

Release 8.0 Configuration

This document describes the new features and enhancements included in the Credible 8.0 release. It lists the settings necessary to enable each release item along with the steps for configuration and use. Settings that are new and specifically needed for a release item are emphasized with *italics*.

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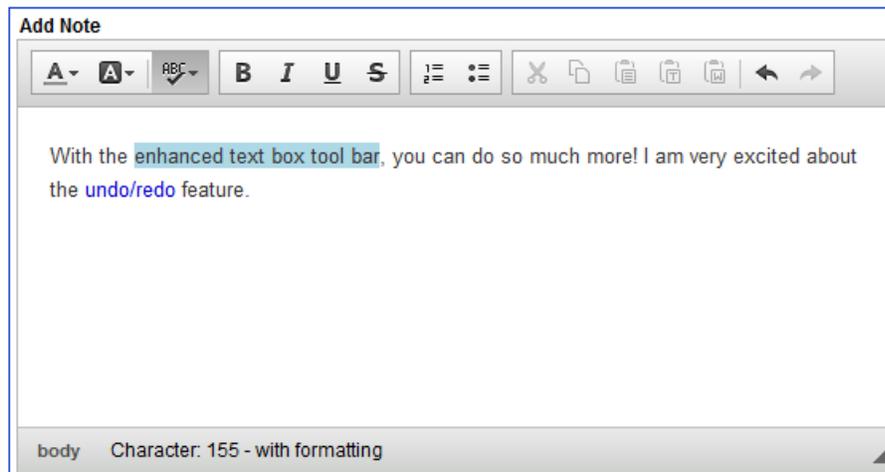
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GENERAL

Enhanced Tool Bar for Text Boxes

Each text box in Credible has an enhanced tool bar with the following new features: highlighting (background color), cut/copy/paste, and undo/redo. And there are three different paste options.



The character counter at the bottom of the text box includes the characters in the behind-the-scenes HTML formatting.

Settings

Partner Config (optional): ClientNotesNote (to add a note above the Add Note text box), Use Client Notes Email (makes the Email To section available)

Security Matrix: ClientNoteAdd, EmployeeNoteAdd

Configuration

N/A

Use

The Spell Check As You Type (SCAYT) function will be enabled by default. To disable it, click the spell check button and select Disable SCAYT.

To check spelling after you have entered your text or check the grammar/use the Thesaurus, click the spell check button and select Check Spelling. To check the grammar or use the Thesaurus, select the corresponding tab.

See [Client Notes](#) in the help for more information.

NOT IN Operator Added to Advanced Search Custom Filter

With the new NOT IN operator for the custom filter in the different Advanced Searches, you can now create queries that exclude specific values. For example, if you want to search for all visits that are *not linked* to PayerA or PayerC, you would set the Custom Filter to VisitBilling.Current Insurance NOT IN PayerA, PayerB. This eliminates the need for multiple AND conditions, i.e. VisitBilling.Current Insurance NOT = PayerA AND VisitBilling.Current Insurance NOT = PayerB.

Settings [Security Matrix](#): AdvSearch, AdvSearchExport, EditAdvancedSearches (optional)

Configuration N/A

Use If you have only one term specified in a WHERE clause, like Abbots, you don't need quotes around it. If you have more than one item, you need to put single quotes around each one. For example: 'Abbots', 'Smith'

See [Advanced Search](#) in the help for additional use information.

PROVIDER PORTAL

Smart Merge: Updating Existing Records with Received Data

When you receive a data exchange, the Provider Portal now checks to see if the clients in the exchange exist in your system. It checks for existing clients by name, birth date, and social security number.

Match to Existing Data

This new record is for Holmes, Sherlock; tax id #: ; birthdate: 6/16/1950

Choose one of the options below:

Create a New Client

Sherlock Holmes Add this as a new client

Use this existing client	Existing Address	Existing Birthdate	Existing SS
<input checked="" type="radio"/> Sherlock Holmes	1234 drive nashua NH 03060	06/16/1950	

If you decide to update an existing client, the system uses a Smart Merge function to examine each piece of data in the exchange to determine if it already exists in the client's record.

Smart Merge

Based on the SmartMerge Rules you've defined (in the Mapping section), 6 Issues were found:

- Records that have an existing match in your system, and there are data conflicts you must resolve shown
- Records that have an existing match in your system, but no differences in the data: 1
- Records that are new; no existing record in your system (and therefore not relevant to SmartMerge): 0

🔄 Clear ALL selections
Select ALL new values

🔍 Data Record: Client

Attributes	New Value	Current Value
address1	4500 Meede Lane	1234 drive
assigned_benefits	False	False
axis_1b	301.83 - BORDERLINE PERSONALITY DISORDER	301.83 - BORDER
	300.20 - ADJUST REACTION QTY W/ PREDOMINANT	300.20 - ADJUST

- If the data does not already exist, the system will add it to the client's record when you complete the exchange (no merging is necessary).
- If the data does exist and there are differences between the existing data and received data (data conflict), you specify which value should be used – new or current.
- If the existing data and received data are identical, there is no decision to make so the data is displayed in read-only mode.

For each part of a client record that you can receive in an exchange (allergies, diagnosis, family, and so on), you specify the fields that the Provider Portal will use to determine uniqueness – the Smart Merge rules. The fewer fields you specify, the more potential duplicates will be identified.

For example, for Medications, selecting just ndc or fdb_medid as a unique attribute may not be enough information to determine if a medication is new since a client may have two or three Advil 300 mg in their record. If you also have start_date as a unique attribute, the system will use NDC and Start Date to match an exchanged medication and determine if any merging is necessary.

