CREDIBLE

April 2009 Software Release

Employee and Client View Updates

April 2009
Release Schedule Highlights

April 18, 2009

- Employee and Client View Enhancements
- Schedule Changes
- Incident Reporting
- Visit Upgrades
- Advanced Search Additions
- Billing and Payment Updates
- Incident Reporting
- Medication Updates
- New Reports

Next Release: June 20, 2009

- Look for an email with more info on what you can expect from the next Credible software release!

New Features Available April 18, 2009

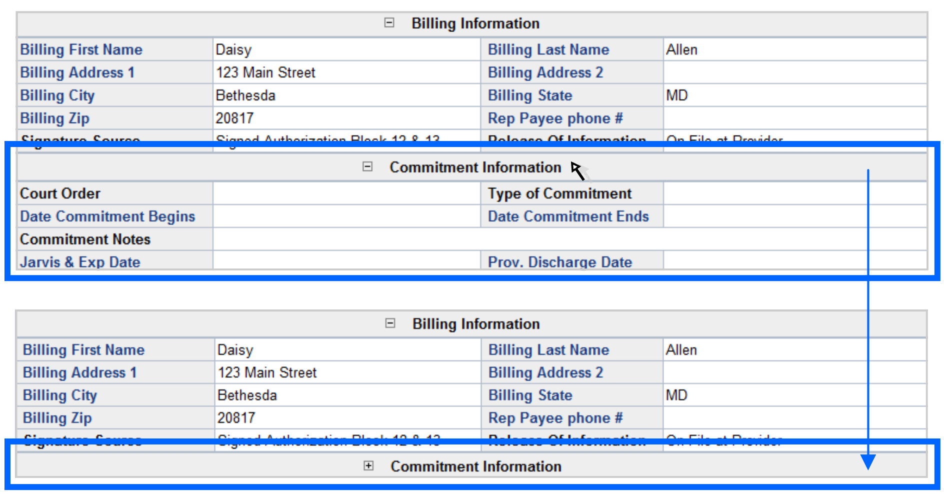
Credible delivers a multitude of new features and upgrades with Release 4.1. Several enhancements have been made to Employee and Client View screens. Visit updates allow you to have more control over visit lists and approvals. Additional fields and custom exports enable you to create even more ad hoc reports and templates. Other releases include Billing and Payment updates, Medication Enhancements, and new Reports.

Software Spotlight:
Employee and Client View Enhancements, Client Updates, Visit Upgrades, Advanced Search Additions, Billing and Payment Updates

Employee and Client View Enhancements

Manage Header Sections

Now you can choose to view only the information you need. With this new feature, you can collapse profile sections with a click of a button. Click on any header on the Employee or Client profile screen and it will collapse the section. Click it again and the section will open up. To default the section as closed just check Header Collapse in the Data Dictionary for that section.



Billing Information			
Billing First Name	Daisy	Billing Last Name	Allen
Billing Address 1	123 Main Street	Billing Address 2	
Billing City	Bethesda	Billing State	MD
Billing Zip	20817	Rep Payee phone #	
Signature Source	Signed Authorization Block 12 & 13	Release Of Information	On File at Provider

Commitment Information			
Court Order		Type of Commitment	
Date Commitment Begins		Date Commitment Ends	
Commitment Notes			
Jarvis & Exp Date		Prov. Discharge Date	

Billing Information			
Billing First Name	Daisy	Billing Last Name	Allen
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Signature Source	Signed Authorization Block 12 & 13	Release Of Information	On File at Provider

Commitment Information

Message Log Update

Keep track of both incoming and outgoing messages with this enhancement. Now both sent and received are viewable by clicking on the Message Log from the employee navigation bar.

Added Note Field on Authorizations

Include more information on Authorizations with this new feature. When adding a new Authorization, you can enter text in the new notes field. Once added, the Auth will have an info icon that will display the notes once you hover over the icon.

Complimentary
Webcast Tutorial on Software Upgrades!

Please email andorinha@credibleinc.com if you would like to sign up for a webcast to review the new features. Please indicate in the email which day you would like to attend. You will receive a confirmation email.

Webcast Schedule

Mon, April 20 2:00 PM ET

Fri, April 24 2:00 PM ET

Mon, April 27 2:00 PM ET

Client Updates

Admin Tool for Axis III

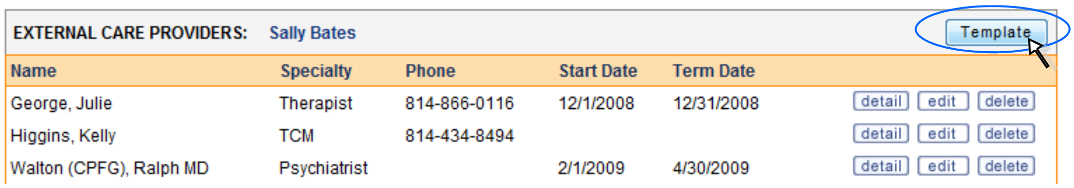
Axis III now can be modified like Axis I & II. From the rights-based Admin Tab, locate the Axis III link and click on it. From the Axis III Category List, click on a row and the Axis III List will display the Codes along with the ability to add, edit and delete them.

