

Security Matrix Settings Guide

Draft Version 1.0 – Last Updated July 15, 2016

Introduction

The purpose of this guide is to clearly illustrate the functionality of every Security Matrix option. This will include screenshots, as well as information on any additional settings that would need to be active in order for the Matrix setting to be relevant.

Version History:

| Version | Created By | Details | Date Completed |
|---------|------------------|---------------|----------------|
| 1.0 | Bill Chamberlain | Initial Draft | |

Table of Contents

(You can click the Matrix Section to be brought to those pages)

| | |
|--|-----|
| Settings that do not currently have documentation: | 4 |
| Matrix Section: Admin | 5 |
| Matrix Section: Admin Time..... | 22 |
| Matrix Section: Assignments..... | 29 |
| Matrix Section: Attachments | 48 |
| Matrix Section: Billing | 70 |
| Matrix Section: Client Visit Admin | 91 |
| Matrix Section: Client Visits | 103 |
| Matrix Section: Clients | 135 |
| Matrix Section: Clients Subsidiary..... | 158 |
| Matrix Section: Credible eRx..... | 215 |
| Matrix Section: EMAR | 227 |
| Matrix Section: Employee Forms | 237 |
| Matrix Section: Employees | 251 |
| Matrix Section: Forms | 281 |
| Matrix Section: Funds | 284 |
| Matrix Section: MyCredible Admin | 293 |
| Matrix Section: Physician Orders | 296 |
| Matrix Section: Reports | 301 |
| Matrix Section: Scheduler | 315 |
| Matrix Section: Standing Order Sets | 334 |

Settings that do not currently have documentation:

If you have any questions on the following settings, please feel free to submit a Task Ticket:

| | | |
|----------------------|----------------------------|----------------------------|
| BillingAddCopay | PaymentControlReopen | TxPlusDocument |
| BillingRetrieveFiles | ClientVisitDeleteSignature | PrescriptionApproveAll |
| ClientPaymentAdd | ClientVisitLinkClient | MessagingHubAnswerMessages |
| ClientPayments | ClientVisitOverrideEmp | ToDoListEditOtherEmp |
| ClientPaymentView | ClientVisitViewExt | MyCWAdmin |
| EnrollmentBypass | ClientVisitViewSummary | MyCWDashboard |
| MatrixHistory | VisitEntryOtherEmpAsSelf | MyCWDashboardClient |
| PaymentControlAlter | VisitEntryOtherEmpNoSig | MyCWDashboardEmployee |
| PaymentControlClose | UnmatchedLabResults | MyCWManager |
| PaymentControlDelete | TxPlusActivate | PhysicianOrderLineComplete |
| CustomExportEdit | PlannerCopyAll | PlannerUpdate |

Matrix Section: Admin

AdminLookupUpdate

Function:

- This setting controls whether the “Lookups and Code Tables” section of the Admin tab will be displayed.
- Also controls whether the User will be able to access the “Accounting Periods” and “835 Adjustment Codes” page from the Billing Tab.
 - Users will still be able to see the Accounting Periods link if this setting is disabled, but clicking the link to enter the page will display an “Insufficient Rights” notification.

Location(s) this setting affects:

- Admin Tab
- Billing Tab -> Accounting Periods
- Billing Tab -> 835 Adjustment Codes

Screenshots:



Admin Tab with AdminLookupUpdate ENABLED



Admin Tab with AdminLookupUpdate DISABLED

AdminView

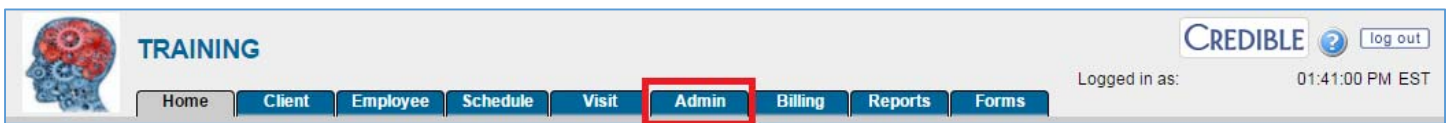
Function:

- Controls whether the “Admin” tab displays for users under that Profile.
 - **NOTE:** This setting supercedes any Matrix setting that controls links within the Admin Tab, since that tab will no longer be visible.

Location(s) this setting affects:

- The tabs that typically display at the top of the page.

Screenshots:



With AdminView ENABLED



With AdminView DISABLED

BedBoardAdmin

Function:

- Controls whether three links in the Admin Tab display in the “Lookups and Code Tables” section:
 - Bed Board Facilities
 - Bed Board Rooms
 - Bed Board Interval Reasons
- **NOTE:** If the AdminLookupUpdate Matrix setting is disabled, this setting will be irrelevant, since the entire “Lookups and Code Tables” section will be removed.

Location(s) this setting affects:

- Admin Tab

Screenshots:

This screenshot shows the Admin Tab menu with the 'Lookups and Code Tables' section expanded. The following items are listed under this section:

- Custom Lookup Categories
- Custom Lookup Items
- Admin Time Types
- Geo Areas / Offices
- Axis 1 | Axis 2 | Axis 3
- ICD-10 Recode
- Care Provider Types
- External Care Providers
- Agencies
- Group Activity Types
- Credential Types
- Client Status Types
- Episode Status Types
- Contact Types
- Relationship Types
- Tx Categories
- Roles
- Program/Role Assoc
- Form Groups
- Form Group Visit Types
- Authorization Levels
- Employee Visit Type
- File Folders Admin
- Attachment Names
- Medical Conditions
- Bed Board Facilities
- Bed Board Rooms
- Bed/Foster Interval Reasons
- Med Severity Levels
- Lab Facilities

The items 'Bed Board Facilities', 'Bed Board Rooms', and 'Bed/Foster Interval Reasons' are highlighted with a red box.

With BedBoardAdmin ENABLED

This screenshot shows the Admin Tab menu with the 'Lookups and Code Tables' section expanded. The following items are listed under this section:

- Custom Lookup Categories
- Custom Lookup Items
- Admin Time Types
- Geo Areas / Offices
- Axis 1 | Axis 2 | Axis 3
- ICD-10 Recode
- Care Provider Types
- External Care Providers
- Agencies
- Group Activity Types
- Credential Types
- Client Status Types
- Episode Status Types
- Contact Types
- Relationship Types
- Tx Categories
- Roles
- Program/Role Assoc
- Form Groups
- Form Group Visit Types
- Authorization Levels
- Employee Visit Type
- File Folders Admin
- Attachment Names
- Medical Conditions
- Med Severity Levels
- Lab Facilities

The items 'Bed Board Facilities', 'Bed Board Rooms', and 'Bed/Foster Interval Reasons' are missing from this screenshot.

With BedBoardAdmin DISABLED

ClinicalSupportAdmin

Function:

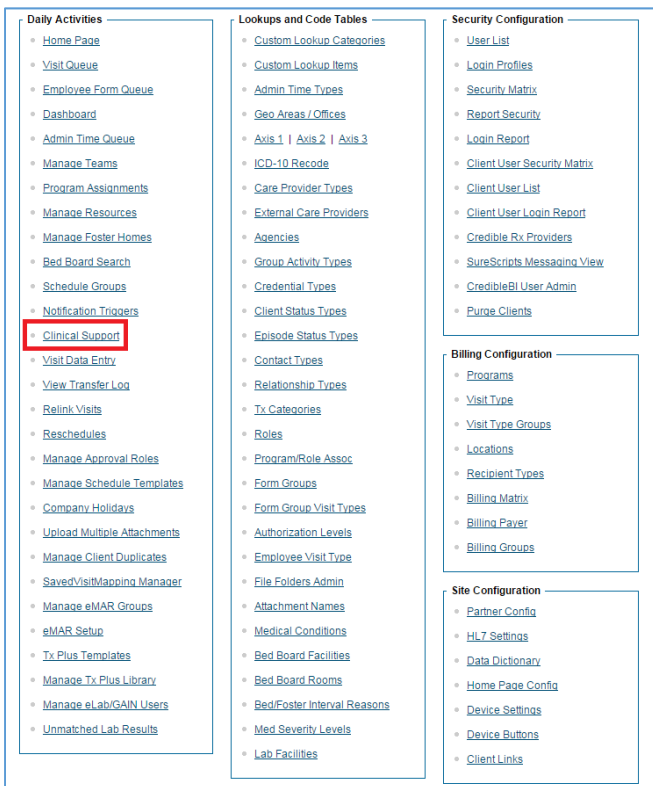
- Controls whether a user will be able to access the “Clinical Support” page from the Admin Tab.
 - If disabled, the user will still be able to see the link, but after clicking it, they will only see an “insufficient rights” message.

You do not have sufficient access rights to use this function. Please contact the system administrator or Credible support.

Location(s) this setting affects:

- Admin Tab

Screenshots:



Where the 'Clinical Support' Link displays from the Admin Tab

DataDictionary

Function:

- Controls whether the “Data Dictionary” link in the Admin tab is viewable.

Location(s) this setting affects:

- Admin Tab

Screenshots:

This screenshot shows the Admin tab menu with the 'Data Dictionary' link visible and highlighted in red. The menu is organized into several sections:

- Daily Activities:** Home Page, Visit Queue, Employee Form Queue, Dashboard, Admin Time Queue, Manage Teams, Program Assignments, Manage Resources, Manage Foster Homes, Bed Board Search, Schedule Groups, Notification Triggers, Clinical Support, Visit Data Entry, View Transfer Log, Relink Visits, Reschedules, Manage Approval Roles, Manage Schedule Templates, Company Holidays, Upload Multiple Attachments, Manage Client Duplicates, SavedVisitMapping Manager, Manage eMAR Groups, eMAR Setup, Tx Plus Templates, Manage Tx Plus Library, Manage eLab/GAIN Users, Unmatched Lab Results.
- Lookups and Code Tables:** Custom Lookup Categories, Custom Lookup Items, Admin Time Types, Geo Areas / Offices, Axis 1 | Axis 2 | Axis 3, ICD-10 Recode, Care Provider Types, External Care Providers, Agencies, Group Activity Types, Credential Types, Client Status Types, Episode Status Types, Contact Types, Relationship Types, Tx Categories, Roles, Program/Role Assoc, Form Groups, Form Group Visit Types, Authorization Levels, Employee Visit Type, File Folders Admin, Attachment Names, Medical Conditions, Bed Board Facilities, Bed Board Rooms, Bed/Foster Interval Reasons, Med Severity Levels, Lab Facilities.
- Security Configuration:** User List, Login Profiles, Security Matrix, Report Security, Login Report, Client User Security Matrix, Client User List, Client User Login Report, Credible Rx Providers, SureScripts Messaging View, CredibleBI User Admin, Purge Clients.
- Billing Configuration:** Programs, Visit Type, Visit Type Groups, Locations, Recipient Types, Billing Matrix, Billing Payer, Billing Groups.
- Site Configuration:** Partner Config, HL7 Settings, **Data Dictionary** (highlighted), Home Page Config, Device Settings, Device Buttons, Client Links.

With DataDictionary ENABLED

This screenshot shows the Admin tab menu with the 'Data Dictionary' link missing. The menu structure is identical to the previous screenshot, but the 'Data Dictionary' link is not present in the Site Configuration section.

- Daily Activities:** Home Page, Visit Queue, Employee Form Queue, Dashboard, Admin Time Queue, Manage Teams, Program Assignments, Manage Resources, Manage Foster Homes, Bed Board Search, Schedule Groups, Notification Triggers, Clinical Support, Visit Data Entry, View Transfer Log, Relink Visits, Reschedules, Manage Approval Roles, Manage Schedule Templates, Company Holidays, Upload Multiple Attachments, Manage Client Duplicates, SavedVisitMapping Manager, Manage eMAR Groups, eMAR Setup, Tx Plus Templates, Manage Tx Plus Library, Manage eLab/GAIN Users, Unmatched Lab Results.
- Lookups and Code Tables:** Custom Lookup Categories, Custom Lookup Items, Admin Time Types, Geo Areas / Offices, Axis 1 | Axis 2 | Axis 3, ICD-10 Recode, Care Provider Types, External Care Providers, Agencies, Group Activity Types, Credential Types, Client Status Types, Episode Status Types, Contact Types, Relationship Types, Tx Categories, Roles, Program/Role Assoc, Form Groups, Form Group Visit Types, Authorization Levels, Employee Visit Type, File Folders Admin, Attachment Names, Medical Conditions, Bed Board Facilities, Bed Board Rooms, Bed/Foster Interval Reasons, Med Severity Levels, Lab Facilities.
- Security Configuration:** User List, Login Profiles, Security Matrix, Report Security, Login Report, Client User Security Matrix, Client User List, Client User Login Report, Credible Rx Providers, SureScripts Messaging View, CredibleBI User Admin, Purge Clients.
- Billing Configuration:** Programs, Visit Type, Visit Type Groups, Locations, Recipient Types, Billing Matrix, Billing Payer, Billing Groups.
- Site Configuration:** Partner Config, HL7 Settings, Home Page Config, Device Settings, Device Buttons, Client Links.

With DataDictionary DISABLED

FosterHomeAdmin

Function:

- Controls whether the “Manage Foster Homes” link in the Admin tab is viewable.
 - **NOTE:** Within the Partner Config, the Partner must also have “Use Foster Homes” enabled. Otherwise, this Matrix setting will be irrelevant.

Location(s) this setting affects:

- Admin Tab

Screenshots:

This screenshot shows the Admin Tab menu structure when FosterHomeAdmin is enabled. The menu is organized into three main sections: Daily Activities, Lookups and Code Tables, and Security Configuration. The 'Manage Foster Homes' link is highlighted with a red box in the Daily Activities section.

- Daily Activities**
 - Home Page
 - Visit Queue
 - Employee Form Queue
 - Dashboard
 - Admin Time Queue
 - Manage Teams
 - Program Assignments
 - Manage Resources
 - Manage Foster Homes**
 - Bed Board Search
 - Schedule Groups
 - Notification Triggers
 - Clinical Support
 - Visit Data Entry
 - View Transfer Log
 - Relink Visits
 - Reschedules
 - Manage Approval Roles
 - Manage Schedule Templates
 - Company Holidays
 - Upload Multiple Attachments
 - Manage Client Duplicates
 - SaveVisitMapping Manager
 - Manage eMAR Groups
 - eMAR Setup
 - Tx Plus Templates
 - Manage Tx Plus Library
 - Manage eLab/GAIN Users
 - Unmatched Lab Results
- Lookups and Code Tables**
 - Custom Lookup Categories
 - Custom Lookup Items
 - Admin Time Types
 - Geo Areas / Offices
 - Axis 1 | Axis 2 | Axis 3
 - ICD-10 Recode
 - Care Provider Types
 - External Care Providers
 - Agencies
 - Group Activity Types
 - Credential Types
 - Client Status Types
 - Episode Status Types
 - Contact Types
 - Relationship Types
 - Tx Categories
 - Roles
 - Program/Role Assoc
 - Form Groups
 - Form Group Visit Types
 - Authorization Levels
 - Employee Visit Type
 - File Folders Admin
 - Attachment Names
 - Medical Conditions
 - Bed Board Facilities
 - Bed Board Rooms
 - Bed/Foster Interval Reasons
 - Med Severity Levels
 - Lab Facilities
- Security Configuration**
 - User List
 - Login Profiles
 - Security Matrix
 - Report Security
 - Login Report
 - Client User Security Matrix
 - Client User List
 - Client User Login Report
 - Credible Rx Providers
 - SureScripts Messaging View
 - CredibleBI User Admin
 - Purge Clients
- Billing Configuration**
 - Programs
 - Visit Type
 - Visit Type Groups
 - Locations
 - Recipient Types
 - Billing Matrix
 - Billing Payer
 - Billing Groups
- Site Configuration**
 - Partner Config
 - HL7 Settings
 - Data Dictionary
 - Home Page Config
 - Device Settings
 - Device Buttons
 - Client Links

With FosterHomeAdmin ENABLED

This screenshot shows the Admin Tab menu structure when FosterHomeAdmin is disabled. The menu is organized into three main sections: Daily Activities, Lookups and Code Tables, and Security Configuration. The 'Manage Foster Homes' link is not visible in the Daily Activities section.

- Daily Activities**
 - Home Page
 - Visit Queue
 - Employee Form Queue
 - Dashboard
 - Admin Time Queue
 - Manage Teams
 - Program Assignments
 - Manage Resources
 - Bed Board Search
 - Schedule Groups
 - Notification Triggers
 - Clinical Support
 - Visit Data Entry
 - View Transfer Log
 - Relink Visits
 - Reschedules
 - Manage Approval Roles
 - Manage Schedule Templates
 - Company Holidays
 - Upload Multiple Attachments
 - Manage Client Duplicates
 - SaveVisitMapping Manager
 - Manage eMAR Groups
 - eMAR Setup
 - Tx Plus Templates
 - Manage Tx Plus Library
 - Manage eLab/GAIN Users
 - Unmatched Lab Results
- Lookups and Code Tables**
 - Custom Lookup Categories
 - Custom Lookup Items
 - Admin Time Types
 - Geo Areas / Offices
 - Axis 1 | Axis 2 | Axis 3
 - ICD-10 Recode
 - Care Provider Types
 - External Care Providers
 - Agencies
 - Group Activity Types
 - Credential Types
 - Client Status Types
 - Episode Status Types
 - Contact Types
 - Relationship Types
 - Tx Categories
 - Roles
 - Program/Role Assoc
 - Form Groups
 - Form Group Visit Types
 - Authorization Levels
 - Employee Visit Type
 - File Folders Admin
 - Attachment Names
 - Medical Conditions
 - Bed Board Facilities
 - Bed Board Rooms
 - Bed/Foster Interval Reasons
 - Med Severity Levels
 - Lab Facilities
- Security Configuration**
 - User List
 - Login Profiles
 - Security Matrix
 - Report Security
 - Login Report
 - Client User Security Matrix
 - Client User List
 - Client User Login Report
 - Credible Rx Providers
 - SureScripts Messaging View
 - CredibleBI User Admin
 - Purge Clients
- Billing Configuration**
 - Programs
 - Visit Type
 - Visit Type Groups
 - Locations
 - Recipient Types
 - Billing Matrix
 - Billing Payer
 - Billing Groups
- Site Configuration**
 - Partner Config
 - HL7 Settings
 - Data Dictionary
 - Home Page Config
 - Device Settings
 - Device Buttons
 - Client Links

With FosterHomeAdmin DISABLED

ManageApprovalRoles

Function:

- Controls whether the “Manage Approval Roles” link in the Admin tab is viewable.

Location(s) this setting affects:

- Admin Tab

Screenshots:

This screenshot shows the Admin menu with the 'Manage Approval Roles' link highlighted in red. The menu is organized into three columns:

- Daily Activities:** Home Page, Visit Queue, Employee Form Queue, Dashboard, Admin Time Queue, Manage Teams, Program Assignments, Manage Resources, Manage Foster Homes, Bed Board Search, Schedule Groups, Notification Triggers, Clinical Support, Visit Data Entry, View Transfer Log, ReLink Visits, Reschedules, **Manage Approval Roles**, Manage Schedule Templates, Company Holidays, Upload Multiple Attachments, Manage Client Duplicates, Saved Visit Mapping Manager, Manage eMAR Groups, eMAR Setup, Tx Plus Templates, Manage Tx Plus Library, Manage eLab/GAIN Users, Unmatched Lab Results.
- Lookups and Code Tables:** Custom Lookup Categories, Custom Lookup Items, Admin Time Types, Geo Areas / Offices, Axis 1 | Axis 2 | Axis 3, ICD-10 Recode, Care Provider Types, External Care Providers, Agencies, Group Activity Types, Credential Types, Client Status Types, Episode Status Types, Contact Types, Relationship Types, Tx Categories, Roles, Program/Role Assoc, Form Groups, Form Group Visit Types, Authorization Levels, Employee Visit Type, File Folders Admin, Attachment Names, Medical Conditions, Bed Board Facilities, Bed Board Rooms, Bed/Foster Interval Reasons, Med Severity Levels, Lab Facilities.
- Security Configuration:** User List, Login Profiles, Security Matrix, Report Security, Login Report, Client User Security Matrix, Client User List, Client User Login Report, Credible Rx Providers, SureScripts Messaging View, CredibleBI User Admin, Purge Clients.
- Billing Configuration:** Programs, Visit Type, Visit Type Groups, Locations, Recipient Types, Billing Matrix, Billing Payer, Billing Groups.
- Site Configuration:** Partner Config, HL7 Settings, Data Dictionary, Home Page Config, Device Settings, Device Buttons, Client Links.

With ManageApprovalRoles ENABLED

This screenshot shows the Admin menu with the 'Manage Approval Roles' link missing. The menu is organized into three columns:

- Daily Activities:** Home Page, Visit Queue, Employee Form Queue, Dashboard, Admin Time Queue, Manage Teams, Program Assignments, Manage Resources, Manage Foster Homes, Bed Board Search, Schedule Groups, Notification Triggers, Clinical Support, Visit Data Entry, View Transfer Log, ReLink Visits, Reschedules, Manage Schedule Templates, Company Holidays, Upload Multiple Attachments, Manage Client Duplicates, Saved Visit Mapping Manager, Manage eMAR Groups, eMAR Setup, Tx Plus Templates, Manage Tx Plus Library, Manage eLab/GAIN Users, Unmatched Lab Results.
- Lookups and Code Tables:** Custom Lookup Categories, Custom Lookup Items, Admin Time Types, Geo Areas / Offices, Axis 1 | Axis 2 | Axis 3, ICD-10 Recode, Care Provider Types, External Care Providers, Agencies, Group Activity Types, Credential Types, Client Status Types, Episode Status Types, Contact Types, Relationship Types, Tx Categories, Roles, Program/Role Assoc, Form Groups, Form Group Visit Types, Authorization Levels, Employee Visit Type, File Folders Admin, Attachment Names, Medical Conditions, Bed Board Facilities, Bed Board Rooms, Bed/Foster Interval Reasons, Med Severity Levels, Lab Facilities.
- Security Configuration:** User List, Login Profiles, Security Matrix, Report Security, Login Report, Client User Security Matrix, Client User List, Client User Login Report, Credible Rx Providers, SureScripts Messaging View, CredibleBI User Admin, Purge Clients.
- Billing Configuration:** Programs, Visit Type, Visit Type Groups, Locations, Recipient Types, Billing Matrix, Billing Payer, Billing Groups.
- Site Configuration:** Partner Config, HL7 Settings, Data Dictionary, Home Page Config, Device Settings, Device Buttons, Client Links.

With ManageApprovalRoles DISABLED

NotificationTriggers

Function:

- Controls whether the “Notification Triggers” link in the Admin tab is viewable.

Location(s) this setting affects:

- Admin Tab

Screenshots:

This screenshot shows the Admin Tab menu with three columns of settings. The 'Notification Triggers' link is highlighted with a red box in the 'Daily Activities' column.

- Daily Activities**
 - Home Page
 - Visit Queue
 - Employee Form Queue
 - Dashboard
 - Admin Time Queue
 - Manage Teams
 - Program Assignments
 - Manage Resources
 - Manage Foster Homes
 - Bed Board Search
 - Schedule Groups
 - **Notification Triggers**
 - Clinical Support
 - Visit Data Entry
 - View Transfer Log
 - Relink Visits
 - Reschedules
 - Manage Approval Roles
 - Manage Schedule Templates
 - Company Holidays
 - Upload Multiple Attachments
 - Manage Client Duplicates
 - SavedVisitMapping Manager
 - Manage eMAR Groups
 - eMAR Setup
 - Tx Plus Templates
 - Manage Tx Plus Library
 - Manage eLab/GAIN Users
 - Unmatched Lab Results
- Lookups and Code Tables**
 - Custom Lookup Categories
 - Custom Lookup Items
 - Admin Time Types
 - Geo Areas / Offices
 - Axis 1 | Axis 2 | Axis 3
 - ICD-10 Recode
 - Care Provider Types
 - External Care Providers
 - Agencies
 - Group Activity Types
 - Credential Types
 - Client Status Types
 - Episode Status Types
 - Contact Types
 - Relationship Types
 - Tx Categories
 - Roles
 - Program/Role Assoc
 - Form Groups
 - Form Group Visit Types
 - Authorization Levels
 - Employee Visit Type
 - File Folders Admin
 - Attachment Names
 - Medical Conditions
 - Bed Board Facilities
 - Bed Board Rooms
 - Bed/Foster Interval Reasons
 - Med Severity Levels
 - Lab Facilities
- Security Configuration**
 - User List
 - Login Profiles
 - Security Matrix
 - Report Security
 - Login Report
 - Client User Security Matrix
 - Client User List
 - Client User Login Report
 - Credible Rx Providers
 - SureScripts Messaging View
 - CredibleBI User Admin
 - Purge Clients
- Billing Configuration**
 - Programs
 - Visit Type
 - Visit Type Groups
 - Locations
 - Recipient Types
 - Billing Matrix
 - Billing Payer
 - Billing Groups
- Site Configuration**
 - Partner Config
 - HL7 Settings
 - Data Dictionary
 - Home Page Config
 - Device Settings
 - Device Buttons
 - Client Links

With NotificationTriggers ENABLED

This screenshot shows the Admin Tab menu with the same three columns of settings as the first screenshot, but the 'Notification Triggers' link is missing from the 'Daily Activities' column.

- Daily Activities**
 - Home Page
 - Visit Queue
 - Employee Form Queue
 - Dashboard
 - Admin Time Queue
 - Manage Teams
 - Program Assignments
 - Manage Resources
 - Manage Foster Homes
 - Bed Board Search
 - Schedule Groups
 - Clinical Support
 - Visit Data Entry
 - View Transfer Log
 - Relink Visits
 - Reschedules
 - Manage Approval Roles
 - Manage Schedule Templates
 - Company Holidays
 - Upload Multiple Attachments
 - Manage Client Duplicates
 - SavedVisitMapping Manager
 - Manage eMAR Groups
 - eMAR Setup
 - Tx Plus Templates
 - Manage Tx Plus Library
 - Manage eLab/GAIN Users
 - Unmatched Lab Results
- Lookups and Code Tables**
 - Custom Lookup Categories
 - Custom Lookup Items
 - Admin Time Types
 - Geo Areas / Offices
 - Axis 1 | Axis 2 | Axis 3
 - ICD-10 Recode
 - Care Provider Types
 - External Care Providers
 - Agencies
 - Group Activity Types
 - Credential Types
 - Client Status Types
 - Episode Status Types
 - Contact Types
 - Relationship Types
 - Tx Categories
 - Roles
 - Program/Role Assoc
 - Form Groups
 - Form Group Visit Types
 - Authorization Levels
 - Employee Visit Type
 - File Folders Admin
 - Attachment Names
 - Medical Conditions
 - Bed Board Facilities
 - Bed Board Rooms
 - Bed/Foster Interval Reasons
 - Med Severity Levels
 - Lab Facilities
- Security Configuration**
 - User List
 - Login Profiles
 - Security Matrix
 - Report Security
 - Login Report
 - Client User Security Matrix
 - Client User List
 - Client User Login Report
 - Credible Rx Providers
 - SureScripts Messaging View
 - CredibleBI User Admin
 - Purge Clients
- Billing Configuration**
 - Programs
 - Visit Type
 - Visit Type Groups
 - Locations
 - Recipient Types
 - Billing Matrix
 - Billing Payer
 - Billing Groups
- Site Configuration**
 - Partner Config
 - HL7 Settings
 - Data Dictionary
 - Home Page Config
 - Device Settings
 - Device Buttons
 - Client Links

With NotificationTriggers DISABLED

PartnerConfig

Function:

- Controls whether the “Partner Config” link in the Admin tab is viewable.

Location(s) this setting affects:

- Admin Tab

Screenshots:

This screenshot shows the Admin tab menu with PartnerConfig enabled. The menu is organized into three columns: Daily Activities, Lookups and Code Tables, and Security Configuration. The Site Configuration section at the bottom of the Security Configuration column contains a red-bordered link for 'Partner Config'.

- Daily Activities**
 - Home Page
 - Visit Queue
 - Employee Form Queue
 - Dashboard
 - Admin Time Queue
 - Manage Teams
 - Program Assignments
 - Manage Resources
 - Manage Foster Homes
 - Bed Board Search
 - Schedule Groups
 - Notification Triggers
 - Clinical Support
 - Visit Data Entry
 - View Transfer Log
 - Relink Visits
 - Reschedules
 - Manage Approval Roles
 - Manage Schedule Templates
 - Company Holidays
 - Upload Multiple Attachments
 - Manage Client Duplicates
 - Saved Visit Mapping Manager
 - Manage eMAR Groups
 - eMAR Setup
 - Tx Plus Templates
 - Manage Tx Plus Library
 - Manage eLab/GAIN Users
 - Unmatched Lab Results
- Lookups and Code Tables**
 - Custom Lookup Categories
 - Custom Lookup Items
 - Admin Time Types
 - Geo Areas / Offices
 - Axis 1 | Axis 2 | Axis 3
 - ICD-10 Recode
 - Care Provider Types
 - External Care Providers
 - Agencies
 - Group Activity Types
 - Credential Types
 - Client Status Types
 - Episode Status Types
 - Contact Types
 - Relationship Types
 - Tx Categories
 - Roles
 - Program/Role Assoc
 - Form Groups
 - Form Group Visit Types
 - Authorization Levels
 - Employee Visit Type
 - File Folders Admin
 - Attachment Names
 - Medical Conditions
 - Bed Board Facilities
 - Bed Board Rooms
 - Bed/Foster Interval Reasons
 - Med Severity Levels
 - Lab Facilities
- Security Configuration**
 - User List
 - Login Profiles
 - Security Matrix
 - Report Security
 - Login Report
 - Client User Security Matrix
 - Client User List
 - Client User Login Report
 - Credible Rx Providers
 - SureScripts Messaging View
 - CredibleBI User Admin
 - Purce Clients
- Billing Configuration**
 - Programs
 - Visit Type
 - Visit Type Groups
 - Locations
 - Recipient Types
 - Billing Matrix
 - Billing Payer
 - Billing Groups
- Site Configuration**
 - Partner Config** (highlighted with a red box)
 - HL7 Settings
 - Data Dictionary
 - Home Page Config
 - Device Settings
 - Device Buttons
 - Client Links

With PartnerConfig ENABLED

This screenshot shows the Admin tab menu with PartnerConfig disabled. The menu structure is identical to the previous screenshot, but the 'Partner Config' link is missing from the Site Configuration section.

- Daily Activities**
 - Home Page
 - Visit Queue
 - Employee Form Queue
 - Dashboard
 - Admin Time Queue
 - Manage Teams
 - Program Assignments
 - Manage Resources
 - Manage Foster Homes
 - Bed Board Search
 - Schedule Groups
 - Notification Triggers
 - Clinical Support
 - Visit Data Entry
 - View Transfer Log
 - Relink Visits
 - Reschedules
 - Manage Approval Roles
 - Manage Schedule Templates
 - Company Holidays
 - Upload Multiple Attachments
 - Manage Client Duplicates
 - Saved Visit Mapping Manager
 - Manage eMAR Groups
 - eMAR Setup
 - Tx Plus Templates
 - Manage Tx Plus Library
 - Manage eLab/GAIN Users
 - Unmatched Lab Results
- Lookups and Code Tables**
 - Custom Lookup Categories
 - Custom Lookup Items
 - Admin Time Types
 - Geo Areas / Offices
 - Axis 1 | Axis 2 | Axis 3
 - ICD-10 Recode
 - Care Provider Types
 - External Care Providers
 - Agencies
 - Group Activity Types
 - Credential Types
 - Client Status Types
 - Episode Status Types
 - Contact Types
 - Relationship Types
 - Tx Categories
 - Roles
 - Program/Role Assoc
 - Form Groups
 - Form Group Visit Types
 - Authorization Levels
 - Employee Visit Type
 - File Folders Admin
 - Attachment Names
 - Medical Conditions
 - Bed Board Facilities
 - Bed Board Rooms
 - Bed/Foster Interval Reasons
 - Med Severity Levels
 - Lab Facilities
- Security Configuration**
 - User List
 - Login Profiles
 - Security Matrix
 - Report Security
 - Login Report
 - Client User Security Matrix
 - Client User List
 - Client User Login Report
 - Credible Rx Providers
 - SureScripts Messaging View
 - CredibleBI User Admin
 - Purce Clients
- Billing Configuration**
 - Programs
 - Visit Type
 - Visit Type Groups
 - Locations
 - Recipient Types
 - Billing Matrix
 - Billing Payer
 - Billing Groups
- Site Configuration**
 - HL7 Settings
 - Data Dictionary
 - Home Page Config
 - Device Settings
 - Device Buttons
 - Client Links

With PartnerConfig DISABLED

PurgeClients

Function:

- Controls whether the “Purge Clients” link in the Admin tab is viewable.
 - **RECOMMENDED** only for Admin staff as Purging a Client results in that Client record being permanently removed, which is irreversible.

Location(s) this setting affects:

- Admin Tab

Screenshots:

This screenshot shows the Admin tab menu with three main sections: Daily Activities, Lookups and Code Tables, and Security Configuration. The 'Purge Clients' link is highlighted with a red box under the Security Configuration section.

- Daily Activities**
 - Home Page
 - Visit Queue
 - Employee Form Queue
 - Dashboard
 - Admin Time Queue
 - Manage Teams
 - Program Assignments
 - Manage Resources
 - Manage Foster Homes
 - Bed Board Search
 - Schedule Groups
 - Notification Triggers
 - Clinical Support
 - Visit Data Entry
 - View Transfer Log
 - Relink Visits
 - Reschedules
 - Manage Approval Roles
 - Manage Schedule Templates
 - Company Holidays
 - Upload Multiple Attachments
 - Manage Client Duplicates
 - SavedVisitMapping Manager
 - Manage eMAR Groups
 - eMAR Setup
 - Tx Plus Templates
 - Manage Tx Plus Library
 - Manage eLab/GAIN Users
 - Unmatched Lab Results
- Lookups and Code Tables**
 - Custom Lookup Categories
 - Custom Lookup Items
 - Admin Time Types
 - Geo Areas / Offices
 - Axis 1 | Axis 2 | Axis 3
 - ICD-10 Recode
 - Care Provider Types
 - External Care Providers
 - Agencies
 - Group Activity Types
 - Credential Types
 - Client Status Types
 - Episode Status Types
 - Contact Types
 - Relationship Types
 - Tx Categories
 - Roles
 - Program/Role Assoc
 - Form Groups
 - Form Group Visit Types
 - Authorization Levels
 - Employee Visit Type
 - File Folders Admin
 - Attachment Names
 - Medical Conditions
 - Bed Board Facilities
 - Bed Board Rooms
 - Bed/Foster Interval Reasons
 - Med Severity Levels
 - Lab Facilities
- Security Configuration**
 - User List
 - Login Profiles
 - Security Matrix
 - Report Security
 - Login Report
 - Client User Security Matrix
 - Client User List
 - Client User Login Report
 - Credible Rx Providers
 - SureScripts Messaging View
 - CredibleBI User Admin
 - Purge Clients**
- Billing Configuration**
 - Programs
 - Visit Type
 - Visit Type Groups
 - Locations
 - Recipient Types
 - Billing Matrix
 - Billing Payer
 - Billing Groups
- Site Configuration**
 - Partner Config
 - HL7 Settings
 - Data Dictionary
 - Home Page Config
 - Device Settings
 - Device Buttons
 - Client Links

With PurgeClients ENABLED

This screenshot shows the Admin tab menu with the same three main sections as the previous screenshot. The 'Purge Clients' link is missing from the Security Configuration section.

- Daily Activities**
 - Home Page
 - Visit Queue
 - Employee Form Queue
 - Dashboard
 - Admin Time Queue
 - Manage Teams
 - Program Assignments
 - Manage Resources
 - Manage Foster Homes
 - Bed Board Search
 - Schedule Groups
 - Notification Triggers
 - Clinical Support
 - Visit Data Entry
 - View Transfer Log
 - Relink Visits
 - Reschedules
 - Manage Approval Roles
 - Manage Schedule Templates
 - Company Holidays
 - Upload Multiple Attachments
 - Manage Client Duplicates
 - SavedVisitMapping Manager
 - Manage eMAR Groups
 - eMAR Setup
 - Tx Plus Templates
 - Manage Tx Plus Library
 - Manage eLab/GAIN Users
 - Unmatched Lab Results
- Lookups and Code Tables**
 - Custom Lookup Categories
 - Custom Lookup Items
 - Admin Time Types
 - Geo Areas / Offices
 - Axis 1 | Axis 2 | Axis 3
 - ICD-10 Recode
 - Care Provider Types
 - External Care Providers
 - Agencies
 - Group Activity Types
 - Credential Types
 - Client Status Types
 - Episode Status Types
 - Contact Types
 - Relationship Types
 - Tx Categories
 - Roles
 - Program/Role Assoc
 - Form Groups
 - Form Group Visit Types
 - Authorization Levels
 - Employee Visit Type
 - File Folders Admin
 - Attachment Names
 - Medical Conditions
 - Bed Board Facilities
 - Bed Board Rooms
 - Bed/Foster Interval Reasons
 - Med Severity Levels
 - Lab Facilities
- Security Configuration**
 - User List
 - Login Profiles
 - Security Matrix
 - Report Security
 - Login Report
 - Client User Security Matrix
 - Client User List
 - Client User Login Report
 - Credible Rx Providers
 - SureScripts Messaging View
 - CredibleBI User Admin
- Billing Configuration**
 - Programs
 - Visit Type
 - Visit Type Groups
 - Locations
 - Recipient Types
 - Billing Matrix
 - Billing Payer
 - Billing Groups
- Site Configuration**
 - Partner Config
 - HL7 Settings
 - Data Dictionary
 - Home Page Config
 - Device Settings
 - Device Buttons
 - Client Links

With PurgeClients DISABLED

SavedVisitMappingManager

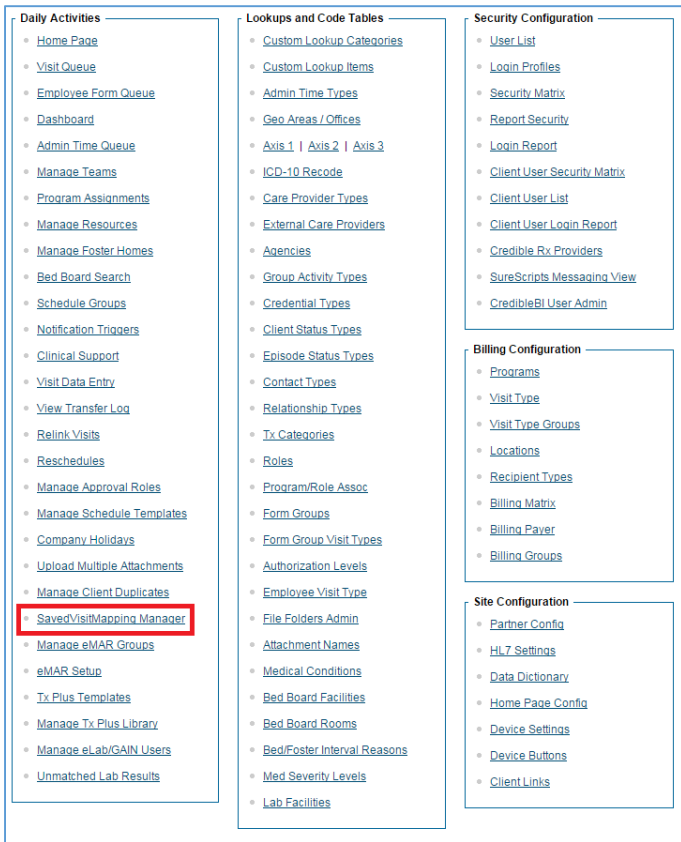
Function:

- Controls whether the “SavedVisitMapping Manager” link in the Admin tab is viewable.
 - This page allows access to the SavedVisitMapping Table, which shows the ID’s of failed visit mappings.

Location(s) this setting affects:

- Admin Tab

Screenshots:



With SavedVisitMappingManger ENABLED



With SavedVisitMappingManger DISABLED

SecurityUpdate

Function:

- Controls whether three links in the Admin Tab display in the “Security Configuration” section:
 - Login Profiles
 - Security Matrix
 - Report Security

Location(s) this setting affects:

- Admin Tab

Screenshots:

The screenshot shows the Admin Tab menu with three sections: Daily Activities, Lookups and Code Tables, and Security Configuration. The Security Configuration section is expanded, and the links 'Login Profiles', 'Security Matrix', and 'Report Security' are highlighted with a red box. Other links in the Security Configuration section include User List, Login Report, Client User Security Matrix, Client User List, Client User Login Report, Credible Rx Providers, SureScripts Messaging View, CredibleBI User Admin, and Purge Clients. The Billing Configuration section includes Programs, Visit Type, Visit Type Groups, Locations, Recipient Types, Billing Matrix, Billing Payer, and Billing Groups. The Site Configuration section includes Partner Config, HL7 Settings, Data Dictionary, Home Page Config, Device Settings, Device Buttons, and Client Links.

When SecurityUpdate is ENABLED

The screenshot shows the Admin Tab menu with three sections: Daily Activities, Lookups and Code Tables, and Security Configuration. The Security Configuration section is collapsed, and the links 'Login Profiles', 'Security Matrix', and 'Report Security' are not visible. Other links in the Security Configuration section include User List, Login Report, Client User Security Matrix, Client User List, Client User Login Report, and Purge Clients. The Billing Configuration section includes Programs, Visit Type, Visit Type Groups, Locations, Recipient Types, Billing Matrix, Billing Payer, and Billing Groups. The Site Configuration section includes Partner Config, HL7 Settings, Data Dictionary, Home Page Config, Device Settings, Device Buttons, and Client Links.

When SecurityUpdate is DISABLED

SubmitLibraryTicket

Function:

- Allows access to the “Submit Library Ticket” link on the “Home Tab – Links” section, giving the Profile the ability to submit Knowledge Share Information details to the LIBRARY domain.

Location(s) this setting affects:

- Home Page

Screenshots:

This screenshot shows the Credible Home Page interface with the 'Submit Library Ticket' link highlighted in red in the 'Links' section. The interface includes a search bar, 'Incomplete Visits' table, 'Add To Do Item' field, 'Employee Messaging' section, 'Links' list, 'Critical Auths' table, and 'Expiring Auths' table.

| Client | Delete | Begin |
|------------|------------------------|----------------------|
| Demo, Wilt | delete | view |
| Demo, Wilt | delete | view |
| Demo, Wilt | delete | view |
| Demo, Wilt | delete | view |

All Incomplete Visits

Add To Do Item

--- SELECT EMPLOYEE/TEAM [Send](#)

Send Broadcast Message

Links

- Google
- Medications - Rx List
- Mobileform Tablet/PC
- New adult protocol
- Security Matrix Reference File
- Training: Hands-On Forms
- Training: Domain Setup
- Submit Library Ticket**
- Dashboard 2.0

| Client | Units | view |
|-----------------|-------|----------------------|
| Test, Abby | 7/24 | view |
| Abbott, Darrell | 2/10 | view |

| Client | End Date | view |
|-----------------|-----------|----------------------|
| Mitchell, Talia | 1/20/2016 | view |

With SubmitLibraryTicket ENABLED

This screenshot shows the Credible Home Page interface with the 'Submit Library Ticket' link removed from the 'Links' section. The interface includes a search bar, 'Incomplete Visits' table, 'Add To Do Item' field, 'Employee Messaging' section, 'Links' list, 'Critical Auths' table, and 'Expiring Auths' table.

| Client | Delete | Begin |
|------------|------------------------|----------------------|
| Demo, Wilt | delete | view |
| Demo, Wilt | delete | view |
| Demo, Wilt | delete | view |
| Demo, Wilt | delete | view |

All Incomplete Visits

Add To Do Item

--- SELECT EMPLOYEE/TEAM [Send](#)

Send Broadcast Message

Links

- Google
- Medications - Rx List
- Mobileform Tablet/PC
- New adult protocol
- Security Matrix Reference File
- Training: Hands-On Forms
- Training: Domain Setup
- Dashboard 2.0

| Client | Units | view |
|-----------------|-------|----------------------|
| Test, Abby | 7/24 | view |
| Abbott, Darrell | 2/10 | view |

| Client | End Date | view |
|-----------------|-----------|----------------------|
| Mitchell, Talia | 1/20/2016 | view |

With SubmitLibraryTicket DISABLED

SubmitTaskTicket

Function:

- This setting is no longer utilized. Task Ticket submission control is now controlled through individual Employee Configs.

SuperviseAll

Function:

- Determines whether extra Employees will display on the “Email To:” section within the Client’s Notes page. If enabled, Employee’s that are a Supervisor will display, even if they are not assigned to the Employee.
 - **NOTE:** The description to this setting mentions the Dashboard, however this description is not valid since the release of Dashboard 2.0.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Notes Button -> Email To Section

Screenshots:

Supervisors not assigned to the Client.

Character: 0/0

Email To: --- AND/OR Team: ---

- Dorman, Matt
- Gerber, Michael
- Menger, Frank
- Rosswog, David
- Schullery, Dave
- Scott, Matt
- Wiggins, Elisheba

Add Note Is Public

When SuperviseAll is ENABLED

Character: 0/0

Email To: --- AND/OR Team: ---

- Rosswog, David
- Schullery, Dave
- Scott, Matt
- Wiggins, Elisheba

Add Note Is Public

When SuperviseAll is DISABLED

TransferLogList

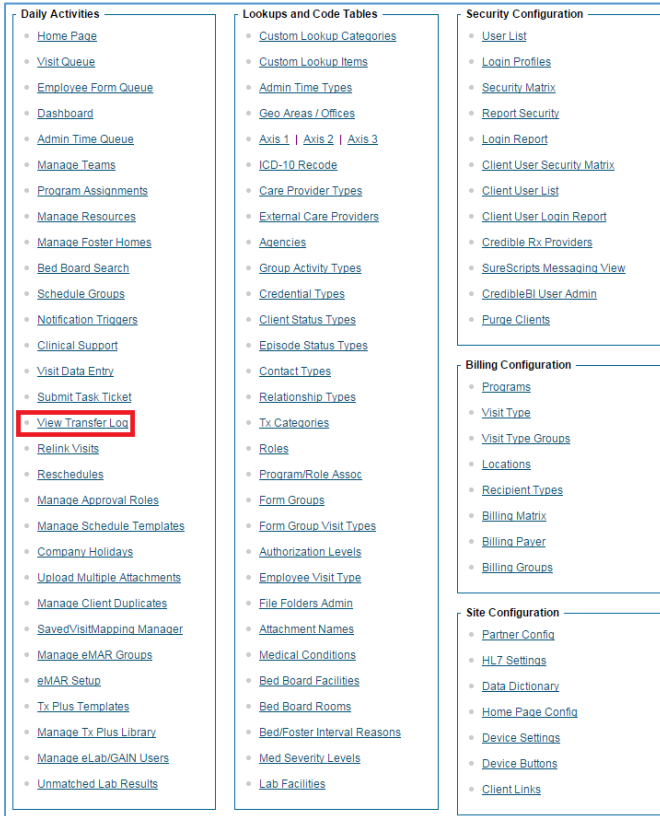
Function:

- Controls whether the “View Transfer Log” link in the Admin tab is viewable.

Location(s) this setting affects:

- Admin Tab -> View Transfer Log

Screenshots:



With TransferLogList ENABLED



With TransferLogList DISABLED

TransferLogView

Function:

- Controls whether the details in the “Transfer Log” page are viewable, by clicking on the timestamp that shows on one of the entries.
 - **NOTE:** If disabled, an “Insufficient Rights” message or an error message will display when clicking one of the timestamps.

Location(s) this setting affects:

- Admin Tab -> View Transfer Log -> Click on one of the timestamps

Screenshots:

Transfer Log:
Showing 1 to 7 of 7.

| # | Transfer Date | Status | Type | Partner Name |
|---|----------------------|---------|-----------|--------------|
| 1 | 6/20/2016 2:57:49 PM | success | visit | CWTRAINING |
| 2 | 6/20/2016 2:52:53 PM | success | admintime | CWTRAINING |
| 3 | 6/20/2016 2:52:52 PM | success | visit | CWTRAINING |
| 4 | 6/20/2016 2:31:38 PM | success | visit | CWTRAINING |
| 5 | 6/20/2016 2:31:35 PM | success | visit | CWTRAINING |
| 6 | 6/20/2016 2:31:26 PM | success | cancel | CWTRAINING |
| 7 | 6/20/2016 2:20:37 PM | success | visit | CWTRAINING |

Matrix Section: Admin Time

AdminTimeAdd

Function:

- Controls whether the “add admin time” button as well as the “Add New” button will display on the Admin Time List page.

Location(s) this setting affects:

- The Admin Time List page, which is accessible in two different ways:
 - Admin Tab -> Admin Time Queue
 - Employee Page -> Employee Nav Bar -> Admin Time

Screenshots:

ADMIN TIME LIST: Showing 1 to 20 of 49. Approved: No Employee: ID Start Date End Date Export Filter

| ID | Appr | Employee | Date | Duration | Type | Notes | approve | update | delete |
|------|--------------------------|----------------|------------|----------|---------|-----------------|---------|--------|--------|
| 1598 | <input type="checkbox"/> | Hannah, S | 12/31/2015 | 165 | PW | | approve | update | delete |
| 1596 | <input type="checkbox"/> | Bolt, M | 12/18/2015 | 60 | Trng | lunch class | approve | update | delete |
| 1595 | <input type="checkbox"/> | Bolt, M | 12/13/2015 | 30 | Lunch | | approve | update | delete |
| 1591 | <input type="checkbox"/> | Lombardi, N | 11/4/2015 | 10 | PW | Test | approve | update | delete |
| 1587 | <input type="checkbox"/> | Bolt, M | 10/21/2015 | 60 | Trng | | approve | update | delete |
| 1586 | <input type="checkbox"/> | Bolt, M | 10/21/2015 | 60 | Trng | lunch and learn | approve | update | delete |
| 1585 | <input type="checkbox"/> | Bolt, M | 10/19/2015 | 40 | PW | | approve | update | delete |
| 1584 | <input type="checkbox"/> | Kost, M | 9/27/2015 | 480 | Holiday | holiday | approve | update | delete |
| 1582 | <input type="checkbox"/> | Norman, L | 9/18/2015 | 60 | Admin | Admin Time | approve | update | delete |
| 1579 | <input type="checkbox"/> | Rasoulzadeh, M | 9/15/2015 | 69 | Trng | | approve | update | delete |
| 1576 | <input type="checkbox"/> | Forma, J | 9/7/2015 | 540 | Holiday | | approve | update | delete |
| 1575 | <input type="checkbox"/> | Lebowitz, B | 8/20/2015 | 480 | Sick | | approve | update | delete |
| 1574 | <input type="checkbox"/> | Lebowitz, B | 8/17/2015 | 147 | Lunch | | approve | update | delete |
| 1548 | <input type="checkbox"/> | Lebowitz, B | 3/24/2015 | 60 | Lunch | | approve | update | delete |
| 1547 | <input type="checkbox"/> | Lebowitz, B | 3/23/2015 | 1440 | FMLA | | approve | update | delete |
| 1492 | <input type="checkbox"/> | Gia, M | 11/20/2014 | 15 | Lunch | Lunch meeting | approve | update | delete |
| 1490 | <input type="checkbox"/> | Horton, R | 11/12/2014 | 28 | PW | | approve | update | delete |
| 1485 | <input type="checkbox"/> | Bolt, M | 10/28/2014 | 60 | Lunch | | approve | update | delete |
| 1478 | <input type="checkbox"/> | Ferrell, K | 9/17/2014 | 1440 | Holiday | Birthday Leave | approve | update | delete |
| 1466 | <input type="checkbox"/> | Emis, G | 8/6/2014 | 540 | | | approve | update | delete |

1 2 3 >>>

Approve All Checked Add New

With AdminTimeAdd ENABLED

ADMIN TIME LIST: Showing 1 to 20 of 49. Approved: No Employee: ID Start Date End Date Export Filter

| ID | Appr | Employee | Date | Duration | Type | Notes | approve | update | delete |
|------|--------------------------|----------------|------------|----------|---------|-----------------|---------|--------|--------|
| 1598 | <input type="checkbox"/> | Hannah, S | 12/31/2015 | 165 | PW | | approve | update | delete |
| 1596 | <input type="checkbox"/> | Bolt, M | 12/18/2015 | 60 | Trng | lunch class | approve | update | delete |
| 1595 | <input type="checkbox"/> | Bolt, M | 12/13/2015 | 30 | Lunch | | approve | update | delete |
| 1591 | <input type="checkbox"/> | Lombardi, N | 11/4/2015 | 10 | PW | Test | approve | update | delete |
| 1587 | <input type="checkbox"/> | Bolt, M | 10/21/2015 | 60 | Trng | | approve | update | delete |
| 1586 | <input type="checkbox"/> | Bolt, M | 10/21/2015 | 60 | Trng | lunch and learn | approve | update | delete |
| 1585 | <input type="checkbox"/> | Bolt, M | 10/19/2015 | 40 | PW | | approve | update | delete |
| 1584 | <input type="checkbox"/> | Kost, M | 9/27/2015 | 480 | Holiday | holiday | approve | update | delete |
| 1582 | <input type="checkbox"/> | Norman, L | 9/18/2015 | 60 | Admin | Admin Time | approve | update | delete |
| 1579 | <input type="checkbox"/> | Rasoulzadeh, M | 9/15/2015 | 69 | Trng | | approve | update | delete |
| 1576 | <input type="checkbox"/> | Forma, J | 9/7/2015 | 540 | Holiday | | approve | update | delete |
| 1575 | <input type="checkbox"/> | Lebowitz, B | 8/20/2015 | 480 | Sick | | approve | update | delete |
| 1574 | <input type="checkbox"/> | Lebowitz, B | 8/17/2015 | 147 | Lunch | | approve | update | delete |
| 1548 | <input type="checkbox"/> | Lebowitz, B | 3/24/2015 | 60 | Lunch | | approve | update | delete |
| 1547 | <input type="checkbox"/> | Lebowitz, B | 3/23/2015 | 1440 | FMLA | | approve | update | delete |
| 1492 | <input type="checkbox"/> | Gia, M | 11/20/2014 | 15 | Lunch | Lunch meeting | approve | update | delete |
| 1490 | <input type="checkbox"/> | Horton, R | 11/12/2014 | 28 | PW | | approve | update | delete |
| 1485 | <input type="checkbox"/> | Bolt, M | 10/28/2014 | 60 | Lunch | | approve | update | delete |
| 1478 | <input type="checkbox"/> | Ferrell, K | 9/17/2014 | 1440 | Holiday | Birthday Leave | approve | update | delete |
| 1466 | <input type="checkbox"/> | Emis, G | 8/6/2014 | 540 | | | approve | update | delete |

1 2 3 >>>

Approve All Checked

With AdminTimeAdd DISABLED

AdminTimeApprove

Function:

- Controls whether the “approve” and “Approve All Checked” buttons appear on the Admin Time List.
- Also controls whether the “Approved” checkbox appears while updating an individual Admin Time entry.

Location(s) this setting affects:

- The Admin Time List page, which is accessible in two different ways:
 - Admin Tab -> Admin Time Queue
 - Employee Page -> Employee Nav Bar -> Admin Time
- Individual Admin Time entry pages, accessed by clicking “update” on an entry from the Admin Time List.

Screenshots:

| ID | Appr | Employee | Date | Duration | Type | Notes | approve | update | delete |
|------|--------------------------|--------------|-----------|----------|------------|-----------------|---------|--------|--------|
| 1276 | <input type="checkbox"/> | Williams, A | 6/21/2013 | 244 | Holiday | | approve | update | delete |
| 1275 | <input type="checkbox"/> | Whitehead, J | 6/20/2013 | 2 | FMLA | 987654321 | approve | update | delete |
| 1274 | <input type="checkbox"/> | Bianco, G | 6/20/2013 | 120 | Paid Leave | Dr. appointment | approve | update | delete |
| 1272 | <input type="checkbox"/> | Sanchez, R | 6/20/2013 | 70 | Admin | | approve | update | delete |
| 1271 | <input type="checkbox"/> | Mendoza, C | 6/20/2013 | 720 | Paid Leave | dfghfg | approve | update | delete |
| 1269 | <input type="checkbox"/> | Rith, T | 6/26/2013 | 120 | Holiday | | approve | update | delete |
| 1268 | <input type="checkbox"/> | Cortes, M | 6/17/2013 | 60 | Admin | HELLO | approve | update | delete |
| 1267 | <input type="checkbox"/> | Renteria, H | 6/17/2013 | 1 | Admin | | approve | update | delete |
| 1265 | <input type="checkbox"/> | Gillespie, S | 6/6/2013 | 180 | Trng | mobile training | approve | update | delete |

Approve All Checked Add New

With AdminTimeAdd ENABLED

| ID | Appr | Employee | Date | Duration | Type | Notes | update | delete |
|------|------|--------------|-----------|----------|------------|-----------------|--------|--------|
| 1276 | | Williams, A | 6/21/2013 | 244 | Holiday | | update | delete |
| 1275 | | Whitehead, J | 6/20/2013 | 2 | FMLA | 987654321 | update | delete |
| 1274 | | Bianco, G | 6/20/2013 | 120 | Paid Leave | Dr. appointment | update | delete |
| 1272 | | Sanchez, R | 6/20/2013 | 70 | Admin | | update | delete |
| 1271 | | Mendoza, C | 6/20/2013 | 720 | Paid Leave | dfghfg | update | delete |
| 1269 | | Rith, T | 6/26/2013 | 120 | Holiday | | update | delete |
| 1268 | | Cortes, M | 6/17/2013 | 60 | Admin | HELLO | update | delete |
| 1267 | | Renteria, H | 6/17/2013 | 1 | Admin | | update | delete |
| 1265 | | Gillespie, S | 6/6/2013 | 180 | Trng | mobile training | update | delete |

Add New

With AdminTimeAdd DISABLED

Admin Time Update: ID=1276

Employee Name: Williams Time In: 6/21/13 10:06 AM Time Out: 6/21/13 2:10 PM

Approved:

Revised Date: 6/21/2013 Revised Time In: Revised Time Out:

Type: Holiday Time Off

Notes: Reviewer Comment:

Update Admin Time Cancel

With AdminTimeAdd ENABLED

Admin Time Update: ID=1276

Employee Name: Williams Time In: 6/21/13 10:06 AM Time Out: 6/21/13 2:10 PM

Approved:

Revised Date: 6/21/2013 Revised Time In: Revised Time Out:

Type: Holiday Time Off

Notes: Reviewer Comment:

Update Admin Time Cancel

With AdminTimeAdd DISABLED

AdminTimeDelete

Function:

- Controls whether the “delete” button appear on the Admin Time List.

Location(s) this setting affects:

- The Admin Time List page, which is accessible in two different ways:
 - Admin Tab -> Admin Time Queue
 - Employee Page -> Employee Nav Bar -> Admin Time

Screenshots:

ADMIN TIME LIST: add admin time

Showing 41 to 49 of 49. **Approved:** No ▾ --- Employee --- ▾ ID Start Date End Date Export Filter

| ID | Appr | Employee | Date | Duration | Type | Notes | approve | update | delete |
|------|--------------------------|--------------|-----------|----------|------------|-----------------|---------|--------|--------|
| 1276 | <input type="checkbox"/> | Williams, A | 6/21/2013 | 244 | Holiday | | approve | update | delete |
| 1275 | <input type="checkbox"/> | Whitehead, J | 6/20/2013 | 2 | FMLA | 987654321 | approve | update | delete |
| 1274 | <input type="checkbox"/> | Blanco, G | 6/20/2013 | 120 | Paid Leave | Dr. appointment | approve | update | delete |
| 1272 | <input type="checkbox"/> | Sanchez, R | 6/20/2013 | 70 | Admin | | approve | update | delete |
| 1271 | <input type="checkbox"/> | Mendoza, C | 6/20/2013 | 720 | Paid Leave | dfghfdg | approve | update | delete |
| 1269 | <input type="checkbox"/> | Rith, T | 6/26/2013 | 120 | Holiday | | approve | update | delete |
| 1268 | <input type="checkbox"/> | Cortes, M | 6/17/2013 | 60 | Admin | HELLO | approve | update | delete |
| 1267 | <input type="checkbox"/> | Renteria, H | 6/17/2013 | 1 | Admin | | approve | update | delete |
| 1265 | <input type="checkbox"/> | Gillespie, S | 6/6/2013 | 180 | Trng | mobile training | approve | update | delete |

◀ 1 2 3 ▶

Approve All Checked Add New

With AdminTimeDelete ENABLED

ADMIN TIME LIST: add admin time

Showing 41 to 49 of 49. **Approved:** No ▾ --- Employee --- ▾ ID Start Date End Date Export Filter

| ID | Appr | Employee | Date | Duration | Type | Notes | approve | update |
|------|--------------------------|--------------|-----------|----------|------------|-----------------|---------|--------|
| 1276 | <input type="checkbox"/> | Williams, A | 6/21/2013 | 244 | Holiday | | approve | update |
| 1275 | <input type="checkbox"/> | Whitehead, J | 6/20/2013 | 2 | FMLA | 987654321 | approve | update |
| 1274 | <input type="checkbox"/> | Blanco, G | 6/20/2013 | 120 | Paid Leave | Dr. appointment | approve | update |
| 1272 | <input type="checkbox"/> | Sanchez, R | 6/20/2013 | 70 | Admin | | approve | update |
| 1271 | <input type="checkbox"/> | Mendoza, C | 6/20/2013 | 720 | Paid Leave | dfghfdg | approve | update |
| 1269 | <input type="checkbox"/> | Rith, T | 6/26/2013 | 120 | Holiday | | approve | update |
| 1268 | <input type="checkbox"/> | Cortes, M | 6/17/2013 | 60 | Admin | HELLO | approve | update |
| 1267 | <input type="checkbox"/> | Renteria, H | 6/17/2013 | 1 | Admin | | approve | update |
| 1265 | <input type="checkbox"/> | Gillespie, S | 6/6/2013 | 180 | Trng | mobile training | approve | update |

◀ 1 2 3 ▶

Approve All Checked Add New

With AdminTimeDelete DISABLED

AdminTimeList

Function:

- Controls whether the user will be able to access the Admin Time List. If disabled, the following links are removed:
 - Admin Tab -> Admin Time Queue
 - Employee Page -> Employee Nav Bar -> Admin Time

Location(s) this setting affects:

- The Admin Tab
- Employee Nav Bar

Screenshots:

The following links will be removed if AdminTimeList is marked as DISABLED:



From the Admin Tab

AdminTimeListAll

Function:

- Determines whether you can see the Admin Time entries for ALL Employees. If disabled, you will only see your own Admin Times, assuming the AdminTimeListOwn Security Matrix setting is enabled.
 - In addition, the dropdown in the Admin Time List that is used to select Employees will only display your name when this setting is disabled.
- **NOTE:** This Matrix setting supersedes the AdminTimeListOwn setting. AdminTimeListOwn is only relevant when this Matrix setting is disabled.