Provider Portal Mapping

Confirmed Agreements Where You Are Receiving Data

	Sending Organization	Receiving
Master Map Settings for this Agreement	CREDIBLE: Credible Development	CREDIBLE: BI

SmartMerge Rules

- ➔ Category: Allergies
- ➔ Category: Clients
- ⬇ Category: Contacts

All attributes:

- contact_id
- client_id
- contacttype_id
- contact_address
- contact_city
- contact_state
- contact_phone
- contact_alt_phone
- contact_mobile_phone
- contact_email

Select >>

<< Remove Selection

Unique attributes:

- contact_name
- contact_zip
- relationship
- external_id

Settings Your Implementation Manager or Partner Services Coordinator needs to turn on the Provider Portal in your system.

Partner Config: Participates in Provider Portal Exchanges

Security Matrix: ProviderPortalOperate, ReportList

- Configuration*
1. Reports tab > Provider Portal button on nav bar > Mapping button on nav bar.
 2. In the Smart Merge Rules section, click Categories: Allergies to open it.
 3. In the All Attributes box, click the first field you want to be used to as a unique attribute and click Select. Repeat as necessary.
 4. Repeat steps 2 and 3 for each category in the Smart Merge Rules section and then click the Save Smart Merge Rules button.

- Use*
1. Receive the exchange and map the data.
 2. Resolve data relationship and then click Next Step.
 3. If a client in the exchange exists in your system and you want to update his/her record, select the Use this existing client radio button and click Next Step. The Smart Merge screen displays.
 4. If there are data conflicts to resolve, select the appropriate new values and existing values. You can use the Select ALL buttons at the top of the screen or select values individually.
 5. When done, click Next Step.
 6. Proceed as you normally would. See [Receiving Client Records](#) in the help for more information.

Sending and Receiving Client Visit Details As Attachments

Sending and receiving client visits through the Provider Portal has been enhanced to now include visit documentation. When you send a client visit to another Partner or non-Credible entity, a PDF of the print view is created in a behind-the-scenes process and sent along with the record.

When you receive a client visit from another Credible Partner, the PDF will be attached to the visit record.

The ability to send attachments has an even wider use for a non-Credible entity because they are not limited to sending visit details. When you receive an exchange with attachments from a non-Credible entity, you can view the attachments and attach each one to the appropriate client record in the exchange. Click [here](#) for information on maximum file size and allowable file types a non-Credible entity can send.

The files are then accessible via the Attachments function on the Client nav bar. "via Provider Portal" is added as a prefix to each attachment received from a non-Credible entity.

Note that Provider Portal visits will not be included when you use the View All or Print All functions from the Client Visit List screen.

Settings Your Implementation Manager or Partner Services Coordinator needs to turn on the Provider Portal in your system.

Partner Config: Participates in Provider Portal Exchanges

Security Matrix: ProviderPortalOperate, ReportList

Configuration Agreements with the entities you are going to exchange information with need to be configured and activated.

Provider Portal exchanged Visit

Client Visit:		
Client Name:	Inspector Lestrade	Employee
Visit Type:	TxPlus	Program:
Time In:	4:00 PM	Time Out:
Revised Time In:		Revised T
CPT Code:	✗	Insurance
Rate:	0.00	Units:
Approved:	✗ False	Approved
Cotherapy:	False	Billing Mat
Status:	COMPLETED	Authorizat
Schedule Date:		Merged:
Form : Version:	:	MobileFor
Additional Fields		
Signature Count:	1	
Attachments:		
 Details created via Provider Portal exchange		

Use For sending client visit details in an exchange, see [Sending Client Records](#) in the help.

To access client visit details in an exchange from another Credible Partner:

1. Receive the exchange as you normally would; see [Receiving Client Records](#) in the help.
2. Access the Overview screen for the client and click Visit List on the Client nav bar.
3. Locate the client visit sent in the exchange (it will have a Provider Portal icon to the left of the visit ID and the visit ID will start with an X). Note there will not be an attachment icon in the Client Visit List even though the visit details are attached in a PDF.
4. Click view and then click the “Details created via Provider Portal Exchange” PDF in the Attachments section.

To receive an exchange from a non-Credible entity and attach files included in the exchange to a client’s record:

1. Reports tab > Provider Portal button on nav bar > External Data button on nav bar.
2. Click Review for the exchange you want to receive.
3. If a client in the exchange exists in your system and you want to update his/her record, select the Use this existing client radio button and click Next Step.

All files sent from the non-Credible entity – including those in previous exchanges – display on the Receive Data screen. You will view/select the attachments after the exchange is complete.

4. Review and select the client records you want to receive and click Next Step.
5. Assign the clients to programs and teams if appropriate.
6. After final review, click Finish and then click Return to Provider Portal Home.
7. In the Exchanges Received & Completed section, click View for the exchange you received above.
8. If you no longer need a file sent from the non-Credible entity (for example, it was sent in a previous exchange), click the gray X and then click OK when the popup displays to *permanently* delete it.
9. To attach one or more of the files to a client’s record, click Attach File, select the files, and then click Attach Selected.

Sending and Receiving Client Notes in an Exchange

Notes have been added to the list of client data that you can send and receive in a Provider Portal exchange.

Settings

Your Implementation Manager or Partner Services Coordinator needs to turn on the Provider Portal in your system.

Partner Config: Participates in Provider Portal Exchanges

Security Matrix: ProviderPortalOperate, ReportList

Configuration

N/A

Use

On the “type of data you want to exchange” screen, select the Notes checkbox when specifying the client data you want to send. See [Sending Client Records](#) in the help for more information.

