accident', and 'Auto Accident', along with a 'Location (State)' dropdown and several date fields for 'Date of Current Illness', 'First Date of Illness', 'Dates Unable to Work', and 'Dates Hospitalized'. The 'Billing Comments' section is a large text area at the bottom. The 'Save' and 'Cancel' buttons are at the bottom right of the form.

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 selected in the top navigation bar. The 'Add New Payer Plan' button is highlighted with a red arrow. Below the button is a table with columns: Automation Order, Default, Payer Type, Payer Name, Plan Name, Plan Type, Effective Date, End Date, ID Number, Held, Edit, and Delete. The table contains one row with the following data: Automation Order: 1, Default: checked, Payer Type: Insurance, Payer Name: Coventry of West Virginia, Plan Name: , Plan Type: , Effective Date: 02/02/2017, End Date: , ID Number: 232GTG654, Held: , Edit: (pencil icon), Delete: (X icon). Below the table is the 'Payer Plan Details' form, which is also highlighted with a red arrow. The form is divided into two main sections: 'Payer Type' and 'Insured's Information'. The 'Payer Type' section includes fields for 'Payer Name*', 'Plan Name*', 'Effective Date*', 'End Date*', 'Plan Type*', 'Insured's ID*', 'Group #', 'Group Name', 'Relationship to Insured*', 'Set as Default Plan', 'Hold', 'Automation Order', and 'Plan Notes'. The 'Insured's Information' section includes a 'Copy from Demographics' button and 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'. The 'Save' and 'Cancel' buttons are at the bottom right of the form.

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.

Fee Schedule

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

Fee Schedule

Show only Services with a Fee Schedule

Service	Default Units	Default Amount	Fee Schedule Units	Fee Schedule Amount
Grp Art Therapy	1.000	\$50.00		\$
Ind Anger Management	1.000	\$75.00	1	\$ 70
Ind Art Therapy	1.000	\$50.00	1	\$ 45
Ind Psychotherapy	1.000	\$100.00	1	\$ 85
Music Therapy	1.000	\$100.00		\$
No Show	1.000	\$25.00		\$
Parental Guidance	1.000	\$60.00		\$

Save Cancel

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.

Client Intake

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

Begins with or matches: Search Display All

Client Name: Abernack, John

Level of Care: No Episode Assigned

Location:

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Abernack, John	05/05/1985	(555) 555-5133	555-55-5555	2343242	2343242
Aberman, 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

Referrals

Add

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					--

Add/Edit Referral Record

Select Referral Type: Incoming Outgoing None

Referral Source:

Search for a Referral Source by Attributes, select an existing Referral Source or add new Referral Source details.

Search for Referral Source by Attributes

Select Referral Source: Begin typing or search by attributes... Add New

Name: Agency: N/A Contact: Address 1: Address 2: City: State: Zip: Phone 1: Phone 2: Email: Website:

Referral Details:

Referral Date: 03/05/2017

Level of Care: No Episode Assigned

Type of Contact: Add/Edit

Previous Services: Add/Edit

Service Requested: Add/Edit

Funding Source: Add/Edit

Referral Reason: Add/Edit

Result: Add/Edit

Category: Add/Edit

Other 1: Add/Edit

Other 2: Add/Edit

Heard about us?: Add/Edit

Referral Comments:

Save Cancel

- 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.

Add/Edit Referral Record

Select Referral Type: ☒ Incoming ☐ Outgoing ☐ None

Referral Source

Search for a Referral Source by Attributes, select an existing Referral Source or add new Referral Source details.

[Search for Referral Source by Attributes](#)

Select Referral Source: begin typing or search by attributes... [Add New](#)

Name:

Agency:

Contact:

Address 1:

Address 2:

City:

State:

Phone 1: X Home

Phone 2: X Home

Email:

Website:

Referral Source List:

- 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
- RCA CGCGCGCGCGCG , CG RCA
- VICTOR, AR

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

Search for Referral Source by Attributes

Filter Referral Source Attributes

Select: Language - EnglishIsGood [Search](#) [Display All](#)

Filter Res: Language - French [Select](#)

Profile: Language - German [Select](#)

[Create a New Referral Source](#)

[Select](#) [Cancel](#)

Attributes List:

- Language - EnglishIsGood
- Language - French
- Language - German
- Language - Japanese
- Language - Russian
- Language - Spanish
- Services - Court
- Services - Detox

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

Referral Source Manager

Referral Source

Name:

Agency: [Add/Edit](#)

Contact:

Address 1:

Address 2:

City:

State: Zip:

Phone 1: X Home

Phone 2: X Home

Email:

Website:

Referral Attributes

Select Referral Source:

Select Attributes:

Click here to show list or begin typing... [Add Selected](#)

Attribute Category ▲	Attribute Detail ▲
Remove All	

Archive Referral Source: ☐

[New](#) [Edit](#) [Save](#) [Cancel](#) [Delete](#) [Setup Attributes](#) [Print](#) [Close](#)

- 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.