Location(s) this setting affects:

- The Admin Time List page, which is accessible in two different ways:
 - Admin Tab -> Admin Time Queue
 - Employee Page -> Employee Nav Bar -> Admin Time

Screenshots:

| ADMIN TIME LIST: | | | | add admin time | | | | |
|--|--------------------------|------------------|-----------|--|----------|---------|--------|--------|
| Showing 1 to 20 of 65. Approved: <input type="checkbox"/> No | | --- Employee --- | ID | Start Date | End Date | Export | Filter | |
| ID | Appr | Employee | Date | | | | | |
| 1627 | <input type="checkbox"/> | Menger, F | 6/20/2016 | 'CertifyEmployee'FellowshipHall, Amy | | approve | update | delete |
| 1626 | <input type="checkbox"/> | Menger, F | 6/20/2016 | 'CertifyEmployee'IM, Thompson | | approve | update | delete |
| 1623 | <input type="checkbox"/> | Lanning, P | 5/6/2016 | (CertifyEmployee) KHFSHELTER, MILLER | | approve | update | delete |
| 1621 | <input type="checkbox"/> | Thomas, N | 4/20/2016 | (CertifyEmployee) horizonhouse, SCOTT | | approve | update | delete |
| 1616 | <input type="checkbox"/> | Menger, F | 4/15/2016 | (CertifyEmployee) HSI, Hakun | | approve | update | delete |
| 1615 | <input type="checkbox"/> | Menger, F | 4/13/2016 | (CertifyEmployee) Life Management, Happy | | approve | update | delete |
| 1614 | <input type="checkbox"/> | Menger, F | 3/25/2016 | (CertifyEmployeeHorizon), Bennett | | approve | update | delete |
| 1613 | <input type="checkbox"/> | Menger, F | 3/25/2016 | 1999, 2010 | | approve | update | delete |
| 1612 | <input type="checkbox"/> | Menger, F | 3/22/2016 | AAAAA, AAAAAA | | approve | update | delete |
| 1611 | <input type="checkbox"/> | Menger, F | 3/9/2016 | AAANDERSON, JOHN | | approve | update | delete |
| 1609 | <input type="checkbox"/> | Thompson, K | 2/26/2016 | AARDVARK, ARMAND | | approve | update | delete |
| 1608 | <input type="checkbox"/> | Thompson, K | 2/26/2016 | Abbenhaus, Philip | | approve | update | delete |
| 1607 | <input type="checkbox"/> | Thompson, K | 2/23/2016 | Abbott, Robin | | approve | update | delete |
| 1602 | <input type="checkbox"/> | Menger, F | 2/10/2016 | Abernathy, Liz | | approve | update | delete |
| 1601 | <input type="checkbox"/> | Vincent, A | 1/28/2016 | Abney, Cindy | | approve | update | delete |
| 1599 | <input type="checkbox"/> | Chamberlain, B | 1/19/2016 | Abram, Nicole | | approve | update | delete |

When AdminTimeListAll is ENABLED

AdminTimeListOwn

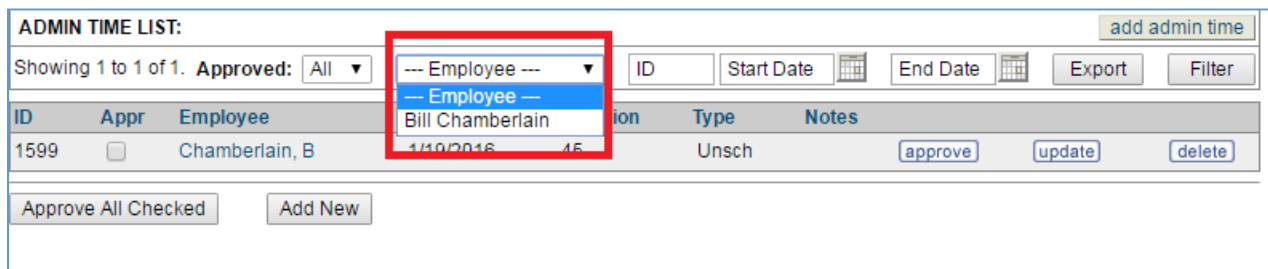
Function:

- Determines whether you can see Admin Time entries for your Employee account only.
 - **NOTE:** Even if enabled, this setting will not function unless AdminTimeListAll is disabled.

Location(s) this setting affects:

- The Admin Time List page, which is accessible in two different ways:
 - Admin Tab -> Admin Time Queue
 - Employee Page -> Employee Nav Bar -> Admin Time

Screenshots:



When AdminTimeListOwn is ENABLED, and AdminTimeListAll is DISABLED

AdminTimeUpdate

Function:

- Determines whether you can make updates on Admin Time entries. Updates include altering the times or adding notes.

Location(s) this setting affects:

- The Admin Time List page, which is accessible in two different ways:
 - Admin Tab -> Admin Time Queue -> Update Button
 - Employee Page -> Employee Nav Bar -> Admin Time -> Update Button

Screenshots:

| ADMIN TIME LIST: | | | | | | | add admin time | | | |
|--|--------------------------|----------------|-----------|----------|-------|---------|----------------|----------|--------|--------|
| Showing 1 to 1 of 1. Approved: No ▾ Chamberlain, Bill ▾ ID | | | | | | | Start Date | End Date | Export | Filter |
| ID | Appr | Employee | Date | Duration | Type | Notes | | | | |
| 1599 | <input type="checkbox"/> | Chamberlain, B | 1/19/2016 | 45 | Unsch | approve | update | delete | | |

When AdminTimeUpdate is ENABLED

| ADMIN TIME LIST: | | | | | | | add admin time | | | |
|---|--------------------------|----------------|-----------|----------|-------|---------|----------------|----------|--------|--------|
| Showing 1 to 1 of 1. Approved: All ▾ Chamberlain, Bill ▾ ID | | | | | | | Start Date | End Date | Export | Filter |
| ID | Appr | Employee | Date | Duration | Type | Notes | | | | |
| 1599 | <input type="checkbox"/> | Chamberlain, B | 1/19/2016 | 45 | Unsch | approve | delete | | | |

When AdminTimeUpdate is DISABLED

Matrix Section: Assignments

AssignClientGeoAreas

Function:

- Determines whether the “Geo Areas” link appears in the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar

Screenshots:



This link would not appear if AssignClientsGeoAreas is disabled.

AssignClientPrograms

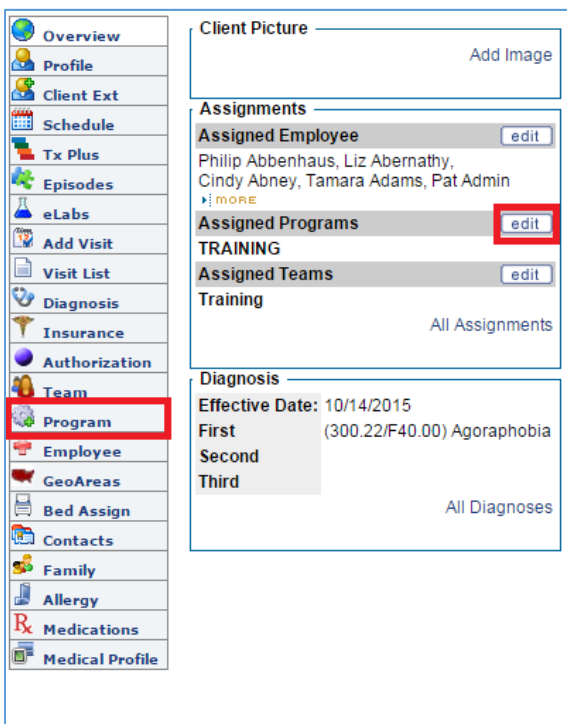
Function:

- Allows/restricts access to editing the Programs on a Client from the following two locations:
 - The “Program” link on the Client Nav Bar.
 - The edit button near the Assigned Programs section of the Assignments window.
- If unchecked the following message will appear when trying to edit Programs: **You do not have sufficient access rights to use this function. Please contact the system administrator or Credible support.**

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Programs
- Client Page -> Assignments -> Assigned Programs

Screenshots:



You do not have sufficient access rights to use this function. Please contact the system administrator or Credible support.



If AssignClientPrograms is disabled, you'll get the above message when trying to access Programs:

AssignClients

Function:

- Allows/restricts the right to assign Clients to Employees while on an Employee page.
 - **NOTE:** This setting does not affect the user's ability to assign Employees to Clients when on a Client page. That is affected by the AssignEmployees matrix setting.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Programs
- Client Page -> Assignments -> Assigned Client

Screenshots:

The screenshot displays the Credible system interface. On the left is a vertical navigation menu with various options: Overview, Profile, Team, Program, Client (highlighted with a red box), Emergency, Supervisor, GeoAreas, Billing Groups, Credentials, Config, Signature, Schedule, Add Visit, Visit List, Medications, eMAR, eMAR Group, Attachments, Work Hours, Medications, and Medical Profile. The main content area is titled 'Employee Picture' and contains an 'Add Image' button. Below this is an 'Add To Do Item' section with a text input field and an 'Add' button. The 'Assignments' section is expanded, showing 'Assigned Client' with an 'edit' button (highlighted with a red box), 'Assigned Programs' with an 'edit' button, and 'Assigned Teams' with an 'edit' button. The 'Assigned Client' section lists 'Wit Demo, Hegner 'CertifyClientCredible', Menger 'Family', Abraham 'Null', xavier a' with a 'MORE' link. The 'Assigned Programs' section lists 'TRAINING, Assessment Program, community mental health, Crisis2, Dan's Program' with a 'MORE' link. The 'Assigned Teams' section lists 'ACAP Arkansas, Achievement Center, Addiction Recovery, Administration, AdmTest' with a 'MORE' link. The 'GeoAreas' section lists 'GeoArea' with an 'edit' button. At the bottom of the assignments section is a link for 'All Assignments'.

AssignClientTeams

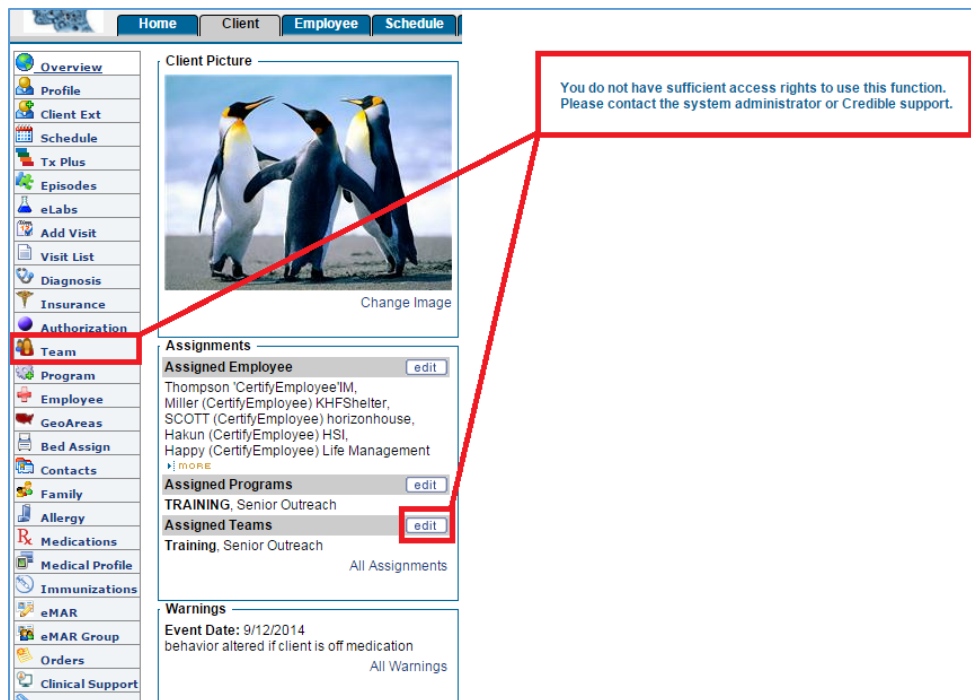
Function:

- Allows/restricts the right to assign Clients to Teams.
 - If this setting is disabled, the Team and Edit button will still display on Client pages, but attempting to access them will result in an Insufficient Rights error.
 - This setting will not affect the ability to edit Teams for Employees.
 - **NOTE:** The AssignTeams Matrix setting will need to be enabled for this setting to be relevant.
 - **NOTE:** This setting is superceded by the AssignClientTeamsSameOnly setting.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Team
- Client Page -> Assignments -> Assigned Teams

Screenshots:



If AssignClientTeams is DISABLED

AssignClientTeamsSameOnly

Function:

- When enabled, the user will only be able to assign Clients to Teams that the user is currently assigned to. For example, if the user is assigned to the Intake and Substance Abuse Teams, they will only be able to assign Clients to those two Teams. Any other Teams that exist will not display as options.
 - **NOTE:** This setting supercedes the AssignClientTeams setting.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Team Button
- Client Page -> Assignments Module -> Assigned Teams -> Edit Button

Screenshots:

The screenshot displays the Credible user interface. On the left is a vertical navigation menu with the following items: Overview, Profile, Client Ext, Schedule, Tx Plus, Episodes, eLabs, Add Visit, Visit List, Diagnosis, Insurance, Authorization, **Team** (highlighted with a red box), Program, Employee, GeoAreas, Bed Assign, Contacts, and Family. The main content area is titled 'Client Picture' and shows a placeholder image of a brain with gears and a 'Change Image' link. Below this is the 'Assignments' section, which includes:

- Assigned Employee** (with an 'edit' button): <3 <3, Philip Abbenhaus, Liz Abernathy, Cindy Abney, Tamara Adams >| MORE
- Assigned Programs** (with an 'edit' button): 4TRAINING, 837 Test Program, Assessment Program, community mental health, Crisis2, Fresno, Harbor test, IHPS, Inpatient, Inpatient, Intake, Intensive Outpatient, JG ADULT OUTPATIENT, JMKTRAN, JP Program, JP Program1, KYDC Training programs, Program Thompson, PROGRAM_Held, Sheridan Oaks - East, TRAINING
- Assigned Teams** (with an 'edit' button): Training

 At the bottom right of the Assignments section is a link for 'All Assignments'.

AssignEmployeeCredentials

Function:

- Allows the user the ability to assign Credentials for all other Employees. Controls whether the “Credentials” button will display on all Employee Nav Bars.
 - **NOTE:** This setting supercedes AssignEmployeeCredentialsOwn.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Credentials Button

Screenshots:



When AssignEmployeeCredentials is ENABLED



When AssignEmployeeCredentials is DISABLED

AssignEmployeeCredentialsOwn

Function:

- Allows the user the ability to assign Credentials for ONLY their own Employee account. Controls whether the “Credentials” button displays on their Employee Nav Bar.
 - **NOTE:** If AssignEmployeeCredentials is enabled, this setting will have no effect.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Credentials Button

Screenshots:



When AssignEmployeeCredentials is ENABLED



When AssignEmployeeCredentials is DISABLED

AssignEmployeeGeoAreas

Function:

- Allows the user the ability to assign GeoAreas for Employees. Controls whether the “GeoAreas” button displays on the Employee Nav Bar.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> GeoAreas Button

Screenshots:



When AssignEmployeeGeoAreas is ENABLED



When AssignEmployeeGeoAreas is DISABLED

AssignEmployeePrograms

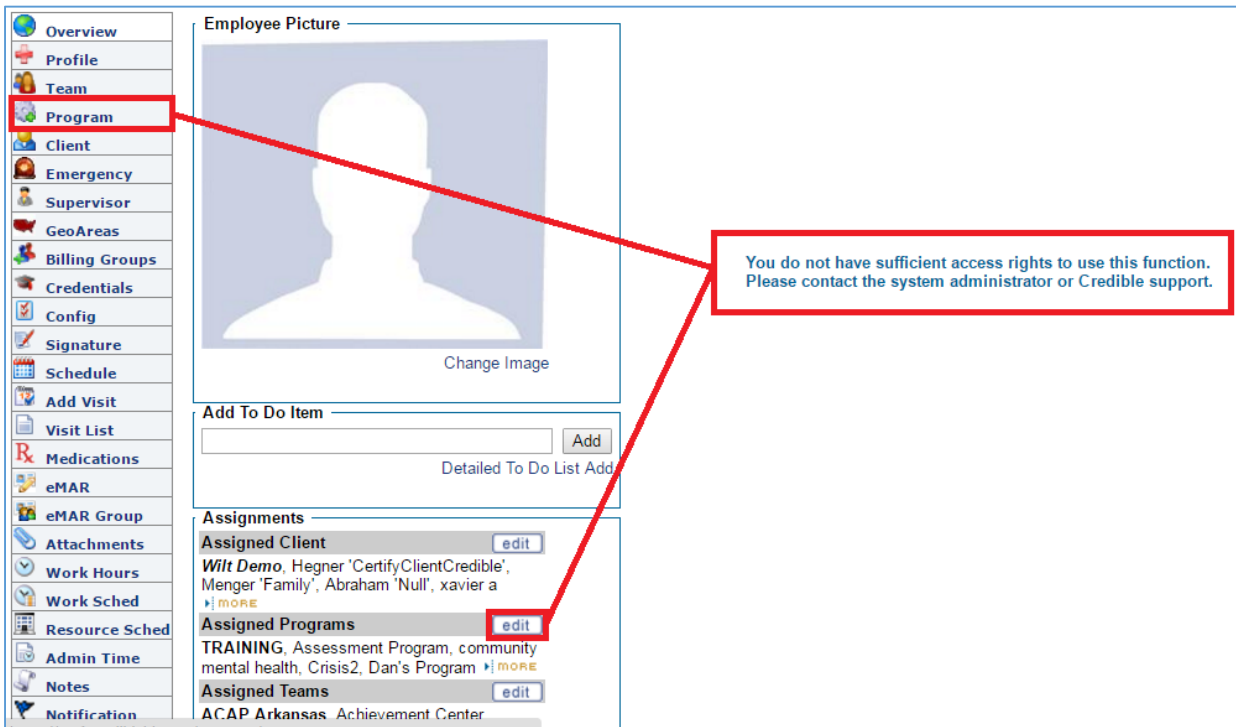
Function:

- Allows the user the ability to assign Programs for Employees. Controls whether the “Programs” button displays on the Employee Nav Bar.
 - When disabled, the Client will receive an “Insufficient Rights” message when trying to access the Employee Programs.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Programs Button
- Employee Page -> Assignments Module -> Assigned Programs -> Edit Button

Screenshots:



When AssignEmployeePrograms is DISABLED

AssignEmployees

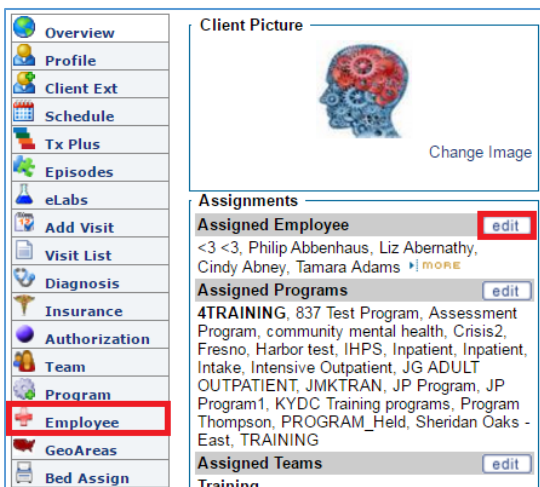
Function:

- Determines whether the user can assign Employees to Clients when on a Client’s page.
 - **NOTE:** This setting does not affect the user’s ability to assign Clients to Employees when on an Employee page. That is affected by the AssignClients matrix setting.

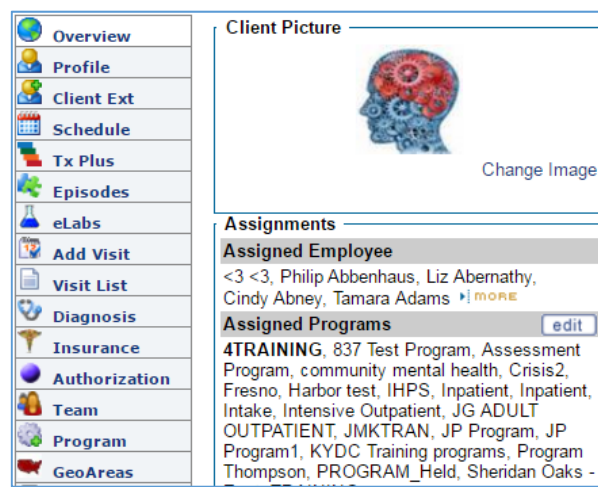
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Employee Button
- Client Page -> Assignments Module -> Assigned Employee -> Edit Button

Screenshots:



When AssignEmployees is ENABLED



When AssignEmployees is DISABLED

AssignEmployeeTeams

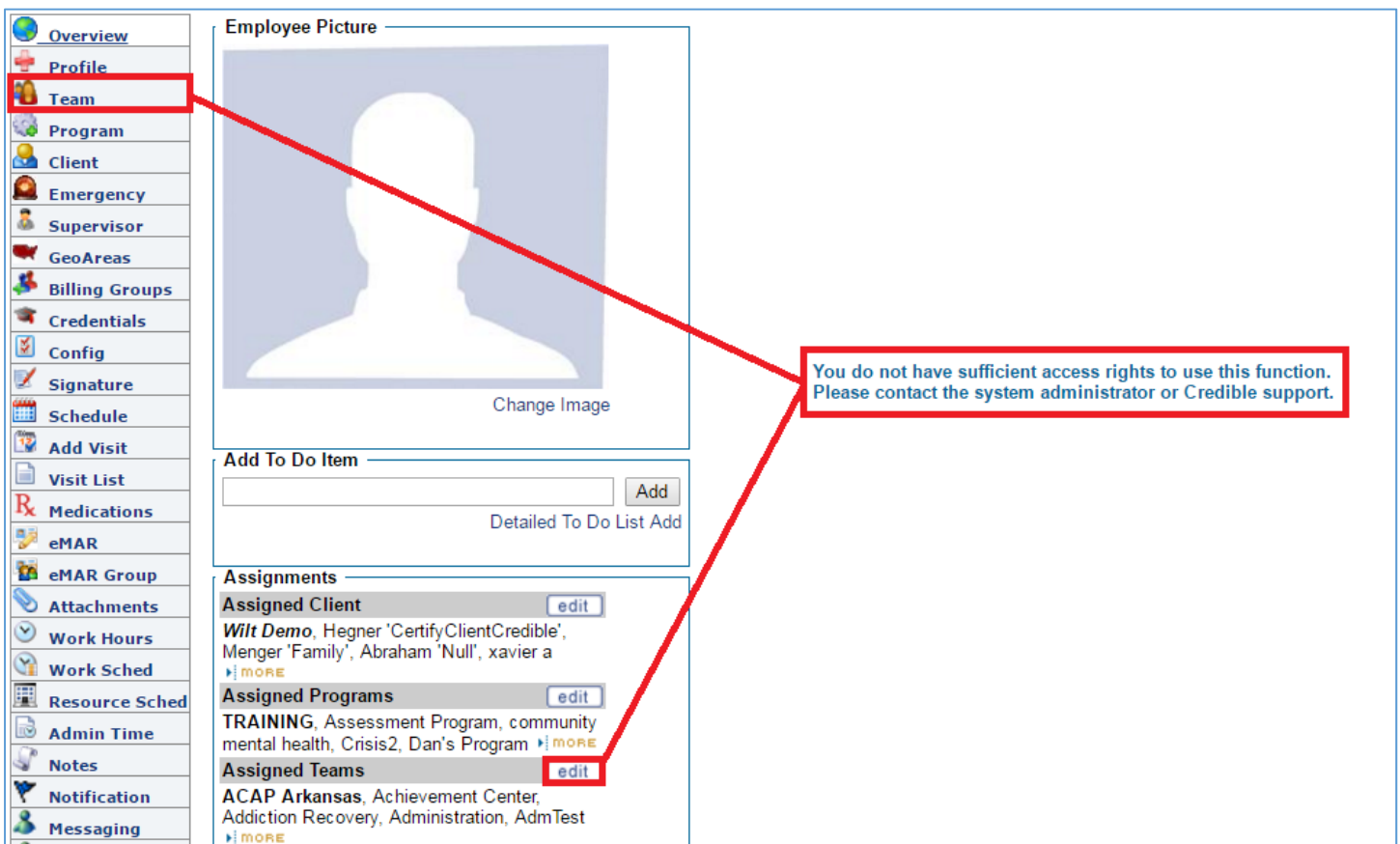
Function:

- Determines whether the user can assign Employees to Teams when accessing an Employee's Page.
 - **NOTE:** If disabled, an Insufficient Rights message will appear when clicking either the "Team" button on the Employee Nav Bar, or the "Edit" button near Assigned Teams on the Assignments module.
 - **NOTE:** The AssignEmployeeTeamsSameOnly setting will supercede this setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Team Button
- Employee Page -> Assignments Module -> Assigned Teams -> Edit Button

Screenshots:



When AssignEmployeeTeams is DISABLED

AssignEmployeeTeamsSameOnly

Function:

- When enabled, the user will only be able to assign other Employees to Teams that the user is currently assigned to. For example, if the user is assigned to the Intake and Substance Abuse Teams, they will only be able to assign Employees to those two Teams. Any other Teams that exist will not display as options.
 - **NOTE:** This setting supercedes the AssignEmployeeTeams setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Team Button
- Employee Page -> Assignments Module -> Assigned Teams -> Edit Button

Screenshots:

The screenshot displays the Credible Employee Profile interface. On the left is a vertical navigation menu with the following items: Overview, Profile, Team (highlighted with a red box), Program, Client, Emergency, Supervisor, GeoAreas, Billing Groups, Credentials, Config, Signature, Schedule, Add Visit, Visit List, Medications, eMAR, eMAR Group, Attachments, Work Hours, Work Sched, Resource Sched, Admin Time, Notes, Notification, and Messaging. The main content area is divided into sections: 'Employee Picture' (with a placeholder image and a 'Change Image' link), 'Add To Do Item' (with an input field and an 'Add' button), and 'Assignments'. The 'Assignments' section includes 'Assigned Client' (with an 'edit' button), 'Assigned Programs' (with an 'edit' button), and 'Assigned Teams' (with an 'edit' button highlighted in a red box). The 'Assigned Teams' list includes 'ACAP Arkansas, Achievement Center, Addiction Recovery, Administration, AdmTest' and a 'MORE' link.

AssignPlannerGroups

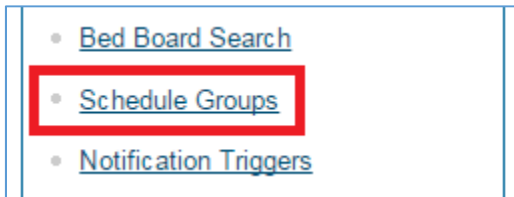
Function:

- Determines whether the user will be able to access the “Schedule Grp” button on the Client Nav Bar, as well as the “Schedule Groups”

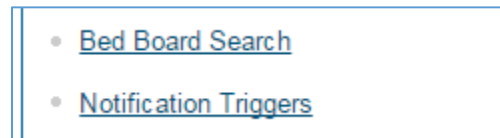
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Schedule Grp Button
- Admin Tab -> Daily Activities Section -> Schedule Groups

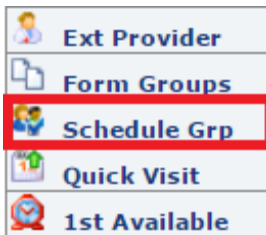
Screenshots:



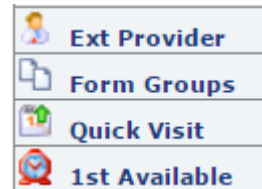
When AssignPlannerGroups is ENABLED



When AssignPlannerGroups is DISABLED



When AssignPlannerGroups is ENABLED



When AssignPlannerGroups is DISABLED

AssignPrograms

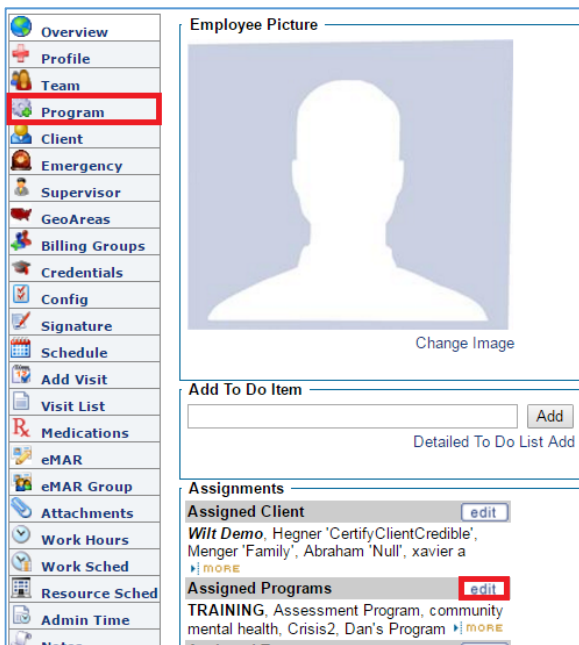
Function:

- Determines whether the user will be able to assign Programs to Clients or Employees from the Nav Bar, the Assignments Module, or the “Program Assignments” link on the Admin Tab.

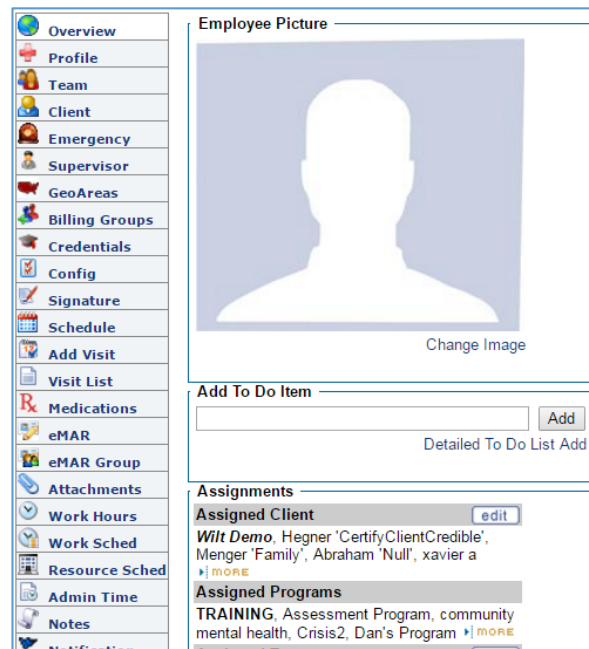
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Program Button
- Client Page -> Assignments Module -> Assigned Programs -> Edit Button
- Employee Page -> Employee Nav Bar -> Program Button
- Employee Page -> Assignments Module -> Assigned Programs -> Edit Button
- Admin Tab -> Daily Activities Section -> Program Assignments

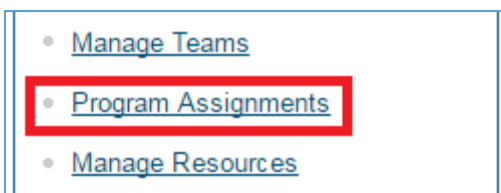
Screenshots:



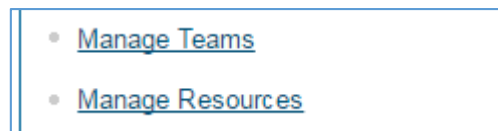
When AssignPrograms is ENABLED



When AssignPrograms is DISABLED



When AssignPrograms is ENABLED



When AssignPrograms is DISABLED

AssignResources

Function:

- Determines whether the “Edit” and “Delete” buttons will display on Resources.
- Determines whether the user can assign Teams to Resources.
- Determines whether the user can create new Resources.
- This setting also controls what Resources the user will be able to see. If disabled, the user will only be able to view Resources that are assigned to the same Team as the user. Any resources that are assigned to different Teams, or assigned to 0 teams will not display.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Resource Sched Button
- Admin Tab -> Daily Activities Section -> Manage Resources

Screenshots:

Resource List:

| # | Resource | Description | Date Created | Teams |
|---|-----------------|-----------------|--------------|--|
| 2 | Board Room | Board Room | 9/24/2014 | 1 Edit <input type="button" value="edit"/> <input type="button" value="schedule"/> |
| 4 | Conference Room | Conference Room | 9/24/2014 | 1 Edit <input type="button" value="edit"/> <input type="button" value="schedule"/> |
| 5 | Northend | Room 106 | 11/30/2015 | 1 Edit <input type="button" value="edit"/> <input type="button" value="schedule"/> |
| 3 | Vehicle 1 | Van | 9/24/2014 | 0 Edit <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="schedule"/> |

Resource: Description:

When AssignResources is ENABLED

Resource List:

| # | Resource | Description | Date Created |
|---|-----------------|-----------------|--------------|
| 2 | Board Room | Board Room | 9/24/2014 |
| 4 | Conference Room | Conference Room | 9/24/2014 |
| 5 | Northend | Room 106 | 11/30/2015 |

When AssignResources is DISABLED

AssignSupervisor

Function:

- Determines whether the user can assign Supervisors to an Employee using either the “Supervisor” button on the Employee Nav Bar, or the “Edit” button in the Assignments module near Assigned Supervisors.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Supervisor Button
- Employee Page -> Assignments Module -> Assigned Supervisors -> Edit Button

Screenshots:



When AssignSupervisor is ENABLED



When AssignSupervisor is DISABLED

AssignTeams

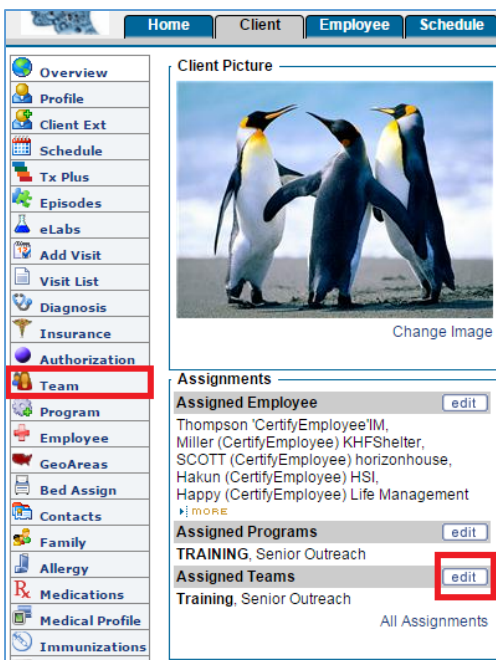
Function:

- Controls whether the user will be able to access the “Manage Teams” page on the Admin Tab.
 - If unchecked, the user will receive an Insufficient Rights message when clicking the “Manage Teams” link.
- On the Assignments section of a Client or Employee page, determines whether an “Edit” button will display near teams. If this Matrix setting is unchecked, no Edit button will display.
- On the Client or Employee Nav Bar, the “Team” button will not display if this setting is unchecked.

Location(s) this setting affects:

- Admin Tab -> Manage Teams
- Client Home Page -> Assignments Section
- Client Nav Bar
- Employee Home Page -> Assignments Section
- Employee Nav Bar

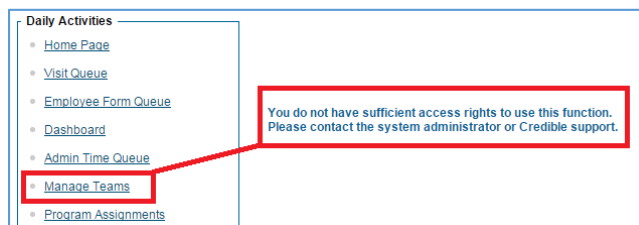
Screenshots:



With AssignTeams ENABLED



With AssignTeams DISABLED



With AssignTeams DISABLED

BillingGroupsAssign

Function:

- Determines whether the user will be able to assign Billing Groups to an Employee.
- Determines whether the user will be able to label an assigned Billing Group as the Default for an Employee.
 - **NOTE:** If disabled, the “Assign” and “Default” buttons will still display, however nothing will occur when the user clicks on them.
 - **NOTE:** If the BillingGroupsView setting is disabled, this setting will have no effect.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Billing Groups Button -> Assign Button
- Employee Page -> Employee Nav Bar -> Billing Groups Button -> Default Button

Screenshots:

| EMPLOYEE BILLING GROUPS: Bill Chamberlain | |
|---|--|
| Billing Group | Assign Default |
| 837 Test Group | <input type="button" value="assign"/> <input type="button" value="no"/> |
| BillingGroupName | <input type="button" value="assign"/> <input type="button" value="no"/> |
| CBH Main A | <input type="button" value="assign"/> <input type="button" value="no"/> |
| CBH Main B | <input type="button" value="assign"/> <input type="button" value="no"/> |
| CBH North A | <input type="button" value="assign"/> <input type="button" value="no"/> |
| CBH North B | <input type="button" value="assign"/> <input type="button" value="no"/> |
| CBH North C | <input type="button" value="assign"/> <input type="button" value="no"/> |
| CBH South A | <input type="button" value="assign"/> <input type="button" value="no"/> |
| CBH South B | <input type="button" value="assign"/> <input type="button" value="no"/> |
| Credible NC | <input type="button" value="assign"/> <input type="button" value="no"/> |
| Credible NH | <input type="button" value="assign"/> <input type="button" value="yes"/> |
| Fresno | <input type="button" value="assign"/> <input type="button" value="no"/> |
| JG COMMUNITY GROUP | <input type="button" value="assign"/> <input type="button" value="no"/> |
| Logisticare Vans | <input type="button" value="assign"/> <input type="button" value="no"/> |
| QA Billing Group | <input type="button" value="assign"/> <input type="button" value="no"/> |
| RCJ Billing Group | <input type="button" value="assign"/> <input type="button" value="no"/> |
| Transportation | <input type="button" value="assign"/> <input type="button" value="no"/> |

If BillingGroupsAssign is DISABLED, nothing will occur when the user clicks these buttons.

BillingGroupsView

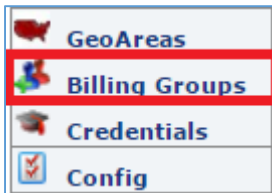
Function:

- Determines whether the user will be able to view the “Billing Groups” button on the Employee Nav Bar.
 - **NOTE:** In order to utilize the BillingGroupsAssign setting, this setting must be enabled.

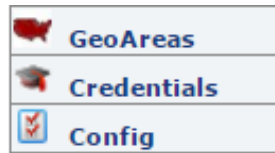
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Billing Groups Button

Screenshots:



When BillingGroupsView is ENABLED



When BillingGroupsView is DISABLED

Matrix Section: Attachments

AttachmentFreeText

Function:

- Determines whether the user will be able to use a free text description on a Client or Employee.
 - If disabled, the user will only be able to use descriptions that have been previously configured to appear in the description dropdown.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button -> Attach New or Scan New
- Client Page -> Client Nav Bar -> Attachments Button -> Attach New or Scan New

Screenshots:

Attach File: Test Test (3599) (M)

Folder: OR FL

Description: OR ---

Select File: Is Public:

**Max file size is 10 MB*

When AttachmentFreeText is ENABLED

Attach File: Test Test (3599) (M)

Folder: OR IP

Description: ---

Select File: Is Public:

**Max file size is 10 MB*

When AttachmentFreeText is DISABLED

ClientFileAdd

Function:

- Determines whether the user will be able to add a new attachment to a Client.
 - If disabled, the “Import Clinical Summary”, “Scan New”, and “Attach New” buttons will not appear on the Client’s Attachments page.
- **NOTE:** This setting is superceded by the ClientFileAddTeamFolderOnly setting.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:



When ClientFileAdd is ENABLED



When ClientFileAdd is DISABLED

ClientFileAddTeamFolderOnly

Function:

- When enabled, this setting allows the user to add Client files to ONLY folders that are either:
 - Assigned to the same team(s) as the Client
 - Are not assigned to teams
- **NOTE:** This setting supercedes the ClientFileAdd setting.
- **NOTE:** Assigning file folders to teams is done from: Admin Tab -> File Folders Admin

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button -> Attach New or Scan New

Screenshots:

The screenshot shows the 'Attach File' interface for a file named 'Test Test (3599) (M)'. It includes a 'Folder:' field with a text input and a dropdown menu. The dropdown menu is highlighted with a red box and shows 'FL'. Below it is a 'Description:' field with a text input and a dropdown menu showing '---'. There is a 'Select File:' section with a 'Browse...' button, an 'Is Public:' checkbox, and an 'Upload File' button. At the bottom, it states '*Max file size is 10 MB'.

When ENABLED, this dropdown will only show folders that are assigned to the same team(s) as the Client, or folders that are not assigned to a team.

ClientFileDelete

Function:

- Determines whether the user will be able to delete a Client attachment.
 - If disabled, the “delete” button will not appear.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:

| FILE ATTACHMENTS: Test Test (3599) (M) | | | | | | Import Clinical Summary | Scan New | Attach New |
|--|---------------|-------|---------------|--------------------------|--------------------------|-------------------------|----------|------------|
| File | Date Attached | Size | Original Name | Is Public | Is Summary | | | |
| ATTACHMENTS | | | | | | | | |
| Diagnostic Assessment | 04/09/2016 | 13 KB | tEST.gif | <input type="checkbox"/> | <input type="checkbox"/> | edit | delete | |

When ClientFileDelete is ENABLED

| FILE ATTACHMENTS: Test Test (3599) (M) | | | | | | Import Clinical Summary | Scan New | Attach New |
|--|---------------|-------|---------------|--------------------------|--------------------------|-------------------------|----------|------------|
| File | Date Attached | Size | Original Name | Is Public | Is Summary | | | |
| ATTACHMENTS | | | | | | | | |
| Diagnostic Assessment | 04/09/2016 | 13 KB | tEST.gif | <input type="checkbox"/> | <input type="checkbox"/> | edit | | |

When ClientFileDelete is DISABLED

ClientFileEdit

Function:

- Determines whether the user will be able to edit a Client attachment.
 - If disabled, the “edit” button will not appear.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:

| FILE ATTACHMENTS: Test Test (3599) (M) | | | | | | | Import Clinical Summary | Scan New | Attach New |
|---|---------------|-------|---------------|--------------------------|--------------------------|-------------|-------------------------|----------|------------|
| File | Date Attached | Size | Original Name | Is Public | Is Summary | | | | |
| ATTACHMENTS | | | | | | | | | |
|  Diagnostic Assessment | 04/09/2016 | 13 KB | tEST.gif | <input type="checkbox"/> | <input type="checkbox"/> | edit | delete | | |

When ClientFileEdit is ENABLED

| FILE ATTACHMENTS: Test Test (3599) (M) | | | | | | | Import Clinical Summary | Scan New | Attach New |
|---|---------------|-------|---------------|--------------------------|--------------------------|--|-------------------------|----------|------------|
| File | Date Attached | Size | Original Name | Is Public | Is Summary | | | | |
| ATTACHMENTS | | | | | | | | | |
|  Diagnostic Assessment | 04/09/2016 | 13 KB | tEST.gif | <input type="checkbox"/> | <input type="checkbox"/> | | delete | | |

When ClientFileEdit is DISABLED

ClientFileView

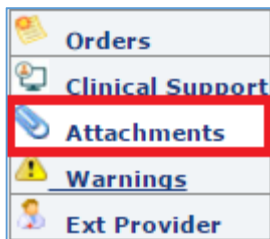
Function:

- Determines whether the user will be able to view the Client's attachments.
 - If disabled, the "Attachments" button will not appear on the Client Nav Bar.

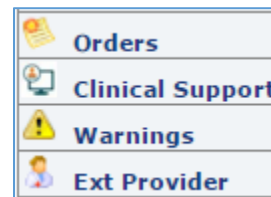
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:



When ClientFileView is ENABLED



When ClientFileView is DISABLED

ClientVisitFileAdd

Function:

- Determines whether the user will be able to add a new attachment to a Client Visit.
 - If disabled, the “Scan New”, and “Attach New” buttons will not appear on the Client Visit summary.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Visit List Button -> View Button -> Attachments Module
- Visit Tab -> View Button -> Attachments Module

Screenshots:

| | | | | | |
|--|--------------------|-------------------|----------------|---------------|---|
| Print Sign Update Delete Log Billing Clone Add To Do List | | | | | |
| Client Visit: | | | | | ID: 42880 + |
| Client Name: | Test Test | Employee Name: | David Tompkins | Recipient: | Client Only |
| Visit Type: | TRAINING - VISIT I | Program: | TRAINING | Location: | Home |
| Time In: | 9:56 AM | Time Out: | 1:54 PM | Date: | 3/3/15 |
| Revised Time In: | | Revised Time Out: | | Duration: | 238 (3:58) |
| CPT Code: | 00000 | Units: | 1 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 0 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: | | | | | Scan New Attach New |

When ClientVisitFileAdd is ENABLED

| | | | | | |
|--|--------------------|-------------------|----------------|---------------|-------------|
| Print Sign Update Delete Log Billing Clone Add To Do List | | | | | |
| Client Visit: | | | | | ID: 42880 + |
| Client Name: | Test Test | Employee Name: | David Tompkins | Recipient: | Client Only |
| Visit Type: | TRAINING - VISIT I | Program: | TRAINING | Location: | Home |
| Time In: | 9:56 AM | Time Out: | 1:54 PM | Date: | 3/3/15 |
| Revised Time In: | | Revised Time Out: | | Duration: | 238 (3:58) |
| CPT Code: | 00000 | Units: | 1 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 0 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: | | | | | |

When ClientVisitFileAdd is DISABLED

ClientVisitFileDelete

Function:

- Determines whether the user will be able to delete an attachment on a Client Visit.
 - If disabled, the “delete” button will not appear on the Client Visit summary.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Visit List Button -> View Button -> Attachments Module
- Visit Tab -> View Button -> Attachments Module

Screenshots:

| | | | | | |
|--|--------------------|-------------------|--|---------------|---|
| <div style="text-align: right;"> Print Sign Update Delete Log Billing Clone Add To Do List </div> | | | | | |
| Client Visit: | | | | | ID: 42880 + |
| Client Name: | Test Test | Employee Name: | David Tompkins | Recipient: | Client Only |
| Visit Type: | TRAINING - VISIT I | Program: | TRAINING | Location: | Home |
| Time In: | 9:56 AM | Time Out: | 1:54 PM | Date: | 3/3/15 |
| Revised Time In: | | Revised Time Out: | | Duration: | 238 (3:58) |
| CPT Code: | 00000 | Units: | 1 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 0 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: | | | | | Scan New Attach New |
| Employee | | | delete | | |

When ClientVisitFileDelete is ENABLED

| | | | | | |
|--|--------------------|-------------------|----------------|---------------|---|
| <div style="text-align: right;"> Print Sign Update Delete Log Billing Clone Add To Do List </div> | | | | | |
| Client Visit: | | | | | ID: 42880 + |
| Client Name: | Test Test | Employee Name: | David Tompkins | Recipient: | Client Only |
| Visit Type: | TRAINING - VISIT I | Program: | TRAINING | Location: | Home |
| Time In: | 9:56 AM | Time Out: | 1:54 PM | Date: | 3/3/15 |
| Revised Time In: | | Revised Time Out: | | Duration: | 238 (3:58) |
| CPT Code: | 00000 | Units: | 1 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 0 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: | | | | | Scan New Attach New |
| Employee | | | | | |

When ClientVisitFileDelete is DISABLED

ClientVisitFileView

Function:

- Determines whether the user will be able to view attachments on a Client Visit.
 - If disabled, the attachments section will not display.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Visit List Button -> View Button -> Attachments Module
- Visit Tab -> View Button -> Attachments Module

Screenshots:

| Client Visit: ID: 42880 | | | | | |
|--|--------------------|-------------------|----------------|---------------|-------------|
| Client Name: | Test Test | Employee Name: | David Tompkins | Recipient: | Client Only |
| Visit Type: | TRAINING - VISIT I | Program: | TRAINING | Location: | Home |
| Time In: | 9:56 AM | Time Out: | 1:54 PM | Date: | 3/3/15 |
| Revised Time In: | | Revised Time Out: | | Duration: | 238 (3:58) |
| CPT Code: | 00000 | Units: | 1 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 0 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: Scan New Attach New | | | | | |
| Employee | | | delete | | |

When ClientVisitFileView is ENABLED

| Client Visit: ID: 42880 | | | | | |
|-------------------------|--------------------|-------------------|----------------|---------------|-------------|
| Client Name: | Test Test | Employee Name: | David Tompkins | Recipient: | Client Only |
| Visit Type: | TRAINING - VISIT I | Program: | TRAINING | Location: | Home |
| Time In: | 9:56 AM | Time Out: | 1:54 PM | Date: | 3/3/15 |
| Revised Time In: | | Revised Time Out: | | Duration: | 238 (3:58) |
| CPT Code: | 00000 | Units: | 1 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 0 | bool1: | False |
| bool2: | False | non_release: | False | | |

When ClientVisitFileView is DISABLED

CreateFolder

Function:

- Allows access to the “File Folders Admin” link in the “Lookups and Code Tables” section of the Admin Tab.
 - **NOTE:** This setting is superceded by the CreateFolderSameTeamOnly setting.

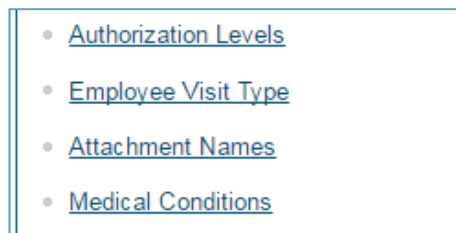
Location(s) this setting affects:

- Admin Tab -> Lookup and Code Tables Section -> File Folders Admin

Screenshots:



When CreateFolder is ENABLED



When CreateFolder is DISABLED

CreateFolderSameTeamOnly

Function:

- If enabled, the user will only be able to assign a new file folder to teams they are attached to.
 - **NOTE:** The user will still be able to create a folder and not assign it to a team.
 - **NOTE:** This setting supercedes the CreateFolder setting.

Location(s) this setting affects:

- Admin Tab -> Lookup and Code Tables Section -> File Folders Admin

Screenshots:

The screenshot shows the 'ADD FOLDER' form. At the top is a table with the following columns: Folder Name, Is Client, Is Employee, Is Clinical Support, Is Client Private, and Is Emp Private. Below the table is a dropdown menu labeled 'Teams:' which is highlighted with a red box. The dropdown menu contains the following options: ACAP Arkansas, Achievement Center, Addiction Recovery, and Administration. An 'Add Folder' button is located at the bottom right of the form.

When CreateFolderSameTeamOnly is ENABLED, the Teams that can be attached to a new folder will only be the Teams currently attached to the user creating the folder.

EmpFilesViewOwn

Function:

- Allows the user to view attachments on their own Employee Page. If disabled, the “Attachments” button will not display on your Employee Nav Bar.
 - **NOTE:** This is the recommended setting for Employees.
 - **NOTE:** This setting is superceded by EmployeeFileView. If EmployeeFileView is enabled, this setting will have no effect.

Location(s) this setting affects:

- Employee Page (your own) -> Employee Nav Bar -> Attachments Button

Screenshots:



When EmpFilesViewOwn is ENABLED



When EmpFilesViewOwn is DISABLED

EmployeeFileAdd

Function:

- Determines whether the user will be able to add an attachment to an Employee.
 - If disabled, the “Attach New” button will not display.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button

Screenshots:

| FILE ATTACHMENTS: Bill Chamberlain | | | | Attach New |
|------------------------------------|---------------|----------|----------------------|------------------------|
| File | Date Attached | Size | Original Name | |
| AUDITS | | | | |
| Evaluations | 4/9/2016 | 13.74 KB | tEST.gif | |
| | | | edit | delete |

When EmployeeFileAdd is ENABLED

| FILE ATTACHMENTS: Bill Chamberlain | | | | |
|------------------------------------|---------------|----------|----------------------|------------------------|
| File | Date Attached | Size | Original Name | |
| AUDITS | | | | |
| Evaluations | 4/9/2016 | 13.74 KB | tEST.gif | |
| | | | edit | delete |

When EmployeeFileAdd is DISABLED

EmployeeFileDelete

Function:

- Determines whether the user will be able to delete an Employee attachment.
 - If disabled, the “delete” button will not display.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button

Screenshots:

| FILE ATTACHMENTS: Bill Chamberlain | | | | Attach New |
|------------------------------------|---------------|----------|---------------|---|
| File | Date Attached | Size | Original Name | |
| AUDITS | | | | |
| Evaluations | 4/9/2016 | 13.74 KB | tEST.gif | <input type="button" value="edit"/> <input type="button" value="delete"/> |

When EmployeeFileDelete is ENABLED

| FILE ATTACHMENTS: Bill Chamberlain | | | | Attach New |
|------------------------------------|---------------|----------|---------------|-------------------------------------|
| File | Date Attached | Size | Original Name | |
| AUDITS | | | | |
| Evaluations | 4/9/2016 | 13.74 KB | tEST.gif | <input type="button" value="edit"/> |

When EmployeeFileDelete is DISABLED

EmployeeFileEdit

Function:

- Determines whether the user will be able to edit an Employee attachment.
 - If disabled, the “edit” button will not display.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button

Screenshots:

| FILE ATTACHMENTS: Bill Chamberlain | | | | Attach New |
|------------------------------------|---------------|----------|---------------|---|
| File | Date Attached | Size | Original Name | |
| AUDITS | | | | |
| Evaluations | 4/9/2016 | 13.74 KB | tEST.gif | <input type="button" value="edit"/> <input type="button" value="delete"/> |

When EmployeeFileDelete is ENABLED

| FILE ATTACHMENTS: Bill Chamberlain | | | | Attach New |
|------------------------------------|---------------|----------|---------------|---------------------------------------|
| File | Date Attached | Size | Original Name | |
| AUDITS | | | | |
| Evaluations | 4/9/2016 | 13.74 KB | tEST.gif | <input type="button" value="delete"/> |

When EmployeeFileDelete is DISABLED

EmployeeFileView

Function:

- Allows the user to view attachments on all Employee pages. If disabled, the “Attachments” button will not display on Employee Nav Bars.
 - **NOTE:** This setting supercedes the EmpFilesViewOwn setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button

Screenshots:



When EmployeeFileView is ENABLED



When EmployeeFileView is DISABLED

EmployeeFormFileAdd


Function:

- Determines whether the user will be able to add an attachment to a completed Employee Form.
 - If disabled, the “Scan New” and “Attach New” buttons will not display.


Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms Button -> View Button
- Admin Tab -> Daily Activities Section -> Employee Form Queue -> View Button

Screenshots:

| | | | |
|--|----------------------|-------------------|---|
| <div style="text-align: right;"> <input type="button" value="Print"/> <input type="button" value="Sign"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="List"/> </div> | | | |
| Employee Form: | | | ID: 44317 <input type="button" value="+"/> |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |
| Duration: | 60 | Approved: | False |
| Approved By: | | Approve Date: | |
| Status: | COMPLETED | Signed: | 12/31/15 10:05 AM |
| Form : Version: | 1078 : 2990 | Handheld Version: | Web Entry |
| Attachments: | | | <input type="button" value="Scan New"/> <input type="button" value="Attach New"/> |
|  Test | | | <input type="button" value="delete"/> |

When EmployeeFormFileAdd is ENABLED

| | | | |
|---|----------------------|-------------------|---|
| <div style="text-align: center;"> <input type="button" value="◀"/> <input type="button" value="Print"/> <input type="button" value="Sign"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="List"/> <input type="button" value="▶"/> </div> | | | |
| Employee Form: | | | ID: 44317 <input type="button" value="+"/> |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |
| Duration: | 60 | Approved: | False |
| Approved By: | | Approve Date: | |
| Status: | COMPLETED | Signed: | 12/31/15 10:05 AM |
| Form : Version: | 1078 : 2990 | Handheld Version: | Web Entry |
| Attachments: | | | |
|  Test | | | <input type="button" value="delete"/> |

When EmployeeFormFileAdd is DISABLED

EmployeeFormFileDelete

Function:

- Determines whether the user will be able to delete an attachment on a completed Employee Form.
 - If disabled, the “Delete” button will not display.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms Button -> View Button
- Admin Tab -> Daily Activities Section -> Employee Form Queue -> View Button

Screenshots:

| Employee Form: | | ID: 44317 + | |
|---------------------|----------------------|---|-------------------|
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |
| Duration: | 60 | Approved: | False |
| Approved By: | | Approve Date: | |
| Status: | COMPLETED | Signed: | 12/31/15 10:05 AM |
| Form : Version: | 1078 : 2990 | Handheld Version: | Web Entry |
| Attachments: | | <input type="button" value="Scan New"/> <input type="button" value="Attach New"/> | |
| Test | | <input type="button" value="delete"/> | |

When EmployeeFormFileDelete is ENABLED

| Employee Form: | | ID: 44317 + | |
|---------------------|----------------------|---|-------------------|
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |
| Duration: | 60 | Approved: | False |
| Approved By: | | Approve Date: | |
| Status: | COMPLETED | Signed: | 12/31/15 10:05 AM |
| Form : Version: | 1078 : 2990 | Handheld Version: | Web Entry |
| Attachments: | | <input type="button" value="Scan New"/> <input type="button" value="Attach New"/> | |
| Test | | | |

When EmployeeFormFileDelete is DISABLED

EmployeeFormFileView


Function:

- Determines whether the user will be able to view attachments on a completed Employee Form.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms Button -> View Button
- Admin Tab -> Daily Activities Section -> Employee Form Queue -> View Button

Screenshots:

| | | | |
|--|----------------------|---|--------------------|
| <div style="text-align: right;"> <input type="button" value="Print"/> <input type="button" value="Sign"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="List"/> </div> | | | |
| Employee Form: | | | ID: 44317 + |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |
| Duration: | 60 | Approved: | False |
| Approved By: | | Approve Date: | |
| Status: | COMPLETED | Signed: | 12/31/15 10:05 AM |
| Form : Version: | 1078 : 2990 | Handheld Version: | Web Entry |
| Attachments: | | <input type="button" value="Scan New"/> <input type="button" value="Attach New"/> | |
|  Test | | <input type="button" value="delete"/> | |

When EmployeeFormFileView is ENABLED

| | | | |
|--|----------------------|-------------------|--------------------|
| <div style="text-align: right;"> <input type="button" value="Print"/> <input type="button" value="Sign"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="List"/> </div> | | | |
| Employee Form: | | | ID: 44317 + |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |
| Duration: | 60 | Approved: | False |
| Approved By: | | Approve Date: | |
| Status: | COMPLETED | Signed: | 12/31/15 10:05 AM |
| Form : Version: | 1078 : 2990 | Handheld Version: | Web Entry |

When EmployeeFormFileView is DISABLED

ViewClientFoldersTeamOnly

Function:

- If enabled, the user will only be able to view attachments on a Client that are either:
 - Contained in file folders that are assigned to teams that the user is also assigned to.
 - Contained in file folders that are not assigned to any teams.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:

| FILE ATTACHMENTS: Test Test (3599) (M) | | | | | | Import Clinical Summary | Scan New | Attach New |
|---|---------------|-------|---------------|--------------------------|--------------------------|-------------------------|------------------------|------------|
| File | Date Attached | Size | Original Name | Is Public | Is Summary | | | |
| ATTACHMENTS | | | | | | | | |
|  Diagnostic Assessment | 04/09/2016 | 13 KB | tEST.gif | <input type="checkbox"/> | <input type="checkbox"/> | edit | delete | |

ViewPrivateClientFolders

Function:

- If enabled, the user will be able to view any client file folders that are marked as Private.
 - File folders can be marked as Private from the “File Folders Admin” page, which is accessed from the Admin Tab.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:

The screenshot displays the 'FILE FOLDER ADMIN' interface. At the top, there is a table with the following data:

| Folder Name | Is Client | Is Employee | Is Clinical Support | Is Client Private | Is Emp Private | Teams |
|-------------|-----------|-------------|---------------------|-------------------|----------------|-------|
| NEW FOLDER | True | True | False | False | False | |

Below the table is the 'ADD FOLDER' form. It includes a text input for 'Folder Name', checkboxes for 'Is Client', 'Is Employee', 'Is Clinical Support', 'Is Client Private', and 'Is Emp Private'. The 'Is Client Private' checkbox is highlighted with a red box. A 'Teams' dropdown menu is visible, listing 'ACAP Arkansas', 'Achievement Center', 'Addiction Recovery', and 'Administration'. An 'Add Folder' button is located at the bottom right of the form.

ViewPrivateEmployeeFolders

Function:

- If enabled, the user will be able to view any employee file folders that are marked as Private.
 - File folders can be marked as Private from the “File Folders Admin” page, which is accessed from the Admin Tab.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button

Screenshots:

FILE FOLDER ADMIN:

| Folder Name | Is Client | Is Employee | Is Clinical Support | Is Client Private | Is Emp Private | Teams |
|-------------|-----------|-------------|---------------------|-------------------|----------------|----------------------|
| NEW FOLDER | True | True | False | False | False | edit |

ADD FOLDER

| Folder Name | Is Client | Is Employee | Is Clinical Support | Is Client Private | Is Emp Private |
|----------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Teams:

- ACAP Arkansas
- Achievement Center
- Addiction Recovery
- Administration

[Add Folder](#)

Matrix Section: Billing

ARGLEExport

Function:

- Determines whether the user will see the “Revenue/AR Export” and the “Revenue/AR Export List” links that will display in the “Reports and Exports” section of the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Revenue/AR Export
- Billing Tab -> Revenue/AR Export List

Screenshots:



When ARGLEExport is ENABLED



When ARGLEExport is DISABLED

BedBoardBilling

Function:

- Determines whether the user will see the “Bed Board Billing” link that displays in the “Bed Board and Foster Home Billing” section of the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Bed Board Billing

Screenshots:



When BedBoardBilling is ENABLED



When BedBoardBilling is DISABLED

BillingAddAdjustment

Function:

- Determines whether the user will see the “Add Adjustment to Service” module when viewing the Billing information on a Visit/Service.

Location(s) this setting affects:

- Listed Service -> View -> Billing

Screenshots:

| Claim Billing Details: | | | | | | | | | | Visit ID: 44659 |
|---------------------------------|-------------------------|--|----------------------|------------------------|--|--|--|--|--|-----------------|
| Client: Jane Test | Date: 2/15/16 10:59 AM | Status: COMPLETED | Rate: \$50.00 | | | | | | | |
| Type: REM FORM_BT | Ins Age Date: 2/15/2016 | Copy: <input type="button" value="add"/> | \$0.00 | Disallowed Amt: \$0.00 | | | | | | |
| Units: 1 | Duration: 6 | Patient Resp: | Adjusted Amt: \$0.00 | | | | | | | |
| Billing Group: QA Billing Group | Open Claim: False | Client Due: \$50.00 | Client Paid: \$0.00 | | | | | | | |
| CPT Code: 99999 | Merged: | Ins Due: \$0.00 | Ins Paid: \$0.00 | | | | | | | |
| Revenue Code: 10002_01-7240 | | | Balance: \$50.00 | | | | | | | |

| Claim | Action | hide | undo | Posting Date | Batch | Payment | Payer | Acctng Date | Amount | Balance | Undo | Adjstmnt | User |
|-------------------|--------|------|------|------------------|-------|---------|-------|-------------|--------|---------|------|----------|------|
| SERVICE INIT | | | | 2/15/16 11:01 AM | | | | 2/15/2016 | 0.00 | 0.00 | | | |
| SERVICE RATE INIT | | | | 2/15/16 11:01 AM | | | | 2/15/2016 | 50.00 | 50.00 | | | |

Add Note: For Claim

Add Adjustment to Service: Adjmnt Amount: (+val -bal) WRITEOFF Acctng Date

Adjustment Reason:

Change Status of Service:

Rejected: Resubmit: Transferred: Acctng Date Transfer Balance: Client

When BillingAddAdjustment is ENABLED

| Claim Billing Details: | | | | | | | | | | Visit ID: 44659 |
|---------------------------------|-------------------------|--|----------------------|------------------------|--|--|--|--|--|-----------------|
| Client: Jane Test | Date: 2/15/16 10:59 AM | Status: COMPLETED | Rate: \$50.00 | | | | | | | |
| Type: REM FORM_BT | Ins Age Date: 2/15/2016 | Copy: <input type="button" value="add"/> | \$0.00 | Disallowed Amt: \$0.00 | | | | | | |
| Units: 1 | Duration: 6 | Patient Resp: | Adjusted Amt: \$0.00 | | | | | | | |
| Billing Group: QA Billing Group | Open Claim: False | Client Due: \$50.00 | Client Paid: \$0.00 | | | | | | | |
| CPT Code: 99999 | Merged: | Ins Due: \$0.00 | Ins Paid: \$0.00 | | | | | | | |
| Revenue Code: 10002_01-7240 | | | Balance: \$50.00 | | | | | | | |

| Claim | Action | hide | undo | Posting Date | Batch | Payment | Payer | Acctng Date | Amount | Balance | Undo | Adjstmnt | User |
|-------------------|--------|------|------|------------------|-------|---------|-------|-------------|--------|---------|------|----------|------|
| SERVICE INIT | | | | 2/15/16 11:01 AM | | | | 2/15/2016 | 0.00 | 0.00 | | | |
| SERVICE RATE INIT | | | | 2/15/16 11:01 AM | | | | 2/15/2016 | 50.00 | 50.00 | | | |

Add Note: For Claim

Change Status of Service:

Rejected: Resubmit: Transferred: Acctng Date Transfer Balance: Client

When BillingAddAdjustment is ENABLED

BillingAddAdjustmentMultiple

Function:

- Determines whether the "Writeoff" checkbox appears when performing an Advanced Visit/Service search. This checkbox will allow a Writeoff column to appear in the search results, and an Adjustment module to appear at the bottom, allowing the user to perform multiple adjustments at once.