Warning Icon for Custom Lookups when Mapping Transferred Data

If a source data field is a custom lookup, it will be now be flagged with a yellow warning icon on the mapping screen.

Client.client_status_date	client_status_date
Client.date2 (Last updated Date)	date2 (SED/SMI Due DateDOF)
Client.dd11 (County)	dd11 (Supports) ⚠
Client.dd14 (Veteran)	dd14 (Lifetime SA IP Res Admiss) ⚠
Client.deaf	deaf (Deaf)

Unless you know that there is exact agreement between the values of the source lookup and the destination lookup in your system, you should not accept the data from that field as data corruption can occur. Click the red X to remove the source data field.

As a best practice, you should consult with a Credible Partner prior to receiving an exchange to determine if there is agreement between the custom lookup values. In addition, you should verify that the data types of the source and destination fields meet the guidelines in the table below.

Source Data Field	Credible Destination Field
Boolean	Has to be Boolean or text
Datetime	Has to be Datetime or text
Numeric	Has to be Numeric or text
Text	Has to be Text

Receiving Employee Data from a Non-Credible Entity

A non-Credible entity can now use the Provider Portal to send employee data (profile information and credentials) to your organization. (The ability for Credible Partners to exchange employee information already exists.) To receive the data, you follow the same steps you would for receiving client data. For example, if the employee already exists in your system, you will have the choice of creating a new employee or updating the existing record.

Match to Existing Data

This new record is for Langston, Nancy; tax id # : birthdate: not specified

Choose one of the options below:

Create a New Employee

<input checked="" type="radio"/> Jane Smith	Add this as a new employee
---	----------------------------

No duplicates found based on name/birthdate or name/ssn

You can also assign the employee to programs and teams.

Attachments from a Non-Credible Entity: Max File Size and File Types

If you have an agreement to exchange data with a non-Credible entity, the default maximum file size you can receive is 1 MB. If you want to change this default, contact your IM/PSC. The allowed file types you can receive are as follows:

- Access (mdb)
- BMP
- CSV
- Email (msg and mso)
- Excel (xls, xlsx, xlsm, xlsx, xlt, xltm, xlw)
- GIF
- HTM and HTML
- JPEG (jpg and jpeg)
- Max
- MP3
- Mpeg (mpeg and mpg)
- PDF
- PNG
- PowerPoint (ppt and pptx)
- Report (rpt)
- RTF
- Text (txt and dat)
- TIFF (tif and tiff)
- Video (avi)
- Wave (wav)
- Word doc (doc, docm, docx, dot, dotx)
- XML
- ZIP

CLIENT

Create a Treatment Plan with Future Start Date

You can now create multiple treatment plans for the same program for a client as long as the date ranges do not overlap. For example, if the client's first treatment plan has the current date as its start date and a future end date, you can create another plan as long as its start date is after the end date of the first plan.

Settings Partner Config: Use Tx Plus
Security Matrix: TxPlusBuild

Configuration N/A

Use See [TxPlus](#) in the help.

Printing Closed/Current/Future Treatment Plans from Client Tx Plus Screen

A print button is now available for each treatment plan on the Client Tx Plus screen, making it possible to print closed, current, and future treatment plans. The fully expanded treatment plan will print in HTML or PDF depending on how your system is configured.

End Date	Active	
	<input checked="" type="checkbox"/>	print
	<input type="checkbox"/>	print

Note that if you select Treatment Plans when generating a print view of a client's profile, only active treatment plans will be included.

If the Show Active Tx Plus Plans in Forms setting is enabled in Partner Config, you will also notice a new Active flag indicator on the Client Tx Plus screen.

Settings Partner Config: Use Tx Plus, Show Active Tx Plus Plans in Forms (optional)
Security Matrix: TxPlusView, TxPlusActivate (if applicable)

Configuration N/A

Use See [TxPlus](#) in the help.

Tx Plus Plan Diagnoses Display in Form and Completed Visit

If one or more diagnoses were selected when a Tx Plus plan was built, they will now display when you are filling out the web form and when you view or print the completed visit.

Settings Partner Config: Use Tx Plus
 Security Matrix: TxPlusDocument, TxPlusView, ClientVisitView

Configuration N/A

Use See [TxPlus](#) in the help.

Adding More Detail to Treatment Plans with Extended Fields

If your organization needs further organization and detail for each Tx Plus level/item, you can configure your system to use extended fields. Each Tx Plus item (problem, goal, objective, and intervention) can have up to five extended fields. You specify the field label and type – checkbox, dropdown, or text box. For a dropdown, you can use an existing custom lookup or enter the options for the dropdown on the fly.

	Tx Plus Type	Field Label	Field Type	Order	
edit	PC Problem	Is problem manifested during visit?:	Checkbox	1 ▼	delete
edit	PC Goal	Desired Outcomes for this Assessed Need in Person's Words:	Textbox	1 ▼	delete
edit	PC Goal	Person's Strengths and Skills and How They Will be Used to Meet This Goal:	Textbox	2 ▼	delete
edit	PC Goal	Primary Support/Resource Needed to Meet This Goal:	Dropdown	3 ▼	delete

[New Extended Field](#) [Show Model](#)

When adding or changing extended elements, you can preview how they will appear to users when documenting against a treatment plan.

