CREDIBLE
Behavioral Health Software

Product Release Communication

August 2018 – Comm Freeze Edition (d1)

For Credible Staff Only

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August Feature: Client 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.

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: **Start Date, End Date**, **Amount, Frequency (**Monthly or Weekly), and **Due By.**
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.

The **Client Payment Plan** list displays key information about the client's plans. Click **View** to add signatures, attachments, and notes.

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.

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**, and **Client Payment Overdue N Business Days w/ Min Amount**.

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**.

Configuration

Activation of **Client Payment Plans** uses two new settings in **Partner Config** and 12 new **Security Matrix** rights.

Full details on configuration, functionality, calculations, and use are found in Credible Help.

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.

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 <= 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 instructions are found in *Credible Help*.

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**.

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.

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

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.

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.

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.

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 within the same browser on different tabs.

Inpatient Enhancements

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.

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.

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.

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.

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

Issue: Setting of "Block Overlapping Employees by Visit Types" and highlighting visit types to block from overlapping it is still allowing me to record visits that overlap. Resolution: Overlapping is not allowed when "Block Overlapping Employees by Visit Types" is enabled on Partner Config

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.

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 Functions

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

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