Location(s) this setting affects:

- Visit Tab -> Advanced Search

Screenshots:

| Writeoff | Service ID | Service Date | Client Name | Service Type | CPT Code | CPT Modifier | Program | Location | Recipient | Employee Name |
|--------------------------|------------|--------------|-------------|--------------|----------|--------------|----------|--------------|------------|---------------|
| <input type="checkbox"/> | 32483 | 6/14/2013 | Boop, Betty | TXPLUS | TRAIN | | TRAINING | Mont Co Home | ClientOnly | DeForest, |
| <input type="checkbox"/> | 32484 | 6/14/2013 | Boop, Betty | TXPLUS | TRAIN | | TRAINING | Mont Co Home | ClientOnly | DeForest, |
| <input type="checkbox"/> | 32561 | 6/14/2013 | Boop, Betty | CLIENTTRN | h2015 | 1 | TRAINING | Mont Co Home | ClientOnly | DeForest, |
| <input type="checkbox"/> | 32892 | 6/20/2013 | Boop, Betty | SCHEDTRN | TRAIN | | TRAINING | Mont Co Home | ClientOnly | DeForest, |
| <input type="checkbox"/> | 33149 | 7/3/2013 | Boop, Betty | VISITTRNI | 00000 | | TRAINING | Other | ClientOnly | DeForest, |
| <input type="checkbox"/> | 33152 | 7/3/2013 | Boop, Betty | VISITTRNII | | | TRAINING | Other | ClientOnly | DeForest, |

6

Writeoff Adjustment Type --- Acctng Date ---
Adjustment Reason

When BillingAddAdjustmentMultiple is ENABLED

| Writeoff | Service ID | Service Date | Client Name | Service Type | CPT Code | CPT Modifier | Program | Location | Recipient | Employee Name |
|--------------------------|------------|--------------|-------------|--------------|----------|--------------|----------|--------------|------------|---------------|
| <input type="checkbox"/> | 32483 | 6/14/2013 | Boop, Betty | TXPLUS | TRAIN | | TRAINING | Mont Co Home | ClientOnly | DeForest, |
| <input type="checkbox"/> | 32484 | 6/14/2013 | Boop, Betty | TXPLUS | TRAIN | | TRAINING | Mont Co Home | ClientOnly | DeForest, |
| <input type="checkbox"/> | 32561 | 6/14/2013 | Boop, Betty | CLIENTTRN | h2015 | 1 | TRAINING | Mont Co Home | ClientOnly | DeForest, |
| <input type="checkbox"/> | 32892 | 6/20/2013 | Boop, Betty | SCHEDTRN | TRAIN | | TRAINING | Mont Co Home | ClientOnly | DeForest, |
| <input type="checkbox"/> | 33149 | 7/3/2013 | Boop, Betty | VISITTRNI | 00000 | | TRAINING | Other | ClientOnly | DeForest, |
| <input type="checkbox"/> | 33152 | 7/3/2013 | Boop, Betty | VISITTRNII | | | TRAINING | Other | ClientOnly | DeForest, |

6

Writeoff Adjustment Type --- Acctng Date ---
Adjustment Reason

When BillingAddAdjustmentMultiple is DISABLED

BillingConfig

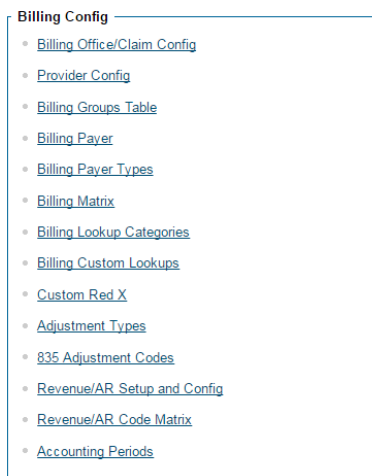
Function:

- Determines whether the “Billing Config” section on the Billing Tab will be accessible.
 - This section contains the following links: Billing Office/Claim Config, Provider Config, Billing Groups Table, Billing Payer, Billing Payer Types, Billing Matrix, Billing Lookup Categories, Billing Custom Lookups, Custom Red X, Adjustment Types, 835 Adjustment Codes, Revenue/AR Setup and Config, Revenue/AR Code Matrix, Accounting Periods

Location(s) this setting affects:

- Billing Tab -> Billing Config Section

Screenshots:



If BillingConfig is DISABLED, this section will not display.

BillingCPTCodes

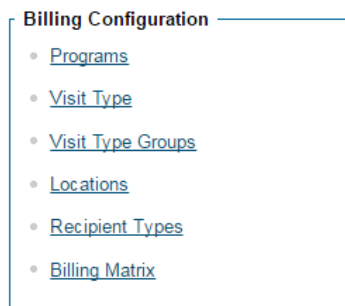
Function:

- Determines whether the “Billing Configuration” section on the Admin Tab will display normally.
 - Typically this section displays the following links: Programs, Visit Type, Visit Type Groups, Locations, Recipient Types, Billing Matrix
- **NOTE:** If disabled, the Billing Configuration section will remove those links and instead display the following links (assuming the user has access to them): Billing Payer, Billing Groups

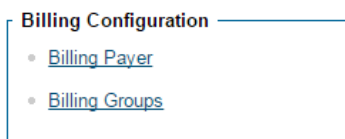
Location(s) this setting affects:

- Admin Tab -> Billing Configuration Section

Screenshots:



When BillingCPTCodes is ENABLED



When BillingCPTCodes is DISABLED

BillingModule

Function:

- Determines whether the “Billing” section on the Billing Tab will be accessible.
 - This section contains the following links: Generate Batch Claim File, Batch List and Edits, Manage Insurance Payments, 835 / EOB Claim Payment Advice, Load / Read 997, Generate Eligibility (270) Batch, Eligibility(270) Batch List, Load / Process 271
- Determines whether the “Client Statements and Payments” section on the Billing Tab will be accessible.
 - This section contains the following links: Manage Client Payments, Generate Client Statements, Manage Past Due Messages.
- Also affects whether the user will be able to access the “Ledger” button from the Client Nav Bar.
 - If disabled, an Insufficient Rights message will display.

Location(s) this setting affects:

- Billing Tab -> Billing Section
- Billing Tab -> Client Statements and Payments Section
- Client Nav Bar -> Ledger Button

Screenshots:



If BillingModule is DISABLED, these sections will not display.

BillingRefundClientPayment

Function:

- Allows the “Refund” and “Return” buttons to display when viewing the “Payments” button from the Client Nav Bar, or the “Manage Client Payments” page from the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Manage Client Payments
- Client Nav Bar -> Payments

Screenshots:

CLIENT PAYMENTS: Test Test (3599) (M)

Payment ID: Client ID: 3599 --- Type --- --- Status --- --- Location --- - Srch Date - Start Date End Date Export Filter

| Payment ID | Payment Status | Payment Date | Deposit Date | Payment Amount | Applied Amount | Payment Balance | Payment Type | Check# Ref# | Note | Emp | Location | Log | Reconcile Services | View/Delete | Adjust Payment | Refund Balance | Return Check | Edit | Print |
|------------|----------------|--------------|--------------|----------------|----------------|-----------------|--------------|-------------|------|-------|----------|------------------------------------|--|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|-------------------------------------|--------------------------------------|
| 4060 | RECEIVED | 3/26/2016 | | \$100.00 | \$0.00 | \$100.00 | CHECK | | | 11596 | | <input type="button" value="log"/> | <input type="button" value="reconcile"/> | <input type="button" value="delete"/> | <input type="button" value="adjust"/> | <input type="button" value="refund"/> | <input type="button" value="return"/> | <input type="button" value="edit"/> | <input type="button" value="print"/> |
| | | | | \$100.00 | \$0.00 | \$100.00 | | | | | | | | | | | | | |

When BillingRefundClientPayment is ENABLED

CLIENT PAYMENTS: Test Test (3599) (M)

Payment ID: Client ID: 3599 --- Type --- --- Status --- --- Location --- - Srch Date - Start Date End Date Export Filter

| Payment ID | Payment Status | Payment Date | Deposit Date | Payment Amount | Applied Amount | Payment Balance | Payment Type | Check# Ref# | Note | Emp | Location | Log | Reconcile Services | View/Delete | Adjust Payment | Edit | Print |
|------------|----------------|--------------|--------------|----------------|----------------|-----------------|--------------|-------------|------|-------|----------|------------------------------------|--|---------------------------------------|---------------------------------------|-------------------------------------|--------------------------------------|
| 4060 | RECEIVED | 3/26/2016 | | \$100.00 | \$0.00 | \$100.00 | CHECK | | | 11596 | | <input type="button" value="log"/> | <input type="button" value="reconcile"/> | <input type="button" value="delete"/> | <input type="button" value="adjust"/> | <input type="button" value="edit"/> | <input type="button" value="print"/> |
| | | | | \$100.00 | \$0.00 | \$100.00 | | | | | | | | | | | |

When BillingRefundClientPayment is DISABLED

BillingReports

Function:

- Determines whether the “Reports and Exports” section on the Billing Tab will be accessible.
 - This section contains the following links: Search Claims and Visits, Batch Claim Error Report, Duplicate Billing Report, Advanced Ledger Search, Revenue/AR Export, Revenue/AR Export List, Aging Intervals

Location(s) this setting affects:

- Billing Tab -> Reports and Exports Section

Screenshots:



If BillingReports is DISABLED, this section will not display.

BillingUndo

Function:

- Allows the "Undo" button to appear on ledger lines when viewing the Billing section of a Visit.

Location(s) this setting affects:

- Visit View -> Billing Button -> Ledger Section

Screenshots:

| Claim Billing Details: | | | | | | | | | | Visit ID: 44970 |
|------------------------|-------------|---------------|-----------------|---------------|---|-----------------|----------|---------|--|-----------------|
| Client: | Abby Test | Date: | 3/21/16 2:54 PM | Status: | COMPLETED | Rate: | \$50.00 | | | |
| Type: | Bill Test | Ins Age Date: | 3/22/2016 | Copay: | <input type="button" value="add"/> \$0.00 | Disallowed Amt: | \$0.00 | | | |
| Units: | 1 | Duration: | 60 | Patient Resp: | | Adjusted Amt: | \$0.00 | | | |
| Billing Group: | Credible NH | Open Claim: | False | Client Due: | \$0.00 | Client Paid: | \$0.00 | | | |
| CPT Code: | 6260 | Merged: | | Ins Due: | \$50.00 | Ins Paid: | \$0.00 | | | |
| Revenue Code: | DAN | | | | | | Balance: | \$50.00 | | |

| Ins Details: | Billing Ord | Current | Next | Ins ID | Payer | Start Date | End Date | Group # | Copay | Auth Released | Prim |
|--------------|-------------|---------------------------------------|------|-----------|-----------|------------|-----------|---------|--------------------------------------|--------------------------|--------------------------|
| 2596 | 1 | x | | 123444444 | AETNA PPO | 6/1/2015 | 3/16/2017 | | 0 <input type="button" value="add"/> | <input type="checkbox"/> | x |
| 2647 | 2 | <input type="button" value="switch"/> | x | 111122258 | CIGNA | 1/18/2016 | | | 0 | | <input type="checkbox"/> |

| Claim | Action | hide undo | Posting Date | Batch | Payment | Payer | Accntng Date | Amount | Balance | Undo | Adjstmnt | User |
|-------|-------------------|-----------|-----------------|-------|---------|-----------|--------------|--------|---------|-------------------------------------|----------|------|
| | SERVICE INIT | | 3/22/16 2:54 PM | | | | 3/21/2016 | 0.00 | 0.00 | | | |
| | SERVICE RATE INIT | | 3/22/16 2:54 PM | | | | 3/21/2016 | 50.00 | 50.00 | | | |
| | INSURANCE INIT | | 3/22/16 2:54 PM | | | AETNA PPO | 3/21/2016 | 50.00 | 50.00 | <input type="button" value="undo"/> | | |

When BillingUndo is ENABLED

| Claim Billing Details: | | | | | | | | | | Visit ID: 44970 |
|------------------------|-------------|---------------|-----------------|---------------|---|-----------------|----------|---------|--|-----------------|
| Client: | Abby Test | Date: | 3/21/16 2:54 PM | Status: | COMPLETED | Rate: | \$50.00 | | | |
| Type: | Bill Test | Ins Age Date: | 3/22/2016 | Copay: | <input type="button" value="add"/> \$0.00 | Disallowed Amt: | \$0.00 | | | |
| Units: | 1 | Duration: | 60 | Patient Resp: | | Adjusted Amt: | \$0.00 | | | |
| Billing Group: | Credible NH | Open Claim: | False | Client Due: | \$0.00 | Client Paid: | \$0.00 | | | |
| CPT Code: | 6260 | Merged: | | Ins Due: | \$50.00 | Ins Paid: | \$0.00 | | | |
| Revenue Code: | DAN | | | | | | Balance: | \$50.00 | | |

| Ins Details: | Billing Ord | Current | Next | Ins ID | Payer | Start Date | End Date | Group # | Copay | Auth Released | Prim |
|--------------|-------------|---------------------------------------|------|-----------|-----------|------------|-----------|---------|--------------------------------------|--------------------------|--------------------------|
| 2596 | 1 | x | | 123444444 | AETNA PPO | 6/1/2015 | 3/16/2017 | | 0 <input type="button" value="add"/> | <input type="checkbox"/> | x |
| 2647 | 2 | <input type="button" value="switch"/> | x | 111122258 | CIGNA | 1/18/2016 | | | 0 | | <input type="checkbox"/> |

| Claim | Action | hide undo | Posting Date | Batch | Payment | Payer | Accntng Date | Amount | Balance | Undo | Adjstmnt | User |
|-------|-------------------|-----------|-----------------|-------|---------|-----------|--------------|--------|---------|------|----------|------|
| | SERVICE INIT | | 3/22/16 2:54 PM | | | | 3/21/2016 | 0.00 | 0.00 | | | |
| | SERVICE RATE INIT | | 3/22/16 2:54 PM | | | | 3/21/2016 | 50.00 | 50.00 | | | |
| | INSURANCE INIT | | 3/22/16 2:54 PM | | | AETNA PPO | 3/21/2016 | 50.00 | 50.00 | | | |

When BillingUndo is DISABLED

ClientPaymentAdjust

Function:

- Allows the “Adjust” button to appear when viewing the “Payments” button from the Client Nav Bar, or the “Manage Client Payments” page from the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Manage Client Payments
- Client Nav Bar -> Payments

Screenshots:

| CLIENT PAYMENTS: Test Test (3599) (M) | | | | | | | | | | | | | | | | | | | |
|--|----------------|-----------------|--------------|----------------|----------------|-----------------|--------------|------------------|------|---------------|----------|------------------------------------|--|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|-------------------------------------|--------------------------------------|
| Payment ID: <input type="text"/> | | Client ID: 3599 | | --- Type --- | | --- Status --- | | --- Location --- | | - Srch Date - | | Start Date | | End Date | | Export | | Filter | |
| Payment ID | Payment Status | Payment Date | Deposit Date | Payment Amount | Applied Amount | Payment Balance | Payment Type | Check# Ref# | Note | Emp | Location | Log | Reconcile Services | View/Delete | Adjust Payment | Refund Balance | Return Check | Edit | Print |
| 4060 | RECEIVED | 3/26/2016 | | \$100.00 | \$0.00 | \$100.00 | CHECK | | | 11596 | | <input type="button" value="log"/> | <input type="button" value="reconcile"/> | <input type="button" value="delete"/> | <input type="button" value="adjust"/> | <input type="button" value="refund"/> | <input type="button" value="return"/> | <input type="button" value="edit"/> | <input type="button" value="print"/> |
| | | | | \$100.00 | \$0.00 | \$100.00 | | | | | | | | | | | | | |
| <input type="button" value="Add Payment"/> | | | | | | | | | | | | | | | | | | | |

When ClientPaymentAdjust is ENABLED

| CLIENT PAYMENTS: Test Test (3599) (M) | | | | | | | | | | | | | | | | | | | |
|--|----------------|-----------------|--------------|----------------|----------------|-----------------|--------------|------------------|------|---------------|----------|------------------------------------|--|---------------------------------------|----------------|---------------------------------------|---------------------------------------|-------------------------------------|--------------------------------------|
| Payment ID: <input type="text"/> | | Client ID: 3599 | | --- Type --- | | --- Status --- | | --- Location --- | | - Srch Date - | | Start Date | | End Date | | Export | | Filter | |
| Payment ID | Payment Status | Payment Date | Deposit Date | Payment Amount | Applied Amount | Payment Balance | Payment Type | Check# Ref# | Note | Emp | Location | Log | Reconcile Services | View/Delete | Adjust Payment | Refund Balance | Return Check | Edit | Print |
| 4061 | RECEIVED | 3/26/2016 | | \$75.00 | \$0.00 | \$75.00 | CHECK | | | 11596 | | <input type="button" value="log"/> | <input type="button" value="reconcile"/> | <input type="button" value="delete"/> | | <input type="button" value="refund"/> | <input type="button" value="return"/> | <input type="button" value="edit"/> | <input type="button" value="print"/> |
| 4060 | RECEIVED | 3/26/2016 | | \$100.00 | \$0.00 | \$100.00 | CHECK | | | 11596 | | <input type="button" value="log"/> | <input type="button" value="reconcile"/> | <input type="button" value="delete"/> | | <input type="button" value="refund"/> | <input type="button" value="return"/> | <input type="button" value="edit"/> | <input type="button" value="print"/> |
| | | | | \$175.00 | \$0.00 | \$175.00 | | | | | | | | | | | | | |
| <input type="button" value="Add Payment"/> | | | | | | | | | | | | | | | | | | | |

When ClientPaymentAdjust is DISABLED

ClientPaymentDelete

Function:

- Allows the “Delete” button to appear when viewing the “Payments” button from the Client Nav Bar, or the “Manage Client Payments” page from the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Manage Client Payments
- Client Nav Bar -> Payments

Screenshots:

CLIENT PAYMENTS: Test Test (3599) (M)

Payment ID: Client ID: 3599 --- Type --- --- Status --- --- Location --- - Srch Date - Start Date End Date Export Filter

| Payment ID | Payment Status | Payment Date | Deposit Date | Payment Amount | Applied Amount | Payment Balance | Payment Type | Check# Ref# | Note | Emp | Location | Log | Reconcile Services | View/Delete | Adjust Payment | Refund Balance | Return Check | Edit | Print |
|------------|----------------|--------------|--------------|----------------|----------------|-----------------|--------------|-------------|------|-------|----------|------------------------------------|--|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|-------------------------------------|--------------------------------------|
| 4060 | RECEIVED | 3/26/2016 | | \$100.00 | \$0.00 | \$100.00 | CHECK | | | 11596 | | <input type="button" value="log"/> | <input type="button" value="reconcile"/> | <input type="button" value="delete"/> | <input type="button" value="adjust"/> | <input type="button" value="refund"/> | <input type="button" value="return"/> | <input type="button" value="edit"/> | <input type="button" value="print"/> |
| | | | | \$100.00 | \$0.00 | \$100.00 | | | | | | | | | | | | | |

When ClientPaymentDelete is ENABLED

CLIENT PAYMENTS: Test Test (3599) (M)

Payment ID: Client ID: 3599 --- Type --- --- Status --- --- Location --- - Srch Date - Start Date End Date Export Filter

| Payment ID | Payment Status | Payment Date | Deposit Date | Payment Amount | Applied Amount | Payment Balance | Payment Type | Check# Ref# | Note | Emp | Location | Log | Reconcile Services | View/Delete | Adjust Payment | Refund Balance | Return Check | Edit | Print |
|------------|----------------|--------------|--------------|----------------|----------------|-----------------|--------------|-------------|------|-------|----------|------------------------------------|--|-------------|---------------------------------------|---------------------------------------|---------------------------------------|-------------------------------------|--------------------------------------|
| 4060 | RECEIVED | 3/26/2016 | | \$100.00 | \$0.00 | \$100.00 | CHECK | | | 11596 | | <input type="button" value="log"/> | <input type="button" value="reconcile"/> | | <input type="button" value="adjust"/> | <input type="button" value="refund"/> | <input type="button" value="return"/> | <input type="button" value="edit"/> | <input type="button" value="print"/> |
| | | | | \$100.00 | \$0.00 | \$100.00 | | | | | | | | | | | | | |

When ClientPaymentDelete is DISABLED

ClientPaymentUpdate

Function:

- Allows the “Edit” button to appear when viewing the “Payments” button from the Client Nav Bar, or the “Manage Client Payments” page from the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Manage Client Payments
- Client Nav Bar -> Payments

Screenshots:

CLIENT PAYMENTS: Test Test (3599) (M)

Payment ID: Client ID: 3599 --- Type --- --- Status --- --- Location --- - Srch Date - Start Date End Date Export Filter

| Payment ID | Payment Status | Payment Date | Deposit Date | Payment Amount | Applied Amount | Payment Balance | Payment Type | Check# Ref# | Note | Emp | Location | Log | Reconcile Services | View/Delete | Adjust Payment | Refund Balance | Return Check | Edit | Print |
|------------|----------------|--------------|--------------|----------------|----------------|-----------------|--------------|-------------|------|-------|----------|------------------------------------|--|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|-------------------------------------|--------------------------------------|
| 4060 | RECEIVED | 3/26/2016 | | \$100.00 | \$0.00 | \$100.00 | CHECK | | | 11596 | | <input type="button" value="log"/> | <input type="button" value="reconcile"/> | <input type="button" value="delete"/> | <input type="button" value="adjust"/> | <input type="button" value="refund"/> | <input type="button" value="return"/> | <input type="button" value="edit"/> | <input type="button" value="print"/> |
| | | | | \$100.00 | \$0.00 | \$100.00 | | | | | | | | | | | | | |

When ClientPaymentUpdate is ENABLED

CLIENT PAYMENTS: Test Test (3599) (M)

Payment ID: Client ID: 3599 --- Type --- --- Status --- --- Location --- - Srch Date - Start Date End Date Export Filter

| Payment ID | Payment Status | Payment Date | Deposit Date | Payment Amount | Applied Amount | Payment Balance | Payment Type | Check# Ref# | Note | Emp | Location | Log | Reconcile Services | View/Delete | Adjust Payment | Refund Balance | Return Check | Edit | Print |
|------------|----------------|--------------|--------------|----------------|----------------|-----------------|--------------|-------------|------|-------|----------|------------------------------------|--|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|------|--------------------------------------|
| 4060 | RECEIVED | 3/26/2016 | | \$100.00 | \$0.00 | \$100.00 | CHECK | | | 11596 | | <input type="button" value="log"/> | <input type="button" value="reconcile"/> | <input type="button" value="delete"/> | <input type="button" value="adjust"/> | <input type="button" value="refund"/> | <input type="button" value="return"/> | | <input type="button" value="print"/> |
| | | | | \$100.00 | \$0.00 | \$100.00 | | | | | | | | | | | | | |

When ClientPaymentUpdate is DISABLED

EnterCreditCardPayment

Function:

- The right to process Credit Card Info from the “Add Client Payment” screen.
- When Disabled, the Credit Card fields will not display, even after choosing a Payment Type that would normally cause these fields to appear.

Location(s) this setting affects:

- Billing Tab -> Manage Client Payments -> Add Payment
- Client Nav Bar -> Payments -> Add Payment

Screenshots:

Add Client Payment / Copay:

Add Payment

Client: Test Test (3599)

Amount: Payment Type:

Check Number: Reference Number:

Check Date: Location:

Deposit Date:

Credit Card Number: Expiration Date: -

Billing Address: City \ State \ Zip Code:

Notes:

When EnterCreditCardPayment is ENABLED

Add Client Payment / Copay:

Add Payment

Client: Test Test (3599)

Amount: Payment Type:

Check Number: Reference Number:

Check Date: Location:

Deposit Date:

Notes:

When EnterCreditCardPayment is DISABLED

FinancialsView

Function:

- Determines whether the “Client Balance” and “Insurance Balance” fields will appear in the “Billing Info” section that can display on the Client Overview and Client Profile pages.

Location(s) this setting affects:

- Client Overview -> Billing Info
- Client Profile -> Billing Info

Screenshots:

| Billing Info | |
|---------------------------------|----------------------------|
| Ins: | ID: |
| Ins Start Date: | Ins End Date: |
| Ins Copay: | Last Updated: |
| <u>Client Balance:</u> \$261.31 | <u>Ins Balance:</u> \$0.00 |
| Full Insurance Info | |

When FinancialsView is ENABLED

| Billing Info | |
|---------------------|---------------|
| Ins: | ID: |
| Ins Start Date: | Ins End Date: |
| Ins Copay: | Last Updated: |
| Full Insurance Info | |

When FinancialsView is DISABLED

| BILLING INFO | | Insurance... | Authorizations... |
|------------------------|--|---------------------|-------------------|
| Insurance: | | Insurance ID: | |
| Insurance Dates: | | Ins Last Updated | |
| Copay: | | Deaf: | False |
| <u>Client Balance:</u> | \$261.31 | <u>Ins Balance:</u> | \$0.00 |
| Authorization Dates: | | Auth Units Used: | |
| Signature Source: | Signed Authorization Block 12 & 13 | Assigned Benefits: | True |
| Release Information: | Appropriate Release of Info on File at Health Care Service Provider or at Utilization Review Org | | |

When FinancialsView is ENABLED

| BILLING INFO | | Insurance... | Authorizations... |
|----------------------|--|--------------------|-------------------|
| Insurance: | | Insurance ID: | |
| Insurance Dates: | | Ins Last Updated | |
| Copay: | | Deaf: | False |
| Authorization Dates: | | Auth Units Used: | |
| Signature Source: | Signed Authorization Block 12 & 13 | Assigned Benefits: | True |
| Release Information: | Appropriate Release of Info on File at Health Care Service Provider or at Utilization Review Org | | |

When FinancialsView is DISABLED

FosterCareBilling

Function:

- Determines whether the “Foster Home Billing” link will display on the Billing Tab, in the “Bed Board and Foster Home Billing” section.

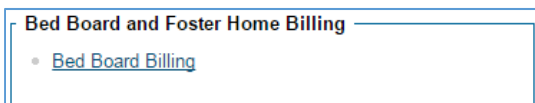
Location(s) this setting affects:

- Billing Tab -> Foster Home Billing

Screenshots:



When FosterCareBilling is ENABLED



When FosterCareBilling is DISABLED

GenerateStatements

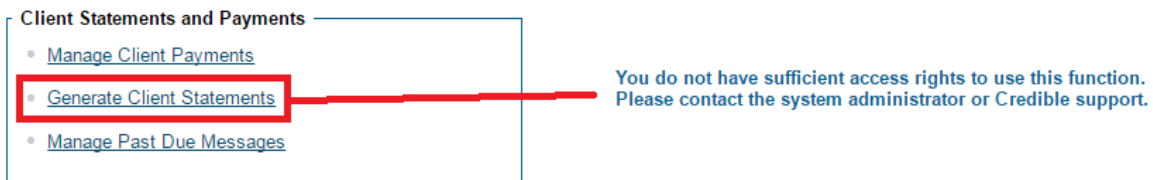
Function:

- Determines whether the “Generate Client Statements” link will be accessible on the Billing Tab, in the “Client Statements and Payments” section.
 - NOTE: If Disabled, clicking this link will lead to an Insufficient Rights notification.

Location(s) this setting affects:

- Billing Tab -> Generate Client Statements

Screenshots:



When GenerateStatements is DISABLED

InsPaymentAdjust

Function:

- Determines whether the “Adjust” button will appear on the “Manage Insurance Payments” page that is accessed from the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Manage Insurance Payments

Screenshots:

| ID | Check Date | Dep Date | Payer | Check# | Ref# | Emp | Amount | Claims | Applied | Adj | Retrcted | Balance | Notes | Log | Claims | Update | Delete | Adjust |
|------|------------|-----------|----------|--------|------|------|--------------|--------|------------|--------|----------|--------------|-------|-----|--------|--------|--------|--------|
| 4056 | 3/22/2016 | 3/23/2016 | AetnaHMO | 1 | 1 | 3109 | \$100,000.00 | 11 | \$1,500.00 | \$0.00 | \$75.00 | \$108,500.00 | | log | view | update | | adjust |
| 4055 | 3/23/2016 | | AetnaHMO | 1 | 1 | 3109 | \$100.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$100.00 | | log | | update | delete | adjust |

When InsPaymentAdjust is ENABLED

| ID | Check Date | Dep Date | Payer | Check# | Ref# | Emp | Amount | Claims | Applied | Adj | Retrcted | Balance | Notes | Log | Claims | Update | Delete | Adjust |
|------|------------|-----------|----------|--------|------|------|--------------|--------|------------|--------|----------|--------------|-------|-----|--------|--------|--------|--------|
| 4056 | 3/22/2016 | 3/23/2016 | AetnaHMO | 1 | 1 | 3109 | \$100,000.00 | 11 | \$1,500.00 | \$0.00 | \$75.00 | \$108,500.00 | | log | view | update | | |
| 4055 | 3/23/2016 | | AetnaHMO | 1 | 1 | 3109 | \$100.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$100.00 | | log | | update | delete | |

When InsPaymentAdjust is DISABLED

InsPaymentDelete

Function:

- Determines whether the “Delete” button will appear on the “Manage Insurance Payments” page that is accessed from the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Manage Insurance Payments

Screenshots:

| ID | Check Date | Dep Date | Payer | Check# | Ref# | Emp | Amount | Claims | Applied | Adj | Retrcted | Balance | Notes | Log | Claims | Update | Delete | Adjust |
|------|------------|-----------|----------|--------|------|------|--------------|--------|------------|--------|----------|--------------|-------|---------------------|----------------------|------------------------|------------------------|------------------------|
| 4056 | 3/22/2016 | 3/23/2016 | AetnaHMO | 1 | 1 | 3109 | \$100,000.00 | 11 | \$1,500.00 | \$0.00 | \$75.00 | \$108,500.00 | | log | view | update | delete | adjust |
| 4055 | 3/23/2016 | | AetnaHMO | 1 | 1 | 3109 | \$100.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$100.00 | | log | | update | delete | adjust |

When InsPaymentDelete is ENABLED

| ID | Check Date | Dep Date | Payer | Check# | Ref# | Emp | Amount | Claims | Applied | Adj | Retrcted | Balance | Notes | Log | Claims | Update | Delete | Adjust |
|------|------------|-----------|----------|--------|------|------|--------------|--------|------------|--------|----------|--------------|-------|---------------------|----------------------|------------------------|--------|------------------------|
| 4056 | 3/22/2016 | 3/23/2016 | AetnaHMO | 1 | 1 | 3109 | \$100,000.00 | 11 | \$1,500.00 | \$0.00 | \$75.00 | \$108,500.00 | | log | view | update | | adjust |
| 4055 | 3/23/2016 | | AetnaHMO | 1 | 1 | 3109 | \$100.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$100.00 | | log | | update | | adjust |

When InsPaymentDelete is DISABLED

InsPaymentUpdate

Function:

- Determines whether the “Update” button will appear on the “Manage Insurance Payments” page that is accessed from the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Manage Insurance Payments

Screenshots:

| ID | Check Date | Dep Date | Payer | Check# | Ref# | Emp | Amount | Claims | Applied | Adj | Retrcted | Balance | Notes | Log | Claims | Update | Delete | Adjust |
|------|------------|-----------|----------|--------|------|------|--------------|--------|------------|--------|----------|--------------|-------|-----|--------|--------|--------|--------|
| 4056 | 3/22/2016 | 3/23/2016 | AetnaHMO | 1 | 1 | 3109 | \$100,000.00 | 11 | \$1,500.00 | \$0.00 | \$75.00 | \$108,500.00 | | log | view | update | | adjust |
| 4055 | 3/23/2016 | | AetnaHMO | 1 | 1 | 3109 | \$100.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$100.00 | | log | | update | delete | adjust |

When InsPaymentUpdate is ENABLED

| ID | Check Date | Dep Date | Payer | Check# | Ref# | Emp | Amount | Claims | Applied | Adj | Retrcted | Balance | Notes | Log | Claims | Update | Delete | Adjust |
|------|------------|-----------|----------|--------|------|------|--------------|--------|------------|--------|----------|--------------|-------|-----|--------|--------|--------|--------|
| 4056 | 3/22/2016 | 3/23/2016 | AetnaHMO | 1 | 1 | 3109 | \$100,000.00 | 11 | \$1,500.00 | \$0.00 | \$75.00 | \$108,500.00 | | log | view | | | adjust |
| 4055 | 3/23/2016 | | AetnaHMO | 1 | 1 | 3109 | \$100.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$100.00 | | log | | | delete | adjust |

When InsPaymentUpdate is DISABLED

ManagePastDueMessages

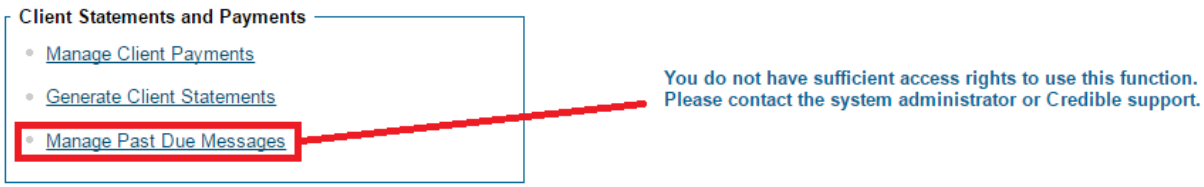
Function:

- Allows access to the “Manage Past Due Messages” link that appears on the Billing Tab.
 - NOTE: If disabled, the user will receive an Insufficient Rights message when trying to access this page.

Location(s) this setting affects:

- Billing Tab -> Manage Past Due Messages

Screenshots:



When ManagePastDueMessages is DISABLED

Matrix Section: Client Visit Admin

ClientVisitApprove

Function:

- Allows the user to approve any Client Visits that they have viewing rights for.

Location(s) this setting affects:

- Visit Tab -> Approve Checkboxes
- Visit Tab -> Advanced Search -> Approve Checkboxes
- Visit Tab -> Selected Visit -> Approve Button

Screenshots:

| ID | Approve | Client | Employee | Type | CPT | Status | Date | Time In | Time Out | Min | Is Late | Team | Schedule | |
|-------|--------------------------|------------|-------------------|-----------|------|--------|---------|---------|----------|-----|---------|---------------|----------|--|
| 44970 | <input type="checkbox"/> | Test, Abby | Rasoulzadeh, Mana | | 6260 | COMP | 3/21/16 | 2:54 PM | 3:54 PM | 60 | | ACAP Arkansas | No Plan | view log print fax |
| 44969 | <input type="checkbox"/> | Test, Abby | Rasoulzadeh, Mana | | 6260 | COMP | 3/21/16 | 8:00 AM | 9:00 AM | 60 | | ACAP Arkansas | No Plan | view log print fax |
| 44914 | <input type="checkbox"/> | Test, Bob | Foust, Dan | Tx Plan | 2 | COMP | 3/14/16 | 3:30 PM | 3:45 PM | 15 | | Training | 3/14/16 | view log print fax |
| 44913 | <input type="checkbox"/> | Test, Bob | Foust, Dan | Tx Review | 2222 | COMP | 3/14/16 | 2:00 PM | 2:15 PM | 15 | | Training | 3/14/16 | view log print fax |

When ClientVisitApprove is ENABLED

| ID | Approve | Client | Employee | Type | CPT | Status | Date | Time In | Time Out | Min | Is Late | Team | Schedule | |
|-------|---------|------------|-------------------|-----------|------|--------|---------|---------|----------|-----|---------|---------------|----------|--|
| 44970 | | Test, Abby | Rasoulzadeh, Mana | | 6260 | COMP | 3/21/16 | 2:54 PM | 3:54 PM | 60 | | ACAP Arkansas | No Plan | view log print fax |
| 44969 | | Test, Abby | Rasoulzadeh, Mana | | 6260 | COMP | 3/21/16 | 8:00 AM | 9:00 AM | 60 | | ACAP Arkansas | No Plan | view log print fax |
| 44914 | | Test, Bob | Foust, Dan | Tx Plan | 2 | COMP | 3/14/16 | 3:30 PM | 3:45 PM | 15 | | Training | 3/14/16 | view log print fax |
| 44913 | | Test, Bob | Foust, Dan | Tx Review | 2222 | COMP | 3/14/16 | 2:00 PM | 2:15 PM | 15 | | Training | 3/14/16 | view log print fax |

When ClientVisitApprove is DISABLED

| | | | |
|---|-----------|-------------------|-----------------------|
| <input type="button" value="Approve"/> <input type="button" value="Print"/> <input type="button" value="Sign"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Log"/> <input type="button" value="Billing"/> <input type="button" value="Clone"/> <input type="button" value="Add To Do"/> <input type="button" value="List"/> | | | |
| Client Visit: | | ID: 44970 | |
| Client Name: | Abby Test | Employee Name: | Mana Rasoulzadeh, LPC |
| Visit Type: | Bill Test | Program: | Outpatient |
| Time In: | 2:54 PM | Time Out: | 3:54 PM |
| Revised Time In: | | Revised Time Out: | |
| CPT Code: | 6260 | Insurance: | AETNA PPO : 123444444 |
| | | Recipient: | Client Only |
| | | Location: | Beth Office |
| | | Date: | 3/21/16 |
| | | Duration: | 60 |
| | | Non Billable: | False |

When ClientVisitApprove is ENABLED

| | | | |
|--|-----------|-------------------|-----------------------|
| <input type="button" value="Print"/> <input type="button" value="Sign"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Log"/> <input type="button" value="Billing"/> <input type="button" value="Clone"/> <input type="button" value="Add To Do"/> <input type="button" value="List"/> | | | |
| Client Visit: | | ID: 44970 | |
| Client Name: | Abby Test | Employee Name: | Mana Rasoulzadeh, LPC |
| Visit Type: | Bill Test | Program: | Outpatient |
| Time In: | 2:54 PM | Time Out: | 3:54 PM |
| Revised Time In: | | Revised Time Out: | |
| CPT Code: | 6260 | Insurance: | AETNA PPO : 123444444 |
| | | Recipient: | Client Only |
| | | Location: | Beth Office |
| | | Date: | 3/21/16 |
| | | Duration: | 60 |
| | | Non Billable: | False |

When ClientVisitApprove is DISABLED

ClientVisitApproveColumn

Function:

- Allows the user to approve any Client Visits that they have viewing rights for, utilizing the 'Approve' checkbox that displays on a Visit List, or an Advanced Visit search.
 - If disabled, this column and checkbox will not display, requiring the user to approve each Visit individually from the Visit view.

Location(s) this setting affects:

- Visit Tab -> Approve Checkboxes
- Visit Tab -> Advanced Search -> Approve Checkboxes

Screenshots:

Client Visit List: advanced search | incomplete visits | add visit

1 to 20 of 420 Not Approved | Visit Type | ID | test | Employee | Start Date | End Date | Prog / Team | Filter

| ID | Approve | Client | Employee | Type | CPT | Status | Date | Time In | Time Out | Min | Is Late | Team | Schedule | |
|-------|--------------------------|------------|-------------------|-----------|------|--------|---------|---------|----------|-----|---------|---------------|----------|--|
| 44970 | <input type="checkbox"/> | Test, Abby | Rasoulzadeh, Mana | | 6260 | COMP | 3/21/16 | 2:54 PM | 3:54 PM | 60 | | ACAP Arkansas | No Plan | view log print fax |
| 44969 | <input type="checkbox"/> | Test, Abby | Rasoulzadeh, Mana | | 6260 | COMP | 3/21/16 | 8:00 AM | 9:00 AM | 60 | | ACAP Arkansas | No Plan | view log print fax |
| 44914 | <input type="checkbox"/> | Test, Bob | Foust, Dan | Tx Plan | 2 | COMP | 3/14/16 | 3:30 PM | 3:45 PM | 15 | | Training | 3/14/16 | view log print fax |
| 44913 | <input type="checkbox"/> | Test, Bob | Foust, Dan | Tx Review | 2222 | COMP | 3/14/16 | 2:00 PM | 2:15 PM | 15 | | Training | 3/14/16 | view log print fax |

When ClientVisitApproveColumn is ENABLED

Client Visit List: advanced search | incomplete visits | add visit

1 to 20 of 420 Not Approved | Visit Type | ID | test | Employee | Start Date | End Date | Prog / Team | Filter

| ID | Client | Employee | Type | CPT | Status | Date | Time In | Time Out | Min | Is Late | Team | Schedule | |
|-------|------------|-------------------|-----------|------|--------|---------|---------|----------|-----|---------|---------------|----------|--|
| 44970 | Test, Abby | Rasoulzadeh, Mana | | 6260 | COMP | 3/21/16 | 2:54 PM | 3:54 PM | 60 | | ACAP Arkansas | No Plan | view log print fax |
| 44969 | Test, Abby | Rasoulzadeh, Mana | | 6260 | COMP | 3/21/16 | 8:00 AM | 9:00 AM | 60 | | ACAP Arkansas | No Plan | view log print fax |
| 44914 | Test, Bob | Foust, Dan | Tx Plan | 2 | COMP | 3/14/16 | 3:30 PM | 3:45 PM | 15 | | Training | 3/14/16 | view log print fax |
| 44913 | Test, Bob | Foust, Dan | Tx Review | 2222 | COMP | 3/14/16 | 2:00 PM | 2:15 PM | 15 | | Training | 3/14/16 | view log print fax |

When ClientVisitApproveColumn is DISABLED

ClientVisitApproveOwn

Function:

- Allows the user to approve ONLY their own Client Visits.
- **NOTE:** If ClientVisitApprove is enabled, this setting will have no effect.

Location(s) this setting affects:

- Visit Tab -> Approve Checkboxes
- Visit Tab -> Advanced Search -> Approve Checkboxes
- Visit Tab -> Selected Visit -> Approve Button

Screenshots:

| | | | | | |
|---|-----------|-----------------------|------------------|-------------------|--------------------------|
| ◀ Approve Print Sign Update Delete Log Billing Clone Add To Do List ▶ | | | | | |
| Client Visit: | | | | | ID: 44713 + |
| Client Name: | Wilt Demo | Employee Name: | Bill Chamberlain | Recipient: | Client Only |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | RWC |
| Time In: | 2:39 PM | Time Out: | 2:40 PM | Date: | 3/4/16 |

| Client Visit List: | | |
|--------------------|--------------------------|------------|
| 1 to 20 of 420 | | |
| ID | Approve | Client |
| 44970 | <input type="checkbox"/> | Test, Abby |
| 44969 | <input type="checkbox"/> | Test, Abby |
| 44914 | <input type="checkbox"/> | Test, Bob |
| 44913 | <input type="checkbox"/> | Test, Bob |

ClientVisitDelete

Function:

- Allows the “Delete” button to appear on the Visit view screen.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Delete Button

Screenshots:

| | | | | | |
|--|-----------|-----------------------|------------------|-------------------|--------------------------|
| ◀ Approve Print Sign Update Delete Log Billing Clone Add To Do List ▶ | | | | | |
| Client Visit: | | | | | ID: 44713 + |
| Client Name: | Wilt Demo | Employee Name: | Bill Chamberlain | Recipient: | Client Only |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | RWC |
| Time In: | 2:39 PM | Time Out: | 2:40 PM | Date: | 3/4/16 |

When ClientVisitDelete is ENABLED

| | | | | | |
|--|-----------|-----------------------|------------------|-------------------|--------------------------|
| ◀ Approve Print Sign Update Log Billing Clone Add To Do List ▶ | | | | | |
| Client Visit: | | | | | ID: 44713 + |
| Client Name: | Wilt Demo | Employee Name: | Bill Chamberlain | Recipient: | Client Only |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | RWC |
| Time In: | 2:39 PM | Time Out: | 2:40 PM | Date: | 3/4/16 |

When ClientVisitDelete is DISABLED

ClientVisitManualRedX

Function:

- Determines whether the "Set Manual Red X" and "Manual Red X Notes" fields will appear when selecting the "Update" button for a visit on the Visit view screen.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button

Screenshots:

Client Visit Update:

| Client Visit For: <small>Now Test</small> | | | | ID: 43813 |
|---|---|---------------------------|---|--|
| Employee Name: | Bill Chamberlain | Credentials: | | Recipient: Client Only |
| Program / Visit Type: | TRAINING: Tx Plus Plan | | | Location: Beth Office |
| Time In: | 1:30 PM | Time Out: | 1:45 PM | Date: 9/17/2015 |
| Revised Date/Time In: | | Revised Date/Time Out: | | Duration: 15 |
| CPT Code: | 99999 | Insurance: | AETNA PPO : 123444444 | Non Billable: <input type="checkbox"/> |
| Rate: | 10.00 | Units: | 1 | Copay: \$0.00 <input type="button" value="add"/> |
| Group: | <input type="checkbox"/> | Activity Type: | ---Not Set--- | Group Type / Count: |
| Approved: | <input type="checkbox"/> | Approved By / On: | | |
| Diagnosis: | (300.22 / F40.00) Agoraphobia <input type="button" value="switch"/> | Billing Matrix: | Tx Plus Plan (798) | Transferred: |
| Status: | COMPLETED | Authorization ID: | | Signed: |
| Schedule Date: | 9/17/2015 | Merged: | | Billing Group: |
| Form : Version: | 784 : 2956 | Handheld Version: | Web Entry | Transfer XML: |
| Create eRx G-Code: | <input type="checkbox"/> | Supervising as Rendering: | <input checked="" type="radio"/> No <input type="radio"/> Yes | Supervising Physician: --- SELECT --- |
| Set Manual Red X: | <input checked="" type="checkbox"/> | Manual Red X Note: | | |

When ClientVisitManualRedX is ENABLED

Client Visit Update:

| Client Visit For: <small>Now Test</small> | | | | ID: 43813 |
|---|---|---------------------------|---|--|
| Employee Name: | Bill Chamberlain | Credentials: | | Recipient: Client Only |
| Program / Visit Type: | TRAINING: Tx Plus Plan | | | Location: Beth Office |
| Time In: | 1:30 PM | Time Out: | 1:45 PM | Date: 9/17/2015 |
| Revised Date/Time In: | | Revised Date/Time Out: | | Duration: 15 |
| CPT Code: | 99999 | Insurance: | AETNA PPO : 123444444 | Non Billable: <input type="checkbox"/> |
| Rate: | 10.00 | Units: | 1 | Copay: \$0.00 <input type="button" value="add"/> |
| Group: | <input type="checkbox"/> | Activity Type: | ---Not Set--- | Group Type / Count: |
| Approved: | <input type="checkbox"/> | Approved By / On: | | |
| Diagnosis: | (300.22 / F40.00) Agoraphobia <input type="button" value="switch"/> | Billing Matrix: | Tx Plus Plan (798) | Transferred: |
| Status: | COMPLETED | Authorization ID: | | Signed: |
| Schedule Date: | 9/17/2015 | Merged: | | Billing Group: |
| Form : Version: | 784 : 2956 | Handheld Version: | Web Entry | Transfer XML: |
| Create eRx G-Code: | <input type="checkbox"/> | Supervising as Rendering: | <input checked="" type="radio"/> No <input type="radio"/> Yes | Supervising Physician: --- SELECT --- |
| PCP: | --- SELECT --- | Guarantor: | Bob Doe | Associated eMAR: |

When ClientVisitManualRedX is DISABLED

ClientVisitRelink

Function:

- Allows the “Relink Visit” button to appear when updating a Visit.
- Determines whether the “Relink Visits” link can be used on the Admin Tab.
 - If disabled, an Insufficient Rights message will display when choosing that link.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button -> Relink Visit Button
- Admin Tab -> Relink Visits

Screenshots:

This screenshot shows the 'Update Visit' form. At the bottom right, the 'Relink Visit' button is highlighted with a red rectangular box. Other buttons visible include 'Update Visit', 'Cancel', 'Edit Secondary', and 'Attach New'.

When ClientVisitRelink is ENABLED

This screenshot shows the 'Update Visit' form with the 'Relink Visit' button missing. The 'Update Visit' and 'Cancel' buttons are visible at the bottom left.

When ClientVisitRelink is DISABLED

- [View Transfer Log](#)
- Relink Visits
- [Reschedules](#)
- [Manage Approval Roles](#)

You do not have sufficient access rights to use this function.
Please contact the system administrator or Credible support.

When ClientVisitRelink is DISABLED

ClientVisitReprocess

Function:

- Allows the “Reprocess” checkbox to display as an option when performing an Advanced Visit search.
- Determines whether the “Save and Reprocess” button will appear at the bottom of a Billing Matrix entry.

Location(s) this setting affects:

- Visit Tab -> Advanced Search -> Reprocess Checkbox
- Admin Tab -> Billing Matrix -> Edit Button -> Save and Reprocess
- Billing Tab -> Billing Matrix -> Edit Button -> Save and Reprocess

Screenshots:

This screenshot shows the Advanced Search interface. The 'Reprocess' checkbox is checked and highlighted with a red box. Other visible elements include filter fields for Client Name/ID, Start Date, Batch ID, Service Type, Billing Group, Ledger Type, and Recipient. There are also export options and various checkboxes for data display.

When ClientVisitReprocess is ENABLED

This screenshot shows the same Advanced Search interface, but the 'Reprocess' checkbox is unchecked. The 'Reprocess' label is still visible, but the checkbox is not checked.

When ClientVisitReprocess is DISABLED

This screenshot shows the 'Custom' entry form. The 'Description' field contains 'Advanced Imports TK', 'Effective_date' is '1/1/2016', 'fixed_units' is '1', and 'unit_multiplier' is '1'. The 'Save And Reprocess' button is highlighted with a red box.

When ClientVisitReprocess is ENABLED

This screenshot shows the same 'Custom' entry form, but the 'Save And Reprocess' button is missing, leaving only 'Save Settings', 'Cancel', and 'Copy New Entry' buttons.

When ClientVisitReprocess is DISABLED

ClientVisitRestrictFinancial

Function:

- This is an anti-right that when enabled will prevent the user from seeing the Rate when viewing a Service, and financial information on a Service when viewing Services on the Advanced Search.

Location(s) this setting affects:

- Visit Tab -> View Button on a Visit -> Rate
- Visit Tab -> Advanced Search

Screenshots:

| | | | | | |
|---------------------------------|---------------|-------------------|----------------------------------|---------------|----------------------------|
| Client Visit: LATE ENTRY | | | | ID: 45472 + | |
| Client Name: | Blue Tura | Employee Name: | John Forma, BS, CAC, Doctor, CAC | Recipient: | Client Only |
| Visit Type: | Bed Board Day | Program: | Intake | Location: | 12345 |
| Time In: | 12:00 AM | Time Out: | 11:59 PM | Date: | 5/29/16 |
| Revised Time In: | | Revised Time Out: | | Duration: | 1439 (23:59) |
| CPT Code: | 12345 | Insurance: | AetnaHMO : 123547896512 | Non Billable: | False |
| Rate : | | Units : | 1 | Copay: | \$0.00 add |

When ClientVisitRestrictFinancial is ENABLED

| | | | | | |
|---------------------------------|---------------|-------------------|----------------------------------|---------------|----------------------------|
| Client Visit: LATE ENTRY | | | | ID: 45472 - | |
| Client Name: | Blue Tura | Employee Name: | John Forma, BS, CAC, Doctor, CAC | Recipient: | Client Only |
| Visit Type: | Bed Board Day | Program: | Intake | Location: | 12345 |
| Time In: | 12:00 AM | Time Out: | 11:59 PM | Date: | 5/29/16 |
| Revised Time In: | | Revised Time Out: | | Duration: | 1439 (23:59) |
| CPT Code: | 12345 | Insurance: | AetnaHMO : 123547896512 | Non Billable: | False |
| Rate : | 150.00 | Units : | 1 | Copay: | \$0.00 add |

When ClientVisitRestrictFinancial is DISABLED

| Service ID | Service Date | Client Name | CPT Code | CPT Modifier | Status | Base Rate | Billing Rate | Ins Paid | Client Paid | Balance Due | Client Due | Insur Due |
|------------|--------------|------------------|----------|--------------|-----------|-----------|--------------|----------|-------------|-------------|------------|-----------|
| 32465 | 6/13/2013 | Fakerson Junior, | h2015 | 1 | COMPLETED | | | | | | | |
| 32467 | 6/13/2013 | Morgan, Samantha | h2015 | 1 | COMPLETED | | | | | | | |
| 32468 | 6/13/2013 | Thing, Wild | h2015 | 1 | COMPLETED | | | | | | | |
| 32469 | 6/9/2013 | Davis, Al | h2015 | 1 | COMPLETED | | | | | | | |
| 32470 | 6/10/2013 | Doe, John | h2015 | 1 | COMPLETED | | | | | | | |
| 32471 | 6/10/2013 | Gonzalez, marley | h2015 | 1 | COMPLETED | | | | | | | |

When ClientVisitRestrictFinancial is ENABLED

| Service ID | Service Date | Client Name | CPT Code | CPT Modifier | Status | Base Rate | Billing Rate | Ins Paid | Client Paid | Balance Due | Client Due | Insur Due |
|------------|--------------|------------------|----------|--------------|-----------|-----------|--------------|----------|-------------|-------------|------------|-----------|
| 32465 | 6/13/2013 | Fakerson Junior, | h2015 | 1 | COMPLETED | \$100 | \$100 | \$0 | \$0 | \$100 | \$100 | \$0 |
| 32467 | 6/13/2013 | Morgan, Samantha | h2015 | 1 | COMPLETED | \$100 | \$100 | \$0 | \$0 | \$100 | \$100 | \$0 |
| 32468 | 6/13/2013 | Thing, Wild | h2015 | 1 | COMPLETED | \$100 | \$100 | \$0 | \$0 | \$100 | \$100 | \$0 |
| 32469 | 6/9/2013 | Davis, Al | h2015 | 1 | COMPLETED | \$100 | \$100 | \$0 | \$0 | \$100 | \$100 | \$0 |
| 32470 | 6/10/2013 | Doe, John | h2015 | 1 | COMPLETED | \$600 | \$600 | \$0 | \$0 | \$600 | \$600 | \$0 |
| 32471 | 6/10/2013 | Gonzalez, marley | h2015 | 1 | COMPLETED | \$100 | \$100 | \$0 | \$0 | \$100 | \$100 | \$0 |

When ClientVisitRestrictFinancial is DISABLED

ClientVisitSignAny

Function:

- Determines whether the user can view the “Sign” button on any Client Visit, regardless of who completed it.
 - If disabled, the Sign button will only appear on Visits that the user has completed.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Sign Button

Screenshots:



When ClientVisitSignAny is ENABLED



When ClientVisitSignAny is DISABLED, and the Visit one that someone else has completed.

ClientVisitSuperView

Function:

- Allows the user to view Visit fields that are marked as “Super View” in the Visit section of the Data Dictionary.

Location(s) this setting affects:

- Admin Tab -> Data Dictionary -> Visit Table Source -> Super View checkboxes

Screenshots:

| Column Name | View Label | View Ord | New Column | Spacer | Is Lookup | Is Boolean | Is Date | Is Numeric | Max Length | Min Length | Double Wide | Super View | History Link | Section Header | Header Collapse | User View | Is Printview | |
|---------------|-----------------|----------|-------------------------------------|--------------------------|---|--------------------------|--------------------------|-------------------------------------|------------|------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|---|
| num3 | Assessment Type | 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update delete |
| visit_dateday | visit_dateday | 2 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update delete |
| axis_c_code | Axis Code | 3 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 7 | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update delete |
| emp_name | Employee Name | 4 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 75 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | update delete |
| fosterhome_id | fosterhome_id | 5 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update delete |
| signature_cnt | Signature Count | 6 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update delete |

ClientVisitUnApprove

Function:

- Allows the user to unapprove locked Visits that have been previously approved.
 - If disabled, the checkbox allowing to unapprove will instead show as the word "True".

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button -> Approved

Screenshots:

| Client Visit Update: | | ID: 44992 | |
|-----------------------|-------------------------------------|------------------------|---|
| Client Visit For: | Mary Missouri | Employee Name: | John Forma |
| Program / Visit Type: | Outpatient: ReleaseofInformation | Credentials: | BS, CAC, Doctor, CAC - CCDP |
| Time In: | 8:45 AM | Time Out: | 9:45 AM |
| Revised Date/Time In: | | Revised Date/Time Out: | |
| CPT Code: | NB [] / [] / [] / [] | Insurance: | |
| Rate: | 0.00 | Units: | 1 |
| Group: | <input type="checkbox"/> | Activity Type: | --Not Set-- |
| Approved: | <input checked="" type="checkbox"/> | Approved By / On: | jforma / 3/25/16 10:51 AM |
| Recipient: | Client Only | Location: | Tampa South |
| Date: | 3/25/2016 | Duration: | 60 |
| Non Billable: | True | Copay: | \$0.00 <input type="button" value="add"/> |
| Group Type / Count: | | | |

When ClientVisitUnApprove is ENABLED

| Client Visit Update: | | ID: 44992 | |
|-----------------------|----------------------------------|------------------------|---|
| Client Visit For: | Mary Missouri | Employee Name: | John Forma |
| Program / Visit Type: | Outpatient: ReleaseofInformation | Credentials: | BS, CAC, Doctor, CAC - CCDP |
| Time In: | 8:45 AM | Time Out: | 9:45 AM |
| Revised Date/Time In: | | Revised Date/Time Out: | |
| CPT Code: | NB [] / [] / [] / [] | Insurance: | |
| Rate: | 0.00 | Units: | 1 |
| Group: | <input type="checkbox"/> | Activity Type: | --Not Set-- |
| Approved: | True | Approved By / On: | jforma / 3/25/16 10:51 AM |
| Recipient: | Client Only | Location: | Tampa South |
| Date: | 3/25/2016 | Duration: | 60 |
| Non Billable: | True | Copay: | \$0.00 <input type="button" value="add"/> |
| Group Type / Count: | | | |

When ClientVisitUnApprove is DISABLED

| Client Visit: | | ID: 44992 | |
|---------------|------------------------|----------------|----------------------------------|
| Client Name: | Mary Missouri | Employee Name: | John Forma, BS, CAC, Doctor, CAC |
| Visit Type: | Release of Information | Program: | Outpatient |
| Recipient: | Client Only | Location: | Tampa South |

When ClientVisitUnApprove is ENABLED

| Client Visit: | | ID: 44992 | |
|---------------|------------------------|----------------|----------------------------------|
| Client Name: | Mary Missouri | Employee Name: | John Forma, BS, CAC, Doctor, CAC |
| Visit Type: | Release of Information | Program: | Outpatient |
| Recipient: | Client Only | Location: | Tampa South |

When ClientVisitUnApprove is DISABLED

ClientVisitUpdateLocked

Function:

- Allows the user to “Update” Visits that are locked, or were previously locked.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Visit Tab -> Selected Visit -> Edit Full Visit Button

Screenshots:

| | | | | | |
|---|------------------------|-----------------------|----------------------------------|-------------------|-------------|
| Print Sign Update Delete Log Billing Clone Add To Do List | | | | | |
| Client Visit: | | | | | ID: 44992 + |
| Client Name: | Mary Missouri | Employee Name: | John Forma, BS, CAC, Doctor, CAC | Recipient: | Client Only |
| Visit Type: | Release of Information | Program: | Outpatient | Location: | Tampa South |

When ClientVisitUpdateLocked is ENABLED

| | | | | | |
|--|------------------------|-----------------------|----------------------------------|-------------------|-------------|
| Print Sign Delete Log Billing Clone Add To Do List | | | | | |
| Client Visit: | | | | | ID: 44992 + |
| Client Name: | Mary Missouri | Employee Name: | John Forma, BS, CAC, Doctor, CAC | Recipient: | Client Only |
| Visit Type: | Release of Information | Program: | Outpatient | Location: | Tampa South |

When ClientVisitUpdateLocked is DISABLED

Matrix Section: Client Visits

ClientVisitClone

Function:

- Determines whether the user will be able to use the “Clone” button to clone an existing Visit.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Visit List -> Selected Visit

Screenshots:

| | | | | | |
|---|--------------------|-------------------|----------------|---------------|-------------|
| Print Sign Update Delete Log Billing Clone Add To Do List | | | | | |
| Client Visit: | | | | | ID: 42880 + |
| Client Name: | Test Test | Employee Name: | David Tompkins | Recipient: | Client Only |
| Visit Type: | TRAINING - VISIT I | Program: | TRAINING | Location: | Home |
| Time In: | 9:56 AM | Time Out: | 1:54 PM | Date: | 3/3/15 |
| Revised Time In: | | Revised Time Out: | | Duration: | 238 (3:58) |
| CPT Code: | 00000 | Units: | 1 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 0 | bool1: | False |
| bool2: | False | non_release: | False | | |

When ClientVisitClone is ENABLED

| | | | | | |
|---|--------------------|-------------------|----------------|---------------|-------------|
| Print Sign Update Delete Log Billing Add To Do List | | | | | |
| Client Visit: | | | | | ID: 42880 + |
| Client Name: | Test Test | Employee Name: | David Tompkins | Recipient: | Client Only |
| Visit Type: | TRAINING - VISIT I | Program: | TRAINING | Location: | Home |
| Time In: | 9:56 AM | Time Out: | 1:54 PM | Date: | 3/3/15 |
| Revised Time In: | | Revised Time Out: | | Duration: | 238 (3:58) |
| CPT Code: | 00000 | Units: | 1 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 0 | bool1: | False |
| bool2: | False | non_release: | False | | |

When ClientVisitClone is DISABLED

ClientVisitCreateGCode

Function:

- Controls whether the user will be able to view the “Create eRx G-Code” option on the Sign & Submit page.
 - **NOTE:** This setting only applies to those that have the “Flag for G-Code” option checked in the Partner Config.

Location(s) this setting affects:

- Sign & Submit Page

Screenshots:

SIGN & SUBMIT

Program: TRAINING

Visit Type: Bill Test

Location:

Diagnosis:

Recipient:

Billing Group:

Supervising Physician:

Override w/Supervising: No Yes

Non-Billable: No Yes

Create eRx G-Code: No Yes

Files: [ATTACHMENTS](#)

Visit Date :

Start & End Time:

Enter Password:

*Please check Date and Time of Service before sign and submit

When ClientVisitCreateGCode is ENABLED

SIGN & SUBMIT

Program: TRAINING

Visit Type: Bill Test

Location:

Diagnosis:

Recipient:

Billing Group:

Supervising Physician:

Override w/Supervising: No Yes

Non-Billable: No Yes

Files: [ATTACHMENTS](#)

Visit Date :

Start & End Time:

Enter Password:

*Please check Date and Time of Service before sign and submit

When ClientVisitCreateGCode is DISABLED

ClientVisitDisplayAll

Function:

- Controls whether the “View All” button will display when viewing a Client or Employee Visit List.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Visit List -> View All
- Employee Page -> Employee Nav Bar -> Visit List -> View All
- Visit Tab -> View All

Screenshots:

Client Visit List: Test Test (3599) (M) advanced search incomplete visits add visit

1 to 4 of 4 All Visit Type ID 3599 Employee Start Date End Date Prog / Team Filter

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | |
|-------|---------|------------|-------------------|------------|----------|---------|---------|--------|-------|---------|----------|----------|--|
| 42880 | | Test, Test | Tompkins, David | VISITTRNI | 1:54 PM | 3/3/15 | 9:56 AM | COMP | 00000 | | Training | No Plan | view log print fax |
| 23619 | | Test, Test | Spaulding, Cassie | VISITTRNI | 5:15 PM | 9/30/12 | 4:15 PM | COMP | 00000 | | Training | 9/30/12 | view log print fax |
| 23617 | | Test, Test | Spaulding, Cassie | VISITTRNI | 9:00 AM | 9/30/12 | 8:00 AM | COMP | 00000 | | Training | No Plan | view log print fax |
| 23609 | | Test, Test | Spaulding, Cassie | MedMgmProg | 6:23 PM | 9/30/12 | 6:20 PM | COMP | 90862 | | Training | No Plan | view log print fax |

My Visits **View All** Print All

When ClientVisitDisplayAll is ENABLED

Client Visit List: Test Test (3599) (M) advanced search incomplete visits add visit

1 to 4 of 4 All Visit Type ID 3599 Employee Start Date End Date Prog / Team Filter

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | |
|-------|---------|------------|-------------------|------------|----------|---------|---------|--------|-------|---------|----------|----------|--|
| 42880 | | Test, Test | Tompkins, David | VISITTRNI | 1:54 PM | 3/3/15 | 9:56 AM | COMP | 00000 | | Training | No Plan | view log print fax |
| 23619 | | Test, Test | Spaulding, Cassie | VISITTRNI | 5:15 PM | 9/30/12 | 4:15 PM | COMP | 00000 | | Training | 9/30/12 | view log print fax |
| 23617 | | Test, Test | Spaulding, Cassie | VISITTRNI | 9:00 AM | 9/30/12 | 8:00 AM | COMP | 00000 | | Training | No Plan | view log print fax |
| 23609 | | Test, Test | Spaulding, Cassie | MedMgmProg | 6:23 PM | 9/30/12 | 6:20 PM | COMP | 90862 | | Training | No Plan | view log print fax |

My Visits Print All

When ClientVisitDisplayAll is DISABLED

ClientVisitEditAllIncomplete

Function:

- Determines whether the “Edit” button will display when viewing an Employee’s Incomplete Visit list.

