

# Product Release Communication

*August 2018*

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# August Feature Releases

## Payment Plans

Credible is introducing new functionality to create and track payments plans for clients. This allows clients to be set up to pay a certain dollar amount each month (or each week). When the client makes a payment, it is linked to the appropriate plan. The payment plan shows how much is due from the client to date versus how much has been paid.

### Configuration

Activation of Payment Plans users two settings in **Partner Config**.

- **Use Client Payment Plans** activates the Payment Plans functionality.
- **Payment Date to use for Client Payment Plan Matching** determines which payments will match to a client's payment plan.
  - **Check:** uses the payment's *Check Date*
  - **Accounting:** uses the accounting date of the payment's *CLIENT PAYMENT ADD* ledger line
  - **Deposit:** uses the payment's *Deposit Date*; if that is blank, it uses *Check Date*
  - **Posting:** uses the date the payment was entered in Credible

In the **Security Matrix**, new rights control Payment Plans.

- **ClientPaymentPlanView** is the primary security right, allowing a user to view Payment Plans for any client the user has access to.
- **ClientPaymentPlanAdd** is the right to add a new Payment Plan for a client.
- **ClientPaymentPlanUpdate** allows the user to update an existing Payment Plan for a client.
- **ClientPaymentPlanDelete** permits a user to delete an existing Payment Plan for a client.
- **ClientPaymentPlanAssign** provides the ability to assign and unassign clients to or from an existing Payment Plan.
- **ClientPaymentPlanFileView** grants the right to view or download a file attached to an existing Payment Plan.
- **ClientPaymentPlanFileAdd** allows a user to attach a file to a Payment Plan.
- **ClientPaymentPlanFileDelete** permits a user to delete a file attached to a Payment Plan.
- **ClientPaymentPlanFileEdit** provides the ability to edit the name of a file attached to a Payment Plan.
- **ClientPaymentPlanNoteView** grants the right to view notes on a Payment Plan.
- **ClientPaymentPlanNoteAdd** provides permission to add a note to a Payment Plan.
- **ClientPaymentPlanNoteDelete** allows a user to delete a note on a Payment Plan.

### Using Payment Plans

1. Navigate to a client and click **Payment Plans** on the Client navbar.
2. Click **Add Payment Plan**.

3. Enter the payment plan information. All fields are required except *End Date*.
  - **Start Date:** the beginning of the payment plan
  - **End Date:** the end of the payment plan; if left blank, the client will continue to owe an additional amount each week or month
  - **Amount:** the dollar amount expected each payment period
  - **Frequency:** *Monthly* or *Weekly*
  - **Due By**
    - For Monthly plans enter the number (15, 30, etc.)
    - For Weekly plans enter the day of the week
4. Click the **Save** button at the top of the screen.

Once the plan has been saved, the client's **Payment Plan List** will display the plan summary.

## Payment Plan List

Click **View** to add signatures, attachments, and notes.

The **Client Payment Plan** list displays key information about the client's plans.

- **ID:** the ID of this specific payment plan
- **Status:** automatically determined based on the date range of the payment plan.
  - **Future:** the plan has a *Start Date* in the future
  - **Current:** the plan has a *Start Date* on or before today, and either no *End Date*, or an *End Date* in the future
  - **Expired:** the plan has an *End Date* in the past
- **Primary Client:** the name of the main client for this payment plan
- **Frequency:** *Monthly* or *Weekly*
- **Payment:** the dollar amount expected each plan period
- **Due On:** when the payment is due each plan period
- **Last Payment:** the date of the last payment
- **Paid/Due:** the total paid towards this payment plan and the total due to-date
- **Start Date:** the beginning of the payment plan
- **End Date:** the end of the payment plan
- **Shared:** will display *No* if this plan is only for the primary client. Users with the **Security Matrix: ClientPaymentPlanAssign** right can click the *No* to add additional clients to this plan. Any payment made by any of the clients assigned to the plan will count towards the *Paid* amount.

## Functionality and Calculations

Once a plan starts, the client immediately owes the *Payment* amount. Payment in full will be expected by the *Due Date*.

For *Monthly* plans, the start of each month adds another expected payment. For *Weekly* plans, the day after the *Due Date* adds the next expected payment.

