November 2014

Version 9.2 Configuration

CREDIBLE
Behavioral Health Software

Confidential & Proprietary

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GENERAL

Text and Email Appointment Reminder Enhancements

Previously, client-requested email and text appointment reminders were all sent at 8:00pm Eastern Time.

Reminders are now sent based on the appointment time in the Partner's time zone. For example, if the Client requests reminders one day ahead, a 3:00pm Monday appointment will be sent at approximately 3:00pm on Sunday local time (or 3:00pm Saturday for two days ahead, or 3:00pm Friday for three days ahead, etc.).

Additionally, same-day reminders can now be sent four hours prior to the scheduled appointment. If the Client wishes to receive same-day reminders, the `reminder_days_ahead` field on the Client Profile must be set to 0.

For additional information on text and email reminders, please see Credible Help.

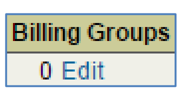
BILLING

Auto-Assign Billing Groups

Billing Groups may now be automatically assigned to all Employee members of a specified Team. If an Employee is removed from a Team, any Billing Groups automatically assigned to that Employee — but not those directly assigned via Billing Group on the Employee Nav Bar — are unassigned. Please note: Billing Groups assigned directly to an Employee are not unassigned via this process.

Configuration

1. Go to **Admin Tab** > **Daily Activities** > **Manage Teams**.
2. Click **New Team** to create team, if necessary.
3. Find desired Team and click **Edit** link in **Billing Groups** column.



4. Click **Assign** button for each Billing Group to be automatically assigned to the Team.

Security

Login Profile Security Enhancement

To enhance security, Login Profile Codes can now be flagged as Invisible. An Invisible Profile Code will only appear to users who have been assigned that Profile Code.

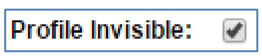
For example, responsibility for adding new Employees to the system is often assigned to Human Resources personnel or Supervisors, neither of whom typically have Admin rights. When all Profile Codes are visible, they have the ability to create a new Admin level user.

When the Admin Profile is set to Invisible, it will not be available in the dropdown list when HR or Supervisors (or other non-Admin users) create or update new Employees.

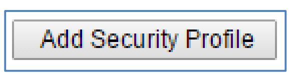
Configuration

Creating a New Restricted Access Login Profile

1. Go to **Admin Tab** > **Security Configuration** > **Login Profiles.**
2. Click the **Add a New Security Profile Entry** link.
3. Check **Profile Invisible** box.



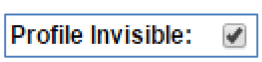
4. Click **Add Security Profile** button.



Add Restricted Access to an Existing Login Profile

1. Go to **Admin Tab > Security Configuration > Login Profiles**.
2. Click **Edit** button by desired **Profile Code**.

3. Check **Profile Invisible** box.



4. Click **Save** button.

Require Employee Team Assignment

When adding a new Employee, Agencies can require the assignment of that Employee to a Team before allowing the Employee to be saved to the system. (This is essentially the same as the **Force Client Teams** setting.)

Configuration

To enable this feature:

1. Go to **Admin Tab** > **Partner Config** > **General Settings**.
2. Check the **Force Employee Teams** box.


3. Click **Save Partner Config** button.

Limit Client and Employee Team Visibility

Agencies may now limit Employees to assigning a Client or Employee to a Team of which the Employee is a member. For example:

A. The Partner provides PACT services and has five PACT teams.

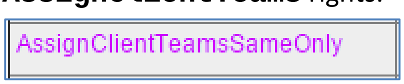
B. A Client is placed on one of the PACT teams by a high-level supervisor.

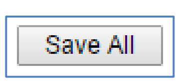
C. The PACT supervisor is assigned to all five PACT teams and has the new **AssignClientTeamOnly** and **AssignEmployeeTeamOnly** rights. She can move the client to a different PACT team as needed but couldn't assign the client to a Medical services team.

The same scenario applies to the Employees she supervises; she can add an Employee to a second PACT team for vacation coverage, but can't add that Employee to a Medical services team.

Configuration

To restrict assignment of Clients to Teams:

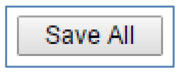
1. Go to **Admin Tab** > **Security Settings** > **Security Matrix**.
2. Go to **Assignments**.
3. Check **`AssignClientTeamsSameOnly`** in the appropriate column for the Profile you want to restrict. This Profile must also have **`AssignClientTeams`** rights.


4. At the bottom of the page, click **Save All**.


To restrict assignment of Employees to Teams:

1. Go to **Admin Tab** > **Security Settings** > **Security Matrix**.
2. Go to **Assignments**.
3. Check **`AssignEmployeeTeamsSameOnly`** in the appropriate column for the Profile you want to restrict. This Profile must also have **`AssignEmployeeTeams`** rights.