Location(s) this setting affects:

- Visit Tab -> Incomplete Services Button
- Employee Page -> Employee Nav Bar -> Visit List -> Incomplete Services Button

Screenshots:

Incomplete Client Visit List:

| ID | Client | Employee | Type | Program | Group Plan Date | Visit Start Time | Delete | Edit | View |
|-------|-----------|------------------|------------|----------|-----------------|-------------------|------------------------|----------------------|----------------------|
| 71106 | Test Test | Bill Chamberlain | | TRAINING | False | 4/10/2016 2:07 PM | delete | edit | view |
| 70398 | Wilt Demo | Bill Chamberlain | CertVisit2 | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |
| 70397 | Wilt Demo | Bill Chamberlain | CertVisit1 | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |
| 70396 | Wilt Demo | Bill Chamberlain | CertSchedu | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |
| 70395 | Wilt Demo | Bill Chamberlain | CertiEmpl | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |
| 70394 | Wilt Demo | Bill Chamberlain | CertClient | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |

When ClientVisitEditAllIncomplete is ENABLED

Incomplete Client Visit List:

| ID | Client | Employee | Type | Program | Group Plan Date | Visit Start Time | Delete | View |
|-------|-----------|------------------|------------|----------|-----------------|-------------------|------------------------|----------------------|
| 71106 | Test Test | Bill Chamberlain | | TRAINING | False | 4/10/2016 2:07 PM | delete | view |
| 70398 | Wilt Demo | Bill Chamberlain | CertVisit2 | TRAINING | False | 1/28/2016 9:06 AM | delete | view |
| 70397 | Wilt Demo | Bill Chamberlain | CertVisit1 | TRAINING | False | 1/28/2016 9:06 AM | delete | view |
| 70396 | Wilt Demo | Bill Chamberlain | CertSchedu | TRAINING | False | 1/28/2016 9:06 AM | delete | view |
| 70395 | Wilt Demo | Bill Chamberlain | CertiEmpl | TRAINING | False | 1/28/2016 9:06 AM | delete | view |
| 70394 | Wilt Demo | Bill Chamberlain | CertClient | TRAINING | False | 1/28/2016 9:06 AM | delete | view |

When ClientVisitEditAllIncomplete is DISABLED

ClientVisitFax

Function:

- Controls whether the “Fax” button will display when viewing a Visit or Template.
 - NOTE:** This setting only affects those that have the “Fax Visits” setting enabled in the Partner Config.

Location(s) this setting affects:

- Visit Tab -> Fax Button
- Visit Tab -> Selected Visit -> Template Button -> Fax Button
- Client Page -> Client Nav Bar -> Visit List Button -> Fax Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Fax Button

Screenshots:

Client Visit List: Test Test (3599) (M) advanced search incomplete visits add visit

1 to 4 of 4 All Visit Type ID 3599 Employee Start Date End Date Prog / Team Filter

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | |
|-------|---------|------------|-------------------|------------|----------|---------|---------|--------|-------|---------|----------|----------|--|
| 42880 | | Test, Test | Tompkins, David | VISITTRNI | 1:54 PM | 3/3/15 | 9:56 AM | COMP | 00000 | | Training | No Plan | view log print fax |
| 23619 | | Test, Test | Spaulding, Cassie | VISITTRNI | 5:15 PM | 9/30/12 | 4:15 PM | COMP | 00000 | | Training | 9/30/12 | view log print fax |
| 23617 | | Test, Test | Spaulding, Cassie | VISITTRNI | 9:00 AM | 9/30/12 | 8:00 AM | COMP | 00000 | | Training | No Plan | view log print fax |
| 23609 | | Test, Test | Spaulding, Cassie | MedMgmProg | 6:23 PM | 9/30/12 | 6:20 PM | COMP | 90862 | | Training | No Plan | view log print fax |

My Visits View All Print All

Agency: -- Select Agency -- Attention: Notes: Fax

When ClientVisitFax is ENABLED

Client Visit List: Test Test (3599) (M) advanced search incomplete visits add visit

1 to 4 of 4 All Visit Type ID 3599 Employee Start Date End Date Prog / Team Filter

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | |
|-------|---------|------------|-------------------|------------|----------|---------|---------|--------|-------|---------|----------|----------|---|
| 42880 | | Test, Test | Tompkins, David | VISITTRNI | 1:54 PM | 3/3/15 | 9:56 AM | COMP | 00000 | | Training | No Plan | view log print |
| 23619 | | Test, Test | Spaulding, Cassie | VISITTRNI | 5:15 PM | 9/30/12 | 4:15 PM | COMP | 00000 | | Training | 9/30/12 | view log print |
| 23617 | | Test, Test | Spaulding, Cassie | VISITTRNI | 9:00 AM | 9/30/12 | 8:00 AM | COMP | 00000 | | Training | No Plan | view log print |
| 23609 | | Test, Test | Spaulding, Cassie | MedMgmProg | 6:23 PM | 9/30/12 | 6:20 PM | COMP | 90862 | | Training | No Plan | view log print |

My Visits View All Print All

When ClientVisitFax is DISABLED

ClientVisitFlagLate

Function:

- Determines whether the user will be able to flag Client Visits as late.
 - **NOTE:** This setting only affects those that have the “Mark Late Entries” setting enabled in Partner Config.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:

| | | | | | |
|--|---------------------|--------------------------|-----------------------|---|-----------------------------|
| Approve Print Summary Sign Update Delete Template Log Billing Clone Add To Do List | | | | | |
| Client Visit: LATE ENTRY | | | | | ID: 44960 |
| Client Name: | John Doe | Employee Name: | Mana Rasoulzadeh, LPC | Recipient: | Client and Family Member(s) |
| Visit Type: | Adult Intake+TXPLAN | Program: | Outpatient | Location: | KYDC01 |
| Time In: | 9:23 AM | Time Out: | 9:24 AM | Date: | 3/2/16 |
| Revised Time In: | | Revised Time Out: | | Duration: | 1 |
| CPT Code: | H1234 | Units: | 0 | Non Billable: | False |
| | | Guarantor: | Johnny Doe | | |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 1 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: | | | | Scan New Attach New | |

ClientVisitList

Function:

- Allows the user to view a list of their own visits, visits done by Employees they supervise, visits done by Employees that are on teams they supervise, and visits done by Employees on Teams that the user is listed as a Team Leader on.
 - **NOTE:** This setting is recommended for all Staff.
 - **NOTE:** If disabled, the user will be unable to access the Visit Tab, or any Visit Lists. They will be kicked to the Client Tab.
 - **NOTE:** This setting also will affect the user's ability to view their own Forms, even if they are Employee Forms. An insufficient rights message will display when clicking 'Incomplete Forms'.

Location(s) this setting affects:

- Visit Tab
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Forms Button -> Incomplete Forms Button

Screenshots:

| Client Visit List: Test Test (3599) (M) | | | | | | | | | | | | advanced search | | incomplete visits | | add visit | | | |
|---|---------|------------|-------------------|------------|----------|---------|---------|--------|-------|----------|----------|-----------------|--|-------------------|-----|-------------|-----|--------|--|
| 1 to 4 of 4 | | All | | Visit Type | | ID | | 3599 | | Employee | | Start Date | | End Date | | Prog / Team | | Filter | |
| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | | | | | | | |
| 42880 | | Test, Test | Tompkins, David | VISITTRNI | 1:54 PM | 3/3/15 | 9:56 AM | COMP | 00000 | | Training | No Plan | | view | log | print | fax | | |
| 23619 | | Test, Test | Spaulding, Cassie | VISITTRNI | 5:15 PM | 9/30/12 | 4:15 PM | COMP | 00000 | | Training | 9/30/12 | | view | log | print | fax | | |
| 23617 | | Test, Test | Spaulding, Cassie | VISITTRNI | 9:00 AM | 9/30/12 | 8:00 AM | COMP | 00000 | | Training | No Plan | | view | log | print | fax | | |
| 23609 | | Test, Test | Spaulding, Cassie | MedMgmProg | 6:23 PM | 9/30/12 | 6:20 PM | COMP | 90862 | | Training | No Plan | | view | log | print | fax | | |

ClientVisitListAll

Function:

- Allows the user to view a list of every Client Visit in the system.
 - **NOTE:** This setting is a high-level role.
 - **NOTE:** ClientVisitList must be enabled to utilize this setting.

Location(s) this setting affects:

- Visit Tab
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button

Screenshots:

| Client Visit List: Test Test (3599) (M) | | | | | | | | | | | | | advanced search | incomplete visits | add visit | | |
|---|---------|------------|-------------------|------------|----------|----------|------------|----------|-------------|---------|----------|----------|-----------------|-------------------|-----------|-------|-----|
| 1 to 4 of 4 | | All | Visit Type | ID | 3599 | Employee | Start Date | End Date | Prog / Team | Filter | | | | | | | |
| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | | | | | |
| 42880 | | Test, Test | Tompkins, David | VISITTRNI | 1:54 PM | 3/3/15 | 9:56 AM | COMP | 00000 | | Training | No Plan | | view | log | print | fax |
| 23619 | | Test, Test | Spaulding, Cassie | VISITTRNI | 5:15 PM | 9/30/12 | 4:15 PM | COMP | 00000 | | Training | 9/30/12 | | view | log | print | fax |
| 23617 | | Test, Test | Spaulding, Cassie | VISITTRNI | 9:00 AM | 9/30/12 | 8:00 AM | COMP | 00000 | | Training | No Plan | | view | log | print | fax |
| 23609 | | Test, Test | Spaulding, Cassie | MedMgmProg | 6:23 PM | 9/30/12 | 6:20 PM | COMP | 90862 | | Training | No Plan | | view | log | print | fax |

ClientVisitListTeam

Function:

- In addition to the Visits that are listed from the ClientVisitList setting, this setting will also list Visits that are done for Clients directly assigned to the user or assigned through a Team.
 - **NOTE:** ClientVisitList must be enabled to utilize this setting.
 - **NOTE:** This setting supercedes the ClientVisitListTeamOnly setting.

Location(s) this setting affects:

- Visit Tab
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button

Screenshots:

| Client Visit List: Test Test (3599) (M) | | | | | | | | | | | | | advanced search | incomplete visits | add visit | | |
|---|---------|------------|-------------------|------------|----------|----------|------------|----------|-------------|---------|----------|----------|-----------------|-------------------|-----------|-------|-----|
| 1 to 4 of 4 | | All | Visit Type | ID | 3599 | Employee | Start Date | End Date | Prog / Team | Filter | | | | | | | |
| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | | | | | |
| 42880 | | Test, Test | Tompkins, David | VISITTRNI | 1:54 PM | 3/3/15 | 9:56 AM | COMP | 00000 | | Training | No Plan | | view | log | print | fax |
| 23619 | | Test, Test | Spaulding, Cassie | VISITTRNI | 5:15 PM | 9/30/12 | 4:15 PM | COMP | 00000 | | Training | 9/30/12 | | view | log | print | fax |
| 23617 | | Test, Test | Spaulding, Cassie | VISITTRNI | 9:00 AM | 9/30/12 | 8:00 AM | COMP | 00000 | | Training | No Plan | | view | log | print | fax |
| 23609 | | Test, Test | Spaulding, Cassie | MedMgmProg | 6:23 PM | 9/30/12 | 6:20 PM | COMP | 90862 | | Training | No Plan | | view | log | print | fax |

ClientVisitListTeamOnly

Function:

- In addition to the Visits that are listed from the ClientVisitList setting, this setting will also list Visits that are done for Clients directly assigned to the user, but ONLY visits that are done on Teams that the user is also assigned to. If the Client has Visits done on other Teams that the user is not a part of, those Visits will not be listed.
 - **NOTE:** ClientVisitList must be enabled to utilize this setting.
 - **NOTE:** This setting is superceded the ClientVisitListTeamOnly setting.

Location(s) this setting affects:

- Visit Tab
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button

Screenshots:

| Client Visit List: Test Test (3599) (M) | | | | | | | | | | | | advanced search | incomplete visits | add visit | | | |
|---|---------|------------|-------------------|------------|----------|----------|------------|----------|-------------|---------|----------|-----------------|-------------------|-----------|-----|-------|-----|
| 1 to 4 of 4 | | All | Visit Type | ID | 3599 | Employee | Start Date | End Date | Prog / Team | Filter | | | | | | | |
| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | | | | | |
| 42880 | | Test, Test | Tompkins, David | VISITTRNI | 1:54 PM | 3/3/15 | 9:56 AM | COMP | 00000 | | Training | No Plan | | view | log | print | fax |
| 23619 | | Test, Test | Spaulding, Cassie | VISITTRNI | 5:15 PM | 9/30/12 | 4:15 PM | COMP | 00000 | | Training | 9/30/12 | | view | log | print | fax |
| 23617 | | Test, Test | Spaulding, Cassie | VISITTRNI | 9:00 AM | 9/30/12 | 8:00 AM | COMP | 00000 | | Training | No Plan | | view | log | print | fax |
| 23609 | | Test, Test | Spaulding, Cassie | MedMgmProg | 6:23 PM | 9/30/12 | 6:20 PM | COMP | 90862 | | Training | No Plan | | view | log | print | fax |

ClientVisitPrintAll

Function:

- Determines whether the user will see the “Print All” button when viewing a Visit List.

Location(s) this setting affects:

- Visit Tab
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button

Screenshots:

Client Visit List: Test Test (3599) (M) advanced search incomplete visits add visit

1 to 4 of 4 All Visit Type ID 3599 Employee Start Date End Date Prog / Team Filter

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | |
|-------|---------|------------|-------------------|------------|----------|---------|---------|--------|-------|---------|----------|----------|--|
| 42880 | | Test, Test | Tompkins, David | VISITTRNI | 1:54 PM | 3/3/15 | 9:56 AM | COMP | 00000 | | Training | No Plan | view log print fax |
| 23619 | | Test, Test | Spaulding, Cassie | VISITTRNI | 5:15 PM | 9/30/12 | 4:15 PM | COMP | 00000 | | Training | 9/30/12 | view log print fax |
| 23617 | | Test, Test | Spaulding, Cassie | VISITTRNI | 9:00 AM | 9/30/12 | 8:00 AM | COMP | 00000 | | Training | No Plan | view log print fax |
| 23609 | | Test, Test | Spaulding, Cassie | MedMgmProg | 6:23 PM | 9/30/12 | 6:20 PM | COMP | 90862 | | Training | No Plan | view log print fax |

My Visits View All Print All

When ClientVisitPrintAll is ENABLED

Client Visit List: Test Test (3599) (M) advanced search incomplete visits add visit

1 to 4 of 4 All Visit Type ID 3599 Employee Start Date End Date Prog / Team Filter

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | |
|-------|---------|------------|-------------------|------------|----------|---------|---------|--------|-------|---------|----------|----------|--|
| 42880 | | Test, Test | Tompkins, David | VISITTRNI | 1:54 PM | 3/3/15 | 9:56 AM | COMP | 00000 | | Training | No Plan | view log print fax |
| 23619 | | Test, Test | Spaulding, Cassie | VISITTRNI | 5:15 PM | 9/30/12 | 4:15 PM | COMP | 00000 | | Training | 9/30/12 | view log print fax |
| 23617 | | Test, Test | Spaulding, Cassie | VISITTRNI | 9:00 AM | 9/30/12 | 8:00 AM | COMP | 00000 | | Training | No Plan | view log print fax |
| 23609 | | Test, Test | Spaulding, Cassie | MedMgmProg | 6:23 PM | 9/30/12 | 6:20 PM | COMP | 90862 | | Training | No Plan | view log print fax |

My Visits View All

When ClientVisitPrintAll is DISABLED

ClientVisitSetNonbillable

Function:

- Determines whether the user will be able to manually set a Visit as Non Billable, when updating the Visit.
 - When disabled, the Non Billable field will instead display “True” or “False”, and cannot be edited.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit -> Update Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit -> Update Button

Screenshots:

| Client Service Update: | | | |
|---|--------------------------|------------------------|---|
| Client Service For: TestClient TestClient | | | ID: 2149757 |
| Employee Name: | | Credentials: | Recipient: Client Face to Face |
| Program / Service Type: | AOP: Crisis Eval - Adult | | Location: Main Off |
| Time In: | 10:05 AM | Time Out: | 10:30 AM |
| Revised Date/Time In: | | Revised Date/Time Out: | |
| CPT Code: | ✗ | Insurance: | MCR B : typeid |
| Rate: | 0.00 | Units: | 0 |
| Group: | <input type="checkbox"/> | Activity Type: | ---Not Set--- |
| Approved: | ✗ False | Approved By / On: | |
| | | Non Billable: | <input type="checkbox"/> |
| | | Copay: | \$0.00 <input type="button" value="add"/> |
| | | Group Type / Count: | |

When ClientVisitSetNonbillable is ENABLED

| Client Service Update: | | | |
|---|--------------------------|------------------------|---|
| Client Service For: TestClient TestClient | | | ID: 2149757 |
| Employee Name: | | Credentials: | Recipient: Client Face to Face |
| Program / Service Type: | AOP: Crisis Eval - Adult | | Location: Main Off |
| Time In: | 10:05 AM | Time Out: | 10:30 AM |
| Revised Date/Time In: | | Revised Date/Time Out: | |
| CPT Code: | ✗ | Insurance: | MCR B : typeid |
| Rate: | 0.00 | Units: | 0 |
| Group: | <input type="checkbox"/> | Activity Type: | ---Not Set--- |
| | | Non Billable: | False |
| | | Copay: | \$0.00 <input type="button" value="add"/> |
| | | Group Type / Count: | |

When ClientVisitSetNonbillable is DISABLED

ClientVisitSummaryView

Function:

- Determines whether the “Summary” button will display when viewing a completed Visit, allowing you to view a Summary printout.
 - A Summary printout will display any answers to questions that were set up in the Form with the “Include in Summary” identifier. The Visit Type must also have the “Include Summary” checkbox enabled.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit -> Update Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit -> Update Button

Screenshots:

The screenshot shows a software interface for viewing a client visit. At the top, there is a navigation bar with buttons: Approve, Print, Summary (highlighted in red), Sign, Delete, Log, Billing, Clone, Add To Do, and List. Below this is a form titled 'Client Visit' with ID: 45039. The form contains the following fields:

| | | | | | |
|--------------------------|---|--------------------------|------------------|----------------------|-------------|
| Client Name: | Test Test | Employee Name: | Bill Chamberlain | Recipient: | Client Only |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | Beth Office |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: | 4/11/16 |
| Revised Time In: | | Revised Time Out: | | Duration: | 0 |
| CPT Code: | | Units: | 0 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 1 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: | <input type="button" value="Scan New"/> <input type="button" value="Attach New"/> | | | | |

When ClientVisitSummaryView is ENABLED

This screenshot is identical to the one above, showing the same 'Client Visit' form with ID: 45039. However, in this version, the 'Summary' button is not present in the top navigation bar, only the other buttons (Approve, Print, Sign, Delete, Log, Billing, Clone, Add To Do, List) are visible.

When ClientVisitSummaryView is ENABLED

ClientVisitUpdate

Function:

- Determines whether the “Update” button will display when viewing a Visit.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:

| | | | | | |
|--|-----------|-------------------|------------------|---|-------------|
| Approve Print Sign Update Delete Log Billing Clone Add To Do List | | | | | |
| Client Visit: | | | | | ID: 45039 + |
| Client Name: | Test Test | Employee Name: | Bill Chamberlain | Recipient: | Client Only |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | Beth Office |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: | 4/11/16 |
| Revised Time In: | | Revised Time Out: | | Duration: | 0 |
| CPT Code: | | Units: | 0 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 1 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: | | | | Scan New Attach New | |

When ClientVisitUpdate is ENABLED

| | | | | | |
|--|-----------|-------------------|------------------|---|-------------|
| Approve Print Summary Sign Delete Log Billing Clone Add To Do List | | | | | |
| Client Visit: | | | | | ID: 45039 + |
| Client Name: | Test Test | Employee Name: | Bill Chamberlain | Recipient: | Client Only |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | Beth Office |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: | 4/11/16 |
| Revised Time In: | | Revised Time Out: | | Duration: | 0 |
| CPT Code: | | Units: | 0 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 1 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: | | | | Scan New Attach New | |

When ClientVisitUpdate is DISABLED

ClientVisitUpdateForm

Function:

- Determines whether the “Edit Full Visit” button will display when viewing a Visit.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:

| Client Visit: | | | | ID: 45039 + | |
|-------------------|-----------|-------------------|------------------|---|-------------|
| Client Name: | Test Test | Employee Name: | Bill Chamberlain | Recipient: | Client Only |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | Beth Office |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: | 4/11/16 |
| Revised Time In: | | Revised Time Out: | | Duration: | 0 |
| CPT Code: | | Units: | 0 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 1 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: | | | | <input type="button" value="Scan New"/> <input type="button" value="Attach New"/> | |

| Bill Test | Enter search criteria | Search Answers | + | Edit Full Visit |
|-----------|-----------------------|----------------|---|-----------------|
|-----------|-----------------------|----------------|---|-----------------|

When ClientVisitUpdateForm is ENABLED

| Client Visit: | | | | ID: 45039 + | |
|-------------------|-----------|-------------------|------------------|---|-------------|
| Client Name: | Test Test | Employee Name: | Bill Chamberlain | Recipient: | Client Only |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | Beth Office |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: | 4/11/16 |
| Revised Time In: | | Revised Time Out: | | Duration: | 0 |
| CPT Code: | | Units: | 0 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 1 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: | | | | <input type="button" value="Scan New"/> <input type="button" value="Attach New"/> | |

| Bill Test | Enter search criteria | Search Answers | + |
|-----------|-----------------------|----------------|---|
|-----------|-----------------------|----------------|---|

When ClientVisitUpdateForm is DISABLED

ClientVisitUpdateModifier

Function:

- Allows the user to update the CPT modifiers when updating a Visit.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit -> Update Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit -> Update Button

Screenshots:

| Client Service Update: | | | | |
|---|-----------------------------|------------------------|----------------|--|
| Client Service For: TestClient TestClient | | | | ID: 2149790 |
| Employee Name: | | Credentials: | | Recipient: Client Face to Face |
| Program / Service Type: | Northfield: Tx Plan - Adult | | | Location: Main Off |
| Time In: | 1:00 PM | Time Out: | 2:00 PM | Date: 4/5/2016 |
| Revised Date/Time In: | | Revised Date/Time Out: | | Duration: 60 |
| CPT Code: | NonBill | Insurance: | MCR B : typeid | Non Billable: True |
| Rate: | 0.00 | Units: | 1 | Copay: \$0.00 <input type="button" value="add"/> |

When ClientVisitUpdateModifier is ENABLED

| Client Service Update: | | | | |
|---|-----------------------------|------------------------|----------------|--|
| Client Service For: TestClient TestClient | | | | ID: 2149790 |
| Employee Name: | | Credentials: | | Recipient: Client Face to Face |
| Program / Service Type: | Northfield: Tx Plan - Adult | | | Location: Main Off |
| Time In: | 1:00 PM | Time Out: | 2:00 PM | Date: 4/5/2016 |
| Revised Date/Time In: | | Revised Date/Time Out: | | Duration: 60 |
| CPT Code: | NonBill | Insurance: | MCR B : typeid | Non Billable: True |
| Rate: | 0.00 | Units: | 1 | Copay: \$0.00 <input type="button" value="add"/> |

When ClientVisitUpdateModifier is DISABLED

ClientVisitUpdateName

Function:

- Allows the user to utilize the “Update Name” checkbox when updating a completed Visit.
 - This checkbox only displays if the Name of the Client has changed since the Visit was completed.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit -> Update Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit -> Update Button

Screenshots:

Client Visit Update:

| | | | | |
|-----------------------------|----------------------------------|--|-----------|------------------------|
| Client Visit For: Test Test | | Update Name <input checked="" type="checkbox"/> | | ID: 45039 |
| Employee Name: | Bill Chamberlain | Credentials: | | Recipient: Client Only |
| Program / Visit Type: | TRAINING: Bill Test: Beth Office | | Location: | Beth Office |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: 4/11/2016 |

When ClientVisitUpdateName is ENABLED

Client Visit Update:

| | | | | |
|-----------------------------|----------------------------------|--------------|-----------|------------------------|
| Client Visit For: Test Test | | | | ID: 45039 |
| Employee Name: | Bill Chamberlain | Credentials: | | Recipient: Client Only |
| Program / Visit Type: | TRAINING: Bill Test: Beth Office | | Location: | Beth Office |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: 4/11/2016 |

When ClientVisitUpdateName is DISABLED

ClientVisitUpdateOwn

Function:

- Allows the user to utilize the “Update” button on only their own Client Visits.
 - **NOTE:** If ClientVisitUpdate is enabled, this setting will have no effect.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit -> Update Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit -> Update Button

Screenshots:

The screenshot displays a software interface for managing client visits. At the top, there is a navigation bar with buttons for 'Approve', 'Print', 'Sign', 'Update' (highlighted in red), 'Delete', 'Log', 'Billing', 'Clone', 'Add To Do', and 'List'. Below this is a form titled 'Client Visit' with a header bar showing 'ID: 45039' and a plus sign. The form contains several fields:

| | | | | | |
|--------------------------|-----------|--------------------------|------------------|---|---|
| Client Name: | Test Test | Employee Name: | Bill Chamberlain | Recipient: | Client Only |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | Beth Office |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: | 4/11/16 |
| Revised Time In: | | Revised Time Out: | | Duration: | 0 |
| CPT Code: | | Units: | 0 | Non Billable: | False |
| 2nd Employees: | | | | | |
| Additional Fields | | | | | |
| Employee Title: | | Signature Count: | 1 | bool1: | False |
| bool2: | False | non_release: | False | | |
| Attachments: | | | | <input type="button" value="Scan New"/> | <input type="button" value="Attach New"/> |

ClientVisitView

Function:

- Allows the user to right to view the summary of their own Client visits, visits done by Employees they supervise, and visits done on teams where the user is a team leader.
 - If disabled, the user will receive an Insufficient Rights message.
 - In addition to not being able to view the summary, the user will also be unable to generate a printout.
 - **NOTE:** This setting is recommended for all staff.
 - **NOTE:** This setting is superceded by ClientVisitViewAll

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:

| | | | | | | |
|--|-----------|-------------------|------------------|-----------------------|-------------|-------------------------|
| ◀ Approve Print Summary Sign Update Delete Log Billing Clone Add To Do List ▶ | | | | | | |
| Client Visit: | | | | | ID: 45039 | + |
| Client Name: | Test Test | Employee Name: | Bill Chamberlain | Recipient: | Client Only | |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | Beth Office | |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: | 4/11/16 | |
| Revised Time In: | | Revised Time Out: | | Duration: | 0 | |
| CPT Code: | | Units: | 0 | Non Billable: | False | |
| 2nd Employees: | | | | | | |
| Additional Fields | | | | | | |
| Employee Title: | | Signature Count: | 1 | bool1: | False | |
| bool2: | False | non_release: | False | | | |
| Attachments: | | | | Scan New | | Attach New |

ClientVisitViewAll

Function:

- Allows the user to right to view the summary of all Client Visits.
 - **NOTE:** This setting is recommended for only high-level staff.
 - **NOTE:** This setting supercedes the ClientVisitView setting.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:

| | | | | | | |
|--|-----------|-------------------|------------------|---------------|-------------|------------|
| ◀ Approve Print Summary Sign Update Delete Log Billing Clone Add To Do List ▶ | | | | | | |
| Client Visit: | | | | | ID: 45039 | + |
| Client Name: | Test Test | Employee Name: | Bill Chamberlain | Recipient: | Client Only | |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | Beth Office | |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: | 4/11/16 | |
| Revised Time In: | | Revised Time Out: | | Duration: | 0 | |
| CPT Code: | | Units: | 0 | Non Billable: | False | |
| 2nd Employees: | | | | | | |
| Additional Fields | | | | | | |
| Employee Title: | | Signature Count: | 1 | bool1: | False | |
| bool2: | False | non_release: | False | | | |
| Attachments: | | | | Scan New | | Attach New |

ClientVisitViewAllIncomplete

Function:

- Allows the user to right to view all Incomplete Visits, including ones started by other users.
 - If disabled, the user will be taken to their own Incomplete Visits when they click the “Incomplete Visits” button while on another Employee’s Service List.

Location(s) this setting affects:

- Visit Tab -> Incomplete Services Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Incomplete Services Button

Screenshots:

Incomplete Client Visit List:

| ID | Client | Employee | Type | Program | Group Plan Date | Visit Start Time | Delete | Edit | View |
|-------|-----------|------------------|------------|----------|-----------------|-------------------|------------------------|----------------------|----------------------|
| 71106 | Test Test | Bill Chamberlain | | TRAINING | False | 4/10/2016 2:07 PM | delete | edit | view |
| 70398 | Wilt Demo | Bill Chamberlain | CertVisit2 | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |
| 70397 | Wilt Demo | Bill Chamberlain | CertVisit1 | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |
| 70396 | Wilt Demo | Bill Chamberlain | CertSchedu | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |
| 70395 | Wilt Demo | Bill Chamberlain | CertiEmpl | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |
| 70394 | Wilt Demo | Bill Chamberlain | CertClient | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |
| 70393 | Wilt Demo | Bill Chamberlain | CertSetup | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |
| 70392 | Wilt Demo | Bill Chamberlain | VISITTRNII | TRAINING | False | 1/28/2016 9:06 AM | delete | edit | view |

ClientVisitViewForm

Function:

- Determines whether the Form information, and the “Edit Full Visit” button will display when viewing a Visit summary.
- Determines whether the “Print” and “Fax” buttons will display when viewing a Visit list.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit
- Print Button on the top row of buttons when viewing a selected Visit.

Screenshots:

| Client Visit: LATE ENTRY | | ID: 45030 | |
|--------------------------|-------------|---------------------|-----------------------|
| Client Name: | Darth Vader | Employee Name: | Alan Vincent, MD, PhD |
| Visit Type: | OP Visit | Program: | TRAINING |
| Time In: | 10:00 AM | Time Out: | 10:15 AM |
| Revised Time In: | | Revised Time Out: | |
| CPT Code: | 90862 - 01 | Units: | 1 |
| 2nd Employees: | | Duration: | 15 |
| Additional Fields | | Non Billable: | False |
| Employee Title: | | Signature Count: | 1 |
| bool2: | False | bool1: | False |
| non_release: | False | | |
| Attachments: | | Scan New Attach New | |

CLM General Referral Form

Enter search criteria Search Answers Edit Full Visit

Change in Service

This Form Is To Be Completed For Any Change Or Addition In Services

Group Therapy: DBT

Insurance Information:

Route To: Intake Buffalo

When ClientVisitViewForm is ENABLED

| Client Visit: LATE ENTRY | | ID: 45030 | |
|--------------------------|-------------|---------------------|-----------------------|
| Client Name: | Darth Vader | Employee Name: | Alan Vincent, MD, PhD |
| Visit Type: | OP Visit | Program: | TRAINING |
| Time In: | 10:00 AM | Time Out: | 10:15 AM |
| Revised Time In: | | Revised Time Out: | |
| CPT Code: | 90862 - 01 | Units: | 1 |
| 2nd Employees: | | Duration: | 15 |
| Additional Fields | | Non Billable: | False |
| Employee Title: | | Signature Count: | 1 |
| bool2: | False | bool1: | False |
| non_release: | False | | |
| Attachments: | | Scan New Attach New | |

When ClientVisitViewForm is DISABLED

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | |
|-------|-------------------------------------|------------|-------------------|------|----------|---------|---------|--------|------|----------|---------|--|---|
| 45039 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:03 PM | 4/11/16 | 2:03 PM | COMP | | Training | No Plan | <input type="button" value="view"/> <input type="button" value="log"/> | <input type="button" value="print"/> <input type="button" value="fax"/> |
| 45038 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:00 PM | 4/11/16 | 1:59 PM | COMP | 6260 | Training | No Plan | <input type="button" value="view"/> <input type="button" value="log"/> | <input type="button" value="print"/> <input type="button" value="fax"/> |

When ClientVisitViewForm is ENABLED

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Team | Schedule | |
|-------|-------------------------------------|------------|-------------------|------|----------|---------|---------|--------|------|----------|---------|--|--|
| 45039 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:03 PM | 4/11/16 | 2:03 PM | COMP | | Training | No Plan | <input type="button" value="view"/> <input type="button" value="log"/> | |
| 45038 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:00 PM | 4/11/16 | 1:59 PM | COMP | 6260 | Training | No Plan | <input type="button" value="view"/> <input type="button" value="log"/> | |

When ClientVisitViewForm is DISABLED

ClientVisitViewLog

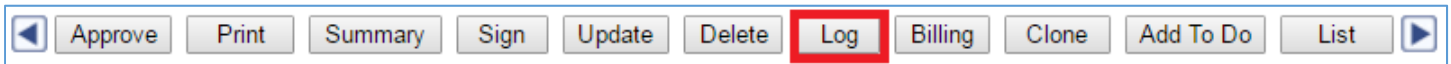
Function:

- Determines whether the Form information, and the “Edit Full Visit” button will display when viewing a Visit summary.
- Determines whether the “Print” and “Fax” buttons will display when viewing a Visit list.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:



When ClientVisitViewLog is ENABLED



When ClientVisitViewLog is DISABLED

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Schedule | view | log | print | fax |
|-------|-------------------------------------|------------|-------------------|------|----------|---------|---------|--------|------|----------|------|-----|-------|-----|
| 45039 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:03 PM | 4/11/16 | 2:03 PM | COMP | | No Plan | view | log | print | fax |
| 45038 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:00 PM | 4/11/16 | 1:59 PM | COMP | 6260 | No Plan | view | log | print | fax |

When ClientVisitViewLog is ENABLED

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Is Late | Schedule | view | print | fax |
|-------|-------------------------------------|------------|-------------------|------|----------|---------|---------|--------|------|---------|----------|------|-------|-----|
| 45039 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:03 PM | 4/11/16 | 2:03 PM | COMP | | | No Plan | view | print | fax |
| 45038 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:00 PM | 4/11/16 | 1:59 PM | COMP | 6260 | | No Plan | view | print | fax |

When ClientVisitViewLog is DISABLED

ClientVisitViewTeam

Function:

- Determines whether the user can view Visit summaries for Clients that are either directly assigned to the user, or Visits that are assigned to the same Team as the user.
 - **NOTE:** If utilizing this setting, it is recommended to also have the ClientVisitView setting enabled as well.
 - **NOTE:** This setting supercedes the ClientVisitViewTeamOnly setting.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:

| | | | | | | |
|--|-----------|-------------------|------------------|-----------------------|-------------|-------------------------|
| Approve Print Summary Sign Update Delete Log Billing Clone Add To Do List | | | | | | |
| Client Visit: | | | | | ID: 45039 | + |
| Client Name: | Test Test | Employee Name: | Bill Chamberlain | Recipient: | Client Only | |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | Beth Office | |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: | 4/11/16 | |
| Revised Time In: | | Revised Time Out: | | Duration: | 0 | |
| CPT Code: | | Units: | 0 | Non Billable: | False | |
| 2nd Employees: | | | | | | |
| Additional Fields | | | | | | |
| Employee Title: | | Signature Count: | 1 | bool1: | False | |
| bool2: | False | non_release: | False | | | |
| Attachments: | | | | Scan New | | Attach New |

ClientVisitViewTeamOnly

Function:

- Determines whether the user can view Visit summaries that are assigned to the same Team as the user.
 - **NOTE:** This setting is superceded by the ClientVisitViewTeam setting.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:

| | | | | | | |
|--|-----------|-------------------|------------------|-----------------------|-------------|-------------------------|
| Approve Print Summary Sign Update Delete Log Billing Clone Add To Do List | | | | | | |
| Client Visit: | | | | | ID: 45039 | + |
| Client Name: | Test Test | Employee Name: | Bill Chamberlain | Recipient: | Client Only | |
| Visit Type: | Bill Test | Program: | TRAINING | Location: | Beth Office | |
| Time In: | 2:03 PM | Time Out: | 2:03 PM | Date: | 4/11/16 | |
| Revised Time In: | | Revised Time Out: | | Duration: | 0 | |
| CPT Code: | | Units: | 0 | Non Billable: | False | |
| 2nd Employees: | | | | | | |
| Additional Fields | | | | | | |
| Employee Title: | | Signature Count: | 1 | bool1: | False | |
| bool2: | False | non_release: | False | | | |
| Attachments: | | | | Scan New | | Attach New |

SubmitAllVisits

Function:

- Determines whether the user will see the “Sign and Submit All Visits” checkbox. This displays on the Sign & Submit page, when signing for multiple/group Visits.

Location(s) this setting affects:

- Sign & Submit Page when signing multiple/group Visits

Screenshots:

| SIGN & SUBMIT | |
|---|--|
| Program: | TRAINING |
| Visit Type: | ISP |
| Location: | <input type="text"/> |
| Diagnosis: | |
| Recipient: | ClientOnly <input type="text"/> |
| Billing Group: | Credible NH <input type="text"/> |
| Files: | ATTACHMENTS |
| Visit Date : | 4/15/2016 <input type="text"/> |
| Start & End Time: | 9:00 AM <input type="text"/> 9:15 AM <input type="text"/> |
| Enter Password: | <input type="password"/> <input type="checkbox"/> Sign and Submit All Visits |
| <input type="button" value="Sign and Submit"/> <input type="button" value="Save Billing Info"/> <input type="button" value="Discard Visit"/> <input type="button" value="No Show"/> | |
| *Please check Date and Time of Service before sign and submit | |

When SubmitAllVisits is ENABLED

| SIGN & SUBMIT | |
|---|---|
| Program: | TRAINING |
| Visit Type: | ISP |
| Location: | <input type="text"/> |
| Diagnosis: | |
| Recipient: | ClientOnly <input type="text"/> |
| Billing Group: | Credible NH <input type="text"/> |
| Files: | ATTACHMENTS |
| Visit Date : | 4/15/2016 <input type="text"/> |
| Start & End Time: | 9:00 AM <input type="text"/> 9:15 AM <input type="text"/> |
| Enter Password: | <input type="password"/> |
| <input type="button" value="Sign and Submit"/> <input type="button" value="Save Billing Info"/> <input type="button" value="Discard Visit"/> <input type="button" value="No Show"/> | |
| *Please check Date and Time of Service before sign and submit | |

When SubmitAllVisits is DISABLED

TxSwitch

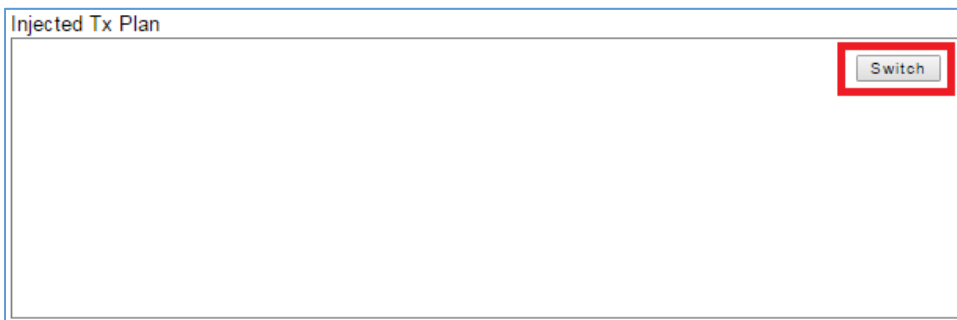
Function:

- If a user is performing a Visit with Web Forms that contain an “Injected Tx Plan” question, this setting determines whether the user will be able to utilize the “Switch” button on that field, which switches the Treatment Plan that is injected.

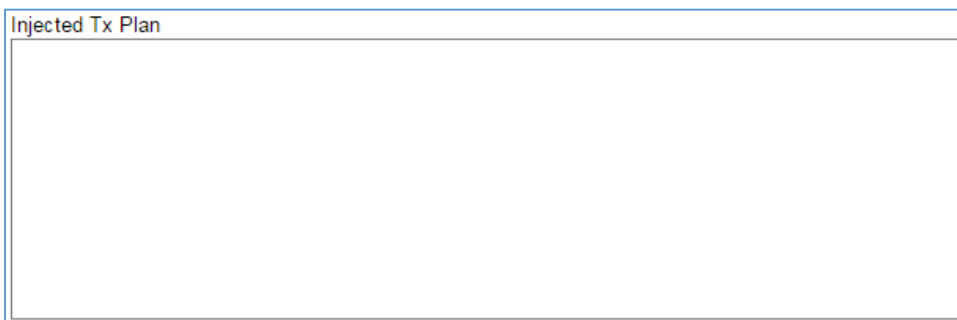
Location(s) this setting affects:

- Web Forms -> Injected Tx Plan Question -> Switch Button

Screenshots:



When TxSwitch is ENABLED



When TxSwitch is DISABLED

ViewIncidentForm

Function:

- Determines whether the user can view Visits that are done utilizing forms that are marked as “Incident Forms”.
 - Forms are marked as Incident Forms directly from the Forms tab. When editing a Form, on the first page, there is a checkbox called “Is Incident Form”.
 - If disabled, the user will not be able to see these Visits on a Visit List.

Location(s) this setting affects:

- Visit Tab -> Visit List
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button

Screenshots:

Form

Form ID: 1182

Form Name: Bill Test

Employee Form:

Show Physicians Orders:

Show Intake Nav Bar:

Is Incident Form:

Where a Form can be marked as “Is Incident Form”

Client Visit List: advanced search incomplete visits add visit

1 to 20 of 32 All Visit Type ID Client 11596 Start Date End Date Prog / Team Filter

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Schedule | |
|-------|-------------------------------------|------------|-------------------|------|----------|---------|---------|-----------|-----|----------|--------------------|
| 45087 | <input checked="" type="checkbox"/> | Demo, Wilt | Chamberlain, Bill | | 9:58 AM | 4/15/16 | 9:58 AM | COMP | | No Plan | view log print fax |
| 45039 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:03 PM | 4/11/16 | 2:03 PM | COMP | | No Plan | view log print fax |
| 45038 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:00 PM | 4/11/16 | 1:59 PM | COMP 6260 | | No Plan | view log print fax |

This Visit has a Form connected to it that is marked as an Incident Form.

When ViewIncidentForm is ENABLED

Client Visit List: advanced search incomplete visits add visit

1 to 20 of 31 All Visit Type ID Client 11596 Start Date End Date Prog / Team Filter

| ID | Approve | Client | Employee | Type | Time Out | Date | Time In | Status | CPT | Schedule | |
|-------|-------------------------------------|------------|-------------------|------|----------|---------|---------|-----------|-----|----------|--------------------|
| 45039 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:03 PM | 4/11/16 | 2:03 PM | COMP | | No Plan | view log print fax |
| 45038 | <input checked="" type="checkbox"/> | Test, Test | Chamberlain, Bill | | 2:00 PM | 4/11/16 | 1:59 PM | COMP 6260 | | No Plan | view log print fax |

When ViewIncidentForm is DISABLED

VisitDataEntry

Function:

- Determines whether the “Data Entry” button will appear when adding a new Visit from the “Add Visit” button on an Employee or Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Add Visit Button
- Employee Page -> Employee Nav Bar -> Add Visit Button

Screenshots:

The screenshot shows the 'ENTER VISIT' form with the following fields and values:

- Employee: Chamberlain, Bill
- Client: Test, Test
- Program: TRAINING (dropdown)
- Visit Type: Bill Test (dropdown)
- Location: Other Location (dropdown)
- Recipient: ClientOnly (dropdown)
- Billing Group: Credible NH (dropdown)
- # of Entries: 1 (dropdown)
- Daily Dates: [] [] (calendar icons)
- Daily Times: [] [] (clock icons)

At the bottom, there are three buttons: 'Data Entry' (highlighted with a red box), 'Web Forms', and 'Reset'.

When VisitDataEntry is ENABLED

The screenshot shows the 'ENTER VISIT' form with the following fields and values:

- Employee: Chamberlain, Bill
- Client: Test, Test
- Program: TRAINING (dropdown)
- Visit Type: Bill Test (dropdown)
- Location: Bethesda Office (dropdown)
- Recipient: ClientOnly (dropdown)
- Billing Group: Credible NH (dropdown)
- # of Entries: 1 (dropdown)
- Daily Dates: [] [] (calendar icons)
- Daily Times: [] [] (clock icons)

At the bottom, there are two buttons: 'Web Forms' and 'Reset'. The 'Data Entry' button is not visible, indicating it is disabled.

When VisitDataEntry is DISABLED

VisitEntryMultiPerClient

Function:

- Allows the user the right to create multiple Visits for multiple Clients through the Advanced Client Search. If enabled, a “Show Add Visit” checkbox will display in the Advanced Client search that allows you to add a Visit to the Clients that are pulled in the search results.
 - If disabled, this checkbox will not appear as an option.

Location(s) this setting affects:

- Client Tab -> Advanced Search Button -> Show Add Visit Checkbox

Screenshots:

The screenshot shows the Advanced Client Search interface. At the top, there are filter fields for 'Filter' (testing), 'Program', 'Team', 'Payer', 'Payer Type', and 'Primary'. Below these are 'Export' options: 'ALL ACTIVE', 'Insurance ID', 'SSN', and 'Phonetic Name'. There are also checkboxes for 'Multiple rows per client' and 'Do not repeat headers'. The 'DIAGNOSIS' section includes an 'Add' button, radio buttons for 'Any' and 'All', a 'Primary Only' checkbox, and a 'Medical' button. The 'COUNTS' section has 'Period Start' and 'Period End' date pickers, 'Bill / NB' and 'Visit Type' dropdowns, and checkboxes for 'Word Wrap' and 'All Episodes'. The 'SORT BY' section has 'Sort By' and 'Sort By 2nd' dropdowns, 'Descending' checkboxes, and 'Grp Total' and 'Grp Total Only' checkboxes. The 'WHERE' section has 'Column', '=', 'Value', and 'AND' dropdowns. At the bottom, there are buttons for 'Hide', 'Saved Reports', 'Custom Fields', 'Reset', 'Multi Select', 'Show Print', 'Show Exports', and 'Show Add Visit'. The 'Show Add Visit' checkbox is checked and highlighted with a red box.

When VisitEntryMultiPerClient is ENABLED

The screenshot shows the Advanced Client Search interface with the 'Show Add Visit' checkbox disabled. The interface is identical to the previous screenshot, but the 'Show Add Visit' checkbox is not visible. The 'Show Add Visit' checkbox is highlighted with a red box in the previous screenshot, but it is not visible in this screenshot.

When VisitEntryMultiPerClient is DISABLED

VisitEntryOtherEmp

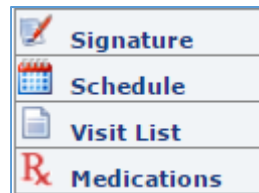
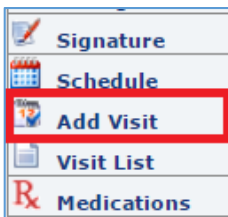
Function:

- Determines whether the “Add Visit” button shows on other Employee Nav Bars, letting the user add and complete Visits under that Employee’s name.
- If enabled, when choosing “Add Visit” on a Client Nav Bar, you will be prompted to choose an Employee name, rather than the user’s name automatically being entered as the Employee.
- **NOTE:** VisitEntryOtherEmp and VisitEntryOtherEmpAsSelf cannot be utilized at the same time. If one is checked, the other setting will be unchecked.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Add Visit Button
- Employee Tab -> Employee Nav Bar -> Add Visit Button

Screenshots:



The nav bar of another Employee with VisitEntryOtherEmp ENABLED vs DISABLED

ENTER VISIT:

Employee: ...

When VisitEntryOtherEmp is ENABLED, choosing “Add Visit” from the Client Nav Bar allows Employee selection.

ENTER VISIT:

Employee: Chamberlain, Bill

Client: Test, Test

Program: TRAINING ▾

Visit Type: Bill Test ▾

Location: Bethesda Office ▾

Recipient: ClientOnly ▾

Billing Group: Credible NH ▾

of Entries: 1 ▾

Daily Dates: —

Daily Times: —

When VisitEntryOtherEmp is DISABLED, choosing “Add Visit” from the Client Nav Bar only allows your Employee Name.

VisitEntryWeb

Function:

- Determines whether the Web Forms on a Visit are accessible.
 - This affects whether the “Web Forms” button displays when using the “Add Visit” button, either on the Client Nav Bar, or when viewing a list of Visits.
 - Also affects whether the “Begin Visit” button will display when viewing a Scheduled Entry.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Add Visit Button -> Web Forms Button
- Employee Tab -> Employee Nav Bar -> Add Visit Button -> Web Forms Button
- Schedule -> Chosen Scheduled Entry -> Begin Visit Button

Screenshots:

The screenshot shows the 'ENTER VISIT' form with the following fields: Employee: Chamberlain, Bill; Program: TRAINING; Visit Type: Bill Test; Location: Other; Recipient: ClientOnly; Billing Group: BillingGroupName; Group Visit: Adolescent therapy; # of Entries: 1 -OR- -- Schedule Group --. At the bottom, there are buttons for 'Data Entry', 'Web Forms' (highlighted with a red box), and 'Reset'.

When VisitEntryWeb is ENABLED

The screenshot shows the 'ENTER VISIT' form with the following fields: Employee: Chamberlain, Bill; Program: TRAINING; Visit Type: Bill Test; Location: Bethesda Office; Recipient: ClientOnly; Billing Group: Credible NH; Group Visit: Adolescent therapy; # of Entries: 1 -OR- -- Schedule Group --. At the bottom, there are buttons for 'Data Entry' and 'Reset'. The 'Web Forms' button is missing.

When VisitEntryWeb is DISABLED

The screenshot shows a client view for 'Wilt Demo (6935)'. Fields include: Secondary Employees, Program / Visit Type: TRAINING: 4TRAN-General, Location: Other, Scheduled Time: 9:00 AM, Duration: 0:15, Payer: AETNAMAG, Status: SCHEDULED, Planned: , Scheduled By: [User Icon], Scheduled Date: 5/11/2016, Copay: Add Copay, Waitlisted: , Waitlist Notes, Schedule Notes. At the bottom, there are buttons for 'Save', 'Begin Visit' (highlighted with a red box), 'Delete', 'Close', and 'Recurrence'.

When VisitEntryWeb is ENABLED

The screenshot shows the same client view as the previous one. At the bottom, the buttons are 'Save', 'Delete', 'Close', and 'Recurrence'. The 'Begin Visit' button is missing.

When VisitEntryWeb is DISABLED

Matrix Section: Clients

ClientAdd

Function:

- Determines whether the user can add new Clients to the Domain.
 - If disabled, the “add client” button will not display when viewing the Client List.

Location(s) this setting affects:

- Client Tab -> Add Client Button

Screenshots:

Client List: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL advanced search **add client**

1 to 15 of 35 | DOB | CITY STATE | PERSONAL IN | MOBILE PHON | NAME / ID | ALL ACTIVE | Prog / Team | Filter

When ClientAdd is ENABLED

Client List: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL advanced search

1 to 15 of 35 | DOB | CITY STATE | PERSONAL IN | MOBILE PHON | NAME / ID | ALL ACTIVE | Prog / Team | Filter

When ClientAdd is DISABLED

ClientAmendmentAdd

Function:

- Determines whether the user can add an Amendment to a Client record.
 - If disabled, the “Create New” button will not display when viewing the Client’s Amendment page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Amendment Button -> Create New Button

Screenshots:

AMENDMENTS: *Wilt Demo (6935) DOB: 09/19/1964 (51 / M)*

| Type | Origin | Details | Status | Selected |
|------|-----------|--|--------|----------|
| New | Diagnosis | (296.82) Atypical depressive disorder(F33) Major depressive disorder, recurrent; Diagnosed By: Chamberlain; Diagnosed: ; Resolved: | | |

Create New

When ClientAmendmentAdd is ENABLED

AMENDMENTS: *Wilt Demo (6935) DOB: 09/19/1964 (51 / M)*

| Type | Origin | Details | Status | Selected |
|------|-----------|--|--------|----------|
| New | Diagnosis | (296.82) Atypical depressive disorder(F33) Major depressive disorder, recurrent; Diagnosed By: Chamberlain; Diagnosed: ; Resolved: | | |

When ClientAmendmentAdd is DISABLED

ClientAmendmentDelete

Function:

- Determines whether the user can delete an attached Amendment from a Client record.
 - If disabled, the “delete” button will not display when viewing the Client’s Amendment page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Amendment Button -> Delete Button

Screenshots:

| AMENDMENTS: <i>Wilt Demo (6935) DOB: 09/19/1964 (51 / M)</i> | | | | |
|--|-------------------------|------------------------------|----------|---------------------------------------|
| Type | Origin | Details | Status | Selected |
| Medication | Pharmacy | Check daily until completed. | Review | <input type="button" value="delete"/> |
| Lab | From previous Provider. | Check daily until completed. | Accepted | <input type="button" value="delete"/> |

ClientAmendmentView

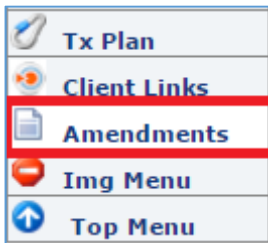
Function:

- Determines whether the user can view attached Amendments on a Client record.
 - If disabled, the “Amendments” button will not display on the Client Nav Bar.
 - If disabled, the “Amendments” module will not display on the Client page (only affects those who set the Amendments module to display).

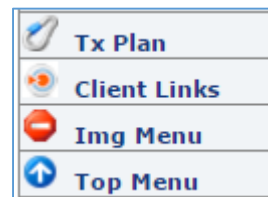
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Amendment Button
- Client Page -> Amendments Module

Screenshots:



When ClientAmendmentView is ENABLED



When ClientAmendmentView is DISABLED

ClientDelete

Function:

- Determines whether the user can delete a Client record.
 - If Disabled, the “Delete” button will not display when viewing the Client’s Profile.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Profile Button -> Delete Button

Screenshots:



ClientEmergencyAccess

Function:

- Determines whether the user can utilize the “Emergency” button on the Employee Nav Bar of their own Employee Page. This would allow them to gain access in an Emergency scenario to Clients that they typically would not be able to view.
 - If Disabled, the “Emergency” button will not display on the Employee Nav Bar.

Location(s) this setting affects:

- Employee Page (your own) -> Employee Nav Bar -> Emergency Button

Screenshots:



When ClientEmergencyAccess is ENABLED



When ClientEmergencyAccess is DISABLED

ClientEpisodeDelete

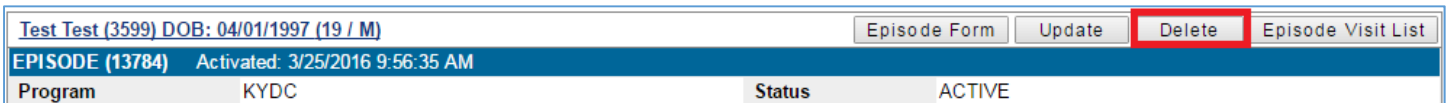
Function:

- Determines whether the user can delete Episodes that appear on a Client.
 - If Disabled, the “Delete” button will not display when viewing an Episode.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Episodes Button -> View Button -> Delete Button
- Client Page -> Episodes Module -> Selected Episode ID -> Delete Button

Screenshots:



When ClientEpisodeDelete is ENABLED



When ClientEpisodeDelete is DISABLED

ClientEpisodeFormsUpdate

Function:

- Determines whether the user will be able to make updates to Episode fields through Web Forms. If an answer on a Web Form is set to map to an Episode field, this setting will determine whether the Form answer will map to that field or not.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Episodes Button -> View Button
- Client Page -> Episodes Module -> Selected Episode ID

ClientEpisodeUpdate

Function:

- Determines whether the user will be able to make updates to an Episode using the 'Update' button.
 - If disabled, the 'Update' button will not display.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Episodes Button -> Update Button
- Client Page -> Episodes Module -> Selected Episode ID -> Update Button

Screenshots:

This screenshot shows the top navigation bar for a client episode. The client information is "Test Test (3599) DOB: 04/01/1997 (19 / M)". The episode information is "EPISODE (13784) Activated: 3/25/2016 9:56:35 AM". The navigation buttons are "Episode Form", "Update", "Delete", and "Episode Visit List". The "Update" button is highlighted with a red box, indicating it is enabled.

When ClientEpisodeUpdate is ENABLED

This screenshot shows the same client episode page as above. However, the "Update" button is missing from the navigation bar. The buttons present are "Episode Form", "Delete", and "Episode Visit List".

When ClientEpisodeUpdate is DISABLED

This screenshot shows a list of client episodes. The table has columns: Ord, ID, Status, Date Range, Program, Admission Date, and LOS. There are three rows of data. The "update" button in the third column of each row is highlighted with a red box, indicating it is enabled.

| Ord | ID | Status | Date Range | Program | Admission Date | LOS | view | update | visits |
|-----|-------|--------|------------|---------|----------------|-----|------|--------|--------|
| 1 | 13784 | ACTIVE | 3/25/2016 | KYDC | | 55 | view | update | visits |
| 2 | 13783 | ACTIVE | 3/25/2016 | KT | | 55 | view | update | visits |
| 3 | 13782 | ACTIVE | 3/25/2016 | JPPROG | | 55 | view | update | visits |

When ClientEpisodeUpdate is ENABLED

This screenshot shows the same list of client episodes as above. However, the "update" buttons are missing from the table, indicating the setting is disabled.

| Ord | ID | Status | Date Range | Program | Admission Date | LOS | view | visits |
|-----|-------|--------|------------|---------|----------------|-----|------|--------|
| 1 | 13784 | ACTIVE | 3/25/2016 | KYDC | | 55 | view | visits |
| 2 | 13783 | ACTIVE | 3/25/2016 | KT | | 55 | view | visits |
| 3 | 13782 | ACTIVE | 3/25/2016 | JPPROG | | 55 | view | visits |

When ClientEpisodeUpdate is DISABLED

ClientFormsUpdate

Function:

- Determines whether the user will be able to make updates to Client fields through Web Forms. If an answer on a Web Form is set to map to a Client field, this setting will determine whether the Form answer will map to that field or not.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Profile Button

ClientLinksAdmin

Function:

- Determines whether the user will be able to manage Client Links on the Home Page Admin Menu.
 - If disabled, the 'Client Links Admin' link will not appear.

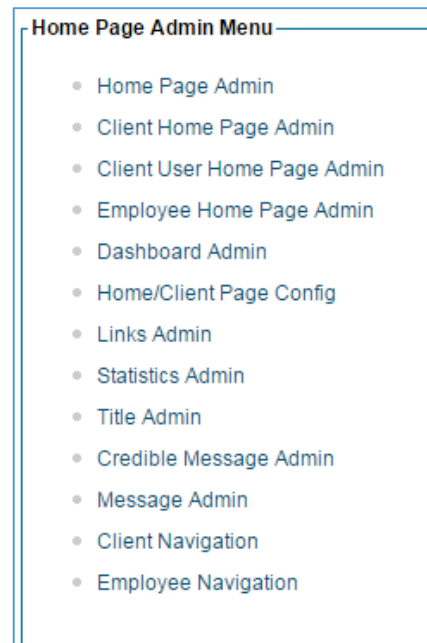
Location(s) this setting affects:

- Admin Tab -> Home Page Config -> Client Links Admin

Screenshots:



When ClientLinksAdmin is ENABLED



When ClientLinksAdmin is DISABLED

ClientList

Function:

- Determines whether the user will be able to access the Client Tab.
 - If Disabled, an “Insufficient Rights” message will appear when clicking the Client Tab.
- If enabled, the user will be able to search listed Clients that are directly assigned to them, indirectly assigned through Teams or Teams they supervise, or assigned to Employees they supervise.
- **NOTE:** This setting is recommended for all Staff.
- **NOTE:** This setting does not affect the ability to click on a listed Client and view their page. That setting is controlled by the ClientView right. This setting only affects what Clients can be searched.
- **NOTE:** Even if the user is utilizing the ClientListAll right, this setting must also be enabled in order to access the Client Tab.

Location(s) this setting affects:

- Client Tab -> Listed Clients

Screenshots:



If ClientList is DISABLED

The screenshot shows the ClientList interface with a navigation bar (Home, Client, Employee, Schedule, Visit, Inpatient, Admin, Billing, Reports, Forms) and a search bar. Below the search bar, a table displays client records. The table has columns for Client ID, Last Name, First Name, City, DOB, Age, and Status. The table contains 18 rows of test data.

| Client ID | Last Name | First Name | City | DOB | Age | Status |
|-----------|-----------|------------|-----------|------------|-----|---------|
| 4940 | Test | Abby | Tampa | 3/20/1965 | 51 | ACTIVE |
| 6674 | Test | Aisha | | 2/19/1992 | 24 | ACTIVE |
| 6989 | Test | Aisha | | 9/1/2015 | 0 | ACTIVE |
| 4761 | test | arthur | | 1/2/1956 | 60 | PENDING |
| 6004 | Test | Bananas | | 10/10/1950 | 65 | ACTIVE |
| 6759 | Test | Beth | | 2/2/1994 | 22 | ACTIVE |
| 4724 | test | bev | Naples | 1/1/1995 | 21 | ACTIVE |
| 9582 | Test | Billy | Kirkville | 1/5/1983 | 33 | ACTIVE |
| 9573 | Test | Bob | | 8/1/1971 | 44 | ACTIVE |
| 6630 | Test | Brian | | 10/14/1991 | 24 | ACTIVE |
| 1306 | test | case | | 2/15/1975 | 41 | ACTIVE |
| 3547 | Test | Client | | 2/7/1985 | 31 | ACTIVE |
| 5993 | Test | Cmb | Bedford | 2/18/1959 | 57 | ACTIVE |
| 6569 | Test | Dawn | phila | 6/14/1992 | 23 | ACTIVE |
| 6673 | TEST | ERIKA | Something | 6/26/1982 | 33 | ACTIVE |

ClientListAll

Function:

- Allows the user to list ALL Clients in the system.
- Allows the user to view any client on the Scheduler when performing a Client search, bypassing Team Assignments.
- **NOTE:** This setting is typically a supervisory right.
- **NOTE:** ClientList will need to be enabled as well, in order to access the Client Tab.

Location(s) this setting affects:

- Client Tab -> Listed Clients
- Schedule Tab -> Add Schedule Entry -> Client Search

Screenshots:

| Client ID | Last Name | First Name | City | DOB | Age | Status |
|-----------|-----------|------------|------------|------------|-----|---------|
| 4940 | Test | Abby | Tampa | 3/20/1965 | 51 | ACTIVE |
| 6674 | Test | Aisha | | 2/19/1992 | 24 | ACTIVE |
| 6989 | Test | Aisha | | 9/1/2015 | 0 | ACTIVE |
| 4761 | test | arthur | | 1/2/1956 | 60 | PENDING |
| 6004 | Test | Bananas | | 10/10/1950 | 65 | ACTIVE |
| 6759 | Test | Beth | | 2/2/1994 | 22 | ACTIVE |
| 4724 | test | bev | Naples | 1/1/1995 | 21 | ACTIVE |
| 9582 | Test | Billy | Kirksville | 1/5/1983 | 33 | ACTIVE |
| 9573 | Test | Bob | | 8/1/1971 | 44 | ACTIVE |
| 6630 | Test | Brian | | 10/14/1991 | 24 | ACTIVE |
| 1306 | test | case | | 2/15/1975 | 41 | ACTIVE |
| 3547 | Test | Client | | 2/7/1985 | 31 | ACTIVE |
| 5993 | Test | Cmb | Bedford | 2/18/1959 | 57 | ACTIVE |
| 6569 | Test | Dawn | phila | 6/14/1992 | 23 | ACTIVE |
| 6673 | TEST | ERIKA | Something | 6/26/1982 | 33 | ACTIVE |

Search for Clients

Last Name: First Name: ID: Program: Status:

(NS) - Indicates High No Show Rate

| ID | Last Name | First Name | Birthdate | City, State | Status |
|------|-------------------------|------------|-----------|----------------|--------|
| 3973 | 'CertifyClientCredible' | Hegner, L | 4/15/1950 | Sunnyville, LA | ACTIVE |
| 5546 | 'Family' | Menger | 12/4/1996 | london, MD | ACTIVE |
| 6447 | Aadan | Aalbert | 7/1/1968 | miami, FL | ACTIVE |
| 2876 | Aardvark | Ann, a | 9/30/1995 | Willmar, AA | ACTIVE |

ClientSuperEdit

Function:

- Determines whether the user will be able to make edits to any Client fields that are marked as “Super Edit”.
- Client fields are marked as “Super Edit” through the Data Dictionary, when viewing the “Update” Type of the “Clients” Table Source.
 - If disabled, any fields marked as “Super Edit” will not display when updating the Client Profile.

Location(s) this setting affects:

- Client Tab -> Selected Client -> Client Nav Bar -> Profile Button -> Update Button -> Client Field
- Client Tab -> Selected Client -> Client Info Module -> Edit Button

Screenshots:

Data Dictionary Update: Table Source: Clients Type: Update Submit Program Specific

| Column Name | Update Label | Update Ord | Is Update Required | Is Lookup | Is Boolean | Is Date | Is Numeric | Max Length | Min Length | Double Wide | Allowed Chars | Super Edit | locked | Is Outcome | Credible Locked | | | |
|---------------|---------------------|------------|-------------------------------------|--|--------------------------|--------------------------|-------------------------------------|------------|------------|-------------------------------------|---------------|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|--------|--------|-------|
| first_name | First Name | 1 | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 10 | | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | update | delete | erase |
| mi | Middle Initial | 2 | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 25 | | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update | delete | erase |
| last_name | Last Name | 3 | <input checked="" type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 35 | | <input type="checkbox"/> | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update | delete | erase |
| text14 | Alias | 4 | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 100 | | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update | delete | erase |
| client_status | Status | 5 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 10 | | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update | delete | erase |
| textlong2 | Reason for Referral | 6 | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1024 | | <input checked="" type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update | delete | erase |
| ssn | SSN | 7 | <input checked="" type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | | <input type="checkbox"/> | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update | delete | erase |

Where fields can be marked as “Super Edit”

ClientSuperView

Function:

- Determines whether the user will be able to view any Client fields that are marked as “Super View”.
- Client fields are marked as “Super View” through the Data Dictionary, when viewing the “View” Type of the “Clients” Table Source.
 - If disabled, any fields marked as “Super View” will not display when viewing the Client Profile.