PC Goal: [] Start: [] Target: [] End: []

Desired Outcomes for this Assessed Need in Person's Words: []

Person's Strengths and Skills and How They Will be Used to Meet This Goal: []

Primary Support/Resource Needed to Meet This Goal: --Select An Option-- ▼

Settings Partner Config: Use Tx Plus Extended Fields, Manage Tx Plus Extended Fields
 Security Matrix: TxPlusBuild

- Configuration**
1. Enable Tx Plus extended fields in Partner Config and then click Manage Tx Plus Extended Fields.
 2. Click the New Extended Field button and select the Tx Plus item you want to add it to.
 3. Enter the label for the field (max 100 characters) and select the field type.
 4. If you select dropdown, click the Manage Dropdown button. Do one of the following and then click Save.
 - To use a custom lookup, select it from the dropdown.
 - To create your dropdown on the fly, select the checkbox and enter the options in the text box, *separating each one with a semicolon*.
 5. Click Save to return to main extended fields list screen.
 6. Repeat steps 2 – 5 to add additional extended fields.
 7. To preview the extended fields for a Tx Plus item, click Show Model, select the item from the dropdown, and click Preview. To clear a preview, click the Remove Model button.
- To edit or delete an extended field, use the corresponding button.
- When done configuring extended fields, close the popup.

Use See [Tx Plus](#) in the help. Note that answers to Tx Plus extended fields are not displayed as part of Previous Documentation.

Restrict Building Tx Plus Plans to Forms

With a new Security Matrix right, you can remove the Tx Plus button from the Client nav bar but still have it available on the Intake nav bar. With this setup, an employee will only be able to build a treatment plan from within a form. If a treatment plan does not exist for the program associated with the visit, the ADD TX PLUS link will also be available in the form.

Settings Partner Config: Use Tx Plus
 Security Matrix: *TxPlusBuildFromForm*

Configuration N/A

Use See [TxPlus](#) in the help.

Hiding Program Dropdown on Client TxPlus Builder Screen

If your organization does not need to associate programs with treatment plans (for example, you have a universal treatment plan), you can hide the Program dropdown on the Client TxPlus Builder screen with a new Partner Config setting. If you decide to hide the Program dropdown but have existing treatment plans with associated programs, the associations will be retained but cannot be changed because the Program dropdown will not be available.

Settings Partner Config: Use Tx Plus, No Program Selector on Builder Screen
Security Matrix: TxPlusBuild

Configuration N/A

Use See [TxPlus](#) in the help.

Credible eRx: Show Two Provider Names on Printed Script

If your organization uses the Credible eRx module and you need to include two provider names on a printed script, you can ask your IM/PSC to configure your system accordingly. For example, if a script is created and approved by a Physician's Assistant, the system will now include his/her name and the supervising Physician's name on the script. If the employee creating/approving the script and the prescriber are one and the same, only one name will appear on the script.

Settings Security Matrix: PrescriptionCreate, PrescriptionCreateNonSPI

Configuration See Reference 32908 in the Library.

Use See [Creating a Prescription](#) in the help.

Micrograms Added As eMAR Dosage Quantity Unit

When adding a med schedule for a client, you now have the option of selecting micrograms – mcg(s) – for the dosage quantity.

Settings Partner Config: Use eMAR Functionality
Security Matrix: eMar, eMarCreateMedSchedule

Configuration See [Setting Up eMAR](#) in the help.

Use See [Adding a Med Schedule](#) in the help.

Refill Quantities Spelled Out After Numeric Value

If your system is set up to spell out prescription quantities on printed prescriptions, refill quantities will now be spelled out in words after the numeric value as well.

Settings Your Implementation Manger or Partners Services Coordinator needs to turn on the Spell Prescription Quantities function in your system.

Configuration N/A

Use See [Managing Prescriptions in the Medications List](#) in the help.

Linking Client Authorization to Single Billing Matrix Line

With the addition of a Billing Matrix dropdown on the Authorizations screen, you can now link an authorization (auth) to a specific Billing Matrix entry and have it decrement based on a CPT code vs a visit type. Previously, this association could only be done via an authorization level.

If an auth is added via an auth level, you will not have the option to change the Billing Matrix line for the auth.

Settings Partner Config: Use Auth Level Billing Matrix

Security Matrix: AuthorizationView, AuthorizationAdd

Configuration N/A

Use See [Authorizations](#) in the help.

Assigning Multiple Payers/Payer Types to Auths & Auth Levels

In the event you have multiple payers sharing the same bucket of authorization dollars, you can now assign multiple payers to an authorization. The Select Ins (Insurance) dropdown is now a multiselect list.

Settings Security Matrix: AuthorizationView, AuthorizationAdd

Configuration N/A

Use See [Authorization Levels](#) and [Authorizations](#) in the help.

Client Warnings Displayed for Occupied Beds when Assigning Beds

To help with safety and liability issues surrounding bed assignments to rooms with occupied beds, an information icon will display if the client in a bed has active warnings in his or her record.

Bedboard Search

Bed Board:

Filter -- Facility --

Show All Occupied Beds in Rooms w/Available Beds

Room: -- Gender -- Min Age: Max Age:

	Facility	Room	Bed	Status	Name	Warning(s)	Age	Gender
<input type="button" value="assign"/>	BedBoardFacility 2	2	B	OPEN				
<input type="button" value="assign"/>	BedBoardFacility 2	3		OCCUPIED			53	M
<input type="button" value="assign"/>	BedBoardFacility 2	4		OCCUPIED				
<input type="button" value="assign"/>	BedBoardFacility 2	5		OCCUPIED				

Client exhibits aggressive behavior

Settings

Partner Config: Use Bed Board

Security Matrix: ClientBedBoardAssign

Configuration

See [Setting Up Bed Board](#) in the help.