4. At the bottom of the page, click **Save All**.



Enhanced Attachment Folder Functions

Attachment Folders have been given three new Security Matrix lines, enhancing an Agency's ability to control access to Folders via Login Profiles.

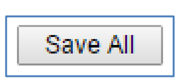
- **View Client Folders by Team** limits the Employee to viewing those Folders that are assigned to their own Teams.
- **Create Client Folders by Team** limits the Employee to creating new Folders assigned to their own Teams.
- **Add Client Files by Team** limits the Employee to attaching files to Folders assigned to their own Teams.

Configuration

All three of these functions are configured in a similar fashion.

1. Go to **Admin Tab** > **Security Settings** > **Security Matrix**.
2. Go to **Attachments**.
3. Check the desired restriction(s) in the appropriate column for the Profile you want to limit.

4. At the bottom of the page, click **Save All**.



PATCH NOTES

General

Extended session time display

During extended user sessions, the time displayed on the screen would become out of sync with the servers, while still remaining correct internally and in documentation.

Resolution

While there was no error in the data being stored, the screen display method was changed to update with greater frequency, removing the appearance of inaccuracy.

Multiple file upload status messages

When uploading multiple files, unclear or incorrect status messages were sometimes displayed, implying that files were not uploaded successfully.

Resolution

Extensive rewriting and error handling was implemented for multiple file uploads to account for varying scenarios.

Billing

Medicare Secondary Type Code

After a Medicare Secondary Type Code is assigned and saved, it is not selected by default when the Client's Insurance is later updated, causing it to be removed when saving the changes.

Resolution

The software now properly loads the Secondary Type Code (if any) as the default when editing a Client's Insurance record.

CMS 1450 Printing

When printing a CMS 1450, Box 5 (Federal Tax ID) was not including leading zeroes in the ID number.

Resolution

The data type for Box 5 was changed from a number to text, retaining the leading zeroes (if any).

AMT*D updates when payment is retracted

Scenario: A payment has been batched to Payer A and subsequently retracted. The Visit is then batched to Payer B. The retracted amount was incorrectly included in the 837 as a Payer Paid Account.

Resolution

The batching procedures now skip all retracted payments during the relevant loops (e.g., 2320). Payments that have been retracted or undone will no longer appear in the 837 as Payer Paid Amounts.

General ledger updates when Payment Location changes

When **Use Multiple Cash Accounts** has been turned on (via the Revenue/AR Setup and Config), the Payment Location dropdown determines the account code. If the payment was edited to reflect a different Location, the ledger lines were not being updated, leading to cash remaining in an incorrect account.

Resolution

Updating a Payment now updates the appropriate Credit and Debit accounts on unbatched Ledger lines.

eRx

Prescription printing enhancements

Line spacing was inefficient and occasionally inaccurate when printing certain prescriptions.

Resolution

Improved print output on printed prescriptions, including GeoArea address printing.

Medication admin schedule change to allow extended instructions

User cannot create a medication admin schedule due to a special documentation error.

Resolution

The error was caused by mismatched maximum field lengths for the comments and instructions applying to the medication entry. The maximum field lengths have been increased to permit longer instructions.

eMAR

New color selections display

When adding or updating an eMAR response for the Treat as Taken status, the color-coding for that response did not immediately appear on the eMAR schedule.

Resolution

Each time an eMAR response type is added or edited, the color selection style sheet is rebuilt and sent to the user.

Employee

Admin Approval timestamp

When Admin Time records were marked Approved at time of entry, the approver information was not saved.

Resolution

Procedures have been modified to ensure that the approver, approval time, and approval status are all saved when Admin Time is approved immediately upon entry.

Appointment reassigning processes enhanced

When an appointment was reassigned to another Employee, the system did not check to ensure the new Employee's schedule was clear at the requested time, or that the Partner Config setting allowed conflicting schedules. This sometimes caused double-booking.

Resolution

Reassignment procedures now check Partner Config to see if conflicting schedules are allowed. If not, the user is given an error when attempting to reassign the Schedule, and the reassignment is canceled.

Forms

Boolean injection format standardized

Forms occasionally injected a Boolean format inconsistent with Partner Config settings; for example, showing “0” instead of “False”.

Resolution

Injection procedures now check Partner Config settings to determine the desired output for Boolean data.

Visit

Diagnosis dropdown display

Diagnosis dropdown lists sporadically appeared empty.

Resolution

Item names containing apostrophes were preventing dropdown lists from populating with choices, e.g., Alzheimer’s Disease. Information retrieved for dropdown lists is now encoded properly to allow for display.