Frequency	Amount	Start Date	End Date	Due Day
Monthly	\$25	05/01/2018	04/30/2019	5
Weekly	\$25	05/01/2018	04/30/2019	Friday

Monthly Plan (Current Date)	Total Due
Any day up to and including 04/30/2018	\$0
05/01/2018 (start of plan) to 05/31/2018	\$25
06/01/2018 (start of second month) to 06/30/2018	\$50
07/01/2018 (start of third month) to 07/31/2018	\$75
08/01/2018 (start of fourth month) to 08/31/2018	\$100
On the 1st each subsequent month, another \$25 is owed	Total + \$25
From 04/01/2019 onward the full amount of the plan would be owed	\$300

Weekly Plan (Current Date)	Total Due
Any day up to and including 04/30/2018	\$0
05/01/2018 (start of plan) to 05/04/2018 (first weekly due date)	\$25
05/05/2018 (start of second week) to 05/11/2018	\$50
05/12/2018 (start of third week) to 05/18/2018	\$75
Each Saturday, another \$25 is owed	Total + \$25
04/27/2019 to 04/30/2019 (last week) and onwards	\$1,325

Client Payments link to the Payment Plan based on the date range of the payment plan and the setting **Partner Config: Payment Date to use for Client Payment Plan Matching**.

*For example, John Doe has a payment plan starting 05/01/2018 and ending 04/30/2019. He writes a check and mails it to the office. Billing staff enter the payment on 05/02/2018 and the check date is recorded as 04/30/2018. If Posting Date is used, it will count towards his payment plan. If Check Date is used, it will not.*

Please keep in mind that check and deposit dates can be updated at any time as long as the user has **Security Matrix: ClientPaymentUpdate** rights. The accounting date on the payment's *CLIENT PAYMENT ADD* ledger line can only change if the accounting period is still open and the ledger line has not been batched for ARGL export. Posting date (the ledger date) will never change.

The dollar amount paid by the client is the full value of the payment. This is the original entered amount, plus or minus any updates, plus or minus any adjustments, and minus any refunded amount.

If the payment is returned, its value is zero and will not count towards the client making a payment. The same applies if the payment is deleted.

Because Payment Plans reflect the money provided by the client, it does not matter if the payment is reconciled towards visits or left as an unapplied credit.

## Sharing Payment Plans

Once a payment plan has been created, additional clients can be assigned to it. This allows all the payments from all the assigned clients to count towards meeting the plan amount.

*For example, Julio & Maria have a payment plan for \$100 per month, paid by the 5th of each month. A \$50 payment is entered on Julio's record and a \$25 payment is entered on Maria's. Together they have paid \$75 towards the \$100 monthly amount.*

## Date Ranges

Clients can have, and be assigned to, multiple payment plans – e.g., a series of 6-month plans. However, clients can only have one payment plan for any point in time. A client cannot be assigned to another plan that would cause an overlap; a client’s plan cannot be edited to overlap a plan for the same client or any client assigned to the edited plan; nor can a new plan be created that would overlap an existing plan for that client.

## Due Date

The client owes the planned amount starting on the first day of the payment plan. If the expected amount is not received by the due date, the client is considered overdue.

In the *Billing Info* panel of the **Client Overview** page, information for the currently active Payment Plan is displayed.

The **Payment Plan Due Amount** will display the total due as per the plan up to the current date, minus any payments made by the client that match the Payment Plan. It will not reflect due amounts for future periods.

The **Next Payment Due** displays when the next payment is due. If the client has not paid the expected amount by the due date, **OVERDUE** will display instead. If the client has paid as expected, the *Next Payment Due* will be blank until the start of the next payment period. If the client has paid above the expected amount, the *Next Payment Due* will be blank until the enough periods occur to cause a positive due amount.

## Notification Triggers

Two new nightly notification triggers work with the **Due Date** to help alert staff that the client is in arrears.

- **Client Payment Overdue N Business Days:** Sends a notification when no client payments for a client have been entered against a payment plan in N business days past the Due Day. Business days are Monday-Friday, excluding dates flagged as company holidays.
- **Client Payment Overdue N Business Days w/ Min Amount:** Sends a notification when no client payments have been entered against a payment plan in N business days past the Due Day AND the Payment Plan overdue amount is equal or greater to the specified amount. Business days are Monday-Friday, excluding dates flagged as company holidays.

Please note: Holidays are configured on the **Admin** tab > **Daily Activities** section > **Company Holidays** link. See *Indicating Company Holidays in Week & Month Views* in Credible Help for more information.

## Reporting

On the **Billing** tab, the **Client Payment Plans List** allows searching and exporting of all payment plans across all clients.

The **Manage Client Payments** list includes a filter for **Payment Plan ID**. Entering the ID will display all payments linked to that payment plan. Note that this overrides the **Search Date** type and start/end date options.

On **Advanced Client Search**, **Payment Plan Start Date** and **Payment Plan End Date** are available as **Custom Filters** and **Custom Fields**.