Use

See [Bed Assign](#) in the help.

VISIT

Controlling Font Size when Printing to PDF

If your system is set up to print visit details to PDF, you can now control the font size for the two main sections of the form. For the information in the header, you can choose between 6 and 8 point. For the form data, the range is 6 to 12 point. The default font size for both the header and body is 8.

<i>Settings</i>	Partner Config: Print in PDF Format, PDF Header font size, PDF Body font size
<i>Configuration</i>	N/A
<i>Use</i>	N/A

CREDIBLE

ADMIN

Lapsing Codes in Custom Lookups

To help you phase out codes in a custom lookup category, the delete function has been updated so the codes are retained in records where they already exist but are no longer available to select going forward. This change will help when your state mandates the expiration of lookup codes used for state reporting.

The updated delete functionality applies to custom lookups used in the following tables: Clients, Employee, Clients Ext, and Client Episode.

Settings Security Matrix: AdminLookupUpdate

Configuration N/A

Use

1. Admin tab > Custom Lookup Items.
2. Select category and click Display.
3. Click delete for each code you need to phase out.

Flagging Program for Deletion if Associated with Active Episodes

The system will no longer let you delete a program if there are episodes associated with it. Instead, when you delete a program, it will be flagged for deletion instead of actually deleted. That way the program will be available to episodes it is currently associated with but will not be available for selection going forward.

Settings N/A

Configuration N/A

Use

1. Admin tab > Programs.
2. Click delete button for program you want to delete and then click OK when confirmation prompt displays.

Fields Locked Against Definition Changes by Agency Staff

To meet certification requirements, Credible now has the ability to lock fields in Data Dictionary so definition changes cannot be made by you or your staff. You will notice a new Credible Locked setting in Data Dictionary. When checked, it means only Credible staff can make changes to the definition of the field. You can change the View Order for a Credible Locked field.

<i>Settings</i>	N/A
<i>Configuration</i>	N/A
<i>Use</i>	N/A

CREDIBLE

BILLING

Accepting Credit Card Payments in Real Time

The Client Payments function has been integrated with a payment gateway so you can accept credit card and debit card payments in real time. You can accept a credit/debit card payment from a client at the time of service or via the Payments or Manage Client Payments functions.

Add Client Payment / Copy:

Add Payment			
Client:	Sherlock Holmes (10503)		
Amount:	<input type="text" value="0.00"/>	Payment Type:	<input type="text" value="Credit Card"/>
Check Number:	<input type="text"/>	Reference Number:	<input type="text"/>
Check Date:	<input type="text" value="2/13/2013"/>	Location:	<input type="text" value="LocA"/>
Deposit Date:	<input type="text"/>		
Credit Card Number:	<input type="text"/>	Expiration Date:	<input type="text" value="00"/> - <input type="text" value="0000"/>
Billing Address:	<input type="text" value="4500 Meede Lane"/>		City State Zip Code: <input type="text" value="Newmark NH"/> <input type="text" value="03857"/>
Notes:	<input type="text"/>		

After you enter the credit/debit card number and expiration date and click Save Payment, there is an instantaneous check to see if the payment was accepted or declined. If declined, an error message displays on the Add Payment screen and you can make the necessary corrections. If accepted, the Client Payments screen displays and the authorization number sent back from the payment gateway is stored in the Reference # field. For security/privacy purposes, the credit/debit card information entered is not stored in your system.

If you want to enter a credit/debit card payment and not have it processed in real-time, do not enter the credit/debit card number in the Credit Card Number field.

Settings

The ability to process credit/debit card payments in real time is a contract item. For more information, send an email to contracts@credibleinc.com

Security Matrix: *EnterCreditCardPayment*, *ClientPayments* and/or *BillingModule*, *ClientPaymentView*, *ClientPaymentAdd*

Configuration

1. Set up a merchant account with Authorize.NET®. Do *not* enable Address or CVV verification services.

Credible supports the Card Not Present and Card Present account types but we do not currently support card readers. Note what kind of account you have as you will need to provide this information to your IM/PSC.

2. Provide your IM/PSC with the account type (Card Not Present/Card Present), API Key, and Transaction ID (Authorize.NET will provide you with the last two).

Use

1. Access the Add Client Payment/Copay screen:
 - Add Copay button in Scheduled Visit popup
 - Payments button on Client nav bar > Add Payment button
 - Manage Client Payments on Billing tab > Add Payment button > select a client
2. Select Credit Card or Debit Card from the Payment Type dropdown.
3. Enter the payment amount, credit or debit card number, and expiration date (the latter is required when you enter a credit/debit card number).

Notes:

- If you do not want to use real-time processing, do not enter a charge card number.
- Currently, the client address populates the Billing address fields. If accessing via Manage Client Payments, the client address will not populate until you select a client.

4. Click Save Payment.

If an error message displays, attempt to correct the error and click Save Payment.

Authorize.Net is a registered trademark of CyberSource, a Visa company.

Adding Partner Logo to Client Statements

With a new Partner Config setting, you can now display your agency logo in the upper left hand corner of each client statement.

Settings

Partner Config: Partner Graphics, *Show logo on Client Statement*; optional settings include Show Last Paid on Statements, Use Simple Client Statement, Payment Display Date

Security Matrix: BillingModule, GenerateStatements

Configuration

In Partner Config, click [Click Here to Add Graphic](#) and upload a Left Banner Logo (file format must be GIF).

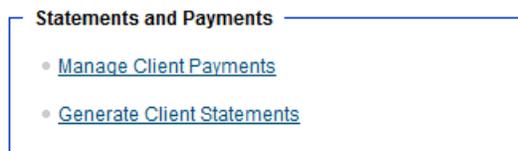
Use

See [Generate Client Statements](#) in the help.