Location(s) this setting affects:

- Client Tab -> Selected Client -> Client Nav Bar -> Profile Button -> Client Field
- Client Tab -> Selected Client -> Client Info Module

Screenshots:

Data Dictionary Update: Table Source: Clients Type: View Submit Program Specific

| Column Name | View Label | View Ord | New Column | Spacer | Is Lookup | Is Boolean | Is Date | Is Numeric | Max Length | Min Length | Double Wide | Search | Super View | History Link | Section Header | Header Collapse | User View | Is Printview | Credible Locked | | |
|---------------|---------------------|----------|-------------------------------------|--------------------------|--|--------------------------|--------------------------|-------------------------------------|------------|------------|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------|--------|
| first_name | First Name | 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 10 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | update | delete |
| mi | Middle Initial | 2 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 25 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | update | delete |
| last_name | Last Name | 3 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 35 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | update | delete |
| text14 | Alias | 4 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 100 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | update | delete |
| client_status | Status | 5 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 10 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | update | delete |
| textlong2 | Reason for Referral | 6 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1024 | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update | delete |
| client_id | Client ID | 7 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | update | delete |
| ssn | SSN | 8 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> edit | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | update | delete |

Where fields can be marked as “Super View”

ClientUpdate

Function:

- Determines whether the user will be able to make updates to a Client by clicking the "Update" button when viewing the Client Profile.
- Determines whether the user will be able to make updates to a Client by clicking the "Edit" button when viewing the Client Info module.

Location(s) this setting affects:

- Client Tab -> Selected Client -> Client Nav Bar -> Profile Button -> Update Button
- Client Tab -> Selected Client -> Client Info Module -> Edit Button

Screenshots:

| Client Info | | | |
|-------------------------------------|--------------------------------------|----------------|------------------|
| First Name | Test , T | Last Name | Test |
| Alias | | Status | ACTIVE |
| Reason for Referral | | | |
| Client ID | 3599 | SSN | 123456789 |
| Is family unit? | NO | School | |
| Allergy | | Phobias | |
| DOB | 4/1/1997 | Date of Death | |
| Gender | M | Marital Status | |
| Age | 19 | | |
| <input type="button" value="edit"/> | <input type="button" value="print"/> | | Full Client Info |

When ClientUpdate is ENABLED

| Client Info | | | |
|--------------------------------------|----------|----------------|------------------|
| First Name | Test , T | Last Name | Test |
| Alias | | Status | ACTIVE |
| Reason for Referral | | | |
| Client ID | 3599 | SSN | 123456789 |
| Is family unit? | NO | School | |
| Allergy | | Phobias | |
| DOB | 4/1/1997 | Date of Death | |
| Gender | M | Marital Status | |
| Age | 19 | | |
| <input type="button" value="print"/> | | | Full Client Info |

When ClientUpdate is DISABLED

| Test Test (3599) DOB: 04/01/1997 (19 / M) | | As Of Date | <input type="button" value="Update"/> | Delete | Print View | Template |
|---|----------|------------|---------------------------------------|--------|------------|----------|
| CLIENT INFO | | | | | | |
| First Name | Test , T | Last Name | Test | | | |
| Alias | | Status | ACTIVE | | | |

When ClientUpdate is ENABLED

| Test Test (3599) DOB: 04/01/1997 (19 / M) | | As Of Date | Delete | Print View | Template |
|---|----------|------------|--------|------------|----------|
| CLIENT INFO | | | | | |
| First Name | Test , T | Last Name | Test | | |
| Alias | | Status | ACTIVE | | |

When ClientUpdate is DISABLED

ClientUpdateContactsFamily

Function:

- Determines whether the user will be able to Add or Select Client Family Members when viewing the “Family” page on the Client Nav Bar.
- Determines whether the user will be able to Add, Delete, or Update Client Contacts when viewing the “Contacts” page on the Client Nav Bar.

Location(s) this setting affects:

- Client Tab -> Selected Client -> Client Nav Bar -> Family Button
- Client Tab -> Selected Client -> Client Nav Bar -> Contacts Button

Screenshots:

| Family Members: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | | | |
|---|----------|--------------|-----------|-----------|--------------|----------------|---------------|--------|--------------------|------------------------|
| Filter | Active | | | | | | | Export | Add Family Members | |
| | Name | Relation | Dependent | Guarantor | ROI Obtained | Pri Care Giver | Lives at Home | Notes | Diagnosis | |
| select | Mom Test | Birth Mother | False | False | True | False | False | | DX | delete |

When ClientUpdateContactsFamily is ENABLED

| Family Members: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | | | |
|---|----------|--------------|-----------|-----------|--------------|----------------|---------------|--------|-----------|------------------------|
| Filter | Active | | | | | | | Export | | |
| | Name | Relation | Dependent | Guarantor | ROI Obtained | Pri Care Giver | Lives at Home | Notes | Diagnosis | |
| | Mom Test | Birth Mother | False | False | True | False | False | | | delete |

When ClientUpdateContactsFamily is DISABLED

| Contacts: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | | | |
|---|----------|-------------|-----------|-------|--------------|--------------|----------------|------------------|------------------|------------------------|
| Filter | CURRENT | | ALL | | | Export | Add Contact | | | |
| | Type | Name | City | State | Phone | ROI Obtained | ROI Start Date | ROI Expires Date | ROI Status | Notes |
| select | Attorney | Jake Mathis | Rockville | MD | 212-555-4847 | False | | | ROI NOT OBTAINED | delete |

When ClientUpdateContactsFamily is ENABLED

| Contacts: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | | | |
|---|----------|-------------|-----------|-------|--------------|--------------|----------------|------------------|------------------|-------|
| Filter | CURRENT | | ALL | | | Export | | | | |
| | Type | Name | City | State | Phone | ROI Obtained | ROI Start Date | ROI Expires Date | ROI Status | Notes |
| select | Attorney | Jake Mathis | Rockville | MD | 212-555-4847 | False | | | ROI NOT OBTAINED | |

When ClientUpdateContactsFamily is DISABLED

ClientView

Function:

- Determines whether the user will be able to access a Client page.
 - If disabled, an “Insufficient Rights” message will appear when clicking the Client Name, ID, or View button.
- If enabled, the user will be able to view the pages for Clients that are directly assigned to them, indirectly assigned through Teams or Teams they supervise, or assigned to Employees they supervise.
- **NOTE:** This setting is recommended for all Staff.
- **NOTE:** This setting does not affect the ability to see listed Clients on the Client Tab. ClientView affects the ability to select a Client and view their page and nav bar.
- **NOTE:** Even if the user is utilizing the ClientViewAll right, this setting must also be enabled in order to access the Client Tab.

Location(s) this setting affects:

- Client Tab -> Listed Clients -> Clicking the Client Name, ID, or View button

Screenshots:

| Client ID | Last Name | First Name | City | DOB | Age | Status | |
|-----------|-----------|------------|------------|-----------|-----|--------|---|
| 3599 | Test | Test | | 4/1/1997 | 19 | ACTIVE | view schedule |
| 6935 | Demo | Wilt | Germantown | 9/19/1964 | 51 | ACTIVE | view schedule |

ClientViewAll


Function:

- Allows the user to view ALL Clients in the system.
- **NOTE:** This setting is typically a supervisory right.
- **NOTE:** ClientView will need to be enabled as well in order to view Clients.

Location(s) this setting affects:

- Client Tab -> Listed Clients -> Clicking the Client Name, ID, or View button

Screenshots:

| Client List: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL | | | | | | | advanced search | add client | |
|--|-----------|------------|-------------|-------------|-----------|--------------|---|----------------------|--------------------------|
| 1 to 15 of 35 | DOB | CITY STATE | PERSONAL IN | MOBILE PHON | NAME / ID | ALL ACTIVE ▼ | Prog / Team ▼ | Filter | |
| Client ID | Last Name | First Name | City | DOB | Age | Status | | | |
| 3599 | Test | Test | | 4/1/1997 | 19 | ACTIVE |  | view | schedule |
| 6935 | Demo | Wilt | Germantown | 9/19/1964 | 51 | ACTIVE | | view | schedule |

ClientViewLog

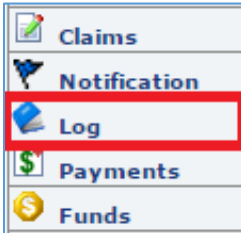
Function:

- Determines whether the “Log” button will display on the Client Nav Bar.

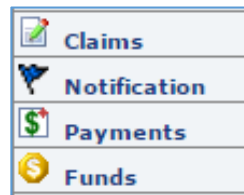
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Log Button

Screenshots:



When ClientViewLog is ENABLED



When ClientViewLog is DISABLED

ClinicalSupportView

Function:

- Determines whether the “Clinical Support” button will display on the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Clinical Support Button

Screenshots:



When ClinicalSupportView is ENABLED



When ClinicalSupportView is DISABLED

PatientSummaryGenerator

Function:

- Determines whether the user will be able to generate a CCR (Continuity of Care Record) by using the “Generate Clinical Summary” button which displays at the bottom right corner of the Client Profile.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Profile Button -> Generate Clinical Summary Button

Screenshots:

| | | | | | | | | | |
|---|---------|--|-----------|------------|--------|-------------|--------------|---------------------------|-------------|
| Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | As Of Date | Update | Delete | Print View | Template | |
| CLIENT INFO | | | | | | | | | |
| First Name | Test, T | | Last Name | Test | | | | | |
| Alias | | | Status | ACTIVE | | | | | |
| Reason for Referral | | | | | | | | | |
| Client ID | 3599 | | SSN | 123456789 | | | | | |
| + BILLING INFO | | | | | | | Insurance... | Authorizations... | |
| + ASSIGNMENTS | | | | | | Employee... | Program... | Team... | GeoAreas... |
| + CLIENT EXTENDED INFO | | | | | | | | Update | |
| + Section Header Testing | | | | | | | | | |
| | | | | | | | | Generate Clinical Summary | |

When PatientSummaryGenerator is ENABLED

| | | | | | | | | | |
|---|---------|--|-----------|------------|--------|-------------|--------------|-------------------|-------------|
| Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | As Of Date | Update | Delete | Print View | Template | |
| CLIENT INFO | | | | | | | | | |
| First Name | Test, T | | Last Name | Test | | | | | |
| Alias | | | Status | ACTIVE | | | | | |
| Reason for Referral | | | | | | | | | |
| Client ID | 3599 | | SSN | 123456789 | | | | | |
| + BILLING INFO | | | | | | | Insurance... | Authorizations... | |
| + ASSIGNMENTS | | | | | | Employee... | Program... | Team... | GeoAreas... |
| + CLIENT EXTENDED INFO | | | | | | | | Update | |
| + Section Header Testing | | | | | | | | | |

When PatientSummaryGenerator is DISABLED

ViewClientLinks

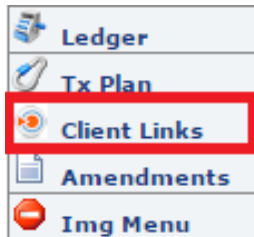
Function:

- Determines whether the “Client Links” button will be viewable on the Client Nav Bar.
 - **NOTE:** This feature is only applicable to some Partners in AR and UT.

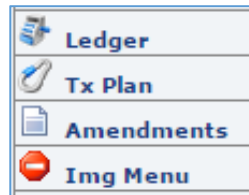
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Client Links Button

Screenshots:



When ViewClientLinks is ENABLED



When ViewClientLinks is DISABLED

Matrix Section: Clients Subsidiary

AddExternalProvider

Function:

- Determines whether the user will be able to create a new External Provider when viewing the External Provider button on a Client Nav Bar.
 - If disabled, the only option will be to add existing External Provider entries using the dropdowns.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Ext Provider Button

Screenshots:

EXTERNAL CARE PROVIDERS: Test Test (3599) DOB: 04/01/1997 (19 / M) Template

| Name | First Name | Last Name | Specialty | Phone | Start Date | Term Date | ROI Obtained | ROI Obtained Date | ROI Expires Date | Is PCP | Notes |
|---------|------------|-----------|-------------|--------------|------------|-----------|--------------------------|-------------------|------------------|--------------------------|---------------|
| Jon Doe | | | Neurologist | 555-555-5555 | | | <input type="checkbox"/> | | | <input type="checkbox"/> | <a>detail |

Add New Client Provider

Type:

Provider: Add From List

----- OR -----

Name: Type:

First Name: Last Name:

Phone: Mobile: Fax:

Email:

Address:

City: State: Zip:

Company/Prov: Agency:

NPI: Alt ID:

Start Date: Term Date:

ROI Obtained: ROI Obtained Dt: ROI Expires Dt: Is PCP:

Notes:

Add New Provider

When AddExternal Provider is ENABLED

EXTERNAL CARE PROVIDERS: Test Test (3599) DOB: 04/01/1997 (19 / M) Template

| Name | First Name | Last Name | Specialty | Phone | Start Date | Term Date | ROI Obtained | ROI Obtained Date | ROI Expires Date | Is PCP | Notes |
|---------|------------|-----------|-------------|--------------|------------|-----------|--------------------------|-------------------|------------------|--------------------------|---------------|
| Jon Doe | | | Neurologist | 555-555-5555 | | | <input type="checkbox"/> | | | <input type="checkbox"/> | <a>detail |

Add New Client Provider

Type:

Provider: Add From List

When AddExternal Provider is DISABLED

AllergyAdd

Function:

- Determines whether the user will be able to add new Allergy entries to a Client, using the “Add Allergy” button on the Client’s Allergy page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Allergy Button -> Add Allergy Button

Screenshots:

CLIENT ALLERGIES: Test Test (3599) DOB: 04/01/1997 (19 / M) ACTIVE ▾

| Allergy | Additional Text/Comments | Severity | Reaction | Med Allergy | Created Date | Created By | Discont Date | Discont By | Reason | |
|-------------|--------------------------|----------|----------|-------------|--------------|----------------|--------------|------------|--------|---|
| amoxicillin | | mild | Rash | True | 5/23/2016 | Chamberlain, B | | | | eRx edit discont delete |

Add Allergy

When AllergyAdd is ENABLED

CLIENT ALLERGIES: Test Test (3599) DOB: 04/01/1997 (19 / M) ACTIVE ▾

| Allergy | Additional Text/Comments | Severity | Reaction | Med Allergy | Created Date | Created By | Discont Date | Discont By | Reason | |
|-------------|--------------------------|----------|----------|-------------|--------------|----------------|--------------|------------|--------|---|
| amoxicillin | | mild | Rash | True | 5/23/2016 | Chamberlain, B | | | | eRx edit discont delete |

When AllergyAdd is DISABLED

AllergyDelete

Function:

- Determines whether the user will be able to delete Allergy entries on a Client, using the “Delete” button on the Client’s Allergy page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Allergy Button -> Delete Button

Screenshots:

CLIENT ALLERGIES: Test Test (3599) DOB: 04/01/1997 (19 / M) ACTIVE ▾

| Allergy | Additional Text/Comments | Severity | Reaction | Med Allergy | Created Date | Created By | Discont Date | Discont By | Reason | |
|-------------|--------------------------|----------|----------|-------------|--------------|----------------|--------------|------------|--------|--|
| amoxicillin | | mild | Rash | True | 5/23/2016 | Chamberlain, B | | | | erx edit discont delete |

Add Allergy

When AllergyDelete is ENABLED

CLIENT ALLERGIES: Test Test (3599) DOB: 04/01/1997 (19 / M) ACTIVE ▾

| Allergy | Additional Text/Comments | Severity | Reaction | Med Allergy | Created Date | Created By | Discont Date | Discont By | Reason | |
|-------------|--------------------------|----------|----------|-------------|--------------|----------------|--------------|------------|--------|---|
| amoxicillin | | mild | Rash | True | 5/23/2016 | Chamberlain, B | | | | erx edit discont |

Add Allergy

When AllergyDelete is DISABLED

AllergyUpdate

Function:

- Determines whether the user will be able to update Allergy entries on a Client, using either the “Edit” or “Discontinue” button on the Client’s Allergy page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Allergy Button -> Edit or Discont Button

Screenshots:

CLIENT ALLERGIES: Test Test (3599) DOB: 04/01/1997 (19 / M) ACTIVE ▾

| Allergy | Additional Text/Comments | Severity | Reaction | Med Allergy | Created Date | Created By | Discont Date | Discont By | Reason | |
|-------------|--------------------------|----------|----------|-------------|--------------|----------------|--------------|------------|--------|--|
| amoxicillin | | mild | Rash | True | 5/23/2016 | Chamberlain, B | | | | erx edit discont delete |

Add Allergy

When AllergyUpdate is ENABLED

CLIENT ALLERGIES: Test Test (3599) DOB: 04/01/1997 (19 / M) ACTIVE ▾

| Allergy | Additional Text/Comments | Severity | Reaction | Med Allergy | Created Date | Created By | Discont Date | Discont By | Reason | |
|-------------|--------------------------|----------|----------|-------------|--------------|----------------|--------------|------------|--------|--|
| amoxicillin | | mild | Rash | True | 5/23/2016 | Chamberlain, B | | | | erx delete |

Add Allergy

When AllergyUpdate is DISABLED

AllergyView

Function:

- Determines whether the “Allergy” button will display on the Client Nav Bar, allowing the user access to the Client’s Allergy page.
- Determines whether the “Allergies” module will display on the Client Overview page.
 - Only applicable if the Allergies module is set to display.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Allergy Button
- Client Page -> Allergies Module

Screenshots:

The screenshot shows a navigation sidebar on the left with the 'Allergy' button highlighted in red. The main content area displays two tables. The first table, 'Client Episode', has columns for ID, Start Date, and Program, with five rows of data. The second table, 'Allergies', has columns for Allergy, Severe, and Created By, with one row of data. Both tables have a link to view all items.

| ID | Start Date | Program |
|-------|------------|------------|
| 13784 | 3/25/16 | KYDC |
| 13783 | 3/25/16 | KT |
| 13782 | 3/25/16 | JPPROG |
| 13781 | 3/25/16 | JP Program |
| 13780 | 3/25/16 | JMKTRAN |

| Allergy | Severe | Created By |
|-------------|--------|----------------|
| amoxicillin | mild | Chamberlain, B |

When AllergyView is ENABLED

The screenshot shows the same navigation sidebar, but the 'Allergy' button is not present. The main content area displays the 'Client Episode' table and a new 'Visits' section with columns for Employee, Type, and Date, containing two rows of data.

| ID | Start Date | Program |
|-------|------------|------------|
| 13784 | 3/25/16 | KYDC |
| 13783 | 3/25/16 | KT |
| 13782 | 3/25/16 | JPPROG |
| 13781 | 3/25/16 | JP Program |
| 13780 | 3/25/16 | JMKTRAN |

| Employee | Type | Date |
|-------------|-----------|-----------|
| Chamberlain | Bill Test | 5/20/2016 |
| Menger | Haile | 4/15/2016 |

When AllergyView is DISABLED

AuthorizationAdd

Function:

- Determines whether the “Add New Authorization” section will display when viewing a Client’s Authorizations page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Authorizations Button -> Add New Authorization

Screenshots:

AUTHORIZATIONS: Test Test (3599) DOB: 04/01/1997 (19 / M) Eff Date - Payer - Current Filter Recalc All

| ID | Level | Payer | Visit Type | Start | End | Auth Num | Auth Date | Count | Units | Pacing (U/T) |
|--|--|-------|--------------|--------------|----------------|-----------------|--------------------------|----------|--|--------------|
| Add New Authorization | | | | | | | | | | |
| Select Ins | Visit Type | | Period Start | Period End | Auth Number | Count | Units / Cap | Period | Specific Provider | |
| AETNA HMO | Adolescent services Substance Abuse | | | | | Visits | | FULL | (CertifyEmployee) Fellow (CertifyEmployee) IM, Tr (CertifyEmployee) KHF (CertifyEmployee) hori: (CertifyEmployee) HSI, (CertifyEmployee) Life (CertifyEmployee) Horiz. 1999, 2010 | |
| | _scw intake and ass \$ Basic Visit | | Auth Date | Program | Location | Credential | Primary | | | |
| | | | 5/23/2016 | -- SELECT -- | -- SELECT -- | -- SELECT -- | <input type="checkbox"/> | | | |
| Auth Level | Notes | | | | Billing Matrix | Requested Units | Auth Pending | TPL Date | | |
| -- Auth Level -- | | | | | -- SELECT -- | | <input type="checkbox"/> | | | |
| <input type="button" value="Add Authorization"/> <input type="button" value="Cancel"/> | | | | | | | | | | |

Key:
 ● Within anticipated pace (+/- 5%)
 ● Exceeding anticipated pace
 ● Over authorized amount
 ● Under anticipated pace
 ● Inactive Period

When AuthorizationAdd is ENABLED

AUTHORIZATIONS: Test Test (3599) DOB: 04/01/1997 (19 / M) Eff Date - Payer - Current Filter Recalc All

| ID | Level | Payer | Visit Type | Start | End | Auth Num | Auth Date | Count | Units | Pacing (U/T) |
|----|-------|-------|------------|-------|-----|----------|-----------|-------|-------|--------------|
|----|-------|-------|------------|-------|-----|----------|-----------|-------|-------|--------------|

Key:
 ● Within anticipated pace (+/- 5%)
 ● Exceeding anticipated pace
 ● Over authorized amount
 ● Under anticipated pace
 ● Inactive Period

When AuthorizationAdd is DISABLED

AuthorizationDelete

Function:

- Determines whether the “Delete” button will display when viewing a Client’s Authorizations.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Authorizations Button -> Delete Button

Screenshots:

| AUTHORIZATIONS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | | | | |
|---|-------|----------|------------|---------|---------|----------|-----------|------------------------|--------|---------|--------------|
| ID | Level | Payer | Visit Type | Start | End | Auth Num | Auth Date | Count | Units | Reserve | Pacing (U/T) |
| 5407 | | AetnaHMO | | 5/22/16 | 5/23/19 | | 5/23/2016 | Visits | 0 / 20 | 0 | 0% / 0.1% |

Buttons: Eff Date, - Payer -, Current, Filter, Recalc All, update, **delete**, clone

When AuthorizationDelete is ENABLED

| AUTHORIZATIONS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | | | | |
|---|-------|----------|------------|---------|---------|----------|-----------|------------------------|--------|---------|--------------|
| ID | Level | Payer | Visit Type | Start | End | Auth Num | Auth Date | Count | Units | Reserve | Pacing (U/T) |
| 5407 | | AetnaHMO | | 5/22/16 | 5/23/19 | | 5/23/2016 | Visits | 0 / 20 | 0 | 0% / 0.1% |

Buttons: Eff Date, - Payer -, Current, Filter, Recalc All, update, clone

When AuthorizationDelete is DISABLED

AuthorizationView

Function:

- Determines whether the “Authorizations” button will display on the Client Nav Bar, allowing the user access to the Client’s Authorizations page.
- Determines whether the “Authorizations” module will display on the Client Overview page.
 - Only applicable if the Authorizations module is set to display.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Authorizations Button
- Client Page -> Authorizations Module

Screenshots:

The screenshot shows a sidebar menu on the left with 'Authorization' highlighted in red. The main content area displays 'Assigned Programs' and 'Assigned Teams' sections. Below these, the 'Authorizations' table is visible, containing one row of data:

| Payer | Visit Type | Period Start | Period End | Units |
|-----------|------------|--------------|------------|--------|
| AETNA HMO | | 5/22/2016 | 5/23/2019 | 0 / 20 |

When AuthorizationView is ENABLED

The screenshot shows the same sidebar menu, but 'Authorization' is not highlighted. The main content area displays 'Assigned Programs' and 'Assigned Teams' sections. Below these, the 'Client Episode' table is visible, containing three rows of data:

| ID | Start Date | Program |
|-------|------------|---------|
| 13784 | 3/25/16 | KYDC |
| 13783 | 3/25/16 | KT |
| 13782 | 3/25/16 | JPPROG |

When AuthorizationView is DISABLED

ClientBedBoardAssign

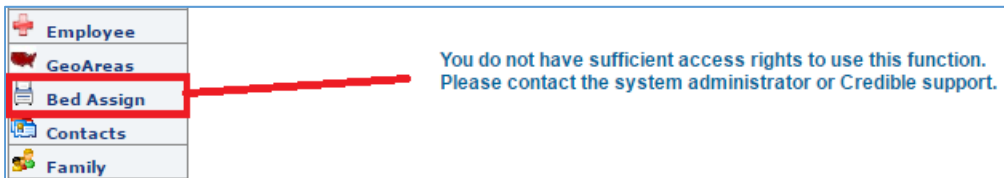
Function:

- Determines whether the user will be able to assign a Client to a bed, and whether the “Bed Assign” button is accessible.
 - If disabled, an “Insufficient Rights” message will display when clicking “Bed Assign”.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Bed Assign

Screenshots:



When ClientBedBoardAssign is DISABLED

ClientBedBoardIntervalDelete

Function:

- Determines whether the user will be able to delete an existing Bed Board entry, when viewing the Client's Bed Assign page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Bed Assign -> Delete Button

Screenshots:

Client Bed Board: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Residential / Inpatient Stay (1732) Admission Date: 5/23/2016 10:05 AM

Assign Bed | Check In | Check Out | Hold Bed | Move Client | End Residential / Inpatient Stay

Expand All

[-] Enigma House

| Room | Bed | In Date | Est Release Date | Out Date | Out Reason | Type | Team | On Hold | Released | Rate | Unit | |
|-----------|----------|---------------------|------------------|----------|------------|------|------|---------|----------|------|------|-------------|
| ✓ Room 13 | Lavender | 05/23/2016 10:05 AM | | | | | | No | NA | NA | NA | edit delete |

When ClientBedBoardIntervalDelete is ENABLED

Client Bed Board: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Residential / Inpatient Stay (1732) Admission Date: 5/23/2016 10:05 AM

Assign Bed | Check In | Check Out | Hold Bed | Move Client | End Residential / Inpatient Stay

Expand All

[-] Enigma House

| Room | Bed | In Date | Est Release Date | Out Date | Out Reason | Type | Team | On Hold | Released | Rate | Unit | |
|-----------|----------|---------------------|------------------|----------|------------|------|------|---------|----------|------|------|------|
| ✓ Room 13 | Lavender | 05/23/2016 10:05 AM | | | | | | No | NA | NA | NA | edit |

When ClientBedBoardIntervalDelete is DISABLED

ClientBedBoardIntervalEdit

Function:

- Determines whether the user will be able to edit an existing Bed Board entry, when viewing the Client's Bed Assign page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Bed Assign -> Edit Button

Screenshots:

Client Bed Board: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Residential / Inpatient Stay (1732) Admission Date: 5/23/2016 10:05 AM

Assign Bed | Check In | Check Out | Hold Bed | Move Client | End Residential / Inpatient Stay

Expand All

[-] Enigma House

| Room | Bed | In Date | Est Release Date | Out Date | Out Reason | Type | Team | On Hold | Released | Rate | Unit | |
|-----------|----------|---------------------|------------------|----------|------------|------|------|---------|----------|------|------|-------------|
| ✓ Room 13 | Lavender | 05/23/2016 10:05 AM | | | | | | No | NA | NA | NA | edit delete |

When ClientBedBoardIntervalEdit is ENABLED

Client Bed Board: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Residential / Inpatient Stay (1732) Admission Date: 5/23/2016 10:05 AM

Assign Bed | Check In | Check Out | Hold Bed | Move Client | End Residential / Inpatient Stay

Expand All

[-] Enigma House

| Room | Bed | In Date | Est Release Date | Out Date | Out Reason | Type | Team | On Hold | Released | Rate | Unit | |
|-----------|----------|---------------------|------------------|----------|------------|------|------|---------|----------|------|------|--------|
| ✓ Room 13 | Lavender | 05/23/2016 10:05 AM | | | | | | No | NA | NA | NA | delete |

When ClientBedBoardIntervalEdit is DISABLED

ClientInsuranceAdd

Function:

- Determines whether the user will be able to add a new Insurance entry to the Client, using the “Add New Insurance” section on the Client’s Insurance page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Insurance Button -> Add New Insurance Section

Screenshots:

INSURANCE COVERAGE: Test Test (3599) DOB: 04/01/1997 (19 / M)

| Ord | Ins | Ins ID | Group | Start | End | Copay | Active | Self | Updated | |
|-----|-----------|------------------------|-------|-----------|-----------|-------|--------|------|---------|---|
| 1 | AETNA HMO | 984654 | | 5/23/2016 | 5/23/2019 | \$0 | True | True | 5/23/16 | edit subscr delete scan |

— Add New Insurance —

| Order | Select Ins | Ins ID | Group | Coverage Starts | Coverage Ends | Copay(\$ %) |
|-------|---------------------------|--------------------------------|----------------------|-----------------------|---|----------------------|
| 1 ▼ | -- SELECT -- ▼ | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| | Program | Credentials | Auth Req | Pending | Visit Type | |
| | -- SELECT -- ▼ | -- SELECT -- ▼ | --N/A-- ▼ | NO ▼ | Adolescent services ----- _scw intake and ass \$ Basic Visit | |
| | Employer Or School | Client's Condition From | Accident Date | Accident State | | |
| | <input type="text"/> | -- SELECT -- ▼ | <input type="text"/> | <input type="text"/> | | |

Notes:

[Add Insurance](#) [Cancel](#)

When ClientInsuranceAdd is ENABLED

INSURANCE COVERAGE: Test Test (3599) DOB: 04/01/1997 (19 / M)

| Ord | Ins | Ins ID | Group | Start | End | Copay | Active | Self | Updated | |
|-----|-----------|------------------------|-------|-----------|-----------|-------|--------|------|---------|---|
| 1 | AETNA HMO | 984654 | | 5/23/2016 | 5/23/2019 | \$0 | True | True | 5/23/16 | delete scan |

When ClientInsuranceAdd is DISABLED

ClientInsuranceDelete

Function:

- Determines whether the user will be able to delete an existing Insurance entry on the Client, using the “Delete” button on the Client’s Insurance page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Insurance Button -> Delete Button

Screenshots:

| INSURANCE COVERAGE: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | | | |
|---|-----------|------------------------|-------|-----------|-----------|-------|--------|------|---------|--|
| Ord | Ins | Ins ID | Group | Start | End | Copay | Active | Self | Updated | ACTIVE ▾ |
| 1 | AETNA HMO | 984654 | | 5/23/2016 | 5/23/2019 | \$0 | True | True | 5/23/16 | <input type="button" value="edit"/> <input type="button" value="subscr"/> <input style="border: 2px solid red;" type="button" value="delete"/> <input type="button" value="scan"/> |

When ClientInsuranceDelete is ENABLED

| INSURANCE COVERAGE: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | | | |
|---|-----------|------------------------|-------|-----------|-----------|-------|--------|------|---------|---|
| Ord | Ins | Ins ID | Group | Start | End | Copay | Active | Self | Updated | ACTIVE ▾ |
| 1 | AETNA HMO | 984654 | | 5/23/2016 | 5/23/2019 | \$0 | True | True | 5/23/16 | <input type="button" value="edit"/> <input type="button" value="subscr"/> <input type="button" value="scan"/> |

When ClientInsuranceDelete is DISABLED

ClientInsuranceView

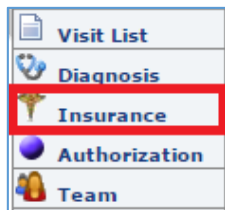
Function:

- Allows the user to view and click the “Insurance” option on the Client Nav Bar.
 - If disabled, the Insurance option will not display.
- If the Client has the “Billing Info” module showing on their overview page, this setting controls whether the user can click the “Full Insurance Info” link to be taken to the Client’s Insurance page.
 - If disabled, an “Insufficient Rights” message will display when clicking the “Full Insurance Info” link.

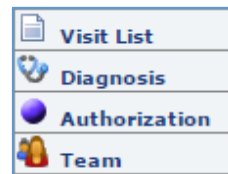
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Insurance Button
- Client Page -> Billing Info Module -> Full Insurance Info Button

Screenshots:



When ClientInsuranceView is ENABLED



When ClientInsuranceView is DISABLED

| Billing Info | | | |
|-----------------|-----------|---------------------|-----------|
| Ins: | AETNA HMO | ID: | 984654 |
| Ins Start Date: | 5/23/2016 | Ins End Date: | 5/23/2019 |
| Ins Copay: | \$0 | Last Updated: | 5/23/2016 |
| Client Balance: | \$311.31 | Ins Balance: | \$0.00 |
| | | Full Insurance Info | |

You do not have sufficient access rights to use this function. Please contact the system administrator or Credible support.

When ClientInsuranceView is DISABLED

ClientLiabilityUpdate

Function:

- Determines whether the user will be able to make an update to the Client’s Liability. Affects whether the “Save Liability Form” and “Start New Form” buttons will display on the Client’s Liability page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Liability Button -> Save Liability Form and Start New Form Buttons

Screenshots:

CLIENT LIABILITY: Test Test (3599) DOB: 04/01/1997 (19 / M) Family Shared Print History

Liability Determination Date: 5/23/2016 Calendar -- Program -- Dropdown
 Effective Date: Calendar End Date: Calendar

TOTAL LIABILITY:

Daily Liability Amount (\$): 10.00 Spinner
 Monthly Liability Amount (\$): 100.00 Spinner
 Annual Liability Amount (\$): 10000.00 Spinner
 Per Visit Liability Amount (\$): Spinner
 Per Visit Liability Percentage (%): Spinner
 Per Visit Hourly Liability Amount (\$): Spinner

NOTES: Text Area

Save Liability Form Start New Form

When ClientLiabilityUpdate is ENABLED

CLIENT LIABILITY: Test Test (3599) DOB: 04/01/1997 (19 / M) Family Shared Print History

Liability Determination Date: 5/23/2016 Calendar -- Program -- Dropdown
 Effective Date: Calendar End Date: Calendar

TOTAL LIABILITY:

Daily Liability Amount (\$): 10.00 Spinner
 Monthly Liability Amount (\$): 100.00 Spinner
 Annual Liability Amount (\$): 10000.00 Spinner
 Per Visit Liability Amount (\$): Spinner
 Per Visit Liability Percentage (%): Spinner
 Per Visit Hourly Liability Amount (\$): Spinner

NOTES: Text Area

When ClientLiabilityUpdate is DISABLED

ClientLiabilityView

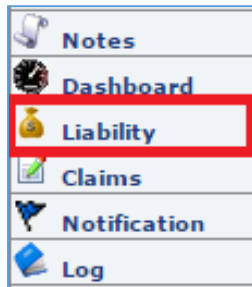
Function:

- Determines whether the user will be able to view the Client's Liability page. Controls whether the Liability button displays on the Client Nav Bar.

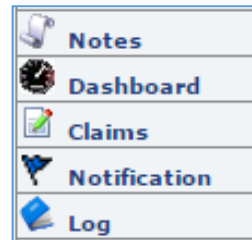
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Liability Button

Screenshots:



When ClientLiabilityView is ENABLED



When ClientLiabilityView is DISABLED

ClientNoteAdd

Function:

- Determines whether the user will be able to add a new Note to a Client. Controls whether the “Add Note” section will display when viewing the Client’s Notes page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Notes Button -> Add Note Section

Screenshots:

NOTES: Test Test (3599) DOB: 04/01/1997 (19 / M)
 Entered by: Bill Chamberlain 5/23/2016 1:30:00 PM delete

Note Example

Add Note

Character: 0/0 Words: 0

Email To: ---
 'CertifyEmployee'FellowshipHall, Amy
 Abram, Nicole
 Acurio, Patrick
 Adams, Josh
 Adams, Venetria
 Adelman, Colette
 Adhikary, Santosh
 Adkins, Melanie
 Aguilera, Sahily

AND/OR

Team: ---
 Training

Add Note

When ClientNoteAdd is ENABLED

NOTES: Test Test (3599) DOB: 04/01/1997 (19 / M)
 Entered by: Bill Chamberlain 5/23/2016 1:30:00 PM delete

Note Example

When ClientNoteAdd is DISABLED

ClientNoteDelete

Function:

- Determines whether the user will be able to Delete an existing Note entry on a Client.

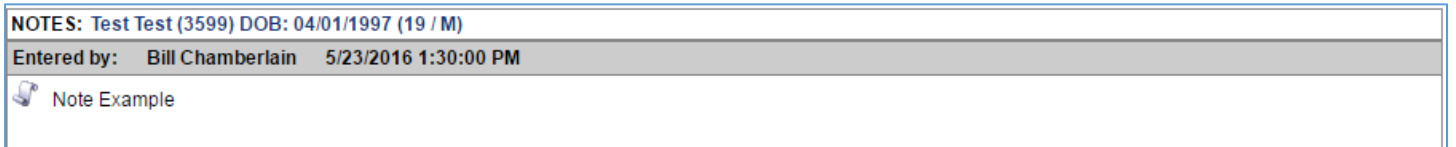
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Notes Button -> Delete Button

Screenshots:



When ClientNoteDelete is ENABLED



When ClientNoteDelete is DISABLED

ClientPictureAdd

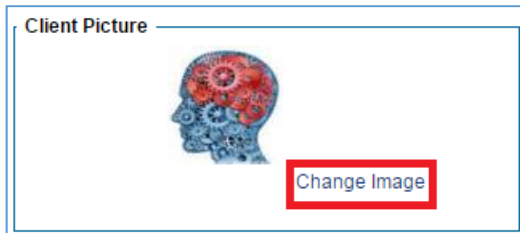
Function:

- Determines whether the user will be able to add, update, or delete a Client Picture.
 - The “Client Picture” section must be added to the Client Overview for this setting to be applicable.

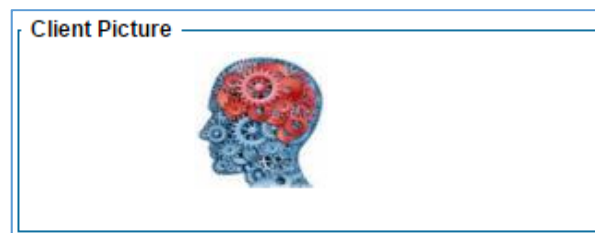
Location(s) this setting affects:

- Client Page -> Client Picture Section

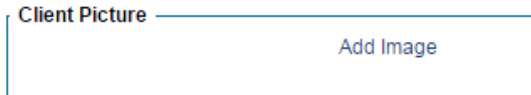
Screenshots:



When ClientPictureAdd is ENABLED



When ClientPictureAdd is DISABLED



When ClientPictureAdd is ENABLED



When ClientPictureAdd is DISABLED

ClientUserView

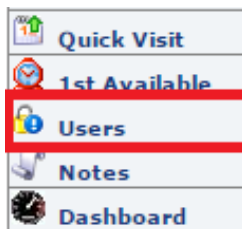
Function:

- Determines whether the user will be able to view, add, or update Client Portal Usernames.
 - If disabled, the “Users” button will not display on the Client Nav Bar.

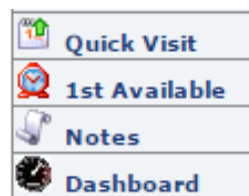
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Users Button
- Admin Tab -> Client User List -> Update Button

Screenshots:



When ClientUserView is ENABLED



When ClientUserView is DISABLED

ClientWarningAdd

Function:

- Determines whether the user will be able to add new warnings to a Client on the Client's Warnings page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Warnings Button

Screenshots:

| CLIENT WARNINGS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | |
|--|----------|-------|-------------------------|---------------------|----------------------|------------------------|
| Start Date | End Date | Level | Client Warning | Is Roommate Warning | | |
| 5/23/2016 | | LOW | Allergic to Amoxicillin | False | edit | delete |

| Add Client Warning | | | | | |
|---------------------------------|----------------------|--------------------------|--------------------------|----------------------|--|
| Start Date | End Date | Level | Is Roommate Warning | Client Warning | |
| 05/23/2016 <input type="text"/> | <input type="text"/> | LOW <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | |
| Add Warning | | | | | |

When ClientWarningAdd is ENABLED

| CLIENT WARNINGS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | |
|--|----------|-------|-------------------------|---------------------|----------------------|------------------------|
| Start Date | End Date | Level | Client Warning | Is Roommate Warning | | |
| 5/23/2016 | | LOW | Allergic to Amoxicillin | False | edit | delete |

When ClientWarningAdd is DISABLED

ClientWarningDelete

Function:

- Determines whether the user will be able to delete existing warnings on the Client's Warnings page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Warnings Button -> Delete Button

Screenshots:

| CLIENT WARNINGS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | |
|--|----------|-------|-------------------------|---------------------|---|
| Start Date | End Date | Level | Client Warning | Is Roommate Warning | |
| 5/23/2016 | | LOW | Allergic to Amoxicillin | False | <input type="button" value="edit"/> <input type="button" value="delete"/> |

When ClientWarningDelete is ENABLED

| CLIENT WARNINGS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | |
|--|----------|-------|-------------------------|---------------------|-------------------------------------|
| Start Date | End Date | Level | Client Warning | Is Roommate Warning | |
| 5/23/2016 | | LOW | Allergic to Amoxicillin | False | <input type="button" value="edit"/> |

When ClientWarningDelete is DISABLED

ClientWarningUpdate

Function:

- Determines whether the user will be able to edit existing warnings on the Client's Warnings page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Warnings Button -> Edit Button

Screenshots:

| CLIENT WARNINGS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | |
|--|----------|-------|-------------------------|---------------------|----------------------|------------------------|
| Start Date | End Date | Level | Client Warning | Is Roommate Warning | | |
| 5/23/2016 | | LOW | Allergic to Amoxicillin | False | edit | delete |

| CLIENT WARNINGS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | |
|--|----------|-------|-------------------------|---------------------|--|------------------------|
| Start Date | End Date | Level | Client Warning | Is Roommate Warning | | |
| 5/23/2016 | | LOW | Allergic to Amoxicillin | False | | delete |

ClientWarningView

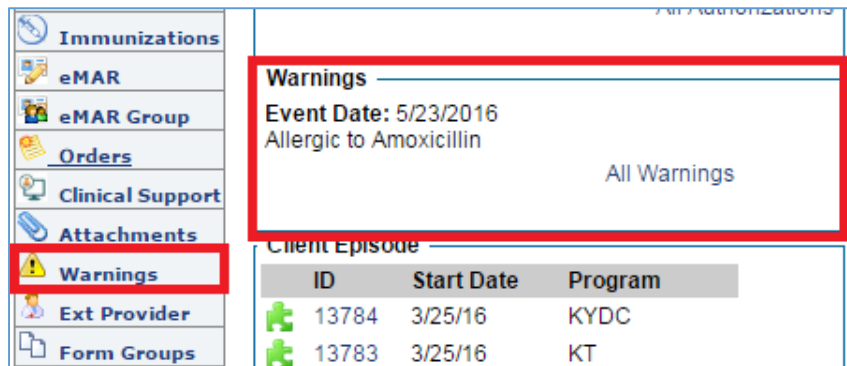
Function:

- Determines whether the user will be able to view the Warnings page on the Client Nav Bar.
 - If disabled, the “Warnings” button will not appear.
- Determines whether the user will be able to view the Warnings module on the Client Overview Page.
 - Only applicable if the Warnings module is set to appear.
- Also controls whether a Warning icon will display on the Client Info module.

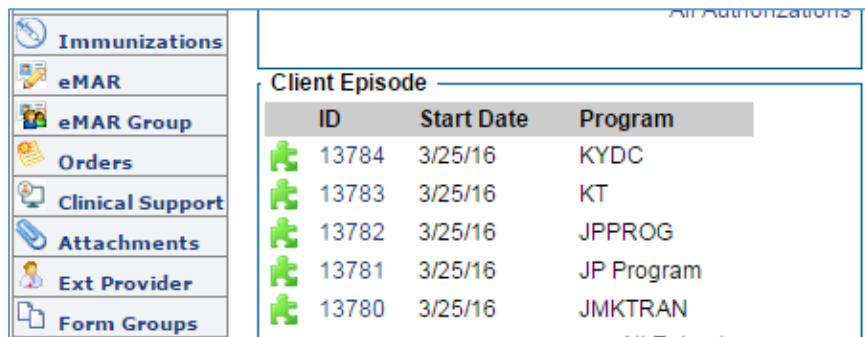
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Warnings Button -> Edit Button

Screenshots:



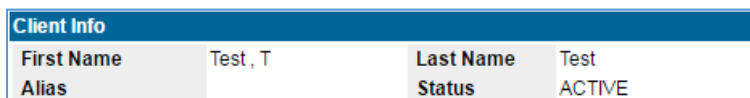
When ClientWarningView is ENABLED



When ClientWarningView is DISABLED



When ClientWarningView is ENABLED



When ClientWarningView is DISABLED

DxAdd

Function:

- Determines whether the user will be able to add Diagnoses to a Client, using the “Start New Diagnoses” button on the Client’s Diagnosis page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Diagnosis Button -> Start New Diagnoses Button

Screenshots:

The screenshot shows a user interface for a client named 'Test Test (3599)' with a date of birth of '04/01/1997 (19 / M)'. At the top right, there are three buttons: 'Start New Diagnoses' (highlighted with a red box), 'Update', and 'History'. Below this, the 'Effective Date' and 'Date Created' are both '5/23/2016'. A section titled 'Problem List (DSM 5 / ICD10)' contains one entry: '1 (F43.1) Post-traumatic stress disorder (PTSD)' with a '+' icon to its right. A 'Show All Detail' button is located at the top right of this section. Below the problem list, there is a section for 'WHODAS 2.0 General Disability' with fields for 'Raw Score:', 'Avg Score:', and 'Assessment Date:', each followed by a '+' icon.

With DxAdd ENABLED

This screenshot is identical to the one above, but the 'Start New Diagnoses' button is not highlighted and appears disabled. The rest of the interface, including the client information, effective date, problem list, and WHODAS 2.0 section, remains the same.

With DxAdd DISABLED

DxAxisDelete

Function:

- Determines whether the user will be able to delete an existing Client Diagnosis, using the “Delete” button on the Client’s Diagnosis page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Diagnosis Button -> Edit Button -> Delete Button

Screenshots:

Problem List: Test Test (3599) DOB: 04/01/1997 (19 / M) View History

Effective Date: 5/23/2016 Date Created: 5/23/2016 Edit

Problem List (DSM 5 / ICD10) Show All Detail

1 (F43.1) Post-traumatic stress disorder (PTSD) Edit **Delete** +

New +

WHODAS 2.0 General Disability Raw Score: Avg Score: Assessment Date: Edit +

When DxAxisDelete is ENABLED

Problem List: Test Test (3599) DOB: 04/01/1997 (19 / M) View History

Effective Date: 5/23/2016 Date Created: 5/23/2016 Edit

Problem List (DSM 5 / ICD10) Show All Detail

1 (F43.1) Post-traumatic stress disorder (PTSD) Edit +

New +

WHODAS 2.0 General Disability Raw Score: Avg Score: Assessment Date: Edit +

When DxAxisDelete is DISABLED

DxFormsAdd

Function:

- Determines whether the user will be able to make updates to Diagnosis fields through Web Forms. If an answer on a Web Form is set to map to a Diagnosis field, this setting will determine whether the Form answer will map to that field or not.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Diagnosis Button

Screenshots:

DxUpdate

Function:

- Determines whether the user will be able to use the “Update” button in the Client’s Diagnosis section to either Delete or Edit an existing Diagnosis entry.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Diagnosis Button -> Update Button

Screenshots:

This screenshot shows the user interface for a client's diagnosis. At the top, there is a header bar with the text "Problem List: Test Test (3599) DOB: 04/01/1997 (19 / M)". To the right of this header are three buttons: "Start New Diagnoses", "Update" (which is highlighted with a red box), and "History". Below the header, the "Effective Date: 5/23/2016" and "Date Created: 5/23/2016" are displayed. A section titled "Problem List (DSM 5 / ICD10)" contains a single entry: "1 (F43.1) Post-traumatic stress disorder (PTSD)" with a "+" button to its right. Below this, there is a section for "WHODAS 2.0 General Disability" with fields for "Raw Score:", "Avg Score:", and "Assessment Date:", each followed by a "+" button. A "Show All Detail" button is located in the top right corner of the diagnosis list section.

When DxUpdate is ENABLED

This screenshot shows the same user interface as the previous one, but with the "Update" button missing from the top header bar. The "Start New Diagnoses" and "History" buttons remain. All other elements, including the client information, effective date, diagnosis list, and WHODAS 2.0 section, are identical to the previous screenshot.

When DxUpdate is DISABLED

DxView

Function:

- Determines whether the user will be able to view the Client's Diagnosis page from the Client Nav Bar.
 - If Disabled, the Diagnosis button will not display on the Client Nav Bar.
- Determines whether the Diagnosis module will display on the Client Overview.
 - Only applicable if the Diagnosis module is set to display.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Diagnosis Button
- Client Page -> Diagnosis Module

Screenshots:

4TRAINING, 837 Test Program, Assessment Program, community mental health, Crisis2, Fresno, Harbor test, IHPS, Inpatient, Inpatient, Intake, Intensive Outpatient, JG ADULT OUTPATIENT, JMKTRAN, JP Program, JP Program1, KYDC Training programs, Program Thompson, PROGRAM_Held, Sheridan Oaks - East, TRAINING

Assigned Teams edit

Training All Assignments

Diagnosis

| | |
|-----------------|---|
| Effective Date: | 5/23/2016 |
| First | (F43.1) Post-traumatic stress disorder (PTSD) |
| Second | |
| Third | |

All Diagnoses

When DxView is ENABLED

4TRAINING, 837 Test Program, Assessment Program, community mental health, Crisis2, Fresno, Harbor test, IHPS, Inpatient, Inpatient, Intake, Intensive Outpatient, JG ADULT OUTPATIENT, JMKTRAN, JP Program, JP Program1, KYDC Training programs, Program Thompson, PROGRAM_Held, Sheridan Oaks - East, TRAINING

Assigned Teams edit

Training All Assignments

Authorizations

| Payer | Visit Type | Period Start | Period End | Units |
|-----------|------------|--------------|------------|--------|
| AETNA HMO | | 5/22/2016 | 5/23/2019 | 0 / 20 |

All Authorizations

When DxView is DISABLED

ExternalProviderUpdate

Function:

- Determines whether the user will be able to make updates to existing External Provider entries on a Client.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Ext Provider Button -> Edit Button

Screenshots:

| EXTERNAL CARE PROVIDERS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | | | | | Template |
|--|------------|-----------|-----------------|-------|------------|-----------|--------------------------|-------------------|------------------|--------|--------------------------|--|
| Name | First Name | Last Name | Specialty | Phone | Start Date | Term Date | ROI Obtained | ROI Obtained Date | ROI Expires Date | Is PCP | Notes | |
| Jane Doe | | | Endocrinologist | | | | <input type="checkbox"/> | | | | <input type="checkbox"/> | detail edit delete |

When ExternalProviderUpdate is ENABLED

| EXTERNAL CARE PROVIDERS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | | | | | Template |
|--|------------|-----------|-----------------|-------|------------|-----------|--------------------------|-------------------|------------------|--------|--------------------------|---|
| Name | First Name | Last Name | Specialty | Phone | Start Date | Term Date | ROI Obtained | ROI Obtained Date | ROI Expires Date | Is PCP | Notes | |
| Jane Doe | | | Endocrinologist | | | | <input type="checkbox"/> | | | | <input type="checkbox"/> | detail delete |

When ExternalProviderUpdate is DISABLED

ExternalProviderView

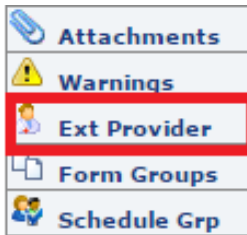
Function:

- Determines whether the user will be able to view the External Providers on a Client.
 - If disabled, the “Ext Provider” button will not display on the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Ext Provider Button

Screenshots:



When ExternalProviderView is ENABLED



When ExternalProviderView is DISABLED

FosterHomeIntervalEdit

Function:

- Determines whether the user will be able to edit an existing Foster Home Interval on a Client Episode.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Episodes Button -> View Button -> Foster Home Intervals Button -> Edit Button
- Client Page -> Episodes Module -> Selected Episode -> Foster Home Intervals Button -> Edit Button

Screenshots:

| FOSTER HOME (Farber Foster Home) INTERVAL FOR: Test Test (3599) | | | | | |
|---|----------|------------|------------------|--------------------------|--|
| In Date | Out Date | Out Reason | Child Discharged | Type | |
| 03/25/2016 09:57 AM | | | | TRAINING:DHS FOSTER CARE | <input type="button" value="out"/> <input type="button" value="edit"/> |

Return to Episode

When FosterHomeIntervalEdit is ENABLED

| FOSTER HOME (Farber Foster Home) INTERVAL FOR: Test Test (3599) | | | | | |
|---|----------|------------|------------------|--------------------------|------------------------------------|
| In Date | Out Date | Out Reason | Child Discharged | Type | |
| 03/25/2016 09:57 AM | | | | TRAINING:DHS FOSTER CARE | <input type="button" value="out"/> |

Return to Episode

When FosterHomeIntervalEdit is DISABLED

ImmunizationAdd

Function:

- Determines whether the user will be able to add a new Immunization to a Client.
 - If disabled, the “Add New” button will not display when viewing a Client’s Immunizations page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Immunizations Button -> Add New Button

Screenshots:

| IMMUNIZATIONS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | |
|---|-----------------------------------|---------------------|--------|--------------|------------|------------------------|
| | Immunization | Immunization Date | Amount | Manufacturer | Lot Number | |
| edit detail | hepatitis A vaccine, adult dosage | 05/24/2016 12:00 AM | | | | delete |
| Add New Export Immunization HL7 | | | | | | |

When ImmunizationAdd is ENABLED

| IMMUNIZATIONS: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | |
|--|-----------------------------------|---------------------|--------|--------------|------------|------------------------|
| | Immunization | Immunization Date | Amount | Manufacturer | Lot Number | |
| edit detail | hepatitis A vaccine, adult dosage | 05/24/2016 12:00 AM | | | | delete |
| Export Immunization HL7 | | | | | | |

When ImmunizationAdd is DISABLED

ImmunizationDelete

Function:

- Determines whether the user will be able to delete a Client Immunization entry.
 - If disabled, an “Insufficient Rights” message will display when trying to delete an Immunization.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Immunizations Button -> Delete Button

Screenshots:

IMMUNIZATIONS: Test Test (3599) DOB: 04/01/1997 (19 / M)

| | Immunization | Immunization Date | Amount | Manufacturer | Lot Number | |
|---|-----------------------------------|---------------------|--------|--------------|------------|------------------------|
| edit detail | hepatitis A vaccine, adult dosage | 05/24/2016 12:00 AM | | | | delete |

[Add New](#) [Export Immunization HL7](#)

You do not have sufficient access rights to use this function.
Please contact the system administrator or Credible support.

When ImmunizationDelete is DISABLED

ImmunizationEdit

Function:

- Determines whether the user will be able to edit a Client Immunization entry.
 - If disabled, an “Insufficient Rights” message will display when trying to edit an Immunization.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Immunizations Button -> Edit Button

Screenshots:

IMMUNIZATIONS: Test Test (3599) DOB: 04/01/1997 (19 / M)

| | Immunization | Immunization Date | Amount | Manufacturer | Lot Number | |
|----------------------|-----------------------------------|---------------------|--------|--------------|------------|------------------------|
| edit | hepatitis A vaccine, adult dosage | 05/24/2016 12:00 AM | | | | delete |

[Add New](#) [Export Immunization HL7](#)

You do not have sufficient access rights to use this function. Please contact the system administrator or Credible support.

ImmunizationView

Function:

- Determines whether the user will be able to edit a Client Immunization entry.
 - If disabled, an “Insufficient Rights” message will display when trying to edit an Immunization.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Immunizations Button

Screenshots:



When ImmunizationView is ENABLED



When ImmunizationView is DISABLED

MedicalProfileAdd

Function:

- Determines whether the user will be able to start a new Medical Profile on a Client.
 - If Disabled, the “Start New Profile” button will not display.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medical Profile Button -> Start New Profile Button

Screenshots:

CLIENT MEDICAL PROFILE: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Profile Date: 05/27/2016 01:34 PM Created By:

Height: ft in Weight: lbs BMI: i

Pulse: bpm BP Resting: / Girth: in Temperature: degrees

Respiration: per min My first custom text fiel: BP Standing: / Waist Circumference: in

Neck Circumference: in Total Cholesterol: mg/dl Triglycerides: mg/dl HDL: mg/dl

LDL: mg/dl Blood Sugar Level: mg/dl Plasma Glucose: mg/dl Notes:

text29:

[View Height & Weight Charts](#)

Save Medical Profile Delete Medical Profile Start New Profile

When MedicalProfileAdd is ENABLED

CLIENT MEDICAL PROFILE: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Profile Date: 05/27/2016 01:34 PM Created By:

Height: ft in Weight: lbs BMI: i

Pulse: bpm BP Resting: / Girth: in Temperature: degrees

Respiration: per min My first custom text fiel: BP Standing: / Waist Circumference: in

Neck Circumference: in Total Cholesterol: mg/dl Triglycerides: mg/dl HDL: mg/dl

LDL: mg/dl Blood Sugar Level: mg/dl Plasma Glucose: mg/dl Notes:

text29:

[View Height & Weight Charts](#)

Save Medical Profile Delete Medical Profile

When MedicalProfileAdd is DISABLED

MedicalProfileDelete

Function:

- Determines whether the user will be able to delete the Medical Profile on a Client.
 - If Disabled, the “Delete Medical Profile” button will not display.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medical Profile Button -> Delete Medical Profile Button

Screenshots:

CLIENT MEDICAL PROFILE: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Profile Date: 05/27/2016 01:34 PM Created By:

Height: ft in Weight: lbs BMI: i

Pulse: bpm BP Resting: / Girth: in Temperature: degrees

Respiration: per min My first custom text fiel: BP Standing: / Waist Circumference: in

Neck Circumference: in Total Cholesterol: mg/dl Triglycerides: mg/dl HDL: mg/dl

LDL: mg/dl Blood Sugar Level: mg/dl Plasma Glucose: mg/dl Notes:

text29:

[View Height & Weight Charts](#)

When MedicalProfileDelete is ENABLED

CLIENT MEDICAL PROFILE: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Profile Date: 05/27/2016 01:34 PM Created By:

Height: ft in Weight: lbs BMI: i

Pulse: bpm BP Resting: / Girth: in Temperature: degrees

Respiration: per min My first custom text fiel: BP Standing: / Waist Circumference: in

Neck Circumference: in Total Cholesterol: mg/dl Triglycerides: mg/dl HDL: mg/dl

LDL: mg/dl Blood Sugar Level: mg/dl Plasma Glucose: mg/dl Notes:

text29:

[View Height & Weight Charts](#)

When MedicalProfileDelete is DISABLED

MedicalProfileUpdate

Function:

- Determines whether the user will be able to save or update the Medical Profile on a Client.
 - If Disabled, the “Save Medical Profile” button will not display.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medical Profile Button -> Save Medical Profile Button

Screenshots:

CLIENT MEDICAL PROFILE: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Profile Date: 05/27/2016 01:34 PM Created By:

Height: ft in Weight: lbs BMI: i

Pulse: bpm BP Resting: / Girth: in Temperature: degrees
 Respiration: per min My first custom text fiel: BP Standing: / Waist Circumference: in
 Neck Circumference: in Total Cholesterol: mg/dl Triglycerides: mg/dl HDL: mg/dl
 LDL: mg/dl Blood Sugar Level: mg/dl Plasma Glucose: mg/dl Notes:
 text29:

[View Height & Weight Charts](#)

Save Medical Profile Delete Medical Profile Start New Profile

When MedicalProfileUpdate is ENABLED

CLIENT MEDICAL PROFILE: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Profile Date: 05/27/2016 01:34 PM Created By:

Height: ft in Weight: lbs BMI: i

Pulse: bpm BP Resting: / Girth: in Temperature: degrees
 Respiration: per min My first custom text fiel: BP Standing: / Waist Circumference: in
 Neck Circumference: in Total Cholesterol: mg/dl Triglycerides: mg/dl HDL: mg/dl
 LDL: mg/dl Blood Sugar Level: mg/dl Plasma Glucose: mg/dl Notes:
 text29:

[View Height & Weight Charts](#)

Delete Medical Profile Start New Profile

When MedicalProfileUpdate is DISABLED

MedicalProfileUpdateInactive

Function:

- Determines whether the user will be able to save or update an Inactive Medical Profile on a Client. The Inactive Medical Profiles are accessed through the “History” button.
 - If Disabled, the “Save Medical Profile” button will not display.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medical Profile Button -> History -> View Button -> Save Medical Profile Button

Screenshots:

CLIENT MEDICAL PROFILE: Test Test (3589) DOB: 04/01/1997 (19 / M) History

Profile Date: 05/27/2016 01:34 PM Created By:

Height: ft in Weight: lbs BMI: i

Pulse: bpm BP Resting: / Girth: in Temperature: degrees

Respiration: per min My first custom text fiel: BP Standing: / Waist Circumference: in

Neck Circumference: in Total Cholesterol: mg/dl Triglycerides: mg/dl HDL: mg/dl

LDL: mg/dl Blood Sugar Level: mg/dl Plasma Glucose: mg/dl Notes:

text29:

[View Height & Weight Charts](#)

Save Medical Profile Delete Medical Profile Start New Profile

When MedicalProfileUpdateInactive is ENABLED

CLIENT MEDICAL PROFILE: Test Test (3589) DOB: 04/01/1997 (19 / M) History

Profile Date: 05/27/2016 01:34 PM Created By:

Height: ft in Weight: lbs BMI: i

Pulse: bpm BP Resting: / Girth: in Temperature: degrees

Respiration: per min My first custom text fiel: BP Standing: / Waist Circumference: in

Neck Circumference: in Total Cholesterol: mg/dl Triglycerides: mg/dl HDL: mg/dl

LDL: mg/dl Blood Sugar Level: mg/dl Plasma Glucose: mg/dl Notes:

text29:

[View Height & Weight Charts](#)

Delete Medical Profile Start New Profile

When MedicalProfileUpdateInactive is DISABLED

MedicalProfileView

Function:

- Determines whether the user will be able to save or update an Inactive Medical Profile on a Client. The Inactive Medical Profiles are accessed through the “History” button.
 - If Disabled, the “Save Medical Profile” button will not display.

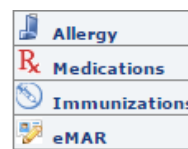
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medical Profile Button

Screenshots:



When MedicalProfileView is ENABLED



When MedicalProfileView is DISABLED

RISarchive

Function:

- Determines whether the user will be able to close / archive Residential / Inpatient stays.
 - If Disabled, the “End Residential / Inpatient Stay” link will be greyed out, and will not be able to be clicked.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Bed Assign Button -> End Residential / Inpatient Stay

Screenshots:

Client Bed Board: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Residential / Inpatient Stay (1737) Admission Date: 5/29/2016 6:55 PM

Assign Bed | Check In | Check Out | Hold Bed | Move Client | **End Residential / Inpatient Stay**

Compress All

[-] Enigma House

| Room | Bed | In Date | Est Release Date | Out Date | Out Reason | Type | Team | On Hold | Released | Rate | Unit |
|---------|----------|---------------------|------------------|---------------------|------------|------|------|---------|----------|------|------|
| Room 13 | Lavender | 05/29/2016 06:55 PM | | 05/29/2016 06:56 PM | Discharged | | | No | Yes | NA | NA |

When RISarchive is ENABLED

Client Bed Board: Test Test (3599) DOB: 04/01/1997 (19 / M) History

Residential / Inpatient Stay (1737) Admission Date: 5/29/2016 6:55 PM

Assign Bed | Check In | Check Out | Hold Bed | Move Client | End Residential / Inpatient Stay

Expand All

[+] Enigma House

When RISarchive is DISABLED

RISReactivate

Function:

- Determines whether the user will be able to reactivate closed Residential / Inpatient stays.
 - If Disabled, the “Reactivate” link will not display.

Location(s) this setting affects:

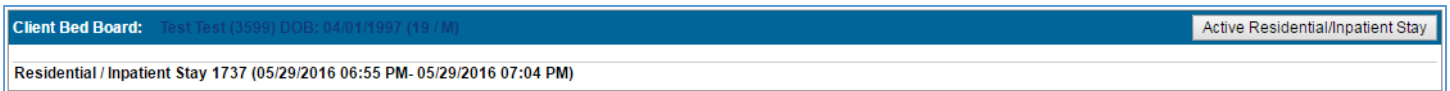
- Client Page -> Client Nav Bar -> Bed Assign Button -> History -> Reactivate

Screenshots:



The screenshot shows a blue header bar with the text "Client Bed Board: Test Test (3599) DOB: 04/01/1997 (19 / M)" on the left and "Active Residential/Inpatient Stay" on the right. Below the header, a white row contains the text "Residential / Inpatient Stay 1737 (05/29/2016 06:55 PM- 05/29/2016 07:04 PM)" on the left and a red "Reactivate" button on the right.