Referral Date: 03/05/2017

Referral Details

Level of Care: [Add/Edit](#)

Type of Contact: [Add/Edit](#)

Previous Services: [Add/Edit](#)

Service Requested: [Add/Edit](#)

Funding Source: [Add/Edit](#)

Referral Reason: [Add/Edit](#)

Result: [Add/Edit](#)

Category: [Add/Edit](#)

Other 1: [Add/Edit](#)

Other 2: [Add/Edit](#)

Heard about us?: [Add/Edit](#)

Billboard
Commercial
Family Referral
Location
Magazine
Online
Other
Physician Referral

Referral Type Of Contact

Emergency
Family
Homeless Shelter
Legal
Provider
Walk In

Selection
Emergency

[New](#) [Edit](#) [Save](#) [Cancel](#) [Delete](#) [Close](#)

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.

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

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.

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

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**

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 #
Abernack, John	05/05/1985	(555) 555-5133	555-55-5555	2343242	2343242
Aberman, 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

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

Military

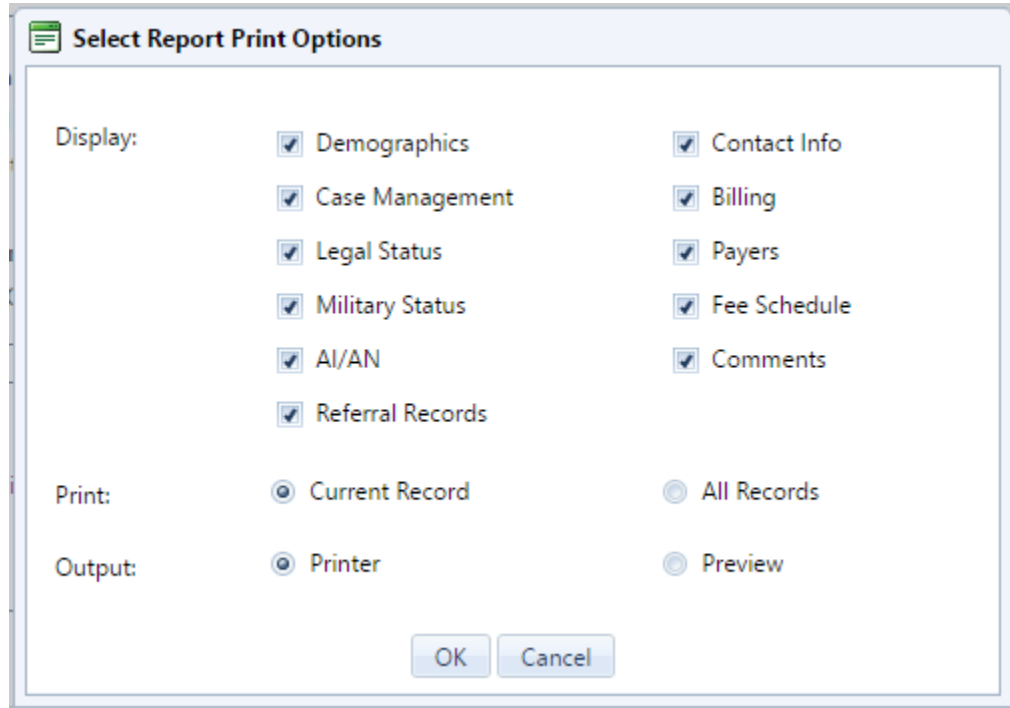
Military Status: Retired Family Members with Military Background: Yes
 Military Branch: Air Force Number of Family Members in Military: 1

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:

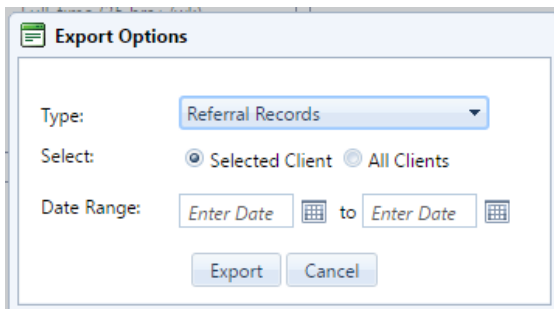
- ☒ Current Record
- ☐ All Records

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.



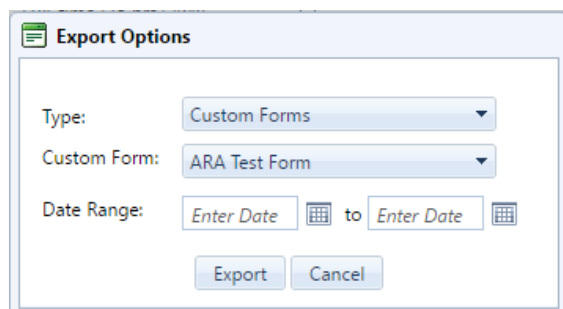
Export Options

Type: Referral Records

Select: ☒ Selected Client ☐ All Clients

Date Range: Enter Date to Enter Date

Export Cancel



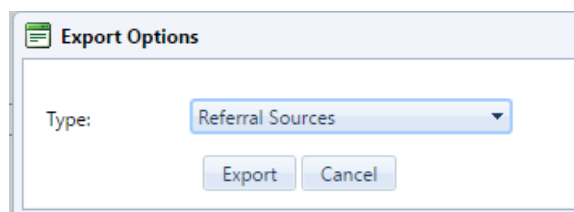
Export Options

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