For custom exports, the following tables are available:

- ClientPaymentPlan
- ClientPaymentPlanAttachment
- ClientPaymentPlanGroup
- ClientPaymentPlanNote
- ClientPaymentPlanSignature

## August Enhancements

### Billing Enhancements

#### Timely Filing and Corrected Claims

Billing staff are provided with additional information for monitoring the claims process in this enhancement. Payers can now be configured to record the number of days allowed for submitting an initial claim (*Timely Filing*) and submitting a correction (*Corrected Claims*). These values are then used to calculate how many days remain for a visit.

#### Workflow

**Timely Filing Days** and **Corrected Claims Days** are available in **Advanced Visit Search** under **Custom Fields** and **Custom Filter**. Billing staff can create saved searches that allow for quickly finding visits that are approaching the filing deadlines. For example, searching for completed visits with *Timely Filing Days*  $\leq 10$  will find visits that need to be batched no later than 10 days from now.

- **Timely Filing Days** is calculated as the number of days between the visit's service date and the time the search is run subtracted from the current payer's **Timely Filing Days** setting.
- **Corrected Claims Days** is calculated from the number of days between the visit's most recent EOB date and the time the search is run subtracted from the most recent EOB payer's **Corrected Claims Days** setting.

#### Configuration

1. Under the **Admin** tab or **Billing** tab, select **Billing Payer**.
2. Click **Edit** for the desired payer.
3. Enter a number between 1 and 1000 for the **Timely Filing Days** and/or **Corrected Claims Days**. If left blank, the payer and its visits will be excluded from calculations.
  - Note that these are calculated in real time when running an **Advanced Visit Search**. They are not fields that are available in the **Data Dictionary** or in the **Export Tool**.

## Geo Area Information in CMS 1500 Box 33

Some payers are requiring service location information in **Box 33**, instead of the standard provider information. To accommodate this, new settings have been added to allow Box 33 to send the **Geo Area name**, the **Geo Area address and phone**, and/or the **Geo Area NPI**.

### Workflow

If configured to use the Geo Area information for any part of Box 33, all claims that appear on a single page of the CMS 1500 will be for the same Geo Area. If the visit's location does not have a Geo Area, or if that Geo Area is missing the information, the **Pay-To Provider** from the **Billing Group** will be used.

### Configuration

By default, all payers are configured to use the **Pay-To Provider** information from the visit's billing group.

1. Under the **Admin** or **Billing** tab, select **Billing Payer**.
2. Click **Edit** for the desired payer.
3. In the **CMS 1500 Claim Overrides** section, select **Geo Area** from **Service Location** for **Box 33 Billing Provider Name**, **Box 33 Billing Provider Address & Phone**, and/or **Box 33 Billing Provider NPI**.
4. Click **Save Settings**.

For more information on Geo Areas and Locations, see Credible Help.

## Geo Area Information in CMS 1450 Box 1 and Box 56

Some payers are requiring service location information in **Boxes 1 and 56** instead of the standard billing provider information.

### Workflow

If configured to use the **Geo Area** information for **Box 1** or **Box 56**, all claims that appear on a single page of the 1450 will be for the same **Geo Area**. If the visit's location does not have a **Geo Area**, or if that **Geo Area** is missing the information, the **Billing Provider** from the **Billing Group** will be used.

### Configuration

The existing **Payer Config: Box 1 Print Out Address** setting has been replaced and split into two new settings. On initial release, payers will have the following default settings:

- If **Box 1 Print Out Address** was checked:
  - **Box 1 Billing Provider Name** will be configured to **Partner Name from Partner Config**; and
  - **Box 1 Billing Provider Address & Phone** will be configured to **Printout Address & Printout Telephone from Partner Config**.
- If **Box 1 Print Out Address** was not checked:
  - **Box 1 Billing Provider Name** will be configured to **Billing Provider from Billing Group**; and
  - **Box 1 Billing Provider Address & Phone** will be configured to **Billing Provider from Billing Group**, and **Box 56 Billing Provider NPI** will be configured to **Billing Provider from Billing Group**.

Payers that require the Geo Area information will need to be edited manually.

1. Under the **Admin** or **Billing** tab, select **Billing Payer**.
2. Click **Edit** for the desired payer.
3. In the **CMS 1450 Claim Overrides** section, select **Geo Area from service Location** for:
  - **Box 1 Billing Provider Name,**
  - **Box 1 Billing Provider Address & Phone, and/or**
  - **Box 56 Billing Provider NPI.**
4. Click **Save Settings**.

For more information on Geo Areas and Locations, see *Credible Help*.

## Client Portal Enhancements

### Display Visit Summary Notes

This enhancement allows clients to see the provider's notes on their visit summary from inside the client portal. The summary notes are only displayed when the visit has been submitted, the **Visit Type** has its **include\_summary** flag set to **True**, and the provider has entered notes for the visit.