When RISReactivate is ENABLED



The screenshot shows a blue header bar with the text "Client Bed Board: Test Test (3599) DOB: 04/01/1997 (19 / M)" on the left and "Active Residential/Inpatient Stay" on the right. Below the header, a white row contains the text "Residential / Inpatient Stay 1737 (05/29/2016 06:55 PM- 05/29/2016 07:04 PM)" on the left, but the "Reactivate" button is missing.

When RISReactivate is DISABLED

RxDelete

Function:

- Determines whether the user will be able to delete Medication entries.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Delete

Screenshots:

CLIENT MEDICATIONS: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) Print View

Filter: ALL ACTIVE Medication Start Date End Date Has Prescription Messages

| Medication | Dosage / Frequency | Quantity | Provider Name | Status | Start Date | Change | Notes | + |
|---|--|----------|---------------|------------|------------|------------|--------------|--------|
| amoxicillin 200 mg/5 mL oral suspension | 200 mg twice a day as needed By Inhalation Route | 30 | Wilt Demo | CONCURRENT | 5/16/2016 | 05/29/2016 | edit history | delete |

When RxDelete is ENABLED

CLIENT MEDICATIONS: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) Print View

Filter: ALL ACTIVE Medication Start Date End Date Has Prescription Messages

| Medication | Dosage / Frequency | Quantity | Provider Name | Status | Start Date | Change | Notes | + |
|---|--|----------|---------------|------------|------------|------------|--------------|---|
| amoxicillin 200 mg/5 mL oral suspension | 200 mg twice a day as needed By Inhalation Route | 30 | Wilt Demo | CONCURRENT | 5/16/2016 | 05/29/2016 | edit history | |

When RxDelete is DISABLED

RxFormsAdd

Function:

- Determines whether the user will be able to map back details to the Medications section from a Form.
 - If Disabled, the Medication details will not map back, even if the Form is set up to do so.

RxUpdate

Function:

- Determines whether the user will be able to add or update a Medication entry.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Edit Button
- Client Page -> Client Nav Bar -> Medications -> Add Medication Button
- Client Page -> Client Nav Bar -> Orders-> Add Medication Button

Screenshots:

CLIENT MEDICATIONS: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) Print View

Filter: ALL ACTIVE Medication Start Date End Date Has Prescription Messages

| Medication | Dosage / Frequency | Quantity | Provider Name | Status | Start Date | Change | Notes |
|---|--|----------|---------------|------------|------------|------------|---------------------|
| amoxicillin 200 mg/5 mL oral suspension | 200 mg twice a day as needed By Inhalation Route | 30 | Wilt Demo | CONCURRENT | 5/16/2016 | 05/29/2016 | edit history delete |

Add Medication Create Prescription Rx Eligibility

When RxUpdate is ENABLED

CLIENT MEDICATIONS: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) Print View

Filter: ALL ACTIVE Medication Start Date End Date Has Prescription Messages

| Medication | Dosage / Frequency | Quantity | Provider Name | Status | Start Date | Change | Notes |
|---|--|----------|---------------|------------|------------|------------|----------------|
| amoxicillin 200 mg/5 mL oral suspension | 200 mg twice a day as needed By Inhalation Route | 30 | Wilt Demo | CONCURRENT | 5/16/2016 | 05/29/2016 | history delete |

Create Prescription Rx Eligibility

When RxUpdate is DISABLED

Order:

Order Date 📅

Add Order Add Medication Create Prescription

When RxUpdate is ENABLED

Order:

Order Date 📅

Add Order Create Prescription

When RxUpdate is DISABLED

RxView

Function:

- Determines whether the user will be able to add or update a Medication entry.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications

Screenshots:



When RxView is ENABLED



When RxView is DISABLED

TxAdd

Function:

- Determines whether the user will be able to view and use the “Add Blank Tx” button when viewing a Client’s Tx Plan.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Tx Plan -> Add Blank Tx Button

Screenshots:

| | | | | | | |
|--|------------------------|------------------------------------|------------|----------|---------------------|-------------|
| TREATMENT PLAN: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) | | | | | Add Blank Tx | Add Form Tx |
| Active ▾ | -- Select Program -- ▾ | -- Select Category -- ▾ | Start Date | End Date | Filter | |
| Dates: 02/02/2016 | | Category: Tx - Primary Goal | | history | edit | |
| Random Goal | | | | | | |
| Dates: 02/02/2016 | | Category: Tx - Primary Objective 2 | | history | edit | |
| Random Goal 2 | | | | | | |

When TxAdd is ENABLED

| | | | | | | |
|--|------------------------|------------------------------------|------------|----------|-------------|--|
| TREATMENT PLAN: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) | | | | | Add Form Tx | |
| Active ▾ | -- Select Program -- ▾ | -- Select Category -- ▾ | Start Date | End Date | Filter | |
| Dates: 02/02/2016 | | Category: Tx - Primary Goal | | history | edit | |
| Random Goal | | | | | | |
| Dates: 02/02/2016 | | Category: Tx - Primary Objective 2 | | history | edit | |
| Random Goal 2 | | | | | | |

When TxAdd is DISABLED

TxDelete

Function:

- Determines whether the user will be able to delete TxPlan entries. If disabled, the “Delete” button will not display when editing a TxPlan entry.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Tx Plan -> Edit Button -> Delete Button

Screenshots:

ENTER TREATMENT PLAN: Wilt Demo (6935) DOB: 09/19/1964 (51 / M)

Start Date: 02/02/2016 End Date:

Target Date: Category: Tx - Primary Goal

Program: -- Select Program --

Buttons: Save, Delete, Cancel

When TxDelete is ENABLED

ENTER TREATMENT PLAN: Wilt Demo (6935) DOB: 09/19/1964 (51 / M)

Start Date: 02/02/2016 End Date:

Target Date: Category: Tx - Primary Goal

Program: -- Select Program --

Buttons: Save, Cancel

When TxDelete is DISABLED

TxFormsAdd

Function:

- Determines whether the user will be able to map back details to the TxPlan section from a Form.
 - If Disabled, the TxPlan details will not map back, even if the Form is set up to do so.

TxPlusBuild

Function:

- Determines whether the user will be able to add new TxPlus plans through the Client Nav Bar or Web Forms.
 - **NOTE:** If disabled, and TxPlusView is also disabled, "TxPlus" will not appear on the Client Nav Bar.
- Determines if the user will be able to edit or add TxPlus segment Titles, Dates, or Descriptions when TxPlus is accessed from the Client Nav Bar.
 - If disabled, the edit button will not display.
- Determines if the user will be able to edit or add TxPlus segment Titles, Dates, or Descriptions when TxPlus is accessed on a Visit Form.
 - **NOTE:** This setting does not affect the ability to Document against existing TxPlus segments.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> TxPlus -> New Tx Plus Button
- Client Page -> Client Nav Bar -> TxPlus -> Edit Button
- Visit Web Form -> TxPlus Section (If Applicable)

Screenshots:

| CLIENT Tx Plus: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) | | | | | | | New Tx Plus | View Closed |
|--|------------|-------------|----------|-------------------------------------|--------------------------------------|--|-------------|-------------|
| Program Description | Start Date | Target Date | End Date | Active | | | | |
| <input type="button" value="select"/> <input type="button" value="edit"/> <input type="button" value="i"/> | 12/09/2015 | 01/15/2016 | | <input checked="" type="checkbox"/> | <input type="button" value="print"/> | | | |

When TxPlusBuild is ENABLED

| CLIENT Tx Plus: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) | | | | | | | View Closed |
|--|------------|-------------|----------|-------------------------------------|--------------------------------------|--|-------------|
| Program Description | Start Date | Target Date | End Date | Active | | | |
| <input type="button" value="select"/> <input type="button" value="i"/> | 12/09/2015 | 01/15/2016 | | <input checked="" type="checkbox"/> | <input type="button" value="print"/> | | |

When TxPlusBuild is DISABLED

Problem:

Start Date: Target Date: End Date:

Description:

When TxPlusBuild is ENABLED

Problem:

Start Date: Target Date: End Date:

Description:

When TxPlusBuild is DISABLED

TxPlusBuildFromForm

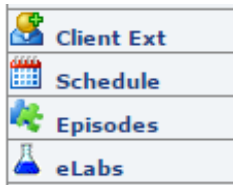
Function:

- This is an anti-right, that will only allow the user to build/edit TxPlus plans from forms.
 - **NOTE:** If enabled, this will remove the TxPlus button from the Client Nav Bar.

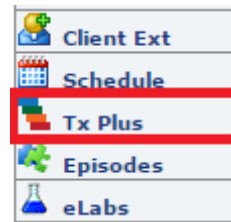
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> TxPlus

Screenshots:



When TxPlusBuildFromForm is ENABLED



When TxPlusBuildFromForm is DISABLED

TxPlusDelete

Function:

- Determines whether the user will be allowed to delete an existing TxPlus entry on a Client.
 - **NOTE:** Even with this setting enabled, a user will not be able to delete a TxPlus entry that has been documented against, or one that is linked to an Incomplete Visit. Those entries show with a blue 'i' next to the edit button where the delete button would normally appear.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> TxPlus -> Delete Button

Screenshots:

| CLIENT Tx Plus: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | New Tx Plus | View Closed |
|---|-------------------------------------|---------------------------------------|---------------------|------------|-------------|----------|-------------------------------------|--------------------------------------|-------------|
| | | | Program Description | Start Date | Target Date | End Date | Active | | |
| <input type="button" value="select"/> | <input type="button" value="edit"/> | <input type="button" value="delete"/> | | 04/15/2016 | | | <input checked="" type="checkbox"/> | <input type="button" value="print"/> | |
| <input type="button" value="select"/> | <input type="button" value="edit"/> | <input type="button" value="delete"/> | Crisis2 | 04/15/2016 | | | <input checked="" type="checkbox"/> | <input type="button" value="print"/> | |

When TxPlusDelete is ENABLED

| CLIENT Tx Plus: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | | | New Tx Plus | View Closed |
|---|-------------------------------------|--|---------------------|------------|-------------|----------|-------------------------------------|--------------------------------------|-------------|
| | | | Program Description | Start Date | Target Date | End Date | Active | | |
| <input type="button" value="select"/> | <input type="button" value="edit"/> | | | 04/15/2016 | | | <input checked="" type="checkbox"/> | <input type="button" value="print"/> | |
| <input type="button" value="select"/> | <input type="button" value="edit"/> | | Crisis2 | 04/15/2016 | | | <input checked="" type="checkbox"/> | <input type="button" value="print"/> | |

When TxPlusDelete is DISABLED

TxPlusInactive

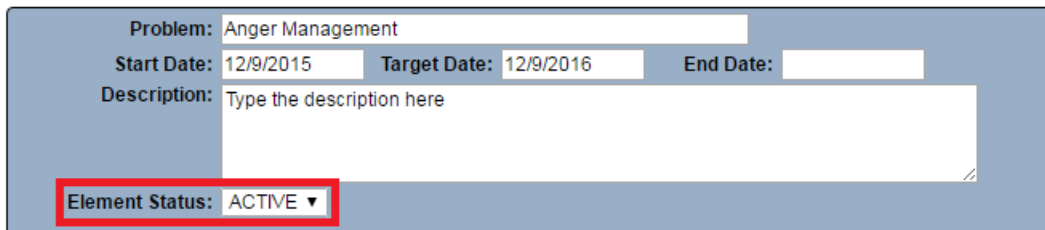
Function:

- Determines whether the user will be allowed to mark TxPlus elements as Inactive.
 - If disabled, the “Element Status” dropdown will still appear, however the dropdown will not activate when clicked.
 - **NOTE:** This setting is only applicable if the domain has the following Partner Config setting enabled: “Inactivate Individual Tx Plus Elements”

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> TxPlus -> Edit Button -> Element Status Dropdown

Screenshots:



The screenshot displays a form with the following fields:

- Problem: Anger Management
- Start Date: 12/9/2015
- Target Date: 12/9/2016
- End Date: [Empty]
- Description: Type the description here
- Element Status: ACTIVE (dropdown menu)

The "Element Status" dropdown menu is highlighted with a red box, indicating that it is not functional when the TxPlusInactive setting is disabled.

When TxPlusInactive is DISABLED, this dropdown cannot be altered.

TxPlusView

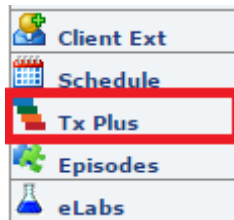
Function:

- If TxPlusBuild is disabled, this will still allow the user to view the TxPlus option on the Client Nav Bar, and will allow the TxPlus plans to be read-only.
 - **NOTE:** If TxPlusBuild is enabled, this setting will have no effect.

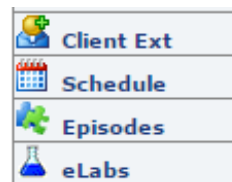
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> TxPlus -> Select Button

Screenshots:



When TxPlusView is ENABLED



When TxPlusView is DISABLED

TxUpdate

Function:

- Determines whether the user will be allowed to edit free text Tx Plan entries.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Tx Plan -> Edit Button

Screenshots:

| | | | | | | | |
|---|------------------------|-------------------------|------------|----------|-------------|--------------|-------------|
| TREATMENT PLAN: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | Add Blank Tx | Add Form Tx |
| Active ▾ | -- Select Program -- ▾ | -- Select Category -- ▾ | Start Date | End Date | Filter | | |
| Dates: 04/14/2016 | | Category: Barriers | | history | edit | | |
| Goals for Tx | | | | | | | |

When TxUpdate is ENABLED

| | | | | | | | |
|---|------------------------|-------------------------|------------|----------|--------|--------------|-------------|
| TREATMENT PLAN: Test Test (3599) DOB: 04/01/1997 (19 / M) | | | | | | Add Blank Tx | Add Form Tx |
| Active ▾ | -- Select Program -- ▾ | -- Select Category -- ▾ | Start Date | End Date | Filter | | |
| Dates: 04/14/2016 | | Category: Barriers | | history | | | |
| Goals for Tx | | | | | | | |

When TxUpdate is DISABLED

TxView

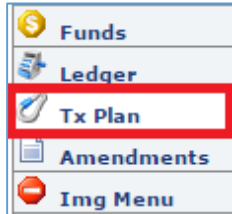
Function:

- Determines whether the user will be allowed to access the Tx Plan button on the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Tx Plan

Screenshots:



When TxView is ENABLED



When TxView is DISABLED

Matrix Section: Credible eRx

eLabs

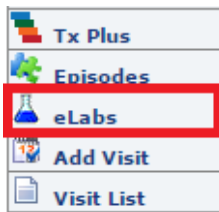
Function:

- Determines whether the user will be able to access the eLabs functionality from the Client Nav Bar.
 - **NOTE:** Only applies to Partners that have eLabs enabled from the Partner Config.

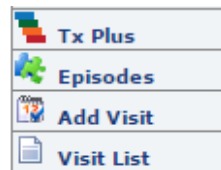
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> eLabs

Screenshots:



When eLabs is ENABLED



When eLabs is DISABLED

eLabsSign

Function:

- Determines whether the user will be able to utilize a “Sign” button when viewing the details of a lab result. This button allows the user to enter their signature password to sign off on the entry.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> eLabs -> Detail Button -> Sign Button

Screenshots:

The screenshot shows the 'Lab Results' interface with the 'Sign' button highlighted in a red box. Below the results panel, a table lists lab results with the 'detail' button highlighted in a red box. A red arrow points from the 'detail' button in the table to the 'Sign' button in the results panel.

| Procedure | Value | Abnormal | Range | Panic Flag |
|----------------------|-------|----------|-------|------------|
| 1) (code: 11100-5) ⓘ | | Normal | | False |

Facility:
QA Labs
123 A Street
Dover, NH USA

Ordered Date: 6/1/2016
Received Date: 6/7/2016 9:03:00 AM
Result Date: 6/7/2016
Collection Date: 6/7/2016 9:03:00 AM

| Order Num | Collected Date | Received Date | Signed Date | Source | |
|-----------|----------------|---------------|-------------|--------|--------------------|
| 12345 | 6/7/2016 | 6/7/2016 | | Manual | detail edit delete |

When eLabsSign is ENABLED

The screenshot shows the 'Lab Results' interface where the 'Sign' button is absent. The table below the results panel shows the 'detail' button is not highlighted.

| Procedure | Value | Abnormal | Range | Panic Flag |
|----------------------|-------|----------|-------|------------|
| 1) (code: 11100-5) ⓘ | | Normal | | False |

Facility:
QA Labs
123 A Street
Dover, NH USA

Ordered Date: 6/1/2016
Received Date: 6/7/2016 9:03:00 AM
Result Date: 6/7/2016
Collection Date: 6/7/2016 9:03:00 AM

| Order Num | Collected Date | Received Date | Signed Date | Source | |
|-----------|----------------|---------------|-------------|--------|--------------------|
| 12345 | 6/7/2016 | 6/7/2016 | | Manual | detail edit delete |

When eLabsSign is DISABLED

eRxViewAllMessages





Function:

- Affects what displays on the “Prescription Messages” module that can appear on the Credible Home Page. If enabled, you will see messages for all Clients you can view. If disabled, you will only see messages where you are the prescriber.
 - **NOTE:** If the “Prescription Messages” module does not appear in the Home Page, this setting will have no effect.

Location(s) this setting affects:

- Home Page -> Prescription Messages Module

Screenshots:

| Prescription Messages | | |
|---|-----------------------------------|---|
| Client | Medication | Status |
| Peter Pan | aripiprazole 10 mg tablet | ELECTRONIC - FAILED  |
| Debbie Diagnosis | aripiprazole 2 mg tablet | ELECTRONIC - FAILED  |
| Ronald MacDonald | hydroxyzine pamoate 25 mg capsule | ELECTRONIC - FAILED  |
| Honey Bee | fluoxetine 10 mg capsule | ELECTRONIC - FAILED  |
| All Prescriptions w/ Messages | | |

When eRxViewAllMessages is DISABLED, this module will only show messages prescribed by you

PrescriptionCreate

Function:

- Allows the “Create Prescription” button to appear on the Medications or Orders page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Create Prescription Button
- Client Page -> Client Nav Bar -> Orders -> Create Prescription Button

Screenshots:

CLIENT MEDICATIONS: Test Test (3599) DOB: 04/01/1997 (19 / M) Print View

Filter ALL ACTIVE Medication Start Date End Date Has Prescription Messages

Client has reported no current medications.

Add Medication **Create Prescription** Rx Eligibility

When PrescriptionCreate is ENABLED

CLIENT MEDICATIONS: Test Test (3599) DOB: 04/01/1997 (19 / M) Print View

Filter ALL ACTIVE Medication Start Date End Date

Client has reported no current medications.

Add Medication Rx Eligibility

When PrescriptionCreate is DISABLED

Order:

Order Date

Add Order Add Medication **Create Prescription**

When PrescriptionCreate is ENABLED

Order:

Order Date

Add Order Add Medication

When PrescriptionCreate is DISABLED

PrescriptionCreateNonSPI

Function:

- Allows an employee without a SureScripts Provider Identifier (SPI) to create a prescription for a noncontrolled substance and then print it or send it to a pharmacy prior to prescriber approval.
 - **NOTE:** The PrescriptionCreate setting must also be enabled to utilize this setting.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Create Prescription Button -> Send / Send and Print Button
- Client Page -> Client Nav Bar -> Orders -> Create Prescription Button -> Send / Send and Print Button

Screenshots:

| Prescription for: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) | |
|---|---|
| Gender: | M |
| Date of Birth: | 9/19/1964 |
| Provider: | TEST, DOCTOR |
| Provider Phone: | 3216549877 |
| Provider Address: | 128 Main Street, Suite 450, Chat, TN, |
| Prescribed Medication Info: | |
| Written Date: | 6/7/2016 10:48:08 AM |
| Medication: | atorvastatin 10 mg tablet |
| Dosage: | Take 1 tablet (10 MG) By Oral Route 1 time per day at bedtime <input type="button" value="Edit"/> |
| Quantity: | 25 Tablet |
| Refills: | 1 |
| Addtl. Comments: *Notes to the Pharmacy. | |
| <input checked="" type="radio"/> Substitutions allowed <input type="radio"/> Dispense as written (substitutions not allowed) | |
| <input type="button" value="Send"/> <input type="button" value="Send & Print Copy"/> <input type="button" value="Submit For Approval"/> <input type="button" value="Back"/> | |

When PrescriptionCreateNonSPI is ENABLED

| Prescription for: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) | |
|---|---|
| Gender: | M |
| Date of Birth: | 9/19/1964 |
| Provider: | TEST, DOCTOR |
| Provider Phone: | 3216549877 |
| Provider Address: | 128 Main Street, Suite 450, Chat, TN, |
| Prescribed Medication Info: | |
| Written Date: | 6/7/2016 10:48:08 AM |
| Medication: | atorvastatin 10 mg tablet |
| Dosage: | Take 1 tablet (10 MG) By Oral Route 1 time per day at bedtime <input type="button" value="Edit"/> |
| Quantity: | 25 Tablet |
| Refills: | 1 |
| Addtl. Comments: *Notes to the Pharmacy. | |
| <input checked="" type="radio"/> Substitutions allowed <input type="radio"/> Dispense as written (substitutions not allowed) | |
| <input type="button" value="Submit For Approval"/> <input type="button" value="Back"/> | |

When PrescriptionCreateNonSPI is DISABLED

PrintOriginalRx

Function:

- Allows an employee to print the original prescription (no Duplicate watermark) when using the print button for an existing prescription.
 - **NOTE:** If disabled, a Duplicate watermark will appear on the printout when the “Print” button is clicked.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Print Button

Screenshots:

| Approve | Medication | Dosage / Frequency | Quantity | Name | Status | Start Date | Change | Notes | + |
|--------------------------|--------------------------------|--|----------|------|--------------------|------------|--|-------|---|
| <input type="checkbox"/> | clonazepam 0.5 mg tablet | Take 1 tablet (0.5 MG) By Oral Route 3 times per day | 90 | | PAPER - CURRENT | 6/2/2016 | <input type="button" value="refill"/> <input type="button" value="print"/> <input type="button" value="history"/> <input type="button" value="discont"/> | | |

RequireSupervisingProvidereRx

Function:

- Determines whether the Supervising Provider dropdown will appear on the SigBuilder page for any Rx created for prescribers with this Security Matrix right.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Create Prescription -> Supervising Provider
- Client Page -> Client Nav Bar -> Orders -> Create Prescription -> Supervising Provider

Screenshots:

Prescription for: **Wilt Demo (6935) DOB: 09/19/1964 (51 / M)**

Medication: **Lipitor 10 mg tablet**
 Save this medication in your favorites list?

Drug Class: **Antihyperlipidemics HMGCo-A Reductase Inhibitors (Statins)** Use Alternative: ▼

Provider: -- Select -- ▼ Start Date: 6/7/2016 **Supervising Provider:** -- Select -- ▼

When RequireSupervisingProvidereRx is ENABLED

Prescription for: **Wilt Demo (6935) DOB: 09/19/1964 (51 / M)**

Medication: **Lipitor 10 mg tablet**
 Save this medication in your favorites list?

Drug Class: **Antihyperlipidemics HMGCo-A Reductase Inhibitors (Statins)** Use Alternative: ▼

Provider: -- Select -- ▼ Start Date: 6/7/2016

When RequireSupervisingProvidereRx is DISABLED

RxDiscontinue

Function:

- Determines whether a non-prescriber can discontinue a Medication.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Discont Button

Screenshots:

| Medication | Dosage / Frequency | Quantity | Provider Name | Status | Start Date | Change | Notes | + |
|-------------------------------|--------------------------------------|----------|---------------|----------------------|------------|--------|---------|---------|
| ⊕ Anafranil 50 mg capsule ⓘ | take tree tabs by mouth at QHS | 90 | | ELECTRONIC - CURRENT | 4/12/2016 | | history | discont |
| ⊕ benztropine 0.5 mg tablet ⓘ | take one tablet by mouth twice a day | 60 | | ELECTRONIC - CURRENT | 4/12/2016 | | history | discont |

When RxDiscontinue is ENABLED

| Medication | Dosage / Frequency | Quantity | Provider Name | Status | Start Date | Change | Notes | + |
|-------------------------------|--------------------------------------|----------|---------------|----------------------|------------|--------|---------|---|
| ⊕ Anafranil 50 mg capsule ⓘ | take tree tabs by mouth at QHS | 90 | | ELECTRONIC - CURRENT | 4/12/2016 | | history | |
| ⊕ benztropine 0.5 mg tablet ⓘ | take one tablet by mouth twice a day | 60 | | ELECTRONIC - CURRENT | 4/12/2016 | | history | |

When RxDiscontinue is DISABLED

RxRefill

Function:

- Determines whether a non-prescriber can refill a prescription without prescriber approval.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Refill Button

Screenshots:

| Medication | Dosage / Frequency | Quantity | Provider Name | Status | Start Date | Change | Notes |
|-------------------------------|--------------------------------------|----------|---------------|----------------------|------------|--------|---------|
| ⊕ Anafranil 50 mg capsule ⓘ | take tree tabs by mouth at QHS | 90 | | ELECTRONIC - CURRENT | 4/12/2016 | refill | history |
| ⊕ benztropine 0.5 mg tablet ⓘ | take one tablet by mouth twice a day | 60 | | ELECTRONIC - CURRENT | 4/12/2016 | refill | history |

When RxRefill is ENABLED

| Medication | Dosage / Frequency | Quantity | Provider Name | Status | Start Date | Change | Notes |
|-------------------------------|--------------------------------------|----------|---------------|----------------------|------------|--------|---------|
| ⊕ Anafranil 50 mg capsule ⓘ | take tree tabs by mouth at QHS | 90 | | ELECTRONIC - CURRENT | 4/12/2016 | | history |
| ⊕ benztropine 0.5 mg tablet ⓘ | take one tablet by mouth twice a day | 60 | | ELECTRONIC - CURRENT | 4/12/2016 | | history |

When RxRefill is DISABLED

RxRefillNeedsApproval

Function:

- Determines whether a non-prescriber can refill a prescription, however the refill will need approval.
 - **NOTE:** RxRefill must be enabled to utilize this setting.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Refill Button -> Send / Send & Print Copy Button

Screenshots:

| Prescribed Medication Info: | |
|--|---|
| Written Date: | 6/8/2016 |
| Start Date: | 6/8/2016 |
| Medication: | Anafranil 50 mg capsule |
| Dosage: | take tree tabs by mouth at QHS |
| Quantity: | 90 Capsule |
| Refills: | <input type="text" value="2"/> |
| Addtl. Comments: | *Notes to the Pharmacy. change back to evening dosing |
| Associate Dx: i | -- Associated Diagnosis -- ▼ |
| <input checked="" type="radio"/> Substitutions allowed <input type="radio"/> Dispense as written (substitutions not allowed) | |
| <input type="button" value="Send"/> <input style="border: 2px solid red;" type="button" value="Send & Print Copy"/> <input type="button" value="Submit For Approval"/> <input type="button" value="Back"/> | |

When RxRefillNeedsApproval is DISABLED

| Prescribed Medication Info: | |
|---|---|
| Written Date: | 6/8/2016 |
| Start Date: | 6/8/2016 |
| Medication: | Anafranil 50 mg capsule |
| Dosage: | take tree tabs by mouth at QHS |
| Quantity: | 90 Capsule |
| Refills: | <input type="text" value="2"/> |
| Addtl. Comments: | *Notes to the Pharmacy. change back to evening dosing |
| Associate Dx: i | -- Associated Diagnosis -- ▼ |
| <input checked="" type="radio"/> Substitutions allowed <input type="radio"/> Dispense as written (substitutions not allowed) | |
| <input type="button" value="Submit For Approval"/> <input type="button" value="Back"/> | |

When RxRefillNeedsApproval is ENABLED

RxReprint

Function:

- Determines whether an Employee can print a copy of a prescription after it has been created.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Print Button

Screenshots:

| Approve | Medication | Dosage / Frequency | Quantity | Name | Status | Start Date | Change | Notes | + |
|--------------------------|---|------------------------------------|----------|------|----------------------|------------|---|-------|---|
| <input type="checkbox"/> | Abilify 10 mg tablet i | take one tablet by mouth every day | 30 | | ELECTRONIC - CURRENT | 6/2/2016 | <input type="button" value="refill"/> <input style="border: 2px solid red;" type="button" value="print"/> <input type="button" value="history"/> <input type="button" value="discont"/> | | |

When RxReprint is ENABLED

| Approve | Medication | Dosage / Frequency | Quantity | Name | Status | Start Date | Change | Notes | + |
|--------------------------|---|------------------------------------|----------|------|----------------------|------------|---|-------|---|
| <input type="checkbox"/> | Abilify 10 mg tablet i | take one tablet by mouth every day | 30 | | ELECTRONIC - CURRENT | 6/2/2016 | <input type="button" value="refill"/> <input type="button" value="history"/> <input type="button" value="discont"/> | | |

When RxReprint is DISABLED

SeverityLevelAdmin

Function:

- Determines whether Med Severity Levels can be created or edited, using the “Med Severity Levels” link on the Admin Tab.
 - If disabled, the “Med Severity Levels” link will not appear.

Location(s) this setting affects:

- Admin Tab -> Lookup and Code Tables Section -> Med Severity Levels

Screenshots:



When SeverityLevelAdmin is ENABLED



When SeverityLevelAdmin is DISABLED

Matrix Section: EMAR

eMar

Function:

- Determines whether the “eMAR” functionality can be utilized.
 - **NOTE:** This setting will need to be enabled to utilize any of the other eMar Security Matrix settings.

Location(s) this setting affects:

- Client Nav Bar -> eMAR

Screenshots:



When eMar is ENABLED



When eMar is DISABLED

eMarAdministerMeds

Function:

- Determines whether the “eMAR” button will display on the Client Nav Bar.

Location(s) this setting affects:

- Client Nav Bar -> eMAR

Screenshots:



When eMar is ENABLED



When eMar is DISABLED

eMarAdminMissed

Function:

- Determines whether the user will be able to make edits to a missed eMar Medication entry.
 - If disabled, the pop-up that appears when clicking the missed entry will be read-only.

Location(s) this setting affects:

- Client Nav Bar -> eMAR -> Missed Entry

Screenshots:

Tue 6/7 **Wed 6/8** Thu 6/9 Fri 6/10 Sat 6/11

Missed Rx Rx Rx Rx

Log Medication Administration

Medication: amoxicillin 200 mg/5 mL oral suspension
 Dosage: Take 1 Tablet(s) By Inhalation Route
 Instructions:

Time Administered: 06/08/16 11:19 AM
 Administration Result: -- SELECT --
 Qty Administered:
 Dosage Notes:

Submit Close

Tue 6/7 **Wed 6/8** Thu 6/9 Fri 6/10 Sat 6/11

Missed Rx Rx Rx Rx

Log Medication Administration

Medication: amoxicillin 200 mg/5 mL oral suspension
 Dosage: Take 1 Tablet(s) By Inhalation Route
 Instructions:

Time Administered:
 Administration Result: MISSED
 Refusal Reason:
 Qty Administered:
 Dosage Notes:

Close

eMarAdminRecordEdit

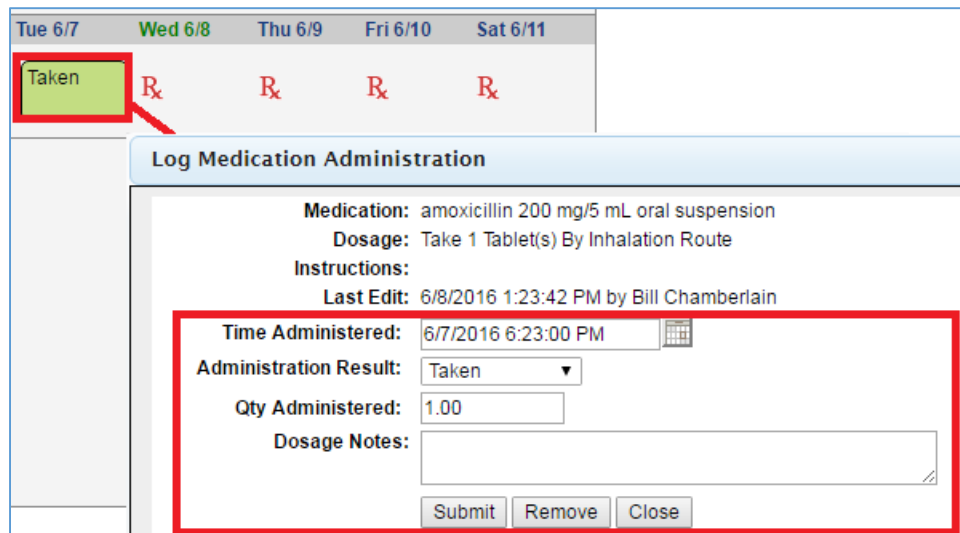
Function:

- Determines whether the user will be able to make edits to a taken eMAR Medication entry.
 - If disabled, the pop-up that appears when clicking the taken entry will be read-only.

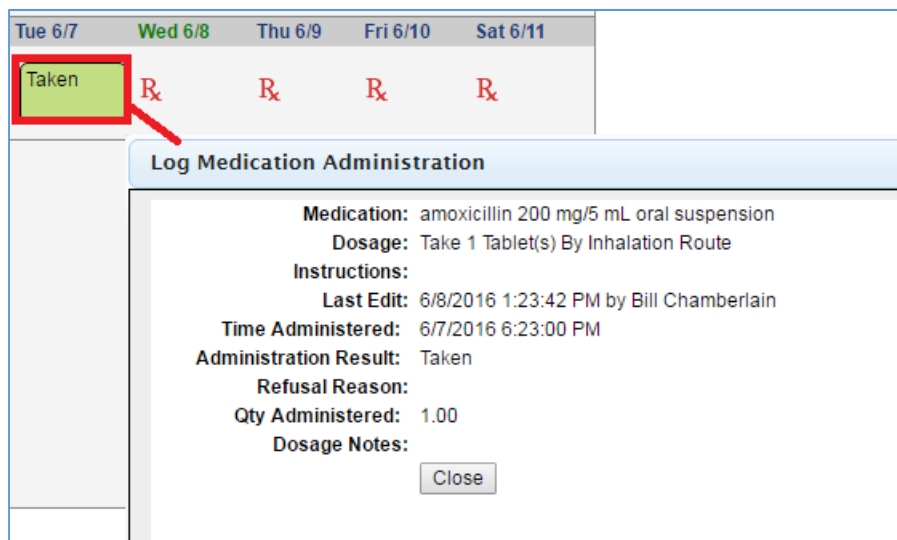
Location(s) this setting affects:

- Client Nav Bar -> eMAR -> Taken Entry

Screenshots:



When eMarAdminRecordEdit is ENABLED



When eMarAdminRecordEdit is DISABLED

eMarClientGroup

Function:

- Determines whether the user will be able to add and remove Clients from eMar Groups.
 - If disabled, the “eMar Groups” button will not appear on the Client Nav Bar.

Location(s) this setting affects:

- Client Nav Bar -> eMAR Group Button

Screenshots:



When eMarClientGroup is ENABLED



When eMarClientGroup is DISABLED

eMarCreateMedSchedule

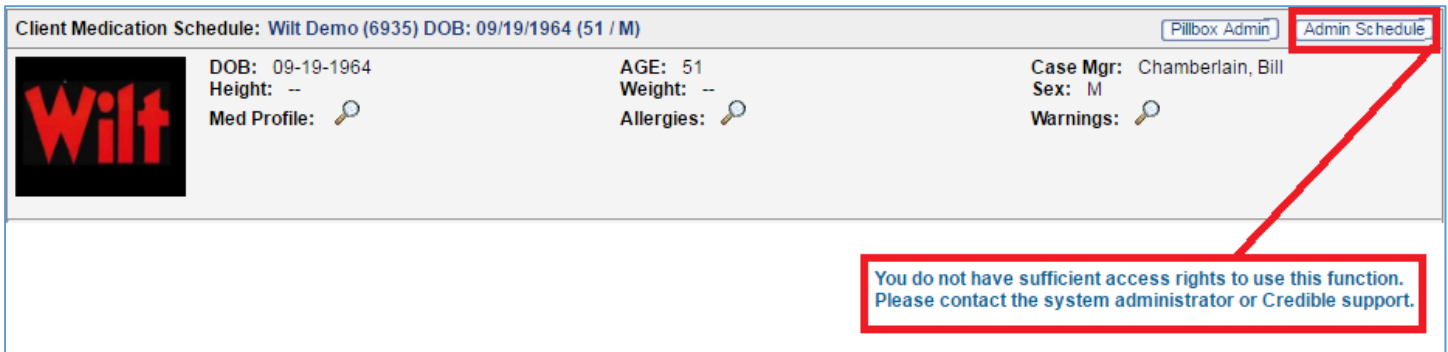
Function:

- Allows the user to create Med Schedules for Clients using the “Admin Schedule” button within eMAR.
 - If disabled, an “Insufficient Rights” message will appear when clicking the “Admin Schedule” button.

Location(s) this setting affects:

- Client Nav Bar -> eMAR Group Button -> Admin Schedule Button

Screenshots:



When eMarCreateMedSchedule is DISABLED

eMarEmployeeGroup

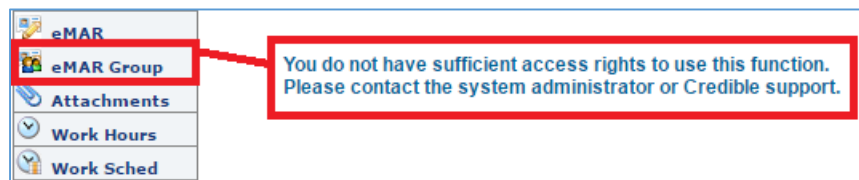
Function:

- Allows the user to add and remove Employees from eMAR Groups using the “eMAR Group” button on an Employee Nav Bar.
 - If disabled, an “Insufficient Rights” message will appear when clicking the “eMAR Group” button on an Employee Nav Bar.

Location(s) this setting affects:

- Employee Nav Bar -> eMAR Group Button

Screenshots:



When eMarEmployeeGroup is DISABLED

eMarManageGroups

Function:

- Determines whether the user will be able to access the “Manage eMAR Groups” link on the Admin Tab.
 - If disabled, the link will not appear.

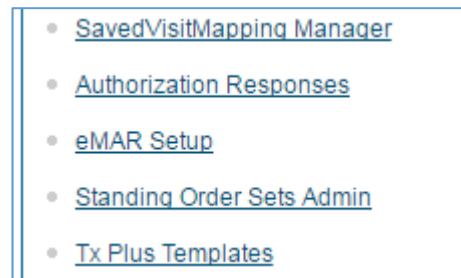
Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Manage eMAR Groups

Screenshots:



When eMarManageGroups is ENABLED



When eMarManageGroups is DISABLED

eMarPillBoxAdmin

Function:

- Determines whether the user will be able to add, edit, or discontinue a Pillbox on a Client’s eMAR page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> eMAR -> Pillbox Admin -> “Add Pillbox”, “Edit”, and “Discont” Buttons

Screenshots:

| eMAR PILLBOX ADMINISTRATION: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) | | | | Add Pillbox | View Closed | Return to eMAR |
|--|--------------|----------------|-----------------|-------------|-------------|----------------|
| Description | Created Date | Delivered Date | Reconciled Date | reconcile | edit | discont |
| Bunch | 9/21/2015 | | | | | |

When eMarPillBoxAdmin is ENABLED

| eMAR PILLBOX ADMINISTRATION: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) | | | | View Closed | Return to eMAR |
|--|--------------|----------------|-----------------|-------------|----------------|
| Description | Created Date | Delivered Date | Reconciled Date | reconcile | |
| Bunch | 9/21/2015 | | | | |

When eMarPillBoxAdmin is DISABLED

eMarPillBoxReconcile

Function:

- Determines whether the user will be able to reconcile a Pillbox on a Client's eMAR page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> eMAR -> Pillbox Admin -> Reconcile Button

Screenshots:

| eMAR PILLBOX ADMINISTRATION: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) | | | | Add Pillbox | View Closed | Return to eMAR |
|--|--------------|----------------|-----------------|-------------|-------------|----------------|
| Description | Created Date | Delivered Date | Reconciled Date | | | |
| Bunch | 9/21/2015 | | | reconcile | edit | discont |

When eMarPillBoxReconcile is ENABLED

| eMAR PILLBOX ADMINISTRATION: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) | | | | Add Pillbox | View Closed | Return to eMAR |
|--|--------------|----------------|-----------------|-------------|-------------|----------------|
| Description | Created Date | Delivered Date | Reconciled Date | | | |
| Bunch | 9/21/2015 | | | | edit | discont |

When eMarPillBoxReconcile is DISABLED

Matrix Section: Employee Forms

EmployeeFormAdd

Function:

- Determines whether the user will be able to add Forms for Employees using the “add employee form” button.
 - If Disabled, this button will not display.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Employee Tab -> Add Employee Form Button
- Admin Tab -> Employee Form Queue

Screenshots:

Employee List: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL advanced search **add employee form** add employee

1 to 15 of 3765. NAME / ID ACTIVE Prog / Team Filter

When EmployeeFormAdd is ENABLED

Employee List: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL advanced search add employee

1 to 15 of 3765. NAME / ID ACTIVE Prog / Team Filter

When EmployeeFormAdd is DISABLED

Employee Form List: incomplete forms **add employee form**

No records found. All Employee Visit Ty ID 9034 By Employee Start Date End Date Filter

| ID | Approve | For Employee | By Employee | Type | Date | Start Time | End Time |
|----|---------|--------------|-------------|------|------|------------|----------|
|----|---------|--------------|-------------|------|------|------------|----------|

When EmployeeFormAdd is ENABLED

Employee Form List: incomplete forms

No records found. All Employee Visit Ty ID 9034 By Employee Start Date End Date Filter

| ID | Approve | For Employee | By Employee | Type | Date | Start Time | End Time |
|----|---------|--------------|-------------|------|------|------------|----------|
|----|---------|--------------|-------------|------|------|------------|----------|

When EmployeeFormAdd is DISABLED

EmployeeFormApprove

Function:

- Determines whether the user will be able to Approve Forms for those Employees the user has supervisory rights to.
 - **NOTE:** If the EmployeeFormApproveAll setting is checked, this setting will have no effect.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

Screenshots:

| Employee Form List: incomplete forms | | | | | | | |
|--|--------------------------|----------------|-------------|---------------------|---------|------------|----------|
| 1 to 3 of 3 All Employee Visit Ty ID test By Employee Start Date End Date Filter | | | | | | | |
| ID | Approve | For Employee | By Employee | Type | Date | Start Time | End Time |
| 43472 | <input type="checkbox"/> | Test, Training | Test | Maintenance Request | 7/10/15 | 1:35 PM | 2:35 PM |

When EmployeeFormApprove is ENABLED

| Employee Form List: incomplete forms add employee form | | | | | | | |
|--|--------------------------|----------------|-------------|---------------------|---------|------------|----------|
| 1 to 3 of 3 All Employee Visit Ty ID test By Employee Start Date End Date Filter | | | | | | | |
| ID | Approve | For Employee | By Employee | Type | Date | Start Time | End Time |
| 43472 | <input type="checkbox"/> | Test, Training | Test | Maintenance Request | 7/10/15 | 1:35 PM | 2:35 PM |

When EmployeeFormApprove is DISABLED

| Employee Form: ID: 43472 | | | |
|---|---------------------|-------------------|---------------|
| For Employee Name: | Training Test | By Employee Name: | Training Test |
| EmployeeVisit Type: | Maintenance Request | Date: | 7/10/2015 |
| Time In: | 1:35 PM | Time Out: | 2:35 PM |

When EmployeeFormApprove is ENABLED

| Employee Form: ID: 43472 | | | |
|---|---------------------|-------------------|---------------|
| For Employee Name: | Training Test | By Employee Name: | Training Test |
| EmployeeVisit Type: | Maintenance Request | Date: | 7/10/2015 |
| Time In: | 1:35 PM | Time Out: | 2:35 PM |

When EmployeeFormApprove is DISABLED

EmployeeFormApproveAll

Function:

- Determines whether the user will be able to Approve Forms for all Employees. Typically reserved for Supervisors that manage all Staff.
 - **NOTE:** This setting supercedes the EmployeeFormApprove setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

Screenshots:

| ID | Approve | For Employee | By Employee | Type | Date | Start Time | End Time | | |
|-------|--------------------------|----------------|-------------|---------------------|---------|------------|----------|------|-------|
| 43472 | <input type="checkbox"/> | Test, Training | Test | Maintenance Request | 7/10/15 | 1:35 PM | 2:35 PM | view | print |

When EmployeeFormApproveAll is ENABLED

| ID | Approve | For Employee | By Employee | Type | Date | Start Time | End Time | | |
|-------|--------------------------|----------------|-------------|---------------------|---------|------------|----------|------|-------|
| 43472 | <input type="checkbox"/> | Test, Training | Test | Maintenance Request | 7/10/15 | 1:35 PM | 2:35 PM | view | print |

When EmployeeFormApproveAll is DISABLED

| Employee Form: | | ID: 43472 |
|---------------------|---------------------|---------------------------------|
| For Employee Name: | Training Test | By Employee Name: Training Test |
| EmployeeVisit Type: | Maintenance Request | Date: 7/10/2015 |
| Time In: | 1:35 PM | Time Out: 2:35 PM |

When EmployeeFormApproveAll is ENABLED

| Employee Form: | | ID: 43472 |
|---------------------|---------------------|---------------------------------|
| For Employee Name: | Training Test | By Employee Name: Training Test |
| EmployeeVisit Type: | Maintenance Request | Date: 7/10/2015 |
| Time In: | 1:35 PM | Time Out: 2:35 PM |

When EmployeeFormApproveAll is DISABLED

EmployeeFormApproveOwn

Function:

- Determines whether the user will be able to Approve their own Employee Forms.
 - **NOTE:** If the EmployeeFormApproveAll setting is checked, this setting will have no effect.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

Screenshots:

| Employee Form List: incomplete forms | | | | | | | | | |
|---|--------------------------|----------------|-------------------|---------------------|---------|-------------|------------|----------|--------|
| 1 to 3 of 3 | | All | Employee Visit Ty | ID | test | By Employee | Start Date | End Date | Filter |
| ID | Approve | For Employee | By Employee | Type | Date | Start Time | End Time | | |
| 43472 | <input type="checkbox"/> | Test, Training | Test | Maintenance Request | 7/10/15 | 1:35 PM | 2:35 PM | view | print |

When EmployeeFormApproveOwn is ENABLED

| Employee Form List: incomplete forms add employee form | | | | | | | | | |
|--|--------------------------|----------------|-------------------|---------------------|---------|-------------|------------|----------|--------|
| 1 to 3 of 3 | | All | Employee Visit Ty | ID | test | By Employee | Start Date | End Date | Filter |
| ID | Approve | For Employee | By Employee | Type | Date | Start Time | End Time | | |
| 43472 | <input type="checkbox"/> | Test, Training | Test | Maintenance Request | 7/10/15 | 1:35 PM | 2:35 PM | view | print |

When EmployeeFormApproveOwn is DISABLED

| | | | |
|---|---------------------|-------------------|--------------------------|
| ◀ Approve Print Sign Update Delete List ▶ | | | |
| Employee Form: | | | ID: 43472 + |
| For Employee Name: | Training Test | By Employee Name: | Training Test |
| EmployeeVisit Type: | Maintenance Request | Date: | 7/10/2015 |
| Time In: | 1:35 PM | Time Out: | 2:35 PM |

When EmployeeFormApproveOwn is ENABLED

| | | | |
|--|---------------------|-------------------|--------------------------|
| ◀ Print Sign Update Delete List ▶ | | | |
| Employee Form: | | | ID: 43472 + |
| For Employee Name: | Training Test | By Employee Name: | Training Test |
| EmployeeVisit Type: | Maintenance Request | Date: | 7/10/2015 |
| Time In: | 1:35 PM | Time Out: | 2:35 PM |

When EmployeeFormApproveOwn is DISABLED

EmployeeFormDelete

Function:

- Determines whether the user will be able to delete any completed Employee Form they can view. This is done with a Delete button that shows when viewing the summary of a Form.
 - **NOTE:** This setting does not affect a user's ability to delete Incomplete Forms.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

Screenshots:

A screenshot of an Employee Form summary page. At the top, there is a navigation bar with buttons for Print, Sign, Update, Delete (highlighted in red), and List. Below the navigation bar is a table with the following data:

| Employee Form: | | ID: 44317 + | |
|---------------------|----------------------|-------------------|------------------|
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |

When EmployeeFormDelete is ENABLED

A screenshot of an Employee Form summary page, similar to the one above, but with the Delete button disabled (greyed out). The table data is identical:

| Employee Form: | | ID: 44317 + | |
|---------------------|----------------------|-------------------|------------------|
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |

When EmployeeFormDelete is DISABLED

EmployeeFormList

Function:

- Gives the Profile the right to view a list of their own employee forms, the forms of employees they supervise, the forms of employees on teams they supervise and the forms of employees on teams for which they are a team leader.
- Determines whether the user will see the “Forms” button that appears on the Employee Nav Bar.
 - **NOTE:** If this setting is disabled, the “Forms” button will not appear, even if EmployeeFormListAll is enabled.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

Screenshots:

Employee Form List: incomplete forms add employee form

1 to 20 of 1144 All Employee Visit Ty ID For Employee By Employee Start Date End Date Filter

| ID | Approve | For Employee | By Employee | Type | Date | Start Time | End Time | view | print |
|-------|-------------------------------------|--------------------|-------------|----------------------|----------|------------|----------|------|-------|
| 44928 | <input type="checkbox"/> | Brown, Shaunt'e | Chamberlain | 1 | 3/15/16 | 4:47 PM | 5:47 PM | view | print |
| 44725 | <input checked="" type="checkbox"/> | Brown, Shaunt'e | Brown | Maintenance Request | 3/8/16 | 12:08 PM | 1:08 PM | view | print |
| 44665 | <input type="checkbox"/> | Soares, Susan | Soares | Employee Test | 2/17/16 | 8:54 PM | 9:54 PM | view | print |
| 44628 | <input checked="" type="checkbox"/> | Schroeder, Barbara | Schroeder | Vacation Request | 2/11/16 | 5:26 PM | 6:26 PM | view | print |
| 44356 | <input checked="" type="checkbox"/> | Vincent, Alan | Vincent | Maintenance Request | 1/27/16 | 9:42 AM | 10:42 AM | view | print |
| 44319 | <input type="checkbox"/> | Hannah, Shana | Hannah | Maintenance Request | 12/31/15 | 12:41 PM | 1:41 PM | view | print |
| 44317 | <input type="checkbox"/> | Chamberlain, Bill | Chamberlain | _scw test visit type | 10/21/15 | 3:41 PM | 4:41 PM | view | print |

EmployeeFormListAll

Function:

- Gives the Profile the right to view forms for ALL Employees.
 - **NOTE:** This setting does not effect whether the “Forms” button displays on the Employee Nav Bar. That is decided by the EmployeeFormList setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

Screenshots:

| Employee Form List: incomplete forms add employee form | | | | | | | | | |
|---|-------------------------------------|--------------------|-------------------|----------------------|--------------|-------------|------------|----------|--------|
| 1 to 20 of 1144 | | All | Employee Visit Ty | ID | For Employee | By Employee | Start Date | End Date | Filter |
| ID | Approve | For Employee | By | Employee Type | Date | Start Time | End Time | | |
| 44928 | <input type="checkbox"/> | Brown, Shaunt'e | Chamberlain | 1 | 3/15/16 | 4:47 PM | 5:47 PM | view | print |
| 44725 | <input checked="" type="checkbox"/> | Brown, Shaunt'e | Brown | Maintenance Request | 3/8/16 | 12:08 PM | 1:08 PM | view | print |
| 44665 | <input checked="" type="checkbox"/> | Soares, Susan | Soares | Employee Test | 2/17/16 | 8:54 PM | 9:54 PM | view | print |
| 44628 | <input checked="" type="checkbox"/> | Schroeder, Barbara | Schroeder | Vacation Request | 2/11/16 | 5:26 PM | 6:26 PM | view | print |
| 44356 | <input checked="" type="checkbox"/> | Vincent, Alan | Vincent | Maintenance Request | 1/27/16 | 9:42 AM | 10:42 AM | view | print |
| 44319 | <input type="checkbox"/> | Hannah, Shana | Hannah | Maintenance Request | 12/31/15 | 12:41 PM | 1:41 PM | view | print |
| 44317 | <input type="checkbox"/> | Chamberlain, Bill | Chamberlain | _scw test visit type | 10/21/15 | 3:41 PM | 4:41 PM | view | print |

EmployeeFormSignAny

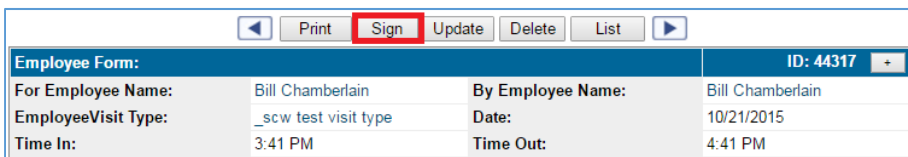
Function:

- Allows the right to utilize the ‘Sign’ button on any Employee form, regardless of who completed it.
 - If disabled, the ‘Sign’ button will only display on Employee forms that the user created. In other words, their name is displaying on the ‘By Employee’ column.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Screenshots:



When EmployeeFormSignAny is ENABLED, this button will show on all forms.

When EmployeeFormSignAny is DISABLED, this button will only show on forms that you have started.

EmployeeFormUnapprove

Function:

- Allows the right to utilize the 'Unapprove' button on any approved or locked Employee form.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Screenshots:

| | | | |
|---|----------------------|--------------------------|------------------|
| <input type="button" value="Unapprove"/> <input type="button" value="Print"/> <input type="button" value="Delete"/> <input type="button" value="List"/> | | | |
| Employee Form: | | ID: 44317 + | |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |

When EmployeeFormUnapprove is ENABLED

| | | | |
|--|----------------------|--------------------------|------------------|
| <input type="button" value="Print"/> <input type="button" value="Delete"/> <input type="button" value="List"/> | | | |
| Employee Form: | | ID: 44317 + | |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |

When EmployeeFormUnapprove is DISABLED

EmployeeFormUpdate

Function:

- Allows the right to utilize the 'Update' button on any unapproved Employee form you can view.
 - **NOTE:** If disabled, this setting does not affect the right to update your own Employee forms. That is affected by the EmployeeFormUpdateOwn matrix setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Screenshots:

| | | | |
|---|----------------------|-------------------|------------------|
| ◀ Print Sign Update Delete List ▶ | | | |
| Employee Form: | | | ID: 44317 |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |

When EmployeeFormUpdate is ENABLED

| | | | |
|--|----------------------|-------------------|------------------|
| ◀ Print Sign Delete List ▶ | | | |
| Employee Form: | | | ID: 44317 |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |

When EmployeeFormUpdate is DISABLED

EmployeeFormUpdateOwn

Function:

- Allows the right to utilize the 'Update' button on only Employee forms that the user has started.
 - **NOTE:** If the EmployeeFormUpdate setting is enabled, this setting will have no effect.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Screenshots:

| | | | |
|--|----------------------|-------------------|------------------|
| <input type="button" value="Print"/> <input type="button" value="Sign"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="List"/> | | | |
| Employee Form: | | | ID: 44317 + |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |

When EmployeeFormUpdateOwn is ENABLED

| | | | |
|--|----------------------|-------------------|------------------|
| <input type="button" value="Print"/> <input type="button" value="Sign"/> <input type="button" value="Delete"/> <input type="button" value="List"/> | | | |
| Employee Form: | | | ID: 44317 + |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |

When EmployeeFormUpdateOwn is DISABLED

EmployeeFormView

Function:

- Allows the Profile the right to view the details on their own employee forms, the forms of employees they supervise, the forms of employees on teams they supervise and the forms of employees on teams for which they are the team leader.
 - **NOTE:** If the EmployeeFormViewAll setting is enabled, this setting will have no effect.
- The difference between this setting and EmployeeFormList is that EmployeeFormList determines whether you can see the listed form entries, where this setting determines whether you can click the “View” button on those listed entries.
 - If this setting is disabled, you will receive an Insufficient Rights message when clicking the “View” button.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Screenshots:

| | | | |
|--|----------------------|-------------------|--------------------------|
| ◀ Print Sign Update Delete List ▶ | | | |
| Employee Form: | | | ID: 44317 + |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |

When EmployeeFormView is ENABLED

**You do not have sufficient access rights to use this function.
Please contact the system administrator or Credible support.**

When EmployeeFormView is DISABLED

EmployeeFormViewAll

Function:

- Allows the Profile the right to view the details on ALL Employee Forms.
 - **NOTE:** This matrix setting supercedes the EmployeeFormView setting.
- The difference between this setting and EmployeeFormList is that EmployeeFormList determines whether you can see the listed form entries, where this setting determines whether you can click the “View” button on those listed entries.
 - If this setting is disabled, you will receive an Insufficient Rights message when clicking the “View” button.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Screenshots:

| | | | |
|--|----------------------|-------------------|---------------------------------|
| ◀ Print Sign Update Delete List ▶ | | | |
| Employee Form: | | | ID: 44317 + |
| For Employee Name: | Bill Chamberlain | By Employee Name: | Bill Chamberlain |
| EmployeeVisit Type: | _scw test visit type | Date: | 10/21/2015 |
| Time In: | 3:41 PM | Time Out: | 4:41 PM |
| Revised Time In: | | Revised Time Out: | |

When EmployeeFormViewAll is ENABLED

**You do not have sufficient access rights to use this function.
Please contact the system administrator or Credible support.**

When EmployeeFormViewAll is DISABLED

EmployeeFormViewTeam

Function:

- The right to view all forms viewable in EmployeeFormList, plus the forms for Employees assigned to you directly or through a team.
 - **NOTE:** If enabled, this setting supercedes EmployeeFormTeamListOnly.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Matrix Section: Employees

EmployeeAdd

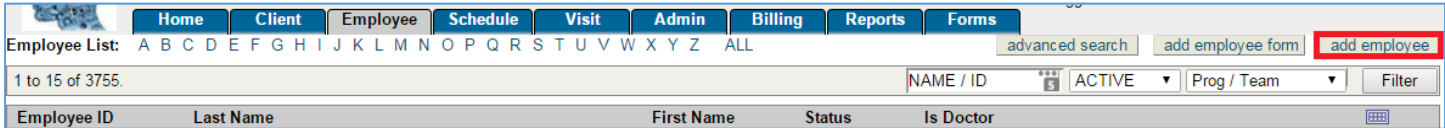
Function:

- Determines whether the “Add Employee” button will appear above the Employee List after clicking the Employee Tab.

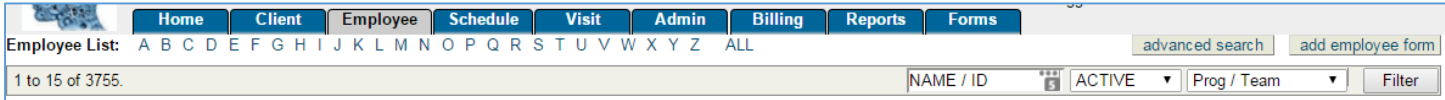
Location(s) this setting affects:

- Employee Tab

Screenshots:



When EmployeeAdd is ENABLED



When EmployeeAdd is DISABLED

EmployeeConfig

Function:

- Determines whether the user will be able to view the “Config” button on the Nav Bar of other Employees.
 - If Disabled, the user will only be able to view the “Config” button on their own Employee navbar.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Config

Screenshots:



When EmployeeConfig is ENABLED, shows for all Employees.

When EmployeeConfig is DISABLED, shows only on your Employee Nav Bar.

EmployeeDelete

Function:

- Determines whether the “Delete” button will appear when viewing an Employee’s Profile page.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile

Screenshots:

| | | | | | | |
|----------------|-----------------------|-----------------------|------------------------|--------|--------|------------|
| Overview | Test Test (9034) | | | Update | Delete | Edit Login |
| Profile | EMPLOYEE INFO | | | | | |
| Team | Employee Type | | Title | | | |
| Program | is_mu_provider | NO | Is employee part-time? | NO | | |
| Client | First Name | Test | Last Name | Test | | |
| Supervisor | Date Password Updated | 8/20/2013 11:20:46 AM | First Service Date | | | |
| GeoAreas | Login DateTime | 8/20/2013 11:20:29 AM | Billing Group Location | | | |
| Billing Groups | Last Service Date | | Status | ACTIVE | | |
| Credentials | Department | | Employee ID | 9034 | | |
| Signature | External ID | | Username | ttest | | |
| | Credentials (Billing) | | Gender | | | |

When EmployeeDelete is ENABLED

| | | | | | | |
|----------------|-----------------------|-----------------------|------------------------|--------|------------|--|
| Overview | Test Test (9034) | | | Update | Edit Login | |
| Profile | EMPLOYEE INFO | | | | | |
| Team | Employee Type | | Title | | | |
| Program | is_mu_provider | NO | Is employee part-time? | NO | | |
| Client | First Name | Test | Last Name | Test | | |
| Supervisor | Date Password Updated | 8/20/2013 11:20:46 AM | First Service Date | | | |
| GeoAreas | Login DateTime | 8/20/2013 11:20:29 AM | Billing Group Location | | | |
| Billing Groups | Last Service Date | | Status | ACTIVE | | |
| Credentials | Department | | Employee ID | 9034 | | |
| Config | External ID | | Username | ttest | | |
| | Credentials (Billing) | | Gender | | | |

When EmployeeDelete is ENABLED

EmployeeFormsUpdate

Function:

- Determines whether the user will be able to map to Employee Fields by completing an Employee Form that has a mapping setup. If this setting is disabled, the mapping will not occur, even if the Form is set up to do so.
 - The user can still complete the Form however.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile
- Employee Page -> Employee Nav Bar -> Forms -> Add Employee Form
- Employee Tab -> Add Employee Form

EmployeeList

Function:

- Allows the Profile the right to display their own employee record plus employees that they supervise, who are on teams they supervise and who are on teams for which they are a team leader.
 - This is the recommended Employee display setting for Staff.
- This setting affects who will display when viewing the Employee List after clicking the Employee Tab, or who will display when adding a Service.
- This setting **does not** affect the ability to access Employee records in other ways, such as searching for Services that other Employees have completed, and clicking on their name, or by viewing a Team Schedule and doing the same. That is controlled by the EmployeeView matrix setting.
- **NOTE:** If EmployeeListAll is enabled, this setting will have no effect.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Add Service
- Employee Tab -> Employee List

Screenshots:

The screenshot shows the 'Employee List' page. At the top, there is a navigation bar with tabs: Home, Client, Employee (selected), Schedule, Visit, Admin, Billing, Reports, and Forms. Below the navigation bar, there are search and filter options: 'Employee List: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL', 'advanced search', 'add employee form', and 'add employee'. A status filter is set to 'ACTIVE' and a 'Prog / Team' dropdown is visible. The main content is a table with the following data:

| Employee ID | Last Name | First Name | Status | Is Doctor | |
|-------------|-------------|------------|--------|-----------|---|
| 11596 | Chamberlain | Bill | ACTIVE | True | view schedule |
| 9594 | Miller | Kevin | ACTIVE | True | view schedule |

At the bottom right of the table area, there is a 'My Record' button.

The screenshot shows the 'ENTER VISIT:' form. It has a blue header with the text 'ENTER VISIT:'. Below the header, there is a label 'Employee:' followed by a dropdown menu showing 'Chamberlain, Bill' and a 'Go' button.

Affects what Employees the user will see when accessing the above pages.

EmployeeListAll

Function:

- Allows the Profile the right to display ALL Employees in the system when performing an Employee Search.
 - Will supersede the EmployeeList Security Matrix setting.
 - This setting **does not** affect the ability to access Employee records in other ways, such as searching for Services that other Employees have completed, and clicking on their name, or by viewing a Team Schedule and doing the same. That is controlled by the EmployeeView matrix setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Add Service
- Employee Tab -> Employee List

EmployeeMessageLogViewAll

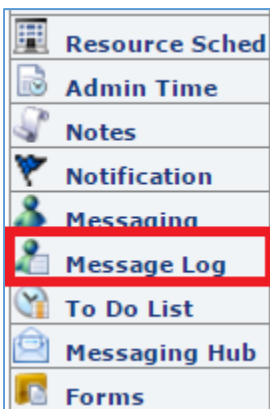
Function:

- Determines whether the “Message Log” button will be visible in ALL Employee navbars.
 - If disabled, the user will only see the “Message Log” button on their own navbar.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Message Log

Screenshots:



When EmployeeMessageLogViewAll is ENABLED, shows for all Employees.

When EmployeeMessageLogViewAll is DISABLED, shows only on your Employee Nav Bar.