Restrict Right to Generate Client Statements

You can now control which employees can generate statements with the new GenerateStatements Security Matrix right. The new right will automatically be selected for any profiles that previously had the BillingModule right.

Note that Manage Client Payments and Generate Client Statements are now in a separate section on the Billing tab.



<i>Settings</i>	Partner Config (optional): Show Last Paid on Statements, Use Simple Client Statement, Payment Display Date Security Matrix: BillingModule, <i>GenerateStatements</i>
<i>Configuration</i>	N/A
<i>Use</i>	See Generate Client Statements in the help.

New Right for Updating an Insurance Payment

With a new Security Matrix right, you can control which employees can change the details of an insurance payment including the amount. If an employee does not have the new InsPaymentUpdate right, the update button will not be available on the Manage Insurance Payments screen.

Note that the existing right InsPaymentAdjust controls the availability of the adjust button which is used to make an adjustment to the payment amount of the insurance check (vs changing the actual amount).

<i>Settings</i>	Security Matrix: <i>InsPaymentUpdate</i>
<i>Configuration</i>	As part of the Release 8.0 update, InsPaymentUpdate will automatically be selected for profiles that have InsPaymentAdjust.
<i>Use</i>	See Managing Insurance Payments in the help.

Deaf Rate Field Added to Payer Specific Rates and Codes

If the payers you work with have different Deaf Rates, you can take advantage of the new Deaf Rate field in the Billing Matrix Payer Rates and Codes screen. The Deaf Rate field is also included in the Payer-Specific export.

Settings Security Matrix: BillingConfig

Configuration N/A

Use See [Payer-Specific Rates & Codes](#) in the help.

150 Days Added to Aged Between Filter for Client Statements

If sorting client statements by a client's last payment date, you can now filter on clients that have not made any payments in 150 days.

Settings Partner Config (optional): Show Last Paid on Statements, Use Simple Client Statement

Security Matrix: BillingModule, GenerateStatements

Configuration N/A

Use See [Generate Client Statements](#) in the help.

REPORTS

Improved Performance with Disconnected Mode for Running Exports

With a focus on maximizing the performance of your Credible system, this release includes a new version of the Export Tool that runs exports in a disconnected mode. You can now perform other tasks in Credible while your run request is being processed and access the export file once notified of its completion.

The new behind-the-scenes run mode will help ensure system responsiveness when large exports are processed and eliminates the output limit of 500,000 rows. The one exception is the PDF Template export format. Because the maximum page size of a PDF is 250 and the output is one row per page, there is a 250 row limit for this export format.

If you select an Excel export format, a large export will be split into multiple worksheets. For XLS, 65,000 rows is the maximum number of rows per worksheet. For XLSX, the maximum is 1 million rows per worksheet.

Running exports in disconnected mode also eliminates time outs before exports are completed.

<i>Settings</i>	Security Matrix: ReportList, ExportBuild, ExportRun
<i>Configuration</i>	N/A
<i>Use</i>	<ol style="list-style-type: none"> 1. Reports tab > Export tool on nav bar. 2. Run an export as you normally would. A processing message displays.

Export_sample Parameters:

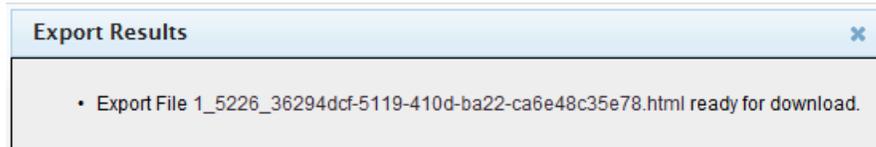
Run Export	Format: HTML Table	Header Row: <input type="checkbox"/>	Show Line #: <input type="checkbox"/>
Start Date: 1/2/2013	End Date	-- Program --	--
Approved: All	-- Payer --	-- Choose Batch --	--

[Return to Export List](#)

Processing your HTML export...you will be notified when it is complete

3. Once the export file is ready, a notification displays below the processing message:
 - Export File [1_5226_36294dcf-5119-410d-ba22-ca6e48c35e78.html](#) ready for download.

The notification also displays in a popup in case you have navigated away from the Run Export screen.



4. You can view the export file by clicking a link or run another export (click Return to Export List). For each subsequent export you run, a “ready for download” link will be added to the screen/popup.

Ad Hoc Query Builder Makes the Move to 64 Bit

This release marks the introduction of the 64-bit version of Ad Hoc Query Builder. You can now use the export builder on any of the supported browsers and you no longer need to accept any ActiveX controls. While the features of the 64-bit version of Query Builder very similar to the ActiveX 32-bit version, you will notice a few changes to the main screen.

Select Employees.first_name,
 Employees.last_name,
 Credentials.credentials,
 EmployeeCredential.start_date,
 EmployeeCredential.end_date,
 Employees.external_id
 From EmployeeCredential
 Inner Join Employees On EmployeeCredential.emp_id = Employees.emp_id
 Inner Join Credentials On EmployeeCredential.credential_id =
 Credentials.credential_id
 Where Employees emp_id = @param1

Output	Expression	Aggregate	Alias	Sort Type	Sort Order	Grouping	Cri
<input checked="" type="checkbox"/>	Employees.first_name					<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Employees.last_name					<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Credentials.credentials					<input type="checkbox"/>	
<input checked="" type="checkbox"/>	EmployeeCredential.start_date					<input type="checkbox"/>	

- Object/expression tree has been removed from the screen.
- Tables you can select for reporting purposes are now on the left side of the screen. The list is pulled from the active list of tables each time you use the Query Builder. For easier viewing, only 13 tables are displayed at a time.
- The raw SQL is now displayed above the Expressions table
- A delete icon has been added to the Expressions table

Settings **Security Matrix:** ExportBuild, ExportRun, ExportEditLocked (optional)

Configuration Allow popups in your browser.