Client Age Date/Statement Message

Improve your cash flow with this enhancement. Create default Statement Messages from Employee Config. Enter any message you would like to set as a default to populate Client Statement message. Save it and then run a client statement to see your new default message in action.

Releases per Provider and Form Letters

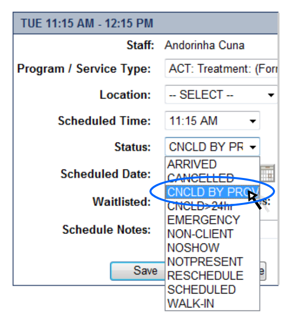
You now have the new ability to generate a form letter to providers. Once a new export or template is created using “ClientProviders” from the Export tool a Template button will be displayed on the Client External Providers screen. This new option populates a unique template for each provider in the list of external providers at once.



EXTERNAL CARE PROVIDERS: Sally Bates   Template

Name	Specialty	Phone	Start Date	Term Date	
George, Julie	Therapist	814-866-0116	12/1/2008	12/31/2008	detail edit delete
Higgins, Kelly	TCM	814-434-8494			detail edit delete
Walton (CPFG), Ralph MD	Psychiatrist		2/1/2009	4/30/2009	detail edit delete

Schedule Changes



Add Staff Cancelled Planner Status

Now you have the ability see which visits were cancelled by a provider with this new visit status. Select “CNCLD BY PROV” from the Scheduler Status drop down. Cancelled by Provider status will also display in the Schedule Status Report and on the Appointment Status graph on the dashboard.

Visible Range in Scheduler Change

Want to set your schedule to just 9 am to 5 pm? Now you can with this new feature. Set a time range for your schedule by selecting default times on Employee configuration. Choose your time for “Default Start for Schedule” and “Default End for Schedule” and your schedule will display your selected time range.

New Security Rights

Separate Security Right for Data Entry

You now have the ability to restrict the use of data entry when doing a encounter. Simply uncheck “VisitDataEntry” on the Security Matrix and the Data Entry button will no longer be accessible.

AR-GL Export Security Right

There is a new security right to conduct the AR-GL export.

Credible Software Tips:

Check here every release for easy-to-use tips from Credible team members.

Have you ever wished the Visit List queue displayed the same for all the ways you can access this list? Well, now you can identify in your Configuration screen (located on the Employee Navigation Bar), what the Visit List Queue can default to for the Employee List, Client List and Visit List.

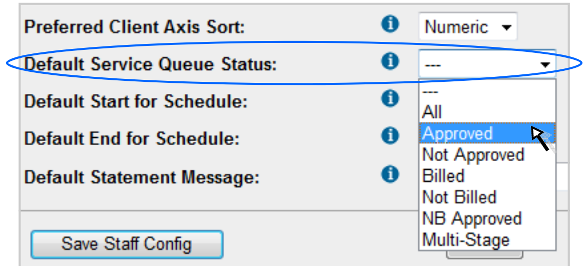
- Karen

Karen Riedling
Implementation Manager

Visit Upgrades

All Activity Default in Visit Queue

Set a default value for Visit status in Client Visit List, Employee Visit List, and Visit Tab. Simply go to Employee Config from the navigation bar and locate “Default Visit Queue Status.” Select “All”, “Approved,” or any desired status from the dropdown. All your Visit Lists will display this selected default status.

