From: Credible Behavioral Health Software <marketing@credibleinc.com>
Sent: Monday, September 17, 2018 11:01 AM
To: Credible Documentation
Subject: Credible Update: Upcoming Enhancements & Task Resolutions

CREDIBLE
Behavioral Health Software

September Enhancements & Task Resolutions

DEAR CREDIBLE,

On Thursday, September 20th, between 10:15 PM - 12:15 AM ET, Credible's Tech Team will release our latest features, enhancements and updates. September's release includes 4 new features, 12 enhancements, and 23 Product Updates.

Click here for additional details and a complete list of September's release.

Learning Opportunities

On **Friday, September 21st**, from **2:00pm-3:00pm EDT**, there will be a free webinar to demonstrate and review the enhancements and updates included in this release. Click here to register and reserve your seat!

New Features

Inpatient/Residential Security Matrix

To facilitate Inpatient/Residential bed and floor management, two new Security Matrix items have been added to allow read-only access to Inpatient/Residential features.

- **Security Matrix: IPCensusVIewOnly:** Use this permission to give a user read-only access to the Inpatient/Residential census. They will be able to open and view census items but not edit or save them.
- **Security Matrix: ClientBedAssignView:** Use this entry to give a user read-only access to bed assignment details. They will be able to open and view bed assignments, but not change them.

Faculty- and Wing-Based Inpatient Access

Currently, any user with the right Security Matrix: InpatientModule can view the status and other information about any beds in any of the Agency's facilities. This new feature provides fine-grained controlled of the visibility and actions that users may perform on the beds associated with facilities and wings, by allowing EHR Admins to assign specific facilities and wings to individual users.

Security Matrix: InpatientAdministration

Users with the **Security Matrix: InpatientAdministration** right can assign and un-assign facilities and wings for employees. They can access the facility assignments via the Facility navbar button or from the new **Facility** button in the user's **Assignment** section (as with Client, Program, or Team). From this **Facility** page, any facility or wing can be assigned or un-assigned for the user.

Please note: At launch, any user who has the right **Security Matrix: InpatientModule** will be assigned to all facilities and wings by default; no one will loose access to any beds.

Enhanced Functions

- The metrics displayed on the Inpatient tab (Utilization, Capacity, Open, Occupied, On Hold, R&S) are calculated based on the assigned facilities and wings and will be indicated as such. For example, if the user is not assigned all the facilities and wings then **Total** will be displayed as **Total (Assigned)**.
- Users will only be able to select those facilities assigned to them from the **Facilities** dropdown menu. The facilities not assigned to the user will be grayed out and unavailable.

- These assignments also determine which beds the user can perform **Bed Board** actions on. The user needs to be assigned to the facility and wing the bed is associated with to be able to perform bed board actions (Move, Hold, etc.) on the bed. The user will not be able to see any information about beds that the user is not assigned to.

The facility assignment actions are logged and can be accessed for auditing and other purposes on the user's log.

Payer Copy and Payer Templates

These new features allow existing payers to be copied to create a new payer (for one-off or ad hoc payer creation), or the creation of payer templates (for creating similar new payers on a repeat basis). These features will save time and reduce the chance of misconfiguration for your Agency.

While most data is copied into the new payer or template, some fields are omitted to prevent accidental creation of duplicates which could result in mismatches with incoming files. The specific fields omitted are detailed in the workflow notes in Credible Help.

Configuration: Users who will be creating new payers through these features must have the **Security Matrix: Billing Config** permission.

Enhancements

Billing Enhancements

Payment Plan Display on Client Statement 2.0

Summary information about the client's payment plan will appear in the **Notes** and **Messages** sections of their statement, reminding clients of their agreements. Here are two samples:

- Sample reminder: "Per your payment plan, $5.00 is due on the 2nd of each month".
- Sample overdue amount: "Per your payment plan, $5.00 is due on the 2nd of each month. $75.00 is overdue".

Any additional messages configured in Client Statements 2.0 will appear after the payment plan information.

Configuration: Both **Partner Config: Use Client Statements 2.0** and **Partner Config: Use Client Payment Plans** must be checked. Additionally, users who will be creating statements must have the **Security Matrix: GenerateStatements** right.

Payment Plan Information in Client Portal 2.0

Clients and their authorized representatives can use Client Portal 2.0 to review their payment plans.

Client Workflow

1. The client logs in to the portal.
2. They then click the **My Payments** button on the navigation panel.
3. By default, a grid of the client's active payment plans will display at the top.
4. Clicking **Show All** will add expired and future plans to the grid.

Configuration: Client Portal 2.0 must be activated for your Credible Domain. To request this, please submit a task ticket to Partner Services. Also, the portal Role's rights must include **View client's billing history and outstanding bills**.

837I Loop 2010AA: Billing Provider Names uses Geo Area Info

Some 837I payers are requiring service location information in Loop 2010AA instead of the standard billing provider information.

Workflow: If configured to use the Geo Area information for Loop 2010AA, all claims that under that loop 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 needed information, the **Billing Provider** from the Billing Group will be used.