Use Navigate to additional “table pages” with the links at the bottom. To search for a specific table, enter its name (or part of its name) in the search box provided. To return to the first page of tables, click the red X.

See [Creating Exports with Query Builder](#) in the help.

New Report to Track Usage of eFax, Texting, and More

With the new Usage Tracking report, you can monitor your usage of eFax, texting, file (attachment) storage, and Credible eRx and get counts for the number of full-time and part-time employees in your organization.

With the exception of the employee counts which are real time, the counts displayed in the report are for the time period you specified.

Usage Tracking Report

From: 12/31/2012 to 01/31/2013

Category	Count
eFax	3
Credible eRx	29
Texting	58
Full-Time Employees	656
Part-Time Employees	1
File Storage (GB)	0.0

Settings **Security Matrix:** ReportList

Report Security: Usage Tracking

- Configuration**
1. Use Data Dictionary to add the part_time field to the Employee table.
 2. Update each employee’s profile with the appropriate YES/NO answer for the part_time field.

Use

1. Reports tab > Admin button on nav bar > Usage Tracking on nav bar.
2. If necessary change the time period for the report; default is the last month.
3. Click Run Report.

CREDIBLE

PATCH LIST

Cross-Browser Compatibility

Chrome: Scanned Pages Out of Order and Missing Pages

Task # 34476

What was the issue? Scanned 7 pages in numerical order and the uploaded document only contained 4 pages and they were not in numerical order.

The patch An update was made to the scanning functionality so it will work correctly with the Chrome browser.

Firefox and Chrome: Unexpected White Space Between Questions in Web Form

Task # 34506

What was the issue? When Firefox or Chrome is used, the white space between questions in a web form is more than expected. The amount of white space when using Internet Explorer is fine.

The patch To prevent extra white space between questions in a form, a behind-the-scenes change was made where forms will use now XHTML instead of HTML 4.0.

Firefox and Safari: Schedule Template Is Off by 7 Hours

Task # 34506

What was the issue? When a schedule template in an employee's schedule was viewed via Firefox or Safari, the template was shifted 7 hours later. The schedule template works fine in Internet Explorer and Chrome.

The patch Corrections have been made to the schedule screens that show the employee work schedule.

Provider Portal

Error when Mapping Data to Wrong Field Type & No Exchange Received Confirmation

Task # 33962

What was the issue? “Conversion failed...” error message displayed at final step in sending an exchange due to mapping mismatched field types. While the exchange took place (client record created in receiving system), exchange did not move into Exchanges Received list and it did not get a green checkmark.

The patch The Provider Portal will now inspect each element as you enter it and display a user-friendly message prompting you to correct the element if necessary.

Client

Tx Plus: First Goal Target Date Not Pulling Into Web Form

Task # 35667

What was the issue? The Target Date in the first goal is not updating in the web form after going into the Tx Plus Builder screen.

The patch The save method used in the Tx Plus Builder screen was updated so if dates are changed, the new dates will be pulled into the web form and saved upon visit completion.

Unexpected Results with Tx Plus Program-Specific Labels and Main Labels

Task # 33919

What was the issue? Scenario 1: all four main labels are filled out and three labels are filled out for a program. When a treatment plan was built for the program, the program-specific labels were used for first three levels (expected) and the main label for the fourth level was used (unexpected).

Scenario 2: only three main labels are filled out and all four labels are filled out for a program. When a treatment plan was built for the program, only the first three program-specific labels were used (unexpected).

The patch A fix was made so program-specific labels are used even when there is a mismatch between the number of levels filled out for the main labels and program-specific labels.

Two related changes:

- If you create new program-specific labels and want a level to use the corresponding main label, you will need to enter that label as a program-specific label. As part of the Release 8.0 update, all existing blank program-specific labels will be automatically populated with the corresponding main labels. You can delete an autopopulated label if you do not want to use it as a program-specific label.
- If you try to change the program for an existing treatment plan and the new program has fewer levels/items defined than the current program, the system checks to see if the extra levels have been documented against. If they have, the levels will be retained but you cannot add more. In addition, the labels will be replaced with the corresponding main label. If there is no documentation in the extra level, it will be deleted. If the extra-level scenario occurs, a message will display asking if you want to continue with the program change.

System Not Saving All Data Entered in Axis IV Text Box

<i>Task #</i>	29200
<i>What was the issue?</i>	All of the data entered into the Axis IV text box on the Multiaxial Assessment screen was not saved.
<i>The patch</i>	To eliminate data loss, the system now prevents you from entering more than 512 characters in the Axis IV text box. Note that this maximum includes the behind-the-scenes HTML formatting. And as a caution, hard returns use up a lot of characters. To help you know when you are getting close to the maximum, there is a character counter at the bottom of the text box.

@ Sign Added to Foster Home Name After Selecting it for Episode

<i>Task #</i>	33778
<i>What was the issue?</i>	When a foster home was selected for an episode, an @ sign was added to the foster home name when displayed in the Foster Home ID field in the Episode screen.
<i>The patch</i>	A fix was made to prevent the @ sign from being added to the foster home name.