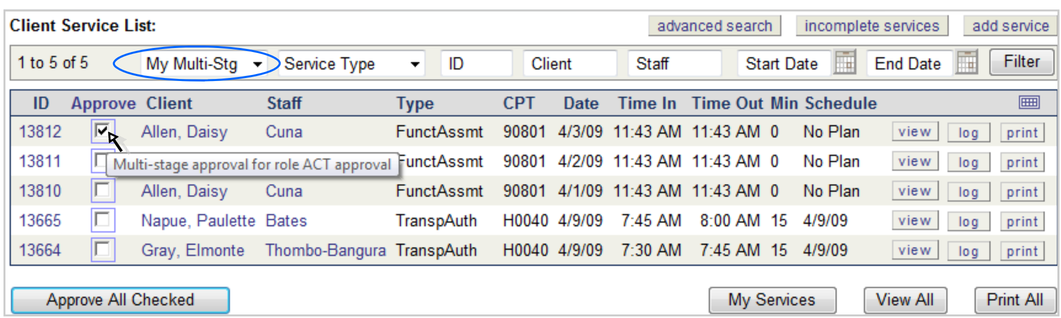


Display Red X in Visit List to All

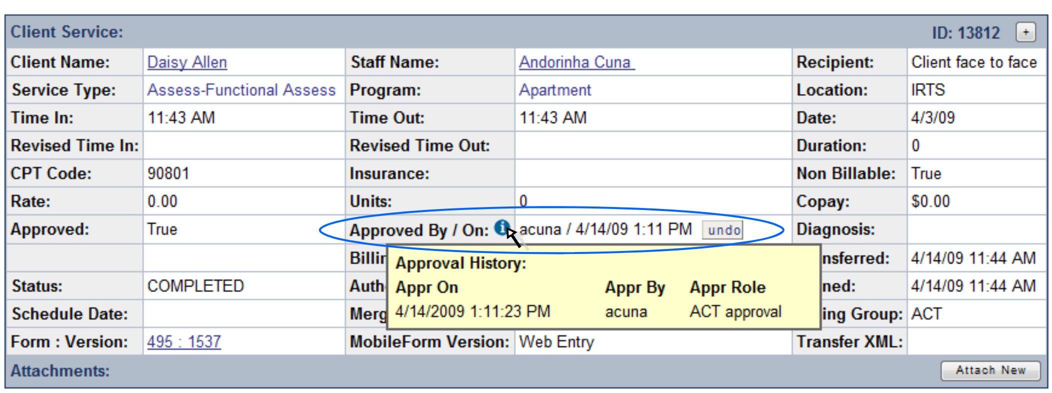
Red X now shows on Visit List, View, and Update screens even if an employee does not have approval rights. Giving employees the ability to see Red X issues so that they can be addressed when possible.

Approval Level Tracking and Multi-stage Unapproved

Multi-stage approval has been enhanced. Filter by “My Multi-Stg” on the Visit list to display visits that are currently at your approval role. Once the visit has been approved, “Approved By/On” will display the initials of who approved the visit and a date and time stamp. Hovering over the info icon will show Approval History.



A new “undo” button will also appear in the “Approved By/On” field. Press the 'undo' button and the Approval will be removed. This will enable you to back up approvals one approval at a time.



Release 4.2
Available in June 2009

Credible's commitment to innovation continues with new features and upgrades available on June 20, 2009. Look for an email from us with more info on what you can expect from the next Credible software release!

Advanced Search Additions and Enhancements

Create Exports and Templates from Client Advanced Search

Create a custom export and template directly from Client Advanced Search. Print out custom letters and forms quickly and easily with this new feature.

The first option is to create a visit or service, then generate a template or export. Select the criteria you want to filter on and check the "Show Add Visit Checkbox" and add the visits. The next page click Print Visit Templates. This button will only show if there exists an export on a form that matches the visit type of the visits that were just created.

Results:

Count	Client Name	Service ID	Results
1	Daisy Allen	13858	Success
2	Alex Doe	13859	Success
3	Dosy Doe	13860	Success
4	Elmer Fudd	13861	Success
5	Brad Smith	13862	Success

Print Service Templates

Return to advanced Client search.

You can also create a template and export directly from Client Advanced Search screen by checking the "Show Templates" checkbox. Select any template from the dropdown and press Generate Template.

☒ Hide ☐ Saved Reports ☐ Custom Fields ☐ Reset ☐ Multi Select ☑ Show Templates ☐ Show Add Service Checkbox

Template	ID	Last Name	Status	First Name	Client ID	Middle Initial
☑	277	Allen	ACTIVE	Daisy	277	
☑	1	Doe	ACTIVE	Alex	1	S
☑	2	Doe	ACTIVE	Dosy	2	
☑	4	Fudd	ACTIVE	Elmer	4	Z
☑	278	Smith	ACTIVE	Brad	278	
5						

Generate Template Client list

Program Codes Added to Custom Fields

Program Export Code and Core Service Codes are now represented in the Advanced Visit Search custom fields as "Exp Prog Code" and "Core Svc Code."

Client Age Date

New "Client Age Date" stores the date the visit is first put into a client statement. "Client Age Date" is in the Advanced Visit Search custom field section and "Past Due Days" is in the Advanced Client Search custom field section.

Billing Matrix External ID

Advanced Visit Search has a new custom field called Matrix External ID and is listed as "Matrix Ext ID" which displays the External Code.

Override Supervising Physician

The new override supervising physician flag is now a custom field in Advanced Visit Search as "Overrd Sup Phys." The new column will be populated with FALSE or TRUE.

Spread the Word!

Let your Agency know about all the new features that are coming out. Share these release notes with a colleague! Email andorinha@credibleinc.com with your request.