EmployeeNoteAdd

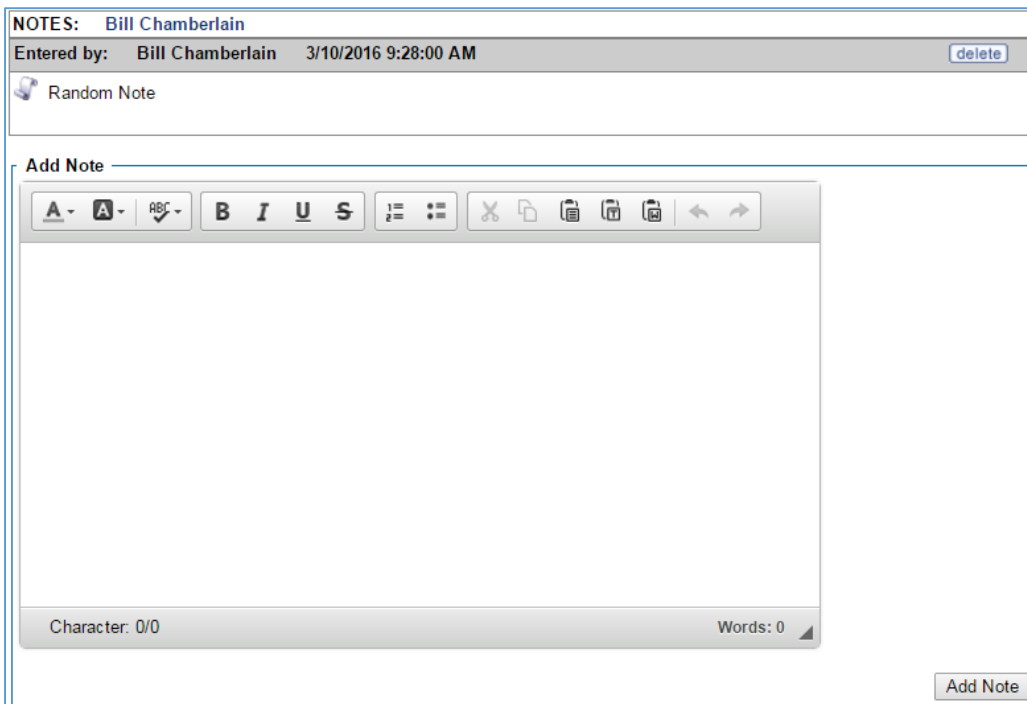
Function:

- Determines whether the user will see the “Add Note” module when viewing an Employees Notes.
 - If Disabled, the user will be able to view any notes, but will not be able to add them.

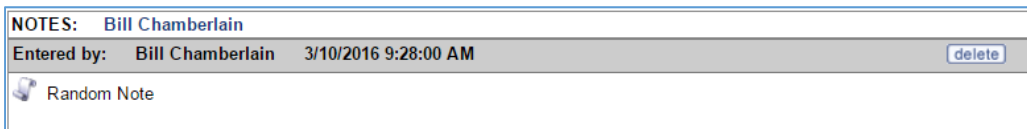
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Notes

Screenshots:



When EmployeeNoteAdd is ENABLED



When EmployeeNoteAdd is DISABLED

EmployeeNoteDelete

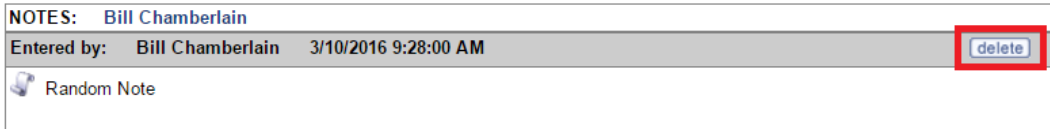
Function:

- Determines whether the user will see the “Delete” button when viewing an Employees Notes.

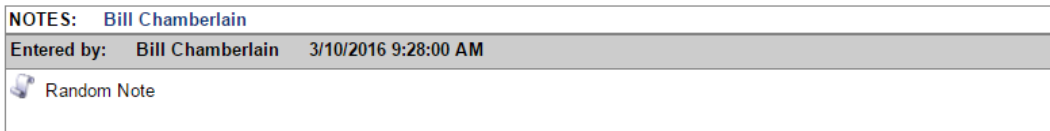
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Notes

Screenshots:



When EmployeeNoteDelete is ENABLED



When EmployeeNoteDelete is DISABLED

EmployeePictureAdd

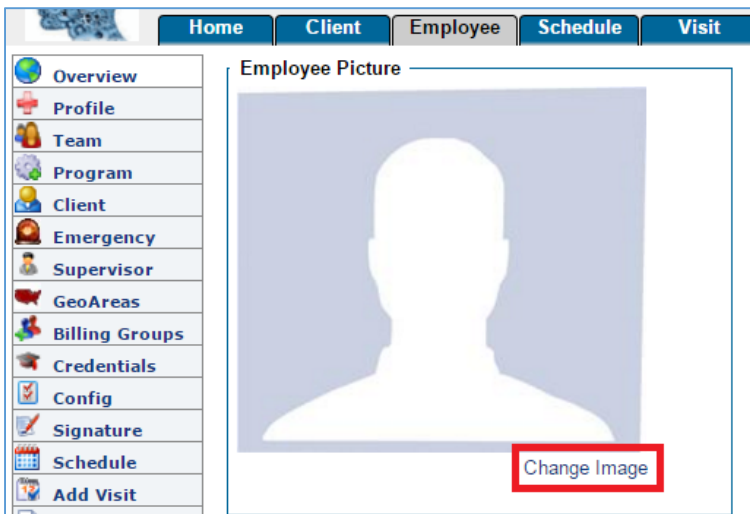
Function:

- Determines whether the user will be able to Add/Remove/Change an Employee’s Picture.
 - If Disabled, the “Change Image” link in the Employee Picture module will not display.

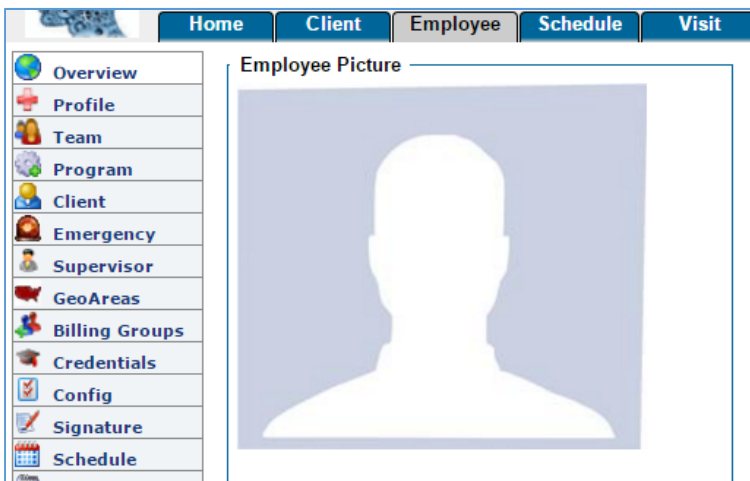
Location(s) this setting affects:

- Employee Page -> Employee Picture

Screenshots:



When EmployeePictureAdd is ENABLED



When EmployeePictureAdd is DISABLED

EmployeeSuperEdit

Function:

- Allows the Profile the right to edit specific Employee fields that are marked as “Super Edit” from the Employee Data Dictionary.
 - If this setting is Disabled, any field that is marked as Super Edit will not display when the user is viewing the Employee’s Profile in Update mode.
- **NOTE:** This setting does not affect the ability to see fields that are marked as “Super View”. That is affected by the EmployeeSuperView setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile -> Update
- Employee Page -> Employee Info Module -> Edit

Screenshots:

| Column Name | Update Label | Update Ord | Is Update Required | Is Lookup | Is Boolean | Is Date | Is Numeric | Max Length | Min Length | Double Wide | Allowed Chars | Super Edit | Locked |
|-------------|---------------|------------|--------------------------|-------------------------------------|--------------------------|--------------------------|-------------------------------------|------------|------------|--------------------------|---------------|-------------------------------------|--------------------------|
| dd11 | Employee Type | 1 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| title | Title | 2 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 35 | | <input type="checkbox"/> | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Where “Super Edit” shows on the Data Dictionary. In this example it’s used on the “Title” field.

EMPLOYEE UPDATE:

EMPLOYEE INFO

| | | | |
|----------------|---|------------------------|---|
| Employee Type | <input type="text" value="-----"/> | Title | <input type="text" value=""/> |
| is_mu_provider | <input checked="" type="radio"/> YES <input type="radio"/> NO | Is employee part-time? | <input type="radio"/> YES <input checked="" type="radio"/> NO |
| * First Name | <input type="text" value="Bill"/> | * Last Name | <input type="text" value="Chamberlain"/> |

When EmployeeSuperEdit is ENABLED, the field will display on the Employee Update page.

EMPLOYEE UPDATE:

EMPLOYEE INFO

| | | | |
|------------------------|---|------------------------|---|
| Employee Type | <input type="text" value="-----"/> | is_mu_provider | <input checked="" type="radio"/> YES <input type="radio"/> NO |
| Is employee part-time? | <input type="radio"/> YES <input checked="" type="radio"/> NO | * First Name | <input type="text" value="Bill"/> |
| * Last Name | <input type="text" value="Chamberlain"/> | Billing Group Location | <input type="text" value="-----"/> |

When EmployeeSuperEdit is DISABLED, the field will NOT display on the Employee Update page.

EmployeeSuperView

Function:

- Allows the Profile the right to view specific Employee fields that are marked as “Super View” from the Employee Data Dictionary.
 - If this setting is Disabled, any field that is marked as Super View will not display when the user is viewing the Employee’s Profile in View mode.
- **NOTE:** This setting does not affect the ability to see fields that are marked as “Super Edit”. That is affected by the EmployeeSuperEdit setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile -> Update
- Employee Page -> Employee Info Module
- Employee Page -> Employee Info Module -> Full Employee Info

Screenshots:

Data Dictionary Update: Table Source: Employee Type: View Submit Program Specific

| Column Name | View Label | View Ord | New Column | Spacer | Is Lookup | Is Boolean | Is Date | Is Numeric | Max Length | Min Length | Double Wide | Super View | History Link |
|-------------|---------------|----------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|-------------------------------------|------------|------------|--------------------------|-------------------------------------|--------------------------|
| dd11 | Employee Type | 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| title | Title | 2 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 35 | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Where “Super View” shows on the Data Dictionary. In this example it’s used on the “Title” field.

| Employee Info | |
|-----------------------|----------------------|
| Employee Type | YES |
| is_mu_provider | YES |
| First Name | Bill |
| Date Password Updated | 9/2/2015 2:37:04 PM |
| Login DateTime | 3/10/2016 9:47:51 AM |
| Last Service Date | 3/4/2016 |
| Department | 11596 |
| External ID | bchamberlain |
| edit | |

| EMPLOYEE INFO | |
|-----------------------|----------------------|
| Employee Type | YES |
| is_mu_provider | YES |
| First Name | Bill |
| Date Password Updated | 9/2/2015 2:37:04 PM |
| Login DateTime | 3/10/2016 9:47:51 AM |
| Last Service Date | 3/4/2016 |
| Department | 11596 |
| External ID | bchamberlain |
| Username | Full Employee Info |
| edit | |

When EmployeeSuperView is ENABLED, the field will display.

| Employee Info | |
|-----------------------|----------------------|
| Employee Type | NO |
| is_mu_provider | YES |
| First Name | Bill |
| Date Password Updated | 9/2/2015 2:37:04 PM |
| Login DateTime | 3/10/2016 9:47:51 AM |
| Last Service Date | 3/4/2016 |
| Department | 11596 |
| External ID | bchamberlain |
| Gender | |
| edit | |

| EMPLOYEE INFO | |
|-----------------------|----------------------|
| Employee Type | NO |
| is_mu_provider | YES |
| First Name | Bill |
| Date Password Updated | 9/2/2015 2:37:04 PM |
| Login DateTime | 3/10/2016 9:47:51 AM |
| Last Service Date | 3/4/2016 |
| Department | 11596 |
| External ID | bchamberlain |
| Username | Full Employee Info |
| edit | |

When EmployeeSuperView is DISABLED, the field will NOT display.

EmployeeTimeClockAll

Function:

- Allows the user to Clock In or Clock Out all Employees from the Time Clock module, which is accessed by clicking the “Work Sched” button on the Employee’s Nav Bar.
 - If disabled, the user will only have the ability to clock themselves in or out. The buttons will not display for other Employees that they access.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Work Sched

Screenshots:

| EMPLOYEE WORK SCHEDULE: Bill Chamberlain | | | | | | | |
|--|---------|---------|---------|---------|---|----------|----------|
| ◀ March 6 - March 12 2016 ▶ | | | | | | | |
| | SUN 3/6 | MON 3/7 | TUE 3/8 | WED 3/9 | THU 3/10 | FRI 3/11 | SAT 3/12 |
| Start Time: | | | | | | | |
| End Time: | | | | | | | |
| Start Time 2: | | | | | | | |
| End Time 2: | | | | | | | |
| | Time | | | Clock | | | |
| In Time: | | | | | <input type="button" value="Clock In"/> | | |
| Out Time: | | | | | | | |

When EmployeeTimeClockAll is ENABLED, this button will show on any Employee’s Time Clocks that you can access.

| EMPLOYEE WORK SCHEDULE: Test Test | | | | | | | |
|-----------------------------------|---------|---------|---------|---------|----------|----------|----------|
| ◀ March 6 - March 12 2016 ▶ | | | | | | | |
| | SUN 3/6 | MON 3/7 | TUE 3/8 | WED 3/9 | THU 3/10 | FRI 3/11 | SAT 3/12 |
| Start Time: | | | | | | | |
| End Time: | | | | | | | |
| Start Time 2: | | | | | | | |
| End Time 2: | | | | | | | |
| | Time | | | Clock | | | |
| In Time: | | | | | | | |
| Out Time: | | | | | | | |

When EmployeeTimeClockAll is DISABLED, no buttons will display for other Employees.

EmployeeTimeClockEdit

Function:

- Determines whether the “View / Edit Time Clock” button will display when viewing an Employee’s Work Schedule.
 - If disabled, the “View / Edit Time Clock” button will not display, even on the user’s own Work Schedule.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Work Sched

Screenshots:

| EMPLOYEE WORK SCHEDULE: Bill Chamberlain | | | | | | | |
|--|---------|---------|-------------|--------------|----------------------|----------|----------|
| ◀ March 6 - March 12 2016 ▶ | | | | | | | |
| | SUN 3/6 | MON 3/7 | TUE 3/8 | WED 3/9 | THU 3/10 | FRI 3/11 | SAT 3/12 |
| Start Time: | | | | | | | |
| End Time: | | | | | | | |
| Start Time 2: | | | | | | | |
| End Time 2: | | | | | | | |
| | | | Time | Clock | | | |
| In Time: | | | | | 01:28 PM Clock In | | |
| Out Time: | | | | | 01:29 PM | | |
| View / Edit Time Clock | | | | | | | |

When EmployeeTimeClockEdit is ENABLED

| EMPLOYEE WORK SCHEDULE: Bill Chamberlain | | | | | | | |
|--|---------|---------|-------------|--------------|----------------------|----------|----------|
| ◀ March 6 - March 12 2016 ▶ | | | | | | | |
| | SUN 3/6 | MON 3/7 | TUE 3/8 | WED 3/9 | THU 3/10 | FRI 3/11 | SAT 3/12 |
| Start Time: | | | | | | | |
| End Time: | | | | | | | |
| Start Time 2: | | | | | | | |
| End Time 2: | | | | | | | |
| | | | Time | Clock | | | |
| In Time: | | | | | 01:28 PM Clock In | | |
| Out Time: | | | | | 01:29 PM | | |

When EmployeeTimeClockEdit is DISABLED

EmployeeTimeZone

Function:

- Determines whether the user will be able to alter the “Employee Time Zone” or “Set Employee Time Zone at Login” selections that are within the Employee Config.
 - If disabled, the dropdown next to “Employee Time Zone” can’t be clicked, and the checkbox next to “Set Employee Time Zone at Login” will not be able to be checked/unchecked.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Config

Screenshots:

The screenshot shows the 'EMPLOYEE CONFIG: Bill Chamberlain' window with various settings. The following table summarizes the visible settings and their states:

| Setting | Value/State |
|---|-------------------------------------|
| Signature Pad: | <input checked="" type="checkbox"/> |
| Tablet Signature: | <input type="checkbox"/> |
| Insurance Card / Attachment Scanner: | <input type="checkbox"/> |
| Do Not Use Client Homepage: | <input type="checkbox"/> |
| Credible Employee Messaging: | <input checked="" type="checkbox"/> |
| Submit Task Ticket: | <input checked="" type="checkbox"/> |
| Preferred Visit Type (Quickvisits): | ---- |
| Preferred Visit Type (Schedule): | ---- |
| Preferred Schedule Zoom: | ---- |
| Default Schedule Duration: | No Default |
| Default Recipient Type: | ---- |
| Default Location: | ---- |
| Use Frame for Orders in Webforms: | <input type="checkbox"/> |
| Preferred Client Axis Sort: | Alpha |
| Default Visit Queue Status: | ---- |
| Default Start for Schedule: | ---- |
| Default End for Schedule: | ---- |
| Default Client Folders: | N/A |
| Default Admin Time Approval Status: | ---- |
| Default Statement Message: | |
| Employee Time Zone: | ---- |
| Set Employee Time Zone at Login: | <input type="checkbox"/> |
| DEA Number: | |

Buttons at the bottom: Update Employee Config, Cancel

When EmployeeTimeZone is ENABLED, the highlighted options above can be changed. When DISABLED, they cannot.

EmployeeUpdate

Function:

- Determines whether the user will be able to edit the Employee Profile.
 - If disabled, the “Edit” button will not appear on the Employee Info module, and the “Update” button will not appear when viewing the Profile page in View mode.
 - **NOTE:** This setting does not affect the user’s ability to edit their own Employee Profile. That is controlled by the EmployeeUpdateOwn matrix setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile
- Employee Page -> Employee Info

Screenshots:

Bill Chamberlain (11596) Update Delete Edit Login

| EMPLOYEE INFO | | | |
|-----------------------|---------------------|------------------------|-------------|
| Employee Type | | Title | |
| is_mu_provider | YES | Is employee part-time? | NO |
| First Name | Bill | Last Name | Chamberlain |
| Date Password Updated | 9/2/2015 2:37:04 PM | First Service Date | 9/2/2015 |

| Employee Info | |
|--|----------------------|
| Employee Type | YES |
| is_mu_provider | Bill |
| First Name | 9/2/2015 2:37:04 PM |
| Date Password Updated | 3/10/2016 4:11:53 PM |
| Login DateTime | 3/4/2016 |
| Last Service Date | |
| Department | |
| External ID | |
| edit | |

When EmployeeUpdate is ENABLED

Test Test (9034) Delete Edit Login

| EMPLOYEE INFO | | | |
|-----------------------|-----------------------|------------------------|------|
| Employee Type | | Title | |
| is_mu_provider | NO | Is employee part-time? | NO |
| First Name | Test | Last Name | Test |
| Date Password Updated | 8/20/2013 11:20:46 AM | First Service Date | |

| Employee Info | |
|-----------------------|-----------------------|
| Employee Type | NO |
| is_mu_provider | Test |
| First Name | 8/20/2013 11:20:46 AM |
| Date Password Updated | 8/20/2013 11:20:29 AM |
| Login DateTime | |
| Last Service Date | |
| Department | |
| External ID | |

When EmployeeUpdate is DISABLED

EmployeeUpdateOwn

Function:

- Determines whether the user will be able to edit their own Employee Profile.
 - If disabled, the “Edit” button will not appear on their Employee Info module, and the “Update” button will not appear when viewing their Profile page in View mode.
 - **NOTE:** This setting does not affect the user’s ability to edit the Employee Profile of others. That is controlled by the EmployeeUpdate matrix setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile
- Employee Page -> Employee Info

Screenshots:

| | | | |
|--|---------------------|------------------------|-------------|
| Bill Chamberlain (11596) Update Delete Edit Login | | | |
| EMPLOYEE INFO | | | |
| Employee Type | | Title | |
| is_mu_provider | YES | Is employee part-time? | NO |
| First Name | Bill | Last Name | Chamberlain |
| Date Password Updated | 9/2/2015 2:37:04 PM | First Service Date | 9/2/2015 |

| | | | |
|-----------------------|----------------------|------------------------|--------------|
| Employee Info | | | |
| Employee Type | | Title | |
| is_mu_provider | YES | Is employee part-time? | NO |
| First Name | Bill | Last Name | Chamberlain |
| Date Password Updated | 9/2/2015 2:37:04 PM | First Service Date | 9/2/2015 |
| Login DateTime | 3/10/2016 4:11:53 PM | Billing Group Location | |
| Last Service Date | 3/4/2016 | Status | ACTIVE |
| Department | | Employee ID | 11596 |
| External ID | | Username | bchamberlain |
| | | Full Employee Info | |

When EmployeeUpdate is ENABLED

| | | | |
|---|-----------------------|------------------------|------|
| Test Test (9034) Delete Edit Login | | | |
| EMPLOYEE INFO | | | |
| Employee Type | | Title | |
| is_mu_provider | NO | Is employee part-time? | NO |
| First Name | Test | Last Name | Test |
| Date Password Updated | 8/20/2013 11:20:46 AM | First Service Date | |

| | | | |
|-----------------------|-----------------------|------------------------|--------|
| Employee Info | | | |
| Employee Type | | Title | |
| is_mu_provider | NO | Is employee part-time? | NO |
| First Name | Test | Last Name | Test |
| Date Password Updated | 8/20/2013 11:20:46 AM | First Service Date | |
| Login DateTime | 8/20/2013 11:20:29 AM | Billing Group Location | |
| Last Service Date | | Status | ACTIVE |
| Department | | Employee ID | 9034 |
| External ID | | Username | ttest |
| | | Full Employee Info | |

When EmployeeUpdate is DISABLED

EmployeeView

Function:

- Allows the Profile the right to view their own record, the record of Employees they supervise, those on teams that they supervise, and those who are on teams which they are a team leader.
 - Recommended for ALL staff.
 - Unlike the EmployeeList setting which controls what Employees display when searching, this setting prevents the user from accessing Employee records. If the user tries to access an Employee that does not meet the above criteria, they will receive an “Insufficient Rights” error.
 - **NOTE:** If EmployeeViewAll is enabled, this setting will have no effect.
 - Supercedes the EmployeeViewSupervise setting.

Location(s) this setting affects:

- Employee Page

Screenshots:



You do not have sufficient access rights to use this function.
Please contact the system administrator or Credible support.

Message received if the user tries to access an Employee they do not have access right for.

EmployeeViewAll

Function:

- Allows the Profile the right to view the records of ALL Employees in the system.
 - Will supersede the EmployeeView & the EmployeeViewSupervise Security Matrix settings.

Location(s) this setting affects:

- Employee Page

EmployeeViewSupervise

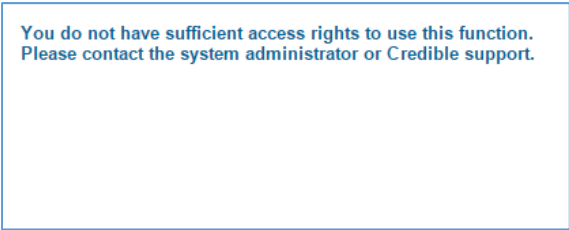
Function:

- Restricts the Profile to view only their own record, and the record of Employees they supervise.
 - Attempting to view the records of any other Employees will result in an “Insufficient Rights” page.
 - **NOTE:** If EmployeeView or EmployeeViewAll are set for this Profile, this setting will have no effect.

Location(s) this setting affects:

- Employee Page

Screenshots:



You do not have sufficient access rights to use this function.
Please contact the system administrator or Credible support.

Message received if the user tries to access an Employee they do not have access right for.

EmployeeWorkSchedEdit

Function:

- Determines whether the user will see an “Edit Schedule” button on an Employee’s Work Schedule page.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Work Sched

Screenshots:

| EMPLOYEE WORK SCHEDULE: Bill Chamberlain | | | | | | | |
|--|---------|---------|-------------|--------------|----------|---|----------|
| March 6 - March 12 2016 | | | | | | | |
| | SUN 3/6 | MON 3/7 | TUE 3/8 | WED 3/9 | THU 3/10 | FRI 3/11 | SAT 3/12 |
| Start Time: | | | | | | | |
| End Time: | | | | | | | |
| Start Time 2: | | | | | | | |
| End Time 2: | | | | | | | |
| | | | Time | Clock | | | |
| In Time: | | | | | 01:28 PM | <input type="button" value="Clock In"/> | |
| Out Time: | | | | | 01:29 PM | | |
| <input type="button" value="Edit Schedule"/> <input type="button" value="View / Edit Time Clock"/> | | | | | | | |

When EmployeeWorkSchedEdit is ENABLED

| EMPLOYEE WORK SCHEDULE: Bill Chamberlain | | | | | | | |
|---|---------|---------|-------------|--------------|----------|---|----------|
| March 6 - March 12 2016 | | | | | | | |
| | SUN 3/6 | MON 3/7 | TUE 3/8 | WED 3/9 | THU 3/10 | FRI 3/11 | SAT 3/12 |
| Start Time: | | | | | | | |
| End Time: | | | | | | | |
| Start Time 2: | | | | | | | |
| End Time 2: | | | | | | | |
| | | | Time | Clock | | | |
| In Time: | | | | | 01:28 PM | <input type="button" value="Clock In"/> | |
| Out Time: | | | | | 01:29 PM | | |
| <input type="button" value="View / Edit Time Clock"/> | | | | | | | |

When EmployeeWorkSchedEdit is DISABLED

EmployeeWorkSchedView

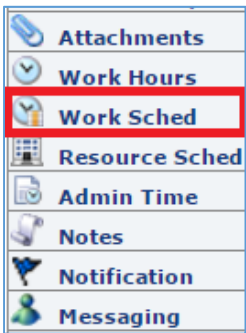
Function:

- Determines whether the user will be able to view the Work Schedule of other Employees.
 - If disabled, the “Work Sched” button will only display on the user’s own Employee nav bar. It will not display on the nav bar of other Employees.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Work Sched

Screenshots:



If ENABLED, this button will display on all Employee Nav Bars.

If DISABLED, this button will only display on the Nav Bar of the Employee that is logged in.

PasswordUpdate

Function:

- Determines whether the “Password” button appears on the Employee Nav Bar of other Employees.
 - If disabled, the “Password” button will only appear on the Nav Bar of the Employee that is logged in.
- Determines whether the “Update Password” button will appear after clicking “Login” on the Employee Nav Bar.
 - If disabled, the “Update Password” button will only appear on the Login page of the Employee that is logged in.

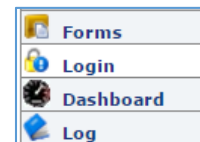
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Password
- Employee Page -> Employee Nav Bar -> Login

Screenshots:



When PasswordUpdate is ENABLED



When PasswordUpdate is DISABLED

| USER EDIT: Chamberlain, Bill | |
|---|---|
| User Login Details | |
| User Name: <input type="text" value="lbchamberlain"/> | Not Employee: <input type="checkbox"/> |
| Email: <input type="text"/> | Email Office: <input type="text"/> |
| | Profile Code: <input type="text" value="MASTER"/> |
| <input type="button" value="Update User"/> <input type="button" value="Delete User"/> <input type="button" value="Update Password"/> <input type="button" value="Cancel"/> <input type="button" value="Sync User To BI"/> | |

When PasswordUpdate is ENABLED

| USER EDIT: Chamberlain, Bill | |
|--|---|
| User Login Details | |
| User Name: <input type="text" value="lbchamberlain"/> | Not Employee: <input type="checkbox"/> |
| Email: <input type="text"/> | Email Office: <input type="text"/> |
| | Profile Code: <input type="text" value="MASTER"/> |
| <input type="button" value="Update User"/> <input type="button" value="Delete User"/> <input type="button" value="Cancel"/> <input type="button" value="Sync User To BI"/> | |

When PasswordUpdate is DISABLED

SendBroadcast

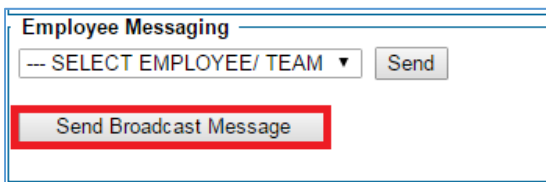
Function:

- Allows the User the right to use the “Send Broadcast Message” button that is within the Employee Messaging module that displays on the Home Page. This sends a message to all Employees.
 - If the Employee Messaging module is not active on the Home Page, this setting will have no effect.

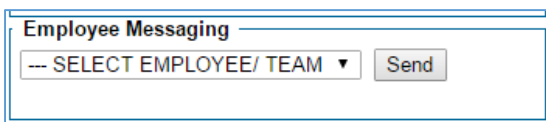
Location(s) this setting affects:

- Home Page -> Employee Messaging

Screenshots:



When SendBroadcast is ENABLED



When SendBroadcast is DISABLED

SendEmpMessage

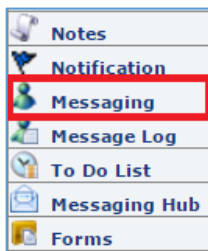
Function:

- Allows the use of the “Messaging” button on the Employee Nav Bar.
- Also determines whether the Messaging icon appears next to an Employee’s name when performing a search on the Employee tab.

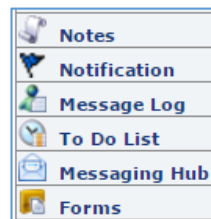
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Messaging
- Employee Tab -> Employee List (after a search)


Screenshots:



When SendEmpMessage is ENABLED



When SendEmpMessage is DISABLED

| Employee ID | Last Name | First Name | Status | Is Doctor | | | |
|-------------|-----------|------------|--------|-----------|------|----------|---|
| 11485 | Test | Training | ACTIVE | False | view | schedule |  |

When SendEmpMessage is ENABLED

| Employee ID | Last Name | First Name | Status | Is Doctor | | | |
|-------------|-----------|------------|--------|-----------|------|----------|--|
| 11485 | Test | Training | ACTIVE | False | view | schedule | |

When SendEmpMessage is DISABLED

ToDoListAddOtherEmp

Function:

- Allows the “Add To Do Item” button to appear when viewing the To Do List of other Employees.
 - When disabled, the “Add To Do Item” button will only appear when viewing the To Do List of the Employee that is logged in.
- Also affects the “Detailed To Do List Add” that can be accessed from the Home Page if the “Add To Do Item” module displays on the Home Page. Determines whether the user can choose other Employees.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> To Do List
- Home Page -> Add To Do Item Module -> Detailed To Do List Add

Screenshots:

| To Do List: Test Test | | | | | | | | Export |
|------------------------|----------------|----------------|---------------------------------|---------------|-----------------------|--------------------------|------------------------|--------|
| Filter | -- PRIORITY -- | -- CATEGORY -- | -- STATUS -- | -- CURRENT -- | Add To Do Item | | | |
| | Begin | Target | Summary | For | % | | | |
| select | 2/12/2015 | | New Exchange Arrived via Portal | | | complete | delete | |
| select | 2/11/2015 | | New Exchange Arrived via Portal | | | complete | delete | |
| select | 2/11/2015 | | New Exchange Arrived via Portal | | | complete | delete | |
| select | 2/11/2015 | | New Exchange Arrived via Portal | | | complete | delete | |

When ToDoListAddOtherEmp is ENABLED

| To Do List: Test Test | | | | | | | | Export |
|------------------------|----------------|----------------|---------------------------------|---------------|---|--------------------------|------------------------|--------|
| Filter | -- PRIORITY -- | -- CATEGORY -- | -- STATUS -- | -- CURRENT -- | | | | |
| | Begin | Target | Summary | For | % | | | |
| select | 2/12/2015 | | New Exchange Arrived via Portal | | | complete | delete | |
| select | 2/11/2015 | | New Exchange Arrived via Portal | | | complete | delete | |
| select | 2/11/2015 | | New Exchange Arrived via Portal | | | complete | delete | |
| select | 2/11/2015 | | New Exchange Arrived via Portal | | | complete | delete | |

When ToDoListAddOtherEmp is DISABLED

TO DO LIST ADD: Bill Chamberlain

Employee Name: Bill Chamberlain

Begin Date: 3/13/2016

Target Date: []

Summary: []

For: []

Priority: -- SELECT --

Percent Complete: [] %

Status: -- SELECT --

Category Color: -- SELECT --

Is Private: []

Description: []

[Add To Do Item](#)

When ToDoListAddOtherEmp is ENABLED

TO DO LIST ADD: Bill Chamberlain

Employee Name: Bill Chamberlain

Begin Date: 3/13/2016

Target Date: []

Summary: []

For: []

Priority: -- SELECT --

Percent Complete: [] %

Status: -- SELECT --

Category Color: -- SELECT --

Is Private: []

Description: []

[Add To Do Item](#)

When ToDoListAddOtherEmp is DISABLED

ToDoListDelete

Function:

- Determines whether the “Delete” button will appear next to an Employee’s To Do List entry.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> To Do List

Screenshots:

| To Do List: Bill Chamberlain | | | | | | | Export |
|------------------------------|----------------|----------------|-----------------|------------------------------------|--------------------------|--------------------------|---|
| Filter | -- PRIORITY -- | -- CATEGORY -- | -- STATUS -- | -- CURRENT -- | Add To Do Item | | |
| | Begin | Target | Summary | For | | % | |
| <input type="checkbox"/> | 3/13/2016 | | Patient search | Client: Unreal, Ursula | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |
| <input type="checkbox"/> | 2/19/2016 | | Test To Do Item | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |
| <input type="checkbox"/> | 2/19/2016 | 2/19/2016 | Test To Do Item | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |
| <input type="checkbox"/> | 2/19/2016 | | Patient search | Client: Franks, Jo Jo | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |
| <input type="checkbox"/> | 12/19/2015 | | Patient search | Client: Beans, Can | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |
| <input type="checkbox"/> | 12/12/2015 | | Billing Manager | Client: Blues, Monday | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |
| <input type="checkbox"/> | 11/30/2015 | | Billing Manager | Client: Bottom, Fuzzy | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |
| <input type="checkbox"/> | 11/28/2015 | | Billing Manager | Client: ZZ client Volcano, Vincent | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |
| <input type="checkbox"/> | 11/14/2015 | | Billing Manager | Client: Pie, Pumpkin | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |
| <input type="checkbox"/> | 11/6/2015 | | Patient search | Client: Doopsy, Daisy | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |
| <input type="checkbox"/> | 11/2/2015 | | Billing Manager | Client: McTesterson, Tester | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |
| <input type="checkbox"/> | 10/30/2015 | | Billing Manager | Client: Gutierrez, Mario | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> <input type="button" value="delete"/> |

When ToDoListDelete is ENABLED

| To Do List: Bill Chamberlain | | | | | | | Export |
|------------------------------|----------------|----------------|-----------------|------------------------------------|--------------------------|--------------------------|---|
| Filter | -- PRIORITY -- | -- CATEGORY -- | -- STATUS -- | -- CURRENT -- | Add To Do Item | | |
| | Begin | Target | Summary | For | | % | |
| <input type="checkbox"/> | 3/13/2016 | | Patient search | Client: Unreal, Ursula | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 3/13/2016 | | sfsadfsdafasdf | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 2/19/2016 | | Test To Do Item | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 2/19/2016 | 2/19/2016 | Test To Do Item | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 2/19/2016 | | Patient search | Client: Franks, Jo Jo | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 12/19/2015 | | Patient search | Client: Beans, Can | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 12/12/2015 | | Billing Manager | Client: Blues, Monday | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 11/30/2015 | | Billing Manager | Client: Bottom, Fuzzy | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 11/28/2015 | | Billing Manager | Client: ZZ client Volcano, Vincent | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 11/14/2015 | | Billing Manager | Client: Pie, Pumpkin | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 11/6/2015 | | Patient search | Client: Doopsy, Daisy | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 11/2/2015 | | Billing Manager | Client: McTesterson, Tester | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |
| <input type="checkbox"/> | 10/30/2015 | | Billing Manager | Client: Gutierrez, Mario | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="complete"/> |

When ToDoListDelete is DISABLED

UserAdd

Function:

- Determines whether a Username and Password can be customized for Employee Accounts that don't yet have a username on their account. If disabled, the "Add User" button will not display.
 - **NOTE:** This setting does not affect updating the username and password of Employee's that already have a username on the account.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> To Do List

Screenshots:

USER ADD: Test, Training

User Login Details

| | | | |
|-----------------------|------------------------------------|------------------------|--------------------------|
| New User Name: | <input type="text" value="ttest"/> | Not Employee: | <input type="checkbox"/> |
| Password: | <input type="password"/> | Password Again: | <input type="password"/> |
| Email: | <input type="text"/> | Email Office: | <input type="text"/> |
| Mobile Phone: | <input type="text"/> | Profile Code: | -- SELECT -- |

Add User

When UserAdd is ENABLED

USER ADD: Test, Training

User Login Details

| | | | |
|-----------------------|------------------------------------|------------------------|--------------------------|
| New User Name: | <input type="text" value="ttest"/> | Not Employee: | <input type="checkbox"/> |
| Password: | <input type="password"/> | Password Again: | <input type="password"/> |
| Email: | <input type="text"/> | Email Office: | <input type="text"/> |
| Mobile Phone: | <input type="text"/> | Profile Code: | -- SELECT -- |

When UserAdd is DISABLED

UserList

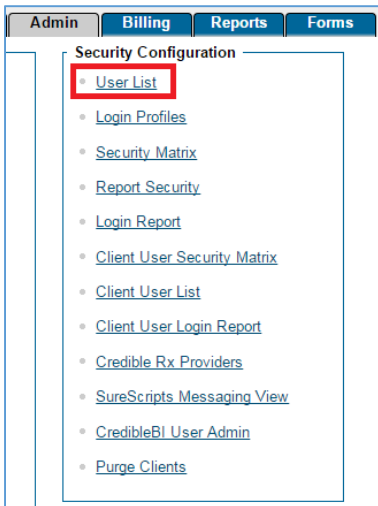
Function:

- Determines whether the user will be able to access the “User List” link that shows on the Admin Tab under the Security Configuration section.

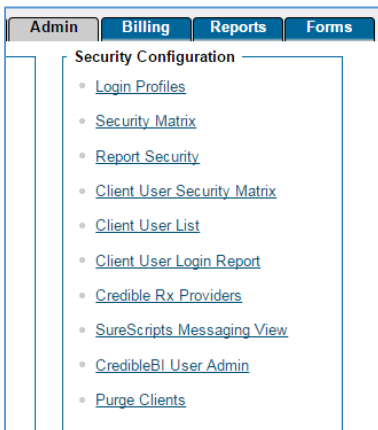
Location(s) this setting affects:

- Admin Tab -> Security Configuration Section -> User List

Screenshots:



With UserList ENABLED



With UserList DISABLED

UserUpdate

Function:

- Determines whether the user will be able to view/access the “Login” button on an Employee Profile.
- Determines whether the user will be able to click “Update” on a User that shows in the “User List”, which is accessed from the Admin Tab.
 - If disabled, the user will receive an “Insufficient Rights Message” when trying to click “Update”.

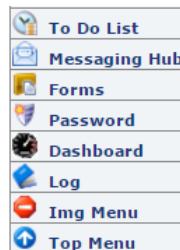
Location(s) this setting affects:

- Admin Tab -> Security Configuration Section -> User List
- Employee Page -> Employee Nav Bar -> Login

Screenshots:



With UserUpdate ENABLED



With UserUpdate DISABLED

User List: Showing 2941 to 2955 of 3315. [Export](#)

| # | Last Name | First Name | User Name | Email | Profile | |
|------|-----------|------------|--------------|--------------------------|------------|------------------------|
| 2941 | Tesfaye | Yoseph | ytesfaye | | ADMIN | update |
| 2942 | Tess | Corey | Tessc | | ADMIN | update |
| 2943 | Tessmer | Brian | btessmer | | ADMIN | update |
| 2944 | TEST | NURSE | NursTest | NurseJane@trainingbh.com | Nurse | update |
| 2945 | TEST | Joe | Testtesttest | | ADMIN | update |
| 2946 | Test | Test | ttest | | ADMIN | update |
| 2947 | Test | Monster | MONSTERT | Monster_Test@email.com | Nurse | update |
| 2948 | test | jennifer | jtesting | | ADMIN | update |
| 2949 | Test | Marissa | mttest | | Billing | update |
| 2950 | Test | Cert | ctest | | ADMIN | update |
| 2951 | TEST | DOCTOR | doctest | | Medical | update |
| 2952 | TEST | NONSPI | nonspitest | | NonSPI | update |
| 2953 | Test | Training | ttest1 | | Front Desk | update |
| 2954 | Test | Lock | ltest | | ADMIN | update |
| 2955 | Tester | Test | ttester | benc@utahcounty.gov | | update |

You do not have sufficient access rights to use this function. Please contact the system administrator or Credible support.

With UserUpdate DISABLED

Matrix Section: Forms

FormBuilder

Function:

- Allow the user to see and click the “Forms” tab.

Location(s) this setting affects:

- Forms Tab

Screenshots:



When FormBuilder is ENABLED



When FormBuilder is DISABLED

FormBuilderCopy

Function:

- Determines whether the user will see the “Copy” button next to each Form that displays on the Form List.

Location(s) this setting affects:

- Forms Tab -> Form List

Screenshots:

Forms List:

| | | | | |
|--------|--------------|---------------------|--------------------|------------------------|
| Filter | Form ID: 916 | --- Program --- | -- Visit Type -- | --- All Form Types --- |
| | Form Name: | --- Built Since --- | --- Phy Orders --- | --- Intake --- |

| ID | Form Name | Emp Form | Version | Build Date | Status | Size |
|-----|-----------|----------|---------|--------------------|--------|------|
| 916 | Test Form | False | 1 | 12/17/2015 7:36 PM | Active | 1K |

When FormBuilderCopy is ENABLED

Forms List:

| | | | | |
|--------|--------------|---------------------|--------------------|------------------------|
| Filter | Form ID: 916 | --- Program --- | -- Visit Type -- | --- All Form Types --- |
| | Form Name: | --- Built Since --- | --- Phy Orders --- | --- Intake --- |

| ID | Form Name | Emp Form | Version | Build Date | Status | Size |
|-----|-----------|----------|---------|--------------------|--------|------|
| 916 | Test Form | False | 1 | 12/17/2015 7:36 PM | Active | 1K |

When FormBuilderCopy is DISABLED

FormBuilderEdit

Function:

- Determines whether the user will see the “Edit” button next to each Form that displays on the Form List.

Location(s) this setting affects:

- Forms Tab -> Form List

Screenshots:

Forms List:

Filter Form ID: --- Program --- -- Visit Type -- --- All Form Types ---
 Form Name: --- Built Since --- --- Phy Orders --- --- Intake ---

| ID | Form Name | Emp Form | Version | Build Date | Status | Size |
|-----|-----------|----------|------------------------|--------------------|--------|------|
| 692 | AAAtest | False | 9 view | 3/6/2015 10:48 PM | Built | 3K |
| | | | 8 view | 12/17/2015 7:36 PM | Active | 2K |

When FormBuilderCopy is ENABLED

Forms List:

Filter Form ID: --- Program --- -- Visit Type -- --- All Form Types ---
 Form Name: --- Built Since --- --- Phy Orders --- --- Intake ---

| ID | Form Name | Emp Form | Version | Build Date | Status | Size |
|-----|-----------|----------|------------------------|--------------------|----------------------|-----------|
| 692 | AAAtest | False | 9 view | 3/6/2015 10:48 PM | Built | 3K |
| | | | 8 view | 12/17/2015 7:36 PM | copy | Active 2K |

When FormBuilderEdit is DISABLED

Matrix Section: Funds

FundsAdd

Function:

- Determines whether the user will be able to add a Funds entry to a Client when viewing the Client’s “Funds” page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Funds Button -> Add Allocation

Screenshots:

| Client Funds: | | | | | | | | | | | Add Allocation |
|-----------------|--------------------------|------------|------------|-----------|---------|------------|------------|----------|-------|---------|---|
| 1 to 1 of 1 | | All | Fund | Fund Type | ID | Start Date | End Date | Filter | | | |
| ID | Pay | Client | Fund | Fund Type | Amount | Sched Dt | Payment Dt | Visit ID | Notes | | |
| 21 | <input type="checkbox"/> | Demo, Wilt | green fund | Deposit | \$20.00 | 6/8/2016 | | | Yes | Payment | <input type="button" value="edit"/> <input type="button" value="delete"/> |
| Pay All Checked | | | | | | | | | | | |

When FundsAdd is ENABLED

| Client Funds: | | | | | | | | | | | |
|-----------------|--------------------------|------------|------------|-----------|---------|------------|------------|----------|-------|---------|---|
| 1 to 1 of 1 | | All | Fund | Fund Type | ID | Start Date | End Date | Filter | | | |
| ID | Pay | Client | Fund | Fund Type | Amount | Sched Dt | Payment Dt | Visit ID | Notes | | |
| 21 | <input type="checkbox"/> | Demo, Wilt | green fund | Deposit | \$20.00 | 6/8/2016 | | | Yes | Payment | <input type="button" value="edit"/> <input type="button" value="delete"/> |
| Pay All Checked | | | | | | | | | | | |

When FundsAdd is DISABLED

FundsBudget

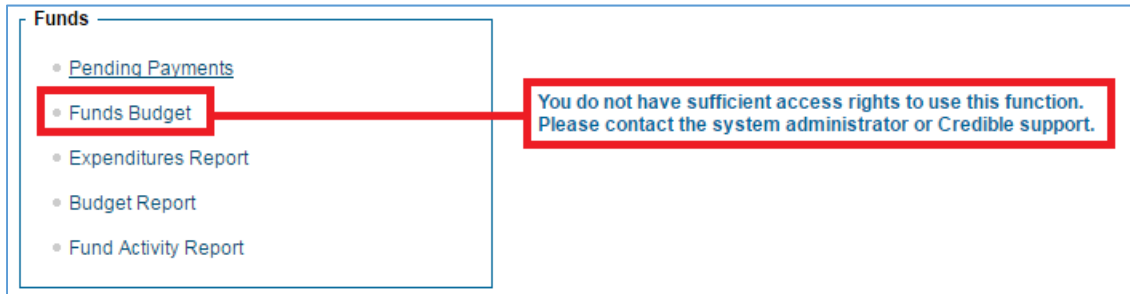
Function:

- Determines whether the user will be able to access the “Funds Budget” page on the Funds Tab.

Location(s) this setting affects:

- Funds Tab -> Funds Budget

Screenshots:



When FundsBudget is DISABLED

FundsConfig

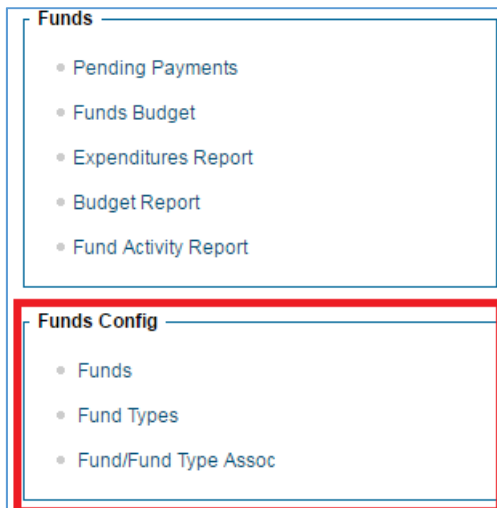
Function:

- Determines whether the user will be able to access the “Funds Config” section of the Funds Tab.
 - This section contains the following links: Funds, Fund Types, and Fund/Fund Type Assoc

Location(s) this setting affects:

- Funds Tab -> Funds Config Section

Screenshots:



When FundsConfig is ENABLED



When FundsConfig is DISABLED

FundsDelete

Function:

- Determines whether the user will be able to delete existing Funds entries on a Client.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Funds Button -> Delete Button

Screenshots:

| Client Funds: | | | | | | | | | | Add Allocation | |
|-----------------|--------------------------|------------|------------|-----------|---------|------------|------------|----------|---------|----------------|--------|
| 1 to 1 of 1 | | All | Fund | Fund Type | ID | Start Date | End Date | Filter | | | |
| ID | Pay | Client | Fund | Fund Type | Amount | Sched Dt | Payment Dt | Visit ID | Notes | | |
| 21 | <input type="checkbox"/> | Demo, Wilt | green fund | Deposit | \$20.00 | 6/8/2016 | | Yes | Payment | edit | delete |
| Pay All Checked | | | | | | | | | | | |

When FundsDelete is ENABLED

| Client Funds: | | | | | | | | | | Add Allocation | |
|-----------------|--------------------------|------------|------------|-----------|---------|------------|------------|----------|---------|----------------|--|
| 1 to 1 of 1 | | All | Fund | Fund Type | ID | Start Date | End Date | Filter | | | |
| ID | Pay | Client | Fund | Fund Type | Amount | Sched Dt | Payment Dt | Visit ID | Notes | | |
| 21 | <input type="checkbox"/> | Demo, Wilt | green fund | Deposit | \$20.00 | 6/8/2016 | | Yes | Payment | edit | |
| Pay All Checked | | | | | | | | | | | |

When FundsDelete is DISABLED

FundsEdit

Function:

- Determines whether the user will be able to edit existing Funds entries on a Client.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Funds Button -> Edit Button

Screenshots:

| Client Funds: | | | | | | | | | | Add Allocation | |
|-----------------|--------------------------|------------|------------|-----------|---------|------------|------------|----------|---------|----------------|--------|
| 1 to 1 of 1 | | All | Fund | Fund Type | ID | Start Date | End Date | Filter | | | |
| ID | Pay | Client | Fund | Fund Type | Amount | Sched Dt | Payment Dt | Visit ID | Notes | | |
| 21 | <input type="checkbox"/> | Demo, Wilt | green fund | Deposit | \$20.00 | 6/8/2016 | | Yes | Payment | edit | delete |
| Pay All Checked | | | | | | | | | | | |

When FundsEdit is ENABLED

| Client Funds: | | | | | | | | | | Add Allocation | |
|-----------------|--------------------------|------------|------------|-----------|---------|------------|------------|----------|---------|----------------|--|
| 1 to 1 of 1 | | All | Fund | Fund Type | ID | Start Date | End Date | Filter | | | |
| ID | Pay | Client | Fund | Fund Type | Amount | Sched Dt | Payment Dt | Visit ID | Notes | | |
| 21 | <input type="checkbox"/> | Demo, Wilt | green fund | Deposit | \$20.00 | 6/8/2016 | | Yes | Payment | delete | |
| Pay All Checked | | | | | | | | | | | |

When FundsEdit is DISABLED

FundsModule

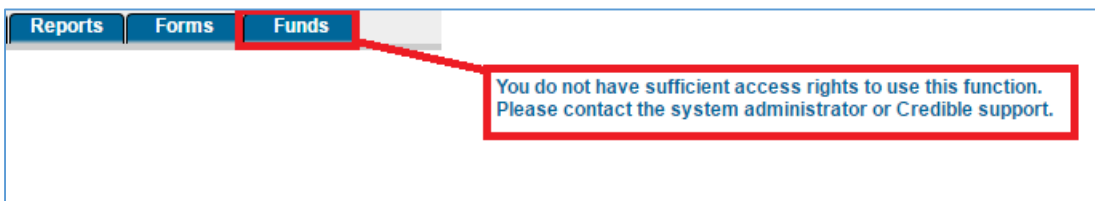
Function:

- Determines whether the user will be able to access the Funds Tab.
 - If disabled, an “Insufficient Rights” message will appear when clicking the Funds Tab.
 - **NOTE:** The Partner must have the Funds Module activated in their domain, or the Funds Matrix settings will have no effect.

Location(s) this setting affects:

- Funds Tab

Screenshots:



FundsPayment

Function:

- Determines whether the user will be able to make payments on Client Fund Allocations, using the “Payment” link on the Client’s Funds page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Funds Button -> Payment

Screenshots:

| Client Funds: | | | | | | | | | | Add Allocation | | |
|-----------------|--------------------------|------------|------------|-----------|---------|------------|------------|----------|-------|----------------|------|--------|
| 1 to 1 of 1 | | All | Fund | Fund Type | ID | Start Date | End Date | Filter | | | | |
| ID | Pay | Client | Fund | Fund Type | Amount | Sched Dt | Payment Dt | Visit ID | Notes | | | |
| 22 | <input type="checkbox"/> | Demo, Wilt | green fund | Deposit | \$20.00 | 6/9/2016 | | | Yes | Payment | edit | delete |
| Pay All Checked | | | | | | | | | | | | |

When FundsPayment is ENABLED

| Client Funds: | | | | | | | | | | Add Allocation | |
|---------------|------------|------------|-----------|-----------|----------|------------|----------|--------|------|----------------|--|
| 1 to 1 of 1 | | All | Fund | Fund Type | ID | Start Date | End Date | Filter | | | |
| ID | Client | Fund | Fund Type | Amount | Sched Dt | Payment Dt | Visit ID | Notes | | | |
| 22 | Demo, Wilt | green fund | Deposit | \$20.00 | 6/9/2016 | | | Yes | edit | delete | |

When FundsPayment is DISABLED

FundsReport

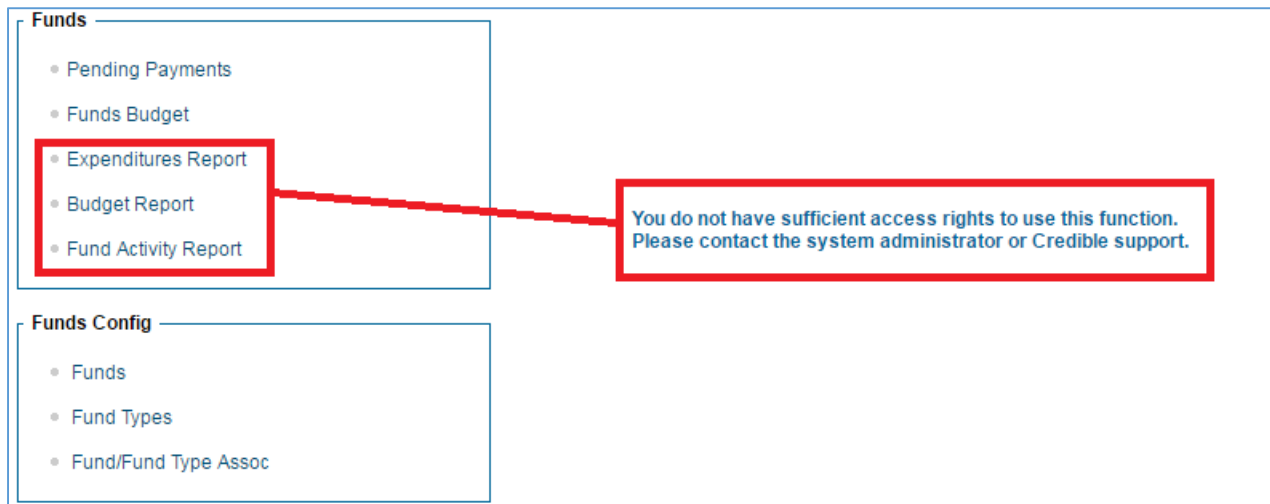
Function:

- Determines whether the user will be able to access the following links on the Funds Tab: Expenditures Report, Budget Report, Fund Activity Report
 - If disabled, an “Insufficient Rights” message will display when clicking either of these links.

Location(s) this setting affects:

- Funds Tab -> Expenditures Report
- Funds Tab -> Budget Report
- Funds Tab -> Fund Activity Report

Screenshots:



When FundsReport is DISABLED

FundsView

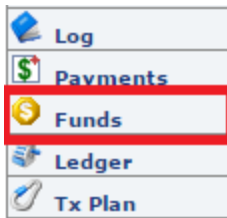
Function:

- Determines whether the user will be able to view Client Funds by clicking on the “Funds” button on the Client Nav Bar.

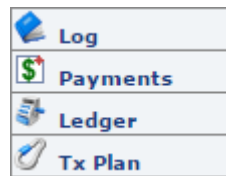
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Funds Button

Screenshots:



When FundsView is ENABLED



When FundsView is DISABLED

Matrix Section: MyCredible Admin

MyCWLinksAdmin

Function:

- Determines whether the user will be able to see the Links Admin link when viewing Admin Tab -> Home Page Config.
 - If the “Links” window is not set to display on the Home Page, this setting won’t have a noticeable effect.

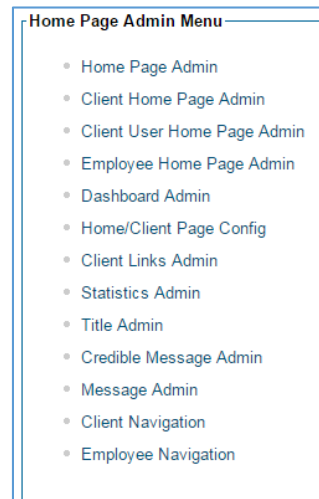
Location(s) this setting affects:

- Home Page
- Admin Tab -> Home Page Config -> Links Admin

Screenshots:



When MyCWLinksAdmin is ENABLED



When MyCWLinksAdmin is DISABLED

MyCWMasterAdmin

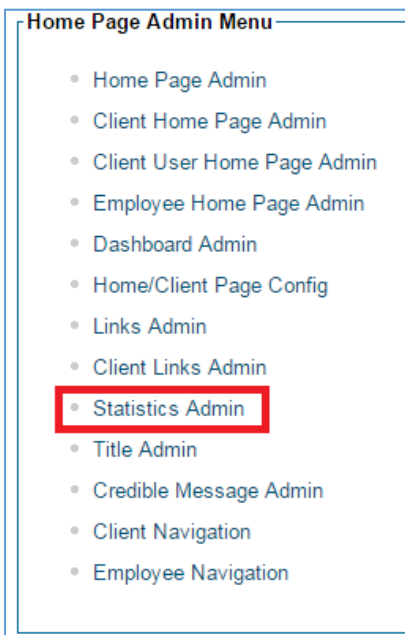
Function:

- Determines whether the “Statistics Admin” link will display when accessing Admin Tab -> Home Page Config

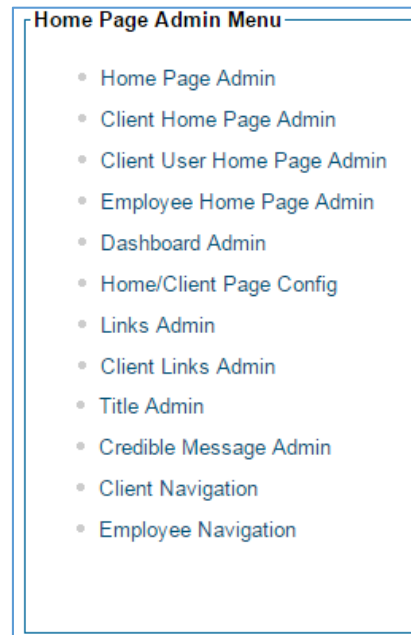
Location(s) this setting affects:

- Home Page
- Admin Tab -> Home Page Config -> Statistics Admin

Screenshots:



If MyCWMasterAdmin is ENABLED



If MyCWMasterAdmin is DISABLED

MyCWMMessageAdmin

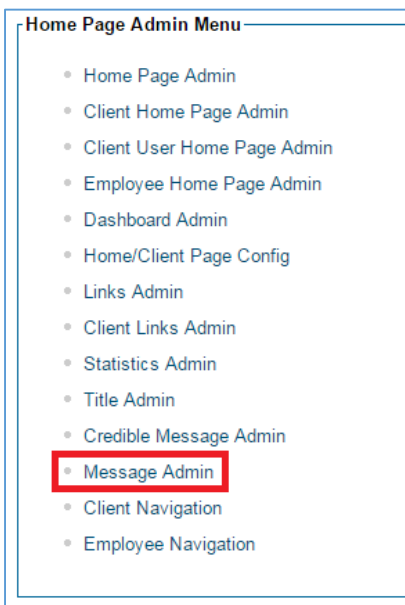
Function:

- Determines whether the “Message Admin” link will display when accessing Admin Tab -> Home Page Config
 - This link allows the user to customize messages that display on the Home Page on the Message Board section.
 - If the Message Board is not active on the Home Page, this setting will not be relevant.

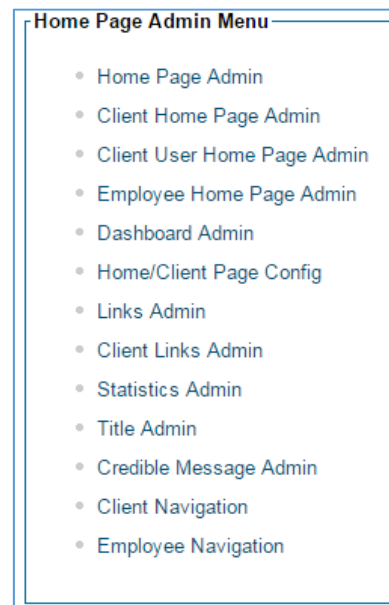
Location(s) this setting affects:

- Home Page -> Message Board
- Admin Tab -> Home Page Config -> Message Admin

Screenshots:



If MyCWMMessageAdmin is ENABLED



If MyCWMMessageAdmin is DISABLED

Matrix Section: Physician Orders

PendingOnHomePage

Function:

- Determines whether the user will be able to view the Pending Orders module on the Home Page.
 - If this setting is disabled, the module will not display, and will move on to the next module in the order.
- **NOTE:** This Matrix setting is only applicable if the Pending Orders module is set to display on the Home Page. This setting can be found at: Admin Tab -> Home Page Config -> Home Page Admin

Location(s) this setting affects:

- Home Page
- Admin Tab -> Home Page Config -> Home Page Admin

Screenshots:

| Name | Physician | Date |
|----------------|---------------|-----------------------|
| Demo, Wilt | B Chamberlain | 2/26/2016 10:26:19 AM |
| Demo, Wilt | B Chamberlain | 2/20/2016 7:55:13 PM |
| Demo, Wilt | B Chamberlain | 2/20/2016 7:54:46 PM |
| Brady, Jany | J Paul | 12/30/2015 2:40:00 PM |
| Paltrow, Sheri | E Duncan | 11/2/2015 |
| Queen, Oliver | B Chamberlain | 10/2/2015 4:28:07 PM |

All Pending Orders

PhysicianOrderLineDelete

Function:

- Determines whether the “Delete” button displays on a Current Order.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Orders

Screenshots:

| Sign | Order Date | Date Updated | Category | Provider | Type | Order | Entered By | Notes |
|--------------------------|------------|--------------|-------------|------------------|-----------|---------------|---------------|--|
| <input type="checkbox"/> | 2/27/2016 | 2/26/2016 | Labs | Bill Chamberlain | Physician | dsafsadfasdfa | B Chamberlain | <input type="checkbox"/> edit notes delete |
| <input type="checkbox"/> | 2/20/2016 | 2/20/2016 | Medications | Bill Chamberlain | Physician | asdfsadfasdfa | B Chamberlain | <input type="checkbox"/> edit notes delete |
| <input type="checkbox"/> | 2/26/2016 | 2/26/2016 | Medications | Bill Chamberlain | Physician | dafdsafda | B Chamberlain | <input type="checkbox"/> edit notes delete |
| <input type="checkbox"/> | 2/26/2016 | 2/26/2016 | Medications | Bill Chamberlain | Physician | dasfsdafdasf | B Chamberlain | <input type="checkbox"/> edit notes delete |

When PhysicianOrderLineDelete is ENABLED

| Sign | Order Date | Date Updated | Category | Provider | Type | Order | Entered By | Notes |
|--------------------------|------------|--------------|-------------|------------------|-----------|---------------|---------------|---|
| <input type="checkbox"/> | 2/26/2016 | 2/26/2016 | Labs | Bill Chamberlain | Physician | lab | B Chamberlain | <input type="checkbox"/> edit notes |
| <input type="checkbox"/> | 2/20/2016 | 2/20/2016 | Medications | Bill Chamberlain | Physician | asdfsadfasdfa | B Chamberlain | <input type="checkbox"/> edit notes |
| <input type="checkbox"/> | 2/26/2016 | 2/26/2016 | Medications | Bill Chamberlain | Physician | dafdsafda | B Chamberlain | <input type="checkbox"/> edit notes |
| <input type="checkbox"/> | 2/26/2016 | 2/26/2016 | Medications | Bill Chamberlain | Physician | dasfsdafdasf | B Chamberlain | <input type="checkbox"/> edit notes |

When PhysicianOrderLineDelete is DISABLED

PhysicianOrdersAdd

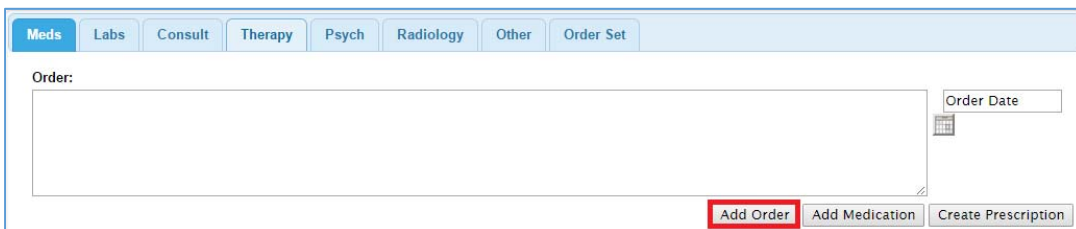
Function:

- Determines whether the “Add Order” button will function in the New Order module.
 - If this setting is disabled, the “Add Order” button will still appear, however it will not function when clicked.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Orders

Screenshots:



The screenshot displays the 'New Order' module interface. At the top, there is a navigation bar with tabs for 'Meds', 'Labs', 'Consult', 'Therapy', 'Psych', 'Radiology', 'Other', and 'Order Set'. Below this, the 'Order:' section contains a large text input area. To the right of the input area is an 'Order Date' field with a calendar icon. At the bottom right of the 'Order:' section, there are three buttons: 'Add Order' (highlighted with a red border), 'Add Medication', and 'Create Prescription'.