Configuration

Upon release, all payers will be set by default to **Billing Provider from Billing Group** for the following new settings:

- 837I Billing Provider Name (2010AA)
- 837I Billing Provider Address & Contact Number (2010AA)
- 837I Billing Provider NPI (2010AA)

Payers that require the Geo Area information will need to be edited manually. Instructions for this process — as well as more information on **Geo Areas** and **Locations** — can be found in Credible Help.

837P Loop 2010AA: Billing Provider Name uses Geo Area Info

This enhancement is functionally the same as the previous item, but addressing 837P payers instead of 837I payers.

CMS 1500 Page Separation

Credible has added a setting to control which services can appear on the same page of a CMS 1500 based on the employee. Once configured, claims on the CMS 1500 will automatically be grouped together based on the setting **Payer Config: Separate Pages By**. This setting has four options:

- **N/A:** The visits on a single 1500 page can be for different visit employees and different rendering employees.
- **Service Employee:** All the visits on a single 1500 page will be for the same visit employee and can have different rendering employees.

- **Rendering Employee:** All the visits on a single 1500 page will be fore the same rendering employee and can have different visit employees.
- **Rendering Employee NPI:** All the visits on a single 1500 page will be for the same rendering NPI and can have different visit and rendering employees.

Configuration: On release, existing payers will default to **Service Employee** for the **Payer Config: Separate Pages By** setting. Payers that have different requirements will need to be manually updated.

Examples can be found in Credible Help.

Visit Summary in Client Portal 2.0

Credible has added the ability for clients and other portal users to view visit summaries from the **My Visits** section of Client Portal 2.0. Visit summaries provide a customized view of documentation for staff, clients, external providers, and families. Clinical summaries can be accessed via the **Visit Details** screen and Credible Client Portal.

Workflow

1. The client user logs in to the portal.
2. They click on **My Visits** in the left-handed navigation.
3. A column for **Visit Summary** is displayed. The user clicks on the **View Summary** button.
4. The **Visit Summary** is displayed. Note that only the Category Name and Questions which have been marked **Include in Summary = TRUE** will be shown.
5. If desired, the client can print the visit summary.

Credible Plan

Credible Plan Navbar View

A section has been added to each element in the view of a Credible Plan from the navbar. This section will display the previous documentation as well as with the date of the visit, and the visit ID that is linked to the visit view. This history is also present in the print view.

Please note: The documentation history does not display on the navbar Edit view, nor does it display in the Visit view. For the visit, the only documentation shown is from that visit.

No configuration is required for this enhancement.

Extended Fields Header

To improve the appearance of Credible Plans, the header label **Extended Fields** has been removed. The name of the actual extended field will now display and print in bold, allowing for better contrast between the name and the value of the of the field.

Clinical Modules

Standard Order Sets Enhancements

Credible has expanded **Standing Order Sets** to use all **Orders 2.0** categories and functionality. Standing Order Sets may now be defined to use the expanded **Order Categories** and user-defined **Order Types**.

Additionally, the labels in Orders 1.0 and Orders 2.0 have been standardized.

- For **Orders 1.0**, the Standing Order Sets categories **Create Rx** and **Meds** have been renamed to **Create Prescription** and **Add Medication**, respectively.
- For **Orders 2.0**, the **Create Medication** button under **More Actions** has been renamed to **Add Medication** for consistency.

Consult Orders

The **Consult Order** in Orders 2.0 has been updated to include structured information specific to consults. The provider who is being consulted, how that consult was transmitted, the purpose of the consult, and any response gathered from the consult can be collected in a structured manner and reported on.

Workflow: When entering a **Consult Order**, select the **Provider** who is being consulted and how they are being notified. Optionally, also collect **Consult Reason**, and how the notification is being sent.

Consult Orders Client Page Widget

Credible has added a new Client Page widget for **Consult Orders**. The client's most recent Consults can be displayed on the **Client Home Page** along with **Referral Orders**.

Medications Enhancement

Credible has updated the **Medications** page to ensure compatibility with eMAR 2.0. The dosage and frequency information entered for the Medication displays correctly in eMAR 2.0. For Agencies using eMAR 2.0 the new **Add Medications** page will be used in the **Meds** sections of Standing Orders. Additionally, when the Standing Order is placed, the dosage and frequency information entered for the Medication displays correctly in **eMAR 2.0**.

Credible plans to push these enhancements **Thursday evening, September 20th, between 10:15 PM - 12:15 AM ET**. There may be intermittent service during this time.

Should you have any questions, please do not hesitate to contact a Partner Service Coordinator for assistance at 301-652-9500. *Please note: In an effort to continually improve our Partnership and quality of service, a task resolution audit will be emailed to you upon the resolution and closure of every single task you have submitted. We strongly encourage you to utilize this tool so that we can better support you.*

Thank you for your continued Partnership,

Jaclyn O'Donnell
Executive Vice President
o. 301-652-9500 I f. 240-744-3086
e. jaclyn.o'donnell@credibleinc.com I w. www.credibleinc.com

Mission: Improve the quality of care and lives in Behavioral Health for clients, families, providers and management.

301.652.9500 I info@credibleinc.com I www.credibleinc.com

This communication is proprietary and confidential to Credible and its Partners. No part of this document may be disclosed to a third party or published externally without prior consent of Credible Behavioral Health, Inc.