### Simultaneous Access to Client Portal 2.0 as Admin and User

Agency staff no longer need to log in with different browsers to access the portal as a user and as an administrator at the same time. It is now possible to do this using tabs within the same browser.

## Inpatient Enhancements

### Prescription History

This enhancement displays the status of a prescription under the **Change** column in the **Client Medications** list. It is currently displayed in the history of the prescription.

### Client Names in Room Search

To facilitate Inpatient/Residential bed and floor management, the room search function has been enhanced to obscure the PHI for occupied beds in cases where the client occupying the bed is not on the same team and program as the logged user.

### Cancel Prescriptions Messages and DEA Numbers

If a provider has a DEA number associated with a clinic location, then any Cancel Prescription messages sent for a prescription prescribed from that clinic location will include this DEA number. Please note: A DEA number is automatically associated with a clinic location if the clinic location is in the same state as the state where the provider is a DEA registrant.

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## August Updates

### Billing Updates

#### Custom Invoices and Internet Explorer

In some cases, custom invoices generated in Internet Explorer did not pull in the signature properly. The signature now pulls into the custom invoice/batch as it should.

#### Primary Claim Grouping

When using a payer group where some payers in the group have the Primary Claim Grouping for Secondary Claims Billing Payer option checked, Credible sent the last payer with the option as the main payer. The correct main payer is now sent, even in this scenario.

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### Inpatient Updates

#### Cancel Service Levels

It is no longer possible to send a **Cancel Rx** instruction for a Credible eRx prescription unless the prescriber has Cancel Service Level rights at the clinic.

#### eMAR and Time Zones

When creating an eMAR schedule, the **Start Recurrence** time will now reflect the Partner's selected time zone.

#### Error Adding Medication

Credible has resolved an issue where specific medication would cause an error when being added. Those medications can now be added without issue.

#### Formularies and Rx Creation

In certain scenarios, users were unable to creation prescriptions for specific medications. Users can now properly create prescriptions for medications when **Use Formulary Benefit** is checked.

#### Legacy Orders and Pending Rx

An issue was resolved where Rx orders with **Skip Pending** checked were automatically being signed upon the completion of another order.

#### Primary Diagnosis on Facility Whiteboard

When a client's primary diagnosis was a DSM-5 code, it did not display on the whiteboard client overview. It now displays in the client's profile within the Inpatient tab for any type of diagnosis: DSM-5, ICD-9, ICD-10.

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## Credible Core Updates

### Adding Documentation to Visits

When a visit includes documentation and the user returns to it at any point, the documentation from that visit should appear in the documentation box as well as extended field documentation. In some instances, users were using the **Edit Full Visit** function on a completed visit, entering documentation, and saving it, but on reviewing the visit, the documentation was missing. This no longer occurs.

### Admin Logging Report

The **Admin Logging** report (**Reports** tab > **Admin** button > **Admin Logging** link) was only returning up to 10,000 rows, no matter how large the data set should have been. This has been corrected, and the report will now return up to 60,000 records.

### Free Text Documentation

The free text documentation box should only be displayed when the Partner's configuration permits it. Previously, it was sometimes appearing. This no longer occurs; the configuration is now respected properly.

### Overlapping Visit Blocks

**Partner Config: Block Overlapping Employees by Visit Types** could be checked and highlighting visit types to block from overlapping would still sometimes allow recording of overlapping visits. This no longer occurs.

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## Client Portal 2.0 Updates

### Upcoming Appointments in Client Portal 2.0

When a client's scheduled appointment was cancelled from Credible Core, Client Portal still showed that the appointment was valid. Cancelled appointments should now disappear from the portal, displaying "No next appointments scheduled" when no other appointments are currently scheduled.

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## Credible Plan Updates

### Credible Plan Element Removal

When an element was removed from a Credible Plan, it became impossible to add others of the same type. During Credible Plan creation or editing, users are not allowed to remove the base elements of a plan-tree (Problem, Goal, Objective, Intervention), but can add and remove other elements.

### Extended Fields Default Values

**Credible Plan Extended Fields** did not contain a "Select" option, sometimes forcing users to select an invalid option so they could save the plan. A "Select" option has now been added for every extended field dropdown in Credible Plan.

## Extended Field Lookup

In some instances, **Extended Fields** which were created with custom lookups were not displayed properly. This should no longer occur.

## Golden Thread Data

In certain scenarios, the Golden Thread was not pulling data entered in visit forms, even though it was marked for inclusion. This issue has been addressed, and all Golden Thread data is properly included.

## Program-Specific Plans

Some Program-specific Credible Plans were not loading properly due to some latency issues. This has been resolved.

## Signature Pad Issues

For some users the signature pad did not function when capturing signatures for a Credible Plan. This has been corrected.