PhysicianOrdersSignAll

Function:

- Allows the Profile the right to use the 'Sign' functionality on a Client's Current Orders where the User is not the listed person on the Order.
 - If this setting is disabled, when trying to sign Current Orders assigned to a different user, the following pop-up error will display: *Error. You can only sign orders where you are the provider.*

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Orders

Screenshots:

The screenshot shows a web application interface with an error dialog box overlaid on top. The dialog box, titled 'ww1.crediblebh.com says:', contains the message: 'Error. You can only sign orders where you are the provider.' and an 'OK' button. Below the dialog, a table of 'Current Orders' is visible. The table has columns for 'Sign', 'Order Date', 'Date Updated', 'Category', 'Provider', 'Type', 'Order', 'Entered By', and 'Notes'. The first row is highlighted in green and has a checked 'Sign' checkbox. The other rows have unchecked checkboxes. A 'Sign' button is also visible in the interface, highlighted with a red box.

| Sign | Order Date | Date Updated | Category | Provider | Type | Order | Entered By | Notes |
|-------------------------------------|------------|--------------|-------------|-----------------|------|---|---------------|--|
| <input checked="" type="checkbox"/> | 10/25/2013 | 10/25/2013 | Medications | Bob Ketcham | | Prozac 40 mg capsule | S Kenney | <input type="checkbox"/> <input type="button" value="edit"/> <input type="button" value="notes"/> |
| <input type="checkbox"/> | 10/25/2013 | 10/25/2013 | Medications | Samantha Kenney | | Zoloft 25 mg tablet Take 2 tablets (50 MG) By Oral Route 1 time per day Quantity:60 Refills:0 | S Kenney | <input type="checkbox"/> <input type="button" value="notes"/> <input type="button" value="discont"/> |
| <input type="checkbox"/> | 2/10/2016 | 2/10/2016 | Medications | Kim Bacher | | Lipitor 10 mg tablet Take 1 Tablet By Oral Route Per daily Quantity:30 Refills:3 | B Chamberlain | <input type="checkbox"/> <input type="button" value="notes"/> <input type="button" value="discont"/> |
| <input type="checkbox"/> | 2/10/2016 | 2/10/2016 | Medications | Kim Bacher | | Lipitor 10 mg tablet Take 1 Tablet By Oral Route Per daily Quantity:30 Refills:3 | B Chamberlain | <input type="checkbox"/> <input type="button" value="notes"/> <input type="button" value="discont"/> |

When PhysicianOrdersSignAll is DISABLED, and you are not the user listed on the order.

PhysicianOrdersView

Function:

- Determines whether the “Orders” button will appear on the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Orders

Screenshots:



When PhysicianOrdersView is ENABLED. Button will not appear if DISABLED.

Matrix Section: Reports

AdvSearch

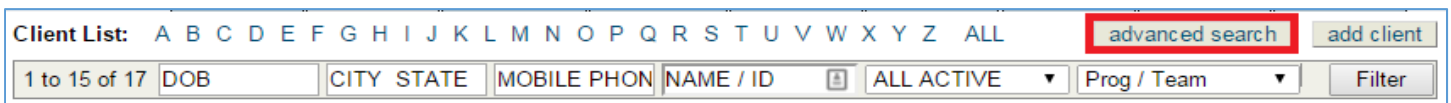
Function:

- Determines whether the user will be able to access the Advanced Search module.
- Determines whether the “Advanced Ledger Search” link will display on the Billing Tab.

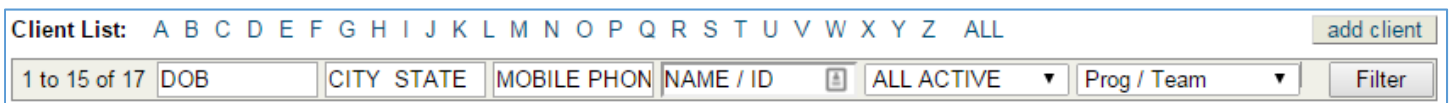
Location(s) this setting affects:

- Client Tab -> Advanced Search
- Employee Tab -> Advanced Search
- Visit Tab -> Advanced Search
- Billing Tab -> Advanced Ledger Search

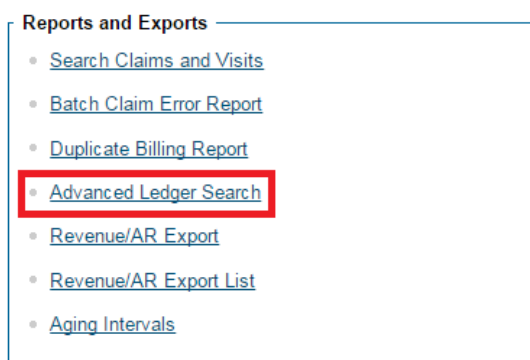
Screenshots:



When AdvSearch is ENABLED



When AdvSearch is DISABLED



When AdvSearch is ENABLED



When AdvSearch is DISABLED

AdvSearchExport

Function:

- Determines whether the user will be able to Export the results of an Advanced Search.
 - If Disabled, the “Export” button will not appear on any of the Advanced Search modules.

Location(s) this setting affects:

- Client Tab -> Advanced Search
- Employee Tab -> Advanced Search
- Visit Tab -> Advanced Search
- Billing Tab -> Advanced Ledger Search

Screenshots:

This screenshot shows the search interface with the 'Export' button highlighted in red. The interface includes various filters and controls:

- Filter:** Client Name/ID, Start Date, Batch ID, Service Type, Billing Group, Ledger Type, Recipient.
- Search Fields:** Employee Name/ID, End Date, Service ID, Team, Program, Payer, Location, Insurance Order.
- Sorting:** Sort By 1, Date Type, Claim ID, Adjust Code, Billable, Primary Payer, Payer Type.
- Additional Fields:** Sort By 2, Status, Age Date.
- Display Options:** Grp Total, Grp Total Only, Show Unappr Svcs, Show Merged Svcs, Show All Claims, No Totals.
- Actions:** Saved Reports, Custom Fields, Custom Filter, Reset, Multi Select, Print, Reprocess, Approve, Resubmit, Writeoff.

When AdvSearchExport is ENABLED

This screenshot shows the search interface with the 'Export' button missing. The layout is identical to the previous screenshot, but the 'Export' button is not present in the top-left corner of the search area.

When AdvSearchExport is DISABLED

ClinicalQualityMeasurements

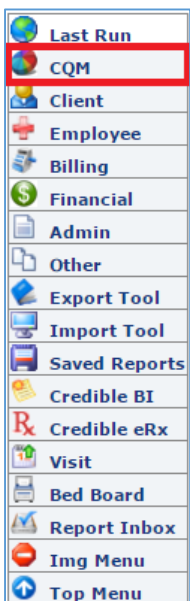
Function:

- Allows the user to run and report Clinical Quality Measurements (CQM's). Will display a CQM button in the left navbar of the Reports Tab.
 - **NOTE:** Your domain must also be setup on the database side to run CQM's, before this setting will take effect. Please contact Credible if CQM's need to be configured.

Location(s) this setting affects:

- Report Tab -> CQM

Screenshots:



This button appears when ClinicalQualityMeasurements is marked as ENABLED.

CredibleBIView

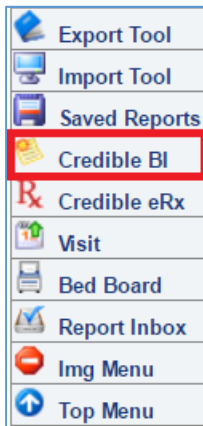
Function:

- Allows the user to view the 'Credible BI' link on the Reports Tab.
 - **NOTE:** The user will still need a valid BI username in order to click the link and actually reach the BI environment. If a user is in need of a BI account, please submit a Task Ticket.

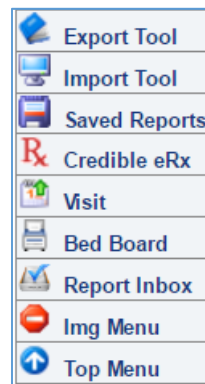
Location(s) this setting affects:

- Report Tab -> Credible BI

Screenshots:



When CredibleBIView is ENABLED





When CredibleBIView is DISABLED

DataPortability

Function:

- This setting is no longer utilized, and is now controlled through the Report Security Matrix.
 - **NOTE:** This setting is in regards to the “170.314(b)(7) Data Portability” report that allows CDA (Clinical Summaries) to be generated for all patients, and would generate in the Report Inbox.

Screenshots:

| Report Security Matrix: | | | | |
|--------------------------------|---|-------------------------------------|--------------------------|-------------------------------------|
| Report | | @SuperUser | Adm Dir | ADMIN |
| 170.314(b)(7) Data Portability |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Admin Logging |  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Admin Time | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| adult intake | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Where the DataPortability Report is viewed in the Report Security Matrix

EditAdvancedSearches

Function:

- Allows the user to Edit or Delete any previously saved Advanced Search Report on the Client, Employee, or Visit tabs, as well as the Advanced Ledger Search screen.
 - **NOTE:** If this setting is disabled, the user will still be able to click the “Save Report” and “Delete Report” buttons, and the page will reload, however no Save/Delete action will actually occur.

Location(s) this setting affects:

- Client Tab -> Advanced Search
- Employee Tab -> Advanced Search
- Visit Tab -> Advanced Search
- Billing Tab -> Advanced Ledger Search

Screenshots:

The screenshot displays the Advanced Search interface. At the top, there are filter fields for Client Name/ID, Start Date, Batch ID, Intake, Billing Group, Ledger Type, and Recipient. Below these are export and search criteria fields including Employee Name/ID, End Date, Service ID, Team, Program, Payer, Location, Client Name, Date Type, Claim ID, Adjust Code, Billable, Primary Payer, Insurance Order, Sort By 2, Status, and Age Date. A row of checkboxes includes Grp Total, Grp Total Only, Show Unappr Svcs, Show Merged Svcs, Show All Claims, and No Totals. A toolbar contains buttons for Saved Reports, Custom Fields, Custom Filter, Reset, Multi Select, Print, Reprocess, Approve, Resubmit, and Writeoff. At the bottom, a dropdown menu shows 'Test Report', and two buttons, 'Save Report' and 'Delete Report', are highlighted with red boxes.

The buttons affected by this setting. If EditAdvancedSearches is DISABLED, no action will occur when clicking these.

ExportBuild

Function:

- Allows the user to view and use the “Edit”, “Delete”, and “Batch” buttons within the Export Tool module.
- Allows the user to view the module to create new Exports at the bottom of the Export List.

Location(s) this setting affects:

- Reports Tab -> Export Tool

Screenshots:

| Export List: | | | | | | | | |
|--------------|-----------------|-----------------|------|--------|------------|-------------------|----------|-----------------|
| # | Export Name | Form/Table Name | Form | Format | Created | Last Run | Template | Notes |
| 645 | ***Test Time*** | CUSTOMADHOC | | XLS | 12/15/2015 | 12/15/15 12:43 PM | | edit delete run |
| 199 | 835 test | CUSTOM | | HTML | 12/16/2011 | 2/8/16 12:12 PM | | edit delete run |
| 638 | BC approvalrole | CUSTOMADHOC | | HTML | 12/2/2015 | 2/16/16 10:10 AM | | edit delete run |
| 639 | BC Planner | CUSTOMADHOC | | HTML | 12/3/2015 | 2/5/16 1:31 PM | | edit delete run |

| | | | | |
|------------------------------------|--------------|----------------------|--------------------|-----------------------------|
| New Export | Export Name: | <input type="text"/> | Form / Table Name: | --- Select Form / Table --- |
| Custom Query: <input type="text"/> | | | | |

When ExportBuild is ENABLED

| Export List: | | | | | | | | |
|--------------|-----------------|-----------------|------|--------|------------|-------------------|----------|-------|
| # | Export Name | Form/Table Name | Form | Format | Created | Last Run | Template | Notes |
| 645 | ***Test Time*** | CUSTOMADHOC | | XLS | 12/15/2015 | 12/15/15 12:43 PM | | run |
| 199 | 835 test | CUSTOM | | HTML | 12/16/2011 | 2/8/16 12:12 PM | | run |
| 638 | BC approvalrole | CUSTOMADHOC | | HTML | 12/2/2015 | 2/16/16 10:10 AM | | run |
| 639 | BC Planner | CUSTOMADHOC | | HTML | 12/3/2015 | 2/5/16 1:31 PM | | run |

When ExportBuild is DISABLED

ExportEditLocked

Function:

- Determines whether a user will be able to Edit or Delete an Export that has been marked as locked by the report creator.
 - **NOTE:** This setting will not affect Exports that you've created. Even if this setting is disabled for your Profile, and an export is marked as locked, you will have full access to the export if you are its creator.

Location(s) this setting affects:

- Reports Tab -> Export Tool

Screenshots:

The screenshot shows the 'Export Builder' interface for a custom report named 'CUSTOMADHOC'. The 'Export Name' is '***Test Time***'. The 'Export Format' is set to 'Excel (XLS)'. The 'Lock Export' checkbox is checked and highlighted with a red box. Other options include 'Quoted Fields', 'Batch Mode', 'For Template Printout', 'Show on Reports Tab', and 'Can Unbatch Exported Items', all of which are currently unchecked. The 'Date Format' is set to '(ie. MM-DD-YYYY HH:NN)' and the 'Category' is 'Other'.

Marking an Export as locked. You'll see this screen after clicking the "Edit" button near an Export entry.

Export List:

| # | Export Name | Form/Table Name | Form | Format | Created | Last Run | Template | Notes |
|-----|-----------------|-----------------|------|--------|------------|-------------------|----------|--|
| 645 | ***Test Time*** | CUSTOMADHOC | | XLS | 12/15/2015 | 12/15/15 12:43 PM | | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 199 | 835 test | CUSTOM | | HTML | 12/16/2011 | 2/8/16 12:12 PM | | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 638 | BC approvalrole | CUSTOMADHOC | | HTML | 12/2/2015 | 2/16/16 10:10 AM | | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 639 | BC Planner | CUSTOMADHOC | | HTML | 12/3/2015 | 2/5/16 1:31 PM | | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |

When ExportEditLocked is ENABLED

Export List:

| # | Export Name | Form/Table Name | Form | Format | Created | Last Run | Template | Notes |
|-----|-----------------|-----------------|------|--------|------------|-------------------|----------|--|
| 645 | ***Test Time*** | CUSTOMADHOC | | XLS | 12/15/2015 | 12/15/15 12:43 PM | | <input type="button" value="run"/> |
| 199 | 835 test | CUSTOM | | HTML | 12/16/2011 | 2/8/16 12:12 PM | | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 638 | BC approvalrole | CUSTOMADHOC | | HTML | 12/2/2015 | 2/16/16 10:10 AM | | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 639 | BC Planner | CUSTOMADHOC | | HTML | 12/3/2015 | 2/5/16 1:31 PM | | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |

When ExportEditLocked is DISABLED

ExportRun

Function:

- Allows the user to view and use the “Run” button within the Export Tool module.

Location(s) this setting affects:

- Reports Tab -> Export Tool

Screenshots:

Export List:

| # | Export Name | Form/Table Name | Form | Format | Created | Last Run | Template | Notes |
|-----|-----------------|-----------------|------|--------|------------|-------------------|----------|--|
| 645 | ***Test Time*** | CUSTOMADHOC | | XLS | 12/15/2015 | 12/15/15 12:43 PM | | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 199 | 835 test | CUSTOM | | HTML | 12/16/2011 | 2/8/16 12:12 PM | | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 638 | BC approvalrole | CUSTOMADHOC | | HTML | 12/2/2015 | 2/16/16 10:10 AM | | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 639 | BC Planner | CUSTOMADHOC | | HTML | 12/3/2015 | 2/5/16 1:31 PM | | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |

When ExportRun is ENABLED

Export List:

| # | Export Name | Form/Table Name | Form | Format | Created | Last Run | Template | Notes |
|-----|-----------------|-----------------|------|--------|------------|-------------------|----------|---|
| 645 | ***Test Time*** | CUSTOMADHOC | | XLS | 12/15/2015 | 12/15/15 12:43 PM | | <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 199 | 835 test | CUSTOM | | HTML | 12/16/2011 | 2/8/16 12:12 PM | | <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 638 | BC approvalrole | CUSTOMADHOC | | HTML | 12/2/2015 | 2/16/16 10:10 AM | | <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 639 | BC Planner | CUSTOMADHOC | | HTML | 12/3/2015 | 2/5/16 1:31 PM | | <input type="button" value="edit"/> <input type="button" value="delete"/> |

When ExportRun is DISABLED

ImportBuild

Function:

- Allows the user to view and use the “Edit” and “Delete” buttons within the Import Tool module.
- Allows the user to view the module to create new Imports at the bottom of the Import List.

Location(s) this setting affects:

- Reports Tab -> Import Tool

Screenshots:

| # | Table | Name | File Format | Transfer Type | Date Created | Last Run | |
|-----|--------------------|-----------------|-------------|---------------|------------------|-------------------------------|-----------------|
| 255 | Planner | Planner status | CSV | POST | 2/19/16 11:33 AM | 2/19/16 12:12 PM (avincen) | edit delete run |
| 254 | ClientVisit | | CSV | POST | 2/18/16 12:51 PM | 2/18/16 1:10 PM (avincen) | edit delete run |
| 251 | BillingMatrix | Advance Imports | CSV | POST | 2/17/16 12:35 PM | 2/17/16 2:00 PM (tfowler) | edit delete run |
| 250 | Payer | Import TF | CSV | POST | 2/17/16 11:27 AM | 2/17/16 12:02 PM (tfowler) | edit delete run |
| 244 | EmployeeSupervisor | | CSV | POST | 2/2/16 3:57 PM | 2/2/16 4:04 PM (bchamberlain) | edit delete run |
| 243 | Planner | | CSV | POST | 2/2/16 9:06 AM | 2/4/16 9:28 AM (bchamberlain) | edit delete run |

Table: AccountingPeriod Format: Comma Separated Add New Import

With ImportBuild ENABLED

| # | Table | Name | File Format | Transfer Type | Date Created | Last Run | |
|-----|--------------------|-----------------|-------------|---------------|------------------|-------------------------------|-----|
| 255 | Planner | Planner status | CSV | POST | 2/19/16 11:33 AM | 2/19/16 12:12 PM (avincen) | run |
| 254 | ClientVisit | | CSV | POST | 2/18/16 12:51 PM | 2/18/16 1:10 PM (avincen) | run |
| 251 | BillingMatrix | Advance Imports | CSV | POST | 2/17/16 12:35 PM | 2/17/16 2:00 PM (tfowler) | run |
| 250 | Payer | Import TF | CSV | POST | 2/17/16 11:27 AM | 2/17/16 12:02 PM (tfowler) | run |
| 244 | EmployeeSupervisor | | CSV | POST | 2/2/16 3:57 PM | 2/2/16 4:04 PM (bchamberlain) | run |
| 243 | Planner | | CSV | POST | 2/2/16 9:06 AM | 2/4/16 9:28 AM (bchamberlain) | run |

With ImportBuild DISABLED

ImportRun

Function:

- Allows the user to view and use the “Run” button within the Import Tool module.

Location(s) this setting affects:

- Reports Tab -> Import Tool

Screenshots:

| Import List: | | | | | | |
|--------------|--------------------|---|-------------|---------------|-------------------|---|
| # | Table | Name | File Format | Transfer Type | Date Created | Last Run |
| 255 | Planner | Planner status | CSV | POST | 2/19/16 11:33 AM | 2/19/16 12:12 PM (avincen) <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 254 | ClientVisit | | CSV | POST | 2/18/16 12:51 PM | 2/18/16 1:10 PM (avincen) <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 251 | BillingMatrix | Advance Imports | CSV | POST | 2/17/16 12:35 PM | 2/17/16 2:00 PM (tfowler) <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 250 | Payer | Import TF | CSV | POST | 2/17/16 11:27 AM | 2/17/16 12:02 PM (tfowler) <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 244 | EmployeeSupervisor | | CSV | POST | 2/2/16 3:57 PM | 2/2/16 4:04 PM (bchamberlain) <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 243 | Planner | | CSV | POST | 2/2/16 9:06 AM | 2/4/16 9:28 AM (bchamberlain) <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 242 | ClientAxisDetail | DiagError5546 | CSV | POST | 1/28/16 3:41 PM | 1/28/16 3:44 PM (avincen) <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 241 | Z_ServiceLedger | testing service ledger accounting date import | CSV | POST | 1/18/16 4:17 PM | 1/18/16 4:19 PM (ejohnson) <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 239 | RevenueCode | Revenue Test | CSV | POST | 1/5/16 7:16 PM | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |
| 238 | Clients | RB Import Lab | CSV | POST | 12/28/15 12:23 PM | 12/28/15 12:28 PM (rbarinbaum) <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="run"/> |

When ImportRun is ENABLED

| Import List: | | | | | | |
|--------------|--------------------|---|-------------|---------------|-------------------|--|
| # | Table | Name | File Format | Transfer Type | Date Created | Last Run |
| 255 | Planner | Planner status | CSV | POST | 2/19/16 11:33 AM | 2/19/16 12:12 PM (avincen) <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 254 | ClientVisit | | CSV | POST | 2/18/16 12:51 PM | 2/18/16 1:10 PM (avincen) <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 251 | BillingMatrix | Advance Imports | CSV | POST | 2/17/16 12:35 PM | 2/17/16 2:00 PM (tfowler) <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 250 | Payer | Import TF | CSV | POST | 2/17/16 11:27 AM | 2/17/16 12:02 PM (tfowler) <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 244 | EmployeeSupervisor | | CSV | POST | 2/2/16 3:57 PM | 2/2/16 4:04 PM (bchamberlain) <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 243 | Planner | | CSV | POST | 2/2/16 9:06 AM | 2/4/16 9:28 AM (bchamberlain) <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 242 | ClientAxisDetail | DiagError5546 | CSV | POST | 1/28/16 3:41 PM | 1/28/16 3:44 PM (avincen) <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 241 | Z_ServiceLedger | testing service ledger accounting date import | CSV | POST | 1/18/16 4:17 PM | 1/18/16 4:19 PM (ejohnson) <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 239 | RevenueCode | Revenue Test | CSV | POST | 1/5/16 7:16 PM | <input type="button" value="edit"/> <input type="button" value="delete"/> |
| 238 | Clients | RB Import Lab | CSV | POST | 12/28/15 12:23 PM | 12/28/15 12:28 PM (rbarinbaum) <input type="button" value="edit"/> <input type="button" value="delete"/> |

When ImportRun is DISABLED

ProviderPortalAgreements

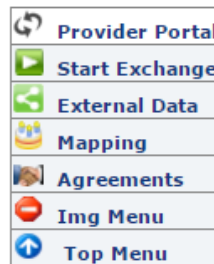
Function:

- Determines whether the user will be able to view the Agreements and Mapping buttons on the Nav Bar within the Provider Portal.

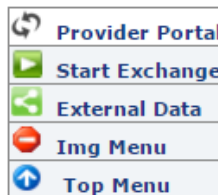
Location(s) this setting affects:

- Reports Tab -> Provider Portal

Screenshots:



When ProviderPortalAgreements is ENABLED



When ProviderPortalAgreements is DISABLED

ProviderPortalOperate

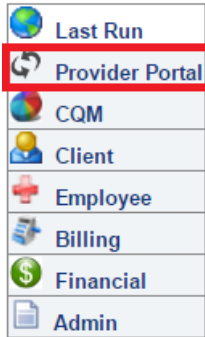
Function:

- Determines whether the user will be able to view the “Provider Portal” link on the Reports Tab.

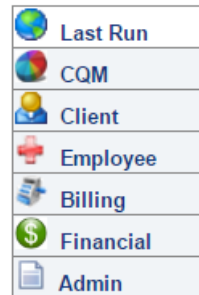
Location(s) this setting affects:

- Reports Tab -> Provider Portal

Screenshots:



When ProviderPortalOperate is ENABLED



When ProviderPortalOperate is DISABLED

ReportList

Function:

- Determines whether the Reports Tab will be accessible.
 - If disabled, the tab will disappear.
- If you want to only limit the Profile from accessing a selection of reports, this Matrix setting should be enabled, and you will want to instead limit the user by accessing the “Report Security” section of the Admin Tab.

Location(s) this setting affects:

- Schedule Tab -> Day View
- Home Tab -> Notification Events

Screenshots:



When ReportList is ENABLED



When ReportList is DISABLED

Matrix Section: Scheduler

NotificationDelete

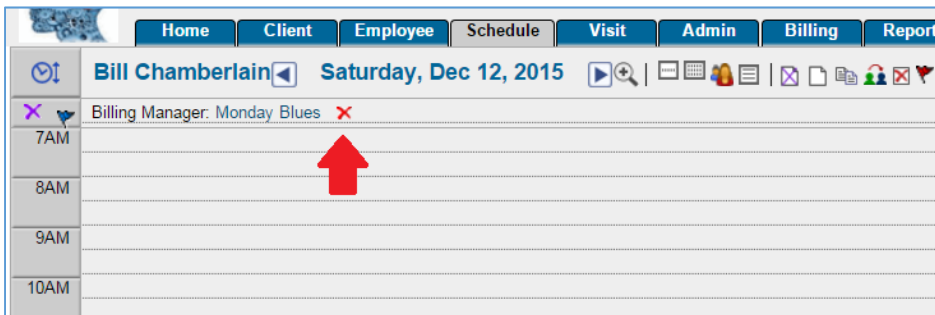
Function:

- Determines whether a Profile will be able to delete a notification, alert, to do item, etc. from the Day View Schedule.
 - **NOTE:** If a notification is deleted that was created for multiple Employees, it is removed for all.

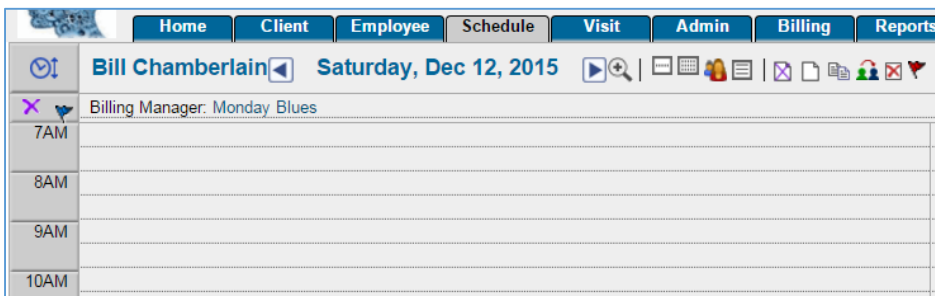
Location(s) this setting affects:

- Schedule Tab -> Day View
- Home Tab -> Notification Events

Screenshots:



When NotificationDelete is ENABLED



When NotificationDelete is DISABLED

NotificationRelink

Function:

- Determines whether the green and red “Relink Notifications” icon appears on the Schedule tab.

Location(s) this setting affects:

- Schedule Tab
- Employee Page -> Employee Nav Bar -> Schedule

Screenshots:

| Bill Chamberlain | | Feb 14 - Feb 20 2016 | | | | | |
|------------------|--------------|----------------------|--------------|--------------|----------|----------|----------|
| | SUN 2/14 | MON 2/15 | TUE 2/16 | WED 2/17 | THU 2/18 | FRI 2/19 | SAT 2/20 |
| ✖ | 1 Late Event | 1 Late Event | 1 Late Event | 1 Late Event | | | |

When NotificationRelink is ENABLED

| Bill Chamberlain | | Feb 14 - Feb 20 2016 | | | | | |
|------------------|--------------|----------------------|--------------|--------------|----------|----------|----------|
| | SUN 2/14 | MON 2/15 | TUE 2/16 | WED 2/17 | THU 2/18 | FRI 2/19 | SAT 2/20 |
| ✖ | 1 Late Event | 1 Late Event | 1 Late Event | 1 Late Event | | | |

When NotificationRelink is DISABLED

PlannerAdd

Function:

- If PlannerAddOther is disabled, having PlannerAdd enabled will allow you to still add scheduled visits to your own Schedule.
 - **NOTE:** To clarify, even if PlannerAdd is disabled, you will still be able to add schedule entries to your own schedule if PlannerAddOther is enabled. So this setting only has effect if PlannerAddOther is disabled.
 - **NOTE:** If both settings are disabled, an Insufficient Rights message will appear on the pop-up when trying to add a schedule entry.

Location(s) this setting affects:

- Schedule Tab
- Employee Page -> Employee Nav Bar -> Schedule

Screenshots:

Add To Schedule:

Client: --- Select Client ---

Visit Type: --- Select Visit Type ---

Location: --- Optional: Location ---

Date: THU, Jul 14 Planned:

Time: 1:00 PM Duration: 0:15

Group Activity: Activity Type: --- Optional: Type ---

Add to Waitlist: Waitlist Notes:

Notes:

Schedule Schedule & Add 2nd Emps Begin Visit Cancel Recurrence

When PlannerAdd is ENABLED

**You do not have sufficient access rights to use this function.
Please contact the system administrator or Credible support.**

When PlannerAdd is DISABLED

PlannerAddOther

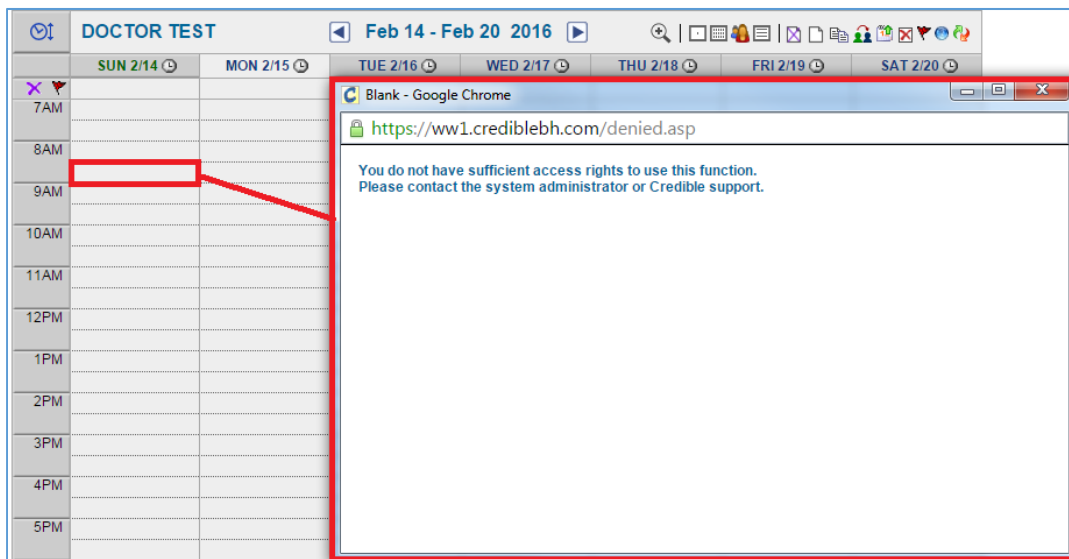
Function:

- Determines whether the user can add a Schedule entry for another user.
 - If disabled, the user will receive an Insufficient Rights message on the pop-up that displays.
 - **NOTE:** The user will still be able to add entries on their own Schedule if PlannerAdd is enabled.

Location(s) this setting affects:

- Schedule Tab
- Employee Page -> Employee Nav Bar -> Schedule

Screenshots:



When PlannerAddOther is DISABLED

PlannerDelete

Function:

- Determines whether the “Delete” button displays when viewing a Scheduled Entry that has not yet been completed.

Location(s) this setting affects:

- Schedule Tab -> Clicking a non-completed Scheduled Entry.

Screenshots:

THU 07:45 AM - 08:45 AM

Client: Don Draper (6843)

Secondary Employees: Assign Secondary

Program / Visit Type: 1: VisitTest

Location: -- SELECT --

Scheduled Time: 7:45 AM Duration: 1:00 Payer: AetnaHMO

Status: SCHEDULED Planned: Scheduled By:

Scheduled Date: 2/11/2016 Copay: Add Copay

Waitlisted: Waitlist Notes:

Schedule Notes:

Save Begin Visit **Delete** Close Recurrence

When PlannerDelete is ENABLED

THU 07:45 AM - 08:45 AM

Client: Don Draper (6843)

Secondary Employees: Assign Secondary

Program / Visit Type: 1: VisitTest

Location: -- SELECT --

Scheduled Time: 7:45 AM Duration: 1:00 Payer: AetnaHMO

Status: SCHEDULED Planned: Scheduled By:

Scheduled Date: 2/11/2016 Copay: Add Copay

Waitlisted: Waitlist Notes:

Schedule Notes:

Save Begin Visit Close Recurrence

When PlannerDelete is DISABLED

PlannerFrontDesk

Function:

- When enabled, the User will immediately be brought to the Team View Schedule when logging in.
 - Typically utilized by Front Desk Staff.
 - The user will also see this version of the Schedule when clicking the Schedule Tab.

Location(s) this setting affects:

- Page when logging in
- Schedule Tab

Screenshots:

| | Adams, A | Baker, D | Barber, N | Baum, M | Beasley, J | Body, B | Chamberlain, B |
|------|--------------|----------|-----------|--------------|------------|---------|----------------|
| 7AM | 1 Late Event | | | 1 Late Event | | | 1 Late Event |
| 8AM | | | | | | | |
| 9AM | | | | | | | |
| 10AM | | | | | | | |
| 11AM | | | | | | | |
| 12PM | | | | | | | GeoArea |
| 1PM | | | | | | | |

Page you're brought to on Login with PlannerFrontDesk ENABLED

PlannerReassign

Function:

- Determines whether the user will see the “Reassign” icon when viewing an Employee’s schedule.

Location(s) this setting affects:

- Schedule Tab
- Employee -> Employee Nav Bar -> Schedule

Screenshots:

The screenshot shows a calendar for Bill Chamberlain from Feb 7 to Feb 13, 2016. The calendar grid shows '1 Late Event' for each day from Sunday to Thursday. On Thursday, there are three events: Draper, D (07:45 AM-08:45 AM), Draper, D (09:00 AM-10:00 AM), and Aaron, A (11 AM). From 12 PM to 2 PM, the calendar shows 'GeoArea' for Thursday, Friday, and Saturday. A red arrow points to the 'FRI 2/12' header, where a 'Reassign' icon (a person with a plus sign) is visible.

When PlannerReassign is ENABLED

This screenshot is identical to the one above, showing the same calendar for Bill Chamberlain. However, the 'Reassign' icon is not present on the Friday header, indicating that the PlannerReassign setting is disabled.

When PlannerReassign is DISABLED

PlannerResourceDelete

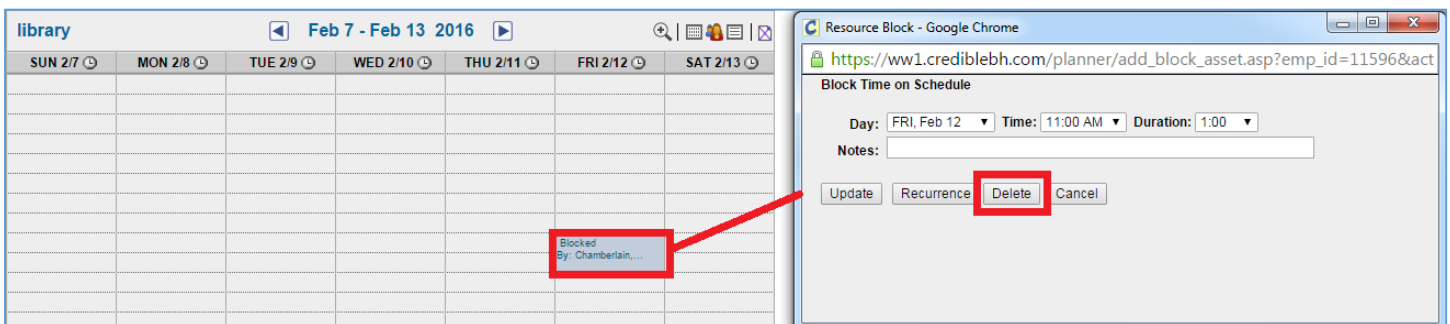
Function:

- Determines whether the user will be able to click an existing schedule entry for a resource, and have the option to Delete it.
 - If disabled, the “Delete” button will not appear when viewing a scheduled resource entry.

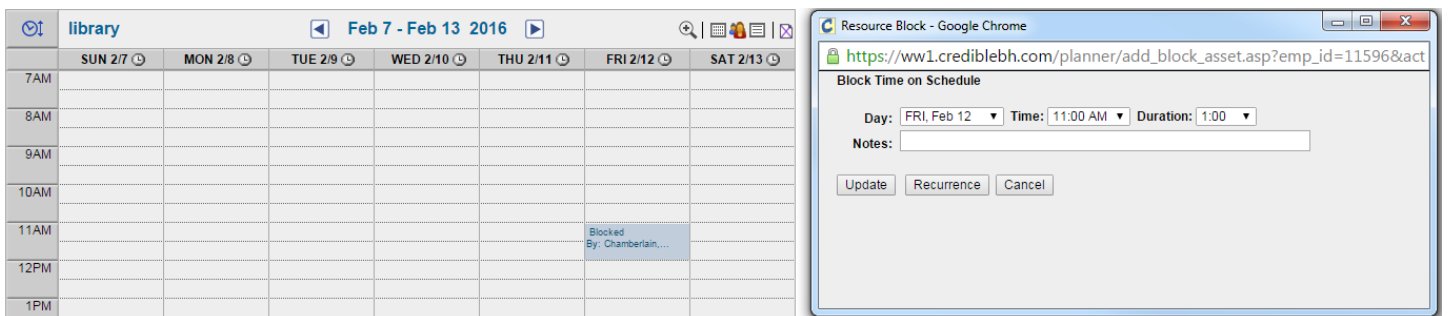
Location(s) this setting affects:

- Admin Tab -> Manage Resources -> Schedule Button -> Clicking an Existing Schedule Entry
- Employee -> Employee Nav Bar -> Resource Sched -> Schedule Button -> Clicking an Existing Schedule Entry

Screenshots:



When PlannerResourceDelete is ENABLED



When PlannerResourceDelete is DISABLED

PlannerResourceSchedule

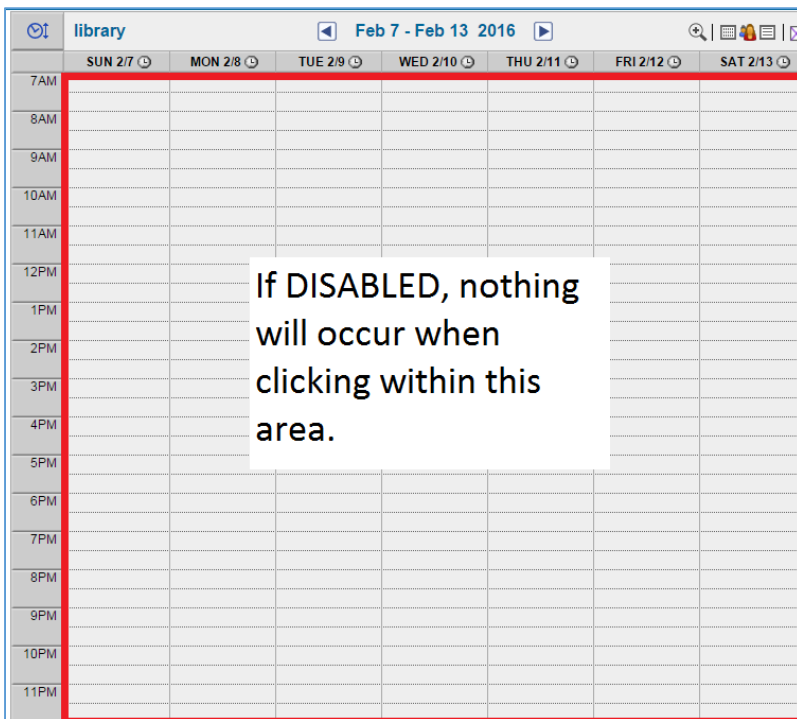
Function:

- Determines whether the user can click a cell on a resource’s schedule and create an entry.
 - If this setting is disabled, nothing will occur when the user clicks.
- NOTE: If ‘PlannerResourceView’ is disabled, this setting will have no effect, as the Schedule won’t be viewable.

Location(s) this setting affects:

- Admin Tab -> Manage Resources -> Schedule Button
- Employee -> Employee Nav Bar -> Resource Sched -> Schedule Button

Screenshots:



PlannerResourceView

Function:

- When viewing the Resource List, determines whether the user will be able to advance after clicking “Schedule” near a Resource entry.
 - If this setting is disabled, then the user will receive an “Insufficient Rights” message, and will not be able to view the Schedule for that Resource.
- **NOTE:** If the “ScheduleResources” Matrix setting is disabled, this setting will have no effect.

Location(s) this setting affects:

- Admin Tab -> Manage Resources -> Schedule Button
- Employee -> Employee Nav Bar -> Resource Sched -> Schedule Button

Screenshots:

| Resource List: | | | | | |
|----------------|----------|-------------|--------------------|--------|---|
| # | Resource | Description | Date Created Teams | | |
| 647 | | | 11/7/2012 | 2 Edit | <input type="button" value="edit"/> <input type="button" value="schedule"/> |
| 664 | Van | | 12/9/2012 | 2 Edit | <input type="button" value="edit"/> <input type="button" value="schedule"/> |
| 718 | library | | 1/21/2013 | 2 Edit | <input type="button" value="edit"/> <input type="button" value="schedule"/> |
| 719 | office | | 1/21/2013 | 1 Edit | <input type="button" value="edit"/> <input type="button" value="schedule"/> |
| 741 | | | 2/4/2013 | 1 Edit | <input type="button" value="edit"/> <input type="button" value="schedule"/> |

You do not have sufficient access rights to use this function. Please contact the system administrator or Credible support.

When PlannerResourceView is DISABLED

PlannerTemplateAdmin

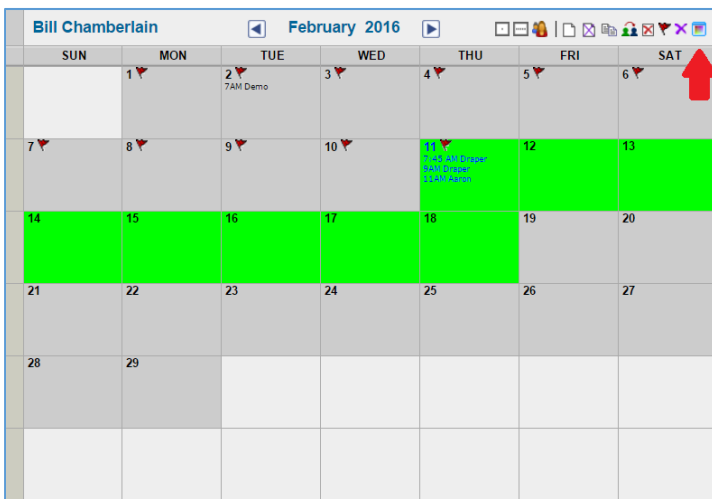
Function:

- Determines whether the user can set a Template on an Employee's schedule when viewing it from the Month View.
 - If this setting is Disabled, the icon used to set the Template will not appear on the schedule.

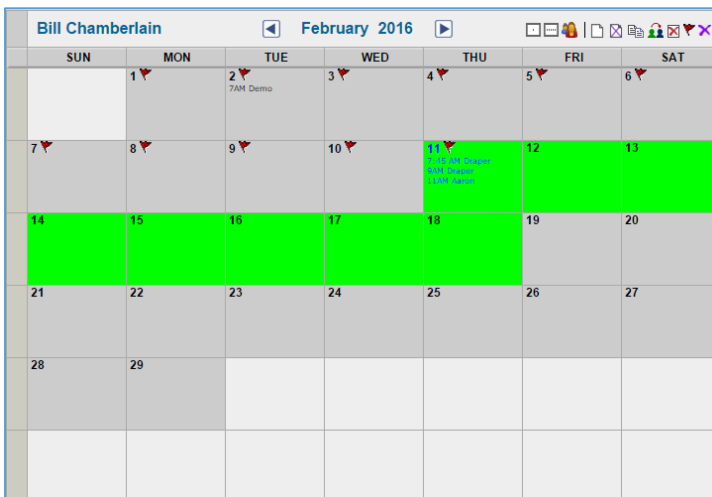
Location(s) this setting affects:

- Schedule -> Month View
- Employee -> Employee Nav Bar -> Schedule -> Month View

Screenshots:



When PlannerTemplateAdmin is ENABLED



When PlannerTemplateAdmin is DISABLED

PlannerTemplateCreate

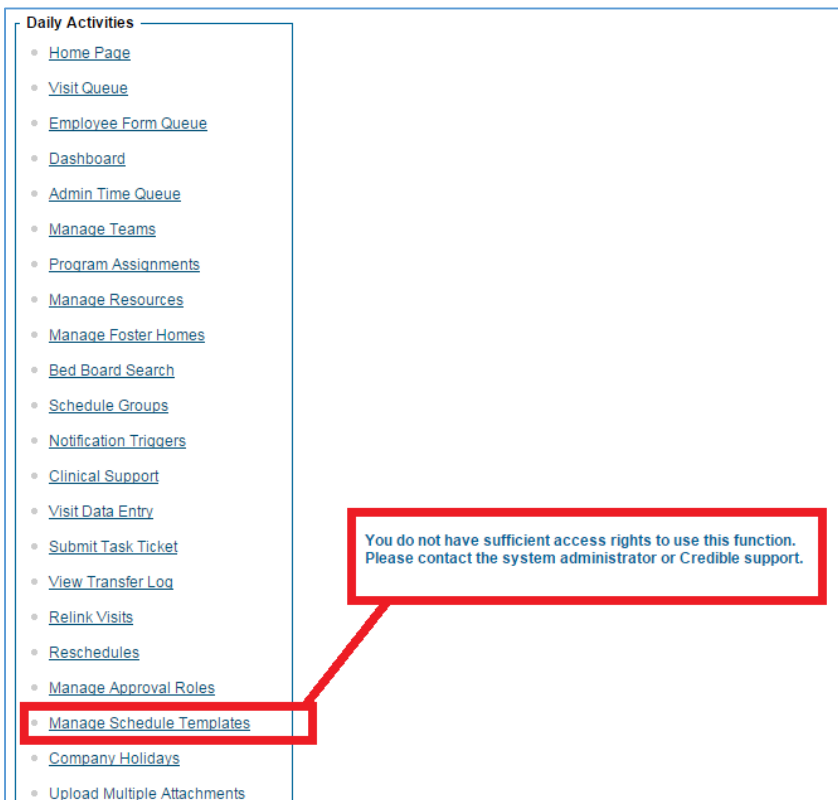
Function:

- Determines whether the user can access the “Manage Schedule Templates” link within the Admin Tab.
 - If this setting is disabled, the user will receive an Insufficient Rights message when clicking the link.

Location(s) this setting affects:

- Admin Tab -> Manage Schedule Templates

Screenshots:



When PlannerTemplateCreate is DISABLED

PlannerUpdateOther

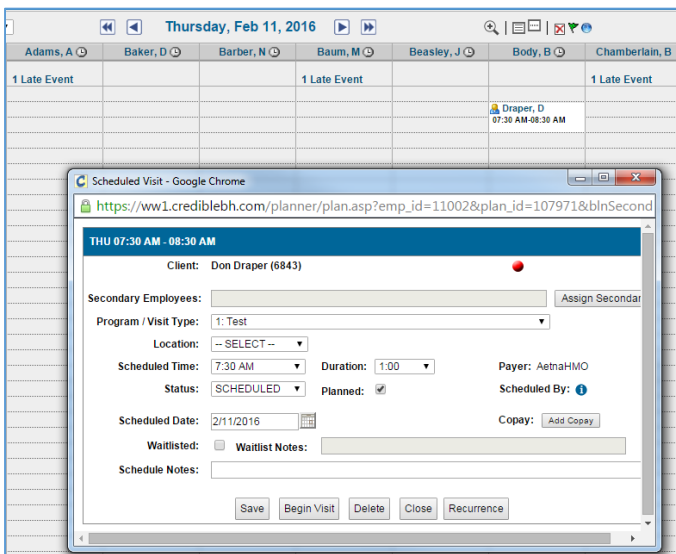
Function:

- Determines whether the user can update the Scheduled Visits of others.
 - If Disabled, an Insufficient Rights message appears in the pop-up window.

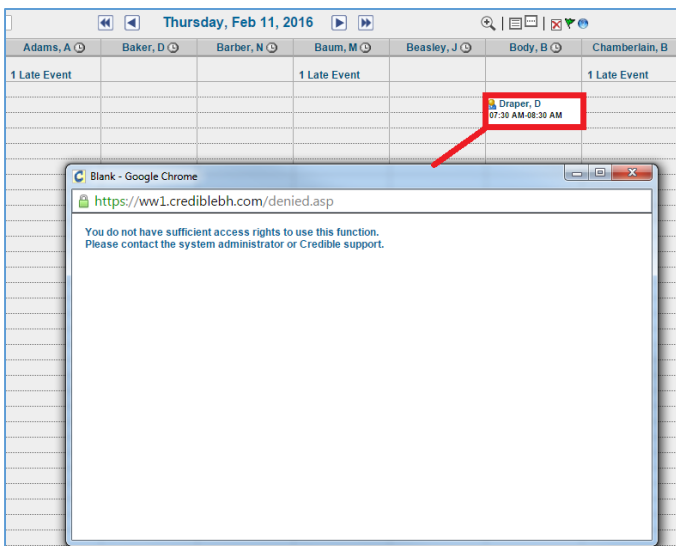
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Schedule
- Schedule Tab

Screenshots:



When PlannerUpdateOther is ENABLED



When PlannerUpdateOther is DISABLED

PlannerView

Function:

- Determines whether the user can view any Schedule, including their own.
 - If disabled, the user will receive an Insufficient Rights message when clicking the 'Schedule' tab.
- Allows the 'Schedule' button to display on the Employee Nav Bar. If this setting is disabled, that button will not appear.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Schedule
- Schedule Tab

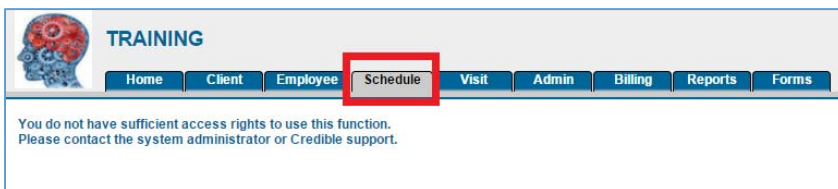
Screenshots:



When PlannerView is ENABLED



When PlannerView is DISABLED



When PlannerView is DISABLED

PlannerViewAll

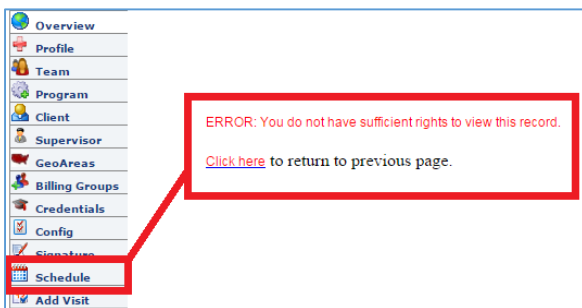
Function:

- Affects whether the user will be able to view ALL Employee's schedules.
- **NOTE:** If the 'PlannerViewTeam' Matrix setting is enabled, the user will still be able to view the schedules of those Employees on the same Team, but ONLY in Team View. If the user then tries to view the individual schedule of one of their teammates, they will receive an error.
- If the PlannerView Matrix setting is disabled, this setting will have no effect.

Location(s) this setting affects:

- Employee Page (that is not your Employee page) -> Employee Nav Bar -> Schedule
- Schedule -> Team View -> Clicking an Employees Name that is not yours

Screenshots:



When PlannerViewAll is DISABLED

PlannerViewTeam

Function:

- Affects whether the user will be able to see the 'Team View' icon when viewing the Schedule tab.
- If the PlannerView Matrix setting is disabled, this setting will have no effect.

Location(s) this setting affects:

- Schedule

Screenshots:

The screenshot shows a calendar interface for 'Bill Chamberlain' from Feb 7 to Feb 13, 2016. The calendar grid shows '1 Late Event' for each day from Sunday to Wednesday. In the top navigation bar, the 'Team View' icon (represented by a group of people) is visible and highlighted with a red arrow.

With PlannerViewTeam ENABLED

The screenshot shows the same calendar interface for 'Bill Chamberlain' from Feb 7 to Feb 13, 2016. The calendar grid shows '1 Late Event' for each day from Sunday to Wednesday. In this view, the 'Team View' icon is not visible in the top navigation bar.

With PlannerViewTeam DISABLED

Reschedule

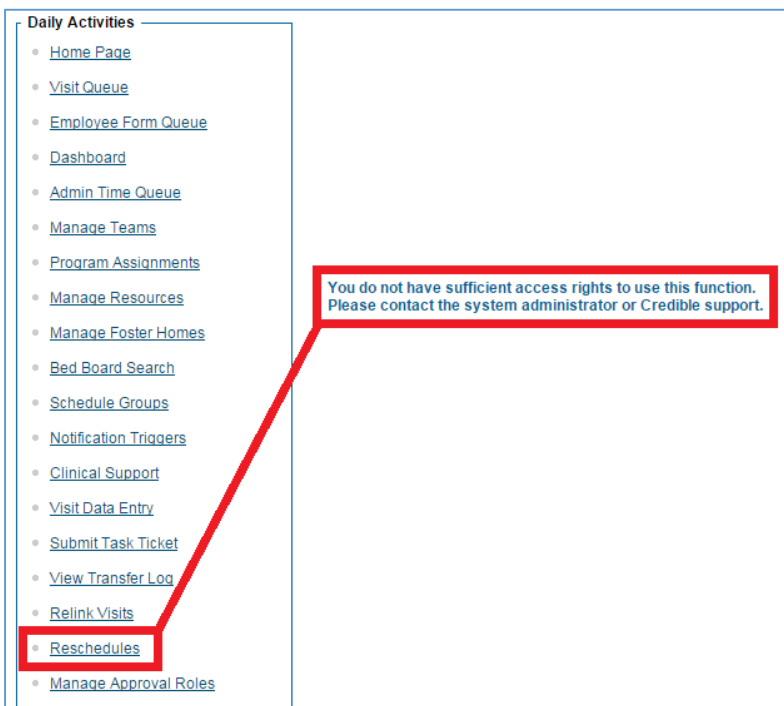
Function:

- Affects whether the “Reschedules” link on the Admin Tab will be accessible.
 - If this setting is disabled, the link will still display, but the user will receive an Insufficient Rights message when

Location(s) this setting affects:

- Admin Tab -> Reschedule

Screenshots:



When Reschedule is DISABLED

ResourceAdd

Function:

- Affects whether the “New Resource” button will display on the Manage Resources page that is accessed from the Admin Tab.

Location(s) this setting affects:

- Admin Tab -> Manage Resources

Screenshots:

Resource List:

| # | Resource | Description | Date Created | Teams |
|---|-----------------|-------------|--------------|--|
| 2 | Board Room | | 9/24/2014 | 0 Edit <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="schedule"/> |
| 4 | Conference Room | | 9/24/2014 | 0 Edit <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="schedule"/> |
| 5 | Northend | | 11/30/2015 | 1 Edit <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="schedule"/> |
| 3 | Vehicle 1 | | 9/24/2014 | 0 Edit <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="schedule"/> |

Resource: Description:

With ResourceAdd ENABLED

Resource List:

| # | Resource | Description | Date Created | Teams |
|---|-----------------|-------------|--------------|--|
| 2 | Board Room | | 9/24/2014 | 0 Edit <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="schedule"/> |
| 4 | Conference Room | | 9/24/2014 | 0 Edit <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="schedule"/> |
| 5 | Northend | | 11/30/2015 | 1 Edit <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="schedule"/> |
| 3 | Vehicle 1 | | 9/24/2014 | 0 Edit <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="schedule"/> |

With ResourceAdd DISABLED

ScheduleResources

Function:

- Affects whether the “Resource Sched” button will display on the Employee Nav Bar.

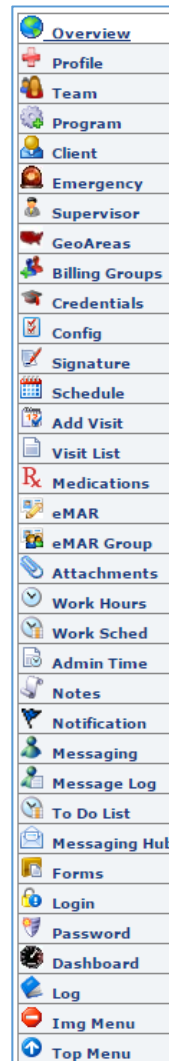
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Resource Sched

Screenshots:



With ScheduleResources ENABLED



With ScheduleResources DISABLED

Matrix Section: Standing Order Sets

SOSActivate

Function:

- Determines whether the user will be able to activate Standing Order Sets on the “Standing Order Sets Admin” page. If disabled, the “Activate” button will not display.

Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Activate Button

Screenshots:

Standing Order Sets Administration

Show Deactivated

| ID | Name | Employee | Date Activated | Date Deactivated | | | | |
|----|--------------------------|----------|----------------|------------------|------|------|-----------------|-------|
| 13 | Tylenol_Test (- DRAFT -) | 0 | | | View | Edit | Activate | Clone |

10 items per page 11 - 11 of 11 items

Create Order Set

When SOSActivate is ENABLED

Standing Order Sets Administration

Show Deactivated

| ID | Name | Employee | Date Activated | Date Deactivated | | | | |
|----|--------------------------|----------|----------------|------------------|------|------|--|-------|
| 13 | Tylenol_Test (- DRAFT -) | 0 | | | View | Edit | | Clone |

10 items per page 11 - 11 of 11 items

Create Order Set

When SOSActivate is DISABLED

SOSAdmin

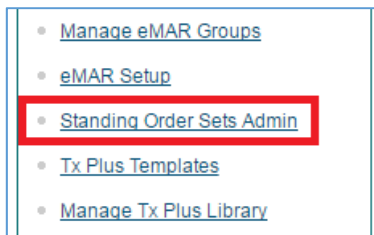
Function:

- Determines whether the user will be able to access the “Standing Order Sets Admin” page. If disabled, the link will not display.

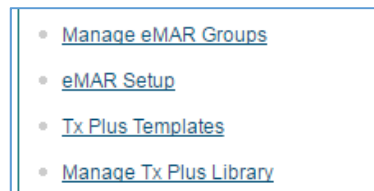
Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin

Screenshots:



When SOSAdmin is ENABLED



When SOSAdmin is DISABLED

SOSAssignEmployee

Function:

- Determines whether the user will be able to assign Employees to Standing Order Sets via the “Standing Order Sets Admin” page. If disabled, the number in the Employee column will not be able to be clicked, and will be read-only.

Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Number Under Employee Column

Screenshots:

Standing Order Sets Administration Show Deactivated

| ID | Name | Employee | Date Activated | Date Deactivated | |
|----|--------------------------|----------|----------------|------------------|--------------------------|
| 13 | Tylenol_Test (- DRAFT -) | 0 | | | View Edit Activate Clone |

10 items per page 11 - 11 of 11 items

Create Order Set

When SOSAssignEmployee is DISABLED, this number will not be able to be clicked.

SOSClone

Function:

- Determines whether the user will be able to Clone Standing Order Sets via the “Standing Order Sets Admin” page. If disabled, the “Clone” button will not display.

Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Clone Button

Screenshots:

Standing Order Sets Administration Show Deactivated

| ID | Name | Employee | Date Activated | Date Deactivated | | | | |
|----|--------------------------|----------|----------------|------------------|-------------------------------------|-------------------------------------|---|--------------------------------------|
| 13 | Tylenol_Test (- DRAFT -) | 0 | | | <input type="button" value="View"/> | <input type="button" value="Edit"/> | <input type="button" value="Activate"/> | <input type="button" value="Clone"/> |

10 items per page
11 - 11 of 11 items

When SOSClone is ENABLED

Standing Order Sets Administration Show Deactivated

| ID | Name | Employee | Date Activated | Date Deactivated | | | | |
|----|--------------------------|----------|----------------|------------------|-------------------------------------|-------------------------------------|---|--|
| 13 | Tylenol_Test (- DRAFT -) | 0 | | | <input type="button" value="View"/> | <input type="button" value="Edit"/> | <input type="button" value="Activate"/> | |

10 items per page
11 - 11 of 11 items

When SOSClone is DISABLED

SOSDeactivate

Function:

- Determines whether the user will be able to Deactivate any Activated Standing Order Sets via the “Standing Order Sets Admin” page. If disabled, the “Deactivate” button will not display.

Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Deactivate Button

Screenshots:

Admin > Standing Order Sets Admin

Standing Order Sets Administration

Show Deactivated

| ID | Name | Employee | Date Activated | Date Deactivated | | | |
|----|--------------|----------|---------------------------|------------------|------|-------------------|-------|
| 13 | Tylenol_Test | 0 | 06/15/2016 06:21 PM (UTC) | | View | Deactivate | Clone |

Navigation: << < 1 2 3 > >> 5 items per page 11 - 11 of 11 items

Create Order Set

When SOSDeactivate is ENABLED

Standing Order Sets Administration

Show Deactivated

| ID | Name | Employee | Date Activated | Date Deactivated | | | |
|----|--------------|----------|---------------------------|------------------|------|--|-------|
| 13 | Tylenol_Test | 0 | 06/15/2016 06:21 PM (UTC) | | View | | Clone |

Navigation: << < 1 2 > >> 10 items per page 11 - 11 of 11 items

Create Order Set

When SOSDeactivate is DISABLED

SOSUpdate

Function:

- Determines whether the user will be able to update or add Standing Order Sets via the “Standing Order Sets Admin” page. If disabled, the “Edit” and “Create Order Set” buttons will not display.

Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Edit Button
- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Create Order Set Button

Screenshots:

Standing Order Sets Administration Show Deactivated

| ID | Name | Employee | Date Activated | Date Deactivated | | | |
|----|--------------------------|----------|----------------|------------------|------|-------------|----------------|
| 13 | Tylenol_Test (- DRAFT -) | 0 | | | View | Edit | Activate Clone |

10 items per page 11 - 11 of 11 items

Create Order Set

When SOSUpdate is ENABLED

Standing Order Sets Administration Show Deactivated

| ID | Name | Employee | Date Activated | Date Deactivated | | | |
|----|----------------------------------|----------|----------------|------------------|------|----------|-------|
| 16 | Tylenol_Test (Clone) (- DRAFT -) | 0 | | | View | Activate | Clone |

10 items per page 11 - 11 of 11 items

When SOSUpdate is DISABLED

SOSView

Function:

- Determines whether the user will be able to view the details on Standing Order Sets via the “Standing Order Sets Admin” page. If disabled, the “View” button will not display.

Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> View Button

Screenshots:

Standing Order Sets Administration Show Deactivated

| ID | Name | Employee | Date Activated | Date Deactivated | | | | |
|----|--------------------------|----------|----------------|------------------|-------------|------|----------|-------|
| 13 | Tylenol_Test (- DRAFT -) | 0 | | | View | Edit | Activate | Clone |

10 items per page 11 - 11 of 11 items

Create Order Set

When SOSView is ENABLED

Standing Order Sets Administration Show Deactivated

| ID | Name | Employee | Date Activated | Date Deactivated | | | | |
|----|----------------------------------|----------|----------------|------------------|--|------|----------|-------|
| 16 | Tylenol_Test (Clone) (- DRAFT -) | 0 | | | | Edit | Activate | Clone |

10 items per page 11 - 11 of 11 items

Create Order Set

When SOSView is DISABLED

No part of this training material, or any other materials available through Credible Behavioral Health Software, may be reproduced in whole or in part in any manner without the permission of Credible Behavioral Health, Inc.

Copyright © 2016 Credible Behavioral Health, Inc. All Rights Reserved.