System Auto-Checking Auth Released for Services After Eligibility Update

Task # 30877

What was the issue? After having the eligibility updated, several services were automatically set to Auth Released.

The patch A fix was made so the Auth Release setting will not be checked erroneously.

Employee**SQL Server Error when Trying to Delete Employee**

Task # 36911

What was the issue? When trying to delete an employee, the error message: "Error Type: Microsoft SQL Server Native Client 10.0 (0x80040E2F) The DELETE statement conflicted with the REFERENCE constraint..." displayed.

The patch When you delete a record from the Employee table, the system checks several other tables to see if the employee being deleted had any "activity" in them. If he or she did, the system will logically delete the record vs physically. The error occurred because there were several tables that were not part of the employee activity check. The delete functionality has been updated to include those tables.

Schedule**Form Group on Employee Schedule: Discarding Last Visit Cancels Entire Form Group**

Task # 36059

What was the issue? After completing a form group on an employee schedule, the last service was discarded. This caused the entire form group to red X on the Employee Schedule and the visits to show as unapproved in Client Visit List. Also, group visits and form groups are duplicated on the Schedule in the Show Actuals view.

The patch A fix was made so the scheduled form group will no longer be cancelled when a visit is discarded from it. Show Actuals view was updated to eliminate the duplication of group visits and form groups.

Visit

Advanced Visit Search Export Is Limited to 500,000 Records

Task # 35743

What was the issue? Advanced Visit Search export was limited to 500,000 records which caused problems when running productivity and balancing/validating month-end reports and other similar actions.

The patch The maximum number of records allowed in an Advanced Visit Search export has been increased from 500,000 to 10,000,000. This matches the maximum for Advanced Ledger Search export.

Group Visit Copay Is Not Reconciled at Sign and Submit

Task # 32115

What was the issue? When a client copay was added to a scheduled group visit, the payment was not reconciled as a copay (CLIENT PAYMENT ledger line) when the visit was completed. Instead, it remained a payment had to be manually reconciled.

The patch Group visit copays have been updated to function the same way a single visit copay does – they are automatically reconciled when the visit is signed and submitted.

Error After Filtering Visit List by Name and Date Range and Sorting by Date

Task # 34302

What was the issue? Client Visit List was filtered by client name and date. Error was generated when attempting to sort search results by Date.

The patch The search/sort functionality was updated to merge visits exchanged via the Provider Portal with regular visits.

Black Diamond Question Mark Appearing in Completed Visits

Task # 34276

What was the issue? Documentation in a completed treatment plan visit included a black diamond question mark in between sentences.

The patch A fix was made so the Visit Details screen and other screens with a similar issue (for example, the Client List and To Do List screens) are now “reading” the correct character set.

Change to Guarantor Not Reflected in Log Details

Task # 34843

What was the issue? The guarantor for a completed visit was changed and the old value and new value were not displayed in the Log Details popup. Instead “No details are available or no changes were made” was displayed.

The patch A fix was made to visit logging so the old and new values for the Guarantor field are now displayed in the Log Details popup.

Admin**Summary/Description Fields for Tx Plus Custom Library Only Display 18 Characters**

Task # 33939

What was the issue? When adding or editing predefined items in the Custom Tx Plus Library, it was difficult to proof text entered because only the first 18 characters in the Summary and Description fields was displayed.

The patch The text boxes for the Summary and Description fields have been changed to scrollable text boxes for easier viewing.

ClientGeoArea Table Not in Data Dictionary

Task # 34420

What was the issue? ClientGeoArea table was not accessible via Data Dictionary so was unable to set a lookup necessary for import that uses ClientGeoArea. The import failed because of the need to point client_id to use external_id instead of client_id

The patch ClientGeoArea table can now be accessed via Data Dictionary.

Billing**Error Screen After Assigning Employees to New Payer**

Task # 35014

What was the issue? While adding a new payer, user attempted to assign employees. The employees were not highlighted after clicking the assign button and an error screen displayed when Return to Payer Update was clicked.

The patch To prevent the error, you will be prompted to save the new payer before assigning employees to it.

Blanket Auth Not Linking Correctly

Task # 31071

What was the issue? When a visit type had more than one blanket auth linked to it, sometimes the wrong blanket auth got linked to a new visit for that visit type.

The patch In the event you have multiple payers sharing the same bucket of authorization dollars, you can now assign multiple payers (or payer types) to an authorization. The Select Ins (Insurance) dropdown is now a multiselect list.

Unable to Get Self-Pay to Attach to Visit

Task # 35280

What was the issue? Self-pay payer did not attach to visits that fell into a gap in insurance coverage when there was a gap in payer order numbers.

The patch Software has been updated to allow the billing sequence to change and to retain the insurance record at the new billing sequence number.

Some background information:

Insurance ORDER is the 1 through 9 set on the Client Insurance screen and is 'fixed' to that record. Insurance SEQUENCE is the actual position of that insurance record in the billing sequence for a given visit. Based on allowed payers, date ranges, and so on, an insurance record at ORDER 3 might actually be SEQUENCE 1 (it is the first allowed payer for that visit).

When you change the client's insurances, the system resequences the insurances for each visit (in case you gave them a different order, expired an insurance, etc and it changed which ones apply to that visit).

If the visit has a transferred or reconciled status, it will stay at the right insurance. So if I have payers A, B, and C (in that order) and my visit has transferred from A to B (so that it is at the secondary payer B) and I then update C to be BEFORE B, the visit will keep B as the current payer.

KNOWN ISSUES

Credible does not currently support Windows 8 with Internet Explorer 10.

CREDIBLE