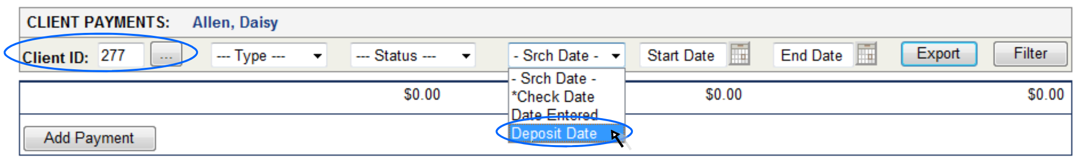
Billing and Payment Updates

Duplicate Billing Report Modification

Duplicate Billing Report has a new “Rate” and “Billable” columns and connectivity to the Billing Matrix. Click on one of the Billable items and you will be shown the Billing Matrix line.

Payment Screen Additions

Updates have been made to the Client Payments screen and the Insurance Payment screens. The Client Payment screen filter row now begins with Client ID and has a Search button. The Search Date drop down now includes Deposit Date, which is also displayed when the payment list is exported.



Manage Insurance Payments screen now includes the ID column and the Deposit Date column.

Bed Assignment/Insurance Billing

You can now set a rate for a bed to be used in Bed Board Billing. Go to your Client Navigation Bar and click “Bed Assign” to assign your client to a bed and then set a rate. This assigned rate will be used for the visit.

Crossover Batching

This new setting allows a non primary client insurance to not be available for batching for a payer by selecting the “Do Not Batch” checkbox from the Insurance detail screen. This will prevent the claim from being batched for crossover batching.

Day Program Duration Management

Bill full day visits and same day events accurately and easily with this new feature. Instead of editing an existing full day service to reflect time deductions, same day events will be deducted automatically by setting up “Subtract Overlapping Duration” and “Is Overlap to Subtract” in the Billing Matrix.

Incident Reporting

Security has been added to viewing incident forms. With the added security rights, only those that have been assigned to view the Incident Report will have access to it. Employees with the “ViewIncidentForm” right can view the completed form in the list/view or update screens.

New Notification Triggers have been added for both Client Incident Visit and Employee Incident Visit. When set, once a incident visit is complete it will send a notification to anyone with the “ViewIncidentForm” right who are assigned to the client (or employee if employee form).

We want to hear from you!

If you have an idea, question, or comment regarding Credible Software Releases or our release process, please call or email Credible today!

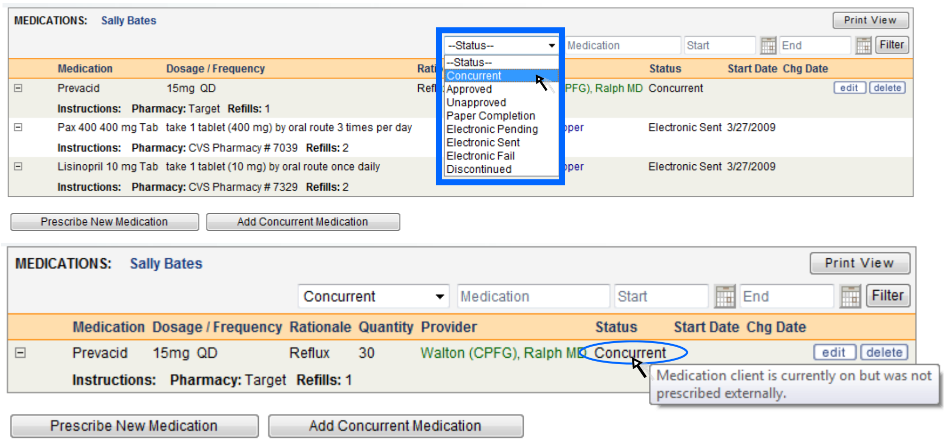
Medication Updates

Medication Notes

You can now choose to display or hide Medication Notes by selecting “Hide Medication Notes” on Partner Configuration.

Medication Screen Enhancements

A filter bar has been added to the medication list screen. Filter By Status, Medication or Date Range based on medication start date. Also the status field has been added to the list. Hover over a status to get a full description.



Nth Current Medication Notification

Receive a notification when N (any number) or more medications have been added by setting the new notification trigger “Nth or Greater Medication Added.”

New and Updated Reports

Employee Productivity Report

Determine employee productivity by running this new report, which displays Total Units completed per week against Expected Weekly Units per employee.

Program Filter on Appointment History Report

You now have the ability to filter by Program on Appointment History.

Login Report

The Login Report now displays IP addresses for each login.

Transcription Productivity Report

This new report measures transcription productivity by number of characters and total points by visit type.

Do you want to share these release notes with a colleague?
Email andorinha@credibleinc.com with your request.

Contact Us

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