Release 4.1 Configuration

Nth Current Medication Notification

A new notification trigger has been added: 'Nth or Greater Medication Added'. When selecting this notification type you can then add a specific value, this is where you enter the Nth number. When medication is added for a client, if the number of non-discontinued meds >= N then the notification is sent as built.

Security Rights- SecurityUpdate; AdminView, NotificationTriggers, NotificationDelete, ClientView or ClientViewAll

Location: Admin Tab- Notification Triggers- Add a New Trigger Entry

Actual Service Address for Home

Two new fields have been added to the Payer Config: Fill 2310D w/Geo Area Address and Use GeoArea Address in Box 32. These both use the Geo Area location for the service location. When Fill 2310D w Geo Area Address is checked, fills loop 2310D Service Facility Location - Uses GeoArea address when applicable versus the Billing Provider address. When Use GeoArea Address in Box 32 is checked, Uses GeoArea address when applicable versus the Billing Provider in Box 32 on the CMS 1500 replacing additional ID. Does not send client address when POS is set to HOME(12). They differ from the "Use Actual Address in Box 32, because they always send the geo area address, even when the POS is 12 which is client's home.

Security Rights- SecurityUpdate; BillingConfig; BillingModule; Billing Tab- Billing Payer- Edit-

Location:

Electronic Claim Overrides section: Fill 2310D w/Geo Area Address-

OR

CMS 1500 Claim Overrides section: Use GeoArea Address in Box 32; Billing Tab- Generate Batch Claim File- CMS 1500 to view

Add Staff Cancelled planner status

A new Status: CNCLD BY PROV; has been added to the dropdowns. This shows with visits that have been started in the scheduler, then if CNCLD BY PROV is selected, that visit will now have a Red X that the Mouse Over will show the new status. If Employee Overview screen, shows 'Employee Schedule' the visit will show and it will have this new status in red text. In the Dashboard (nav bar) the Planner Status chart will include this new status. The report named 'Scheduled Visits Status' has the new Status dropdown choice to filter.

Security Rights- SecurityUpdate; ClientView or ClientViewAll; ClientUpdate; PlannerAdd; PlannerUpdate; PlannerView or PlannerViewAll or PlannerViewTeam;

Location: Scheduler- Scheduled Visit (click on), Status Dropdown- CNCLD BY PROV (select) = Red X.

Adjustments to Copay

This option allows you to adjust a copay balance while not affecting the insurance balance. As a reminder the insurance does need to have a copay.

Security Rights- SecurityUpdate; BillingModule; ClientPayments; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly; Visit Tab or Visit List- Non-Approved Visit-

Location: Add Adjustment to Service section (Billing details screen)- dropdown select COPAY ADJUSTMENT- Add Adjmnt Amount- Submit

Admin Time Approval

The Security Matrix right for: AdminTimeApprove, has now been fixed. Without, the AdminTimeApprove right, there should be no way to approve an admin time from the list or the update screen.

Security Rights- SecurityUpdate; AdminTimeApprove; Employee Tab- Admin Time- Add New or update- option to approve is not available without the right

Admin Tool for Axis III

There is now a separate section for Axis 3 from the Lookups and Code Tables section.

Security Rights- SecurityUpdate; ClientView or ClientViewAll; ClientUpdate; DxView, DxUpdate; Admin Tab- Axis 3- Category List- Select Major Code/Description (ICD9)- edit/delete/add

All Activity Default in Visit Queue

A new field has been added to Employee Config: Default Visit Queue Status. The value selected here will be what is defaulted all visit queues (Client, Employee ,VisitTab). If nothing is selected ('Default Visit Queue Status' is set to '---'), then it will use the set default (which is ALL for client and employee and Not Approved for Visit tab.)

Security Rights- SecurityUpdate; ClientVisitList or ClientVisitListAll or ClientVisitListTeam or ClientVisitListTeamOnly; Employee Config: Default Visit Queue Status;   Employee Tab- Emp Config- Default Visit Queue Status- Visit List (employee nav bar / client nav bar)- Visit Tab

Alternate Id by Billing Group

A field has been added to the Billing Group: Alt Submitter ID. A flag has been added in the Billing Payer: Use Billing Group Alt Sub ID. When setting this flag in Payer, the Alternate submitter ID from the billing group will be selected when batching. If it is null it will use the submitter ID as normal from the Billing Office/Claim Config. A Billing Group must be selected, when batching for this to work and if more than one billing group is selected the first billing group in the list will be used. The segments in the 837 populating are the ISA06, GS02, and the L1000A NM109 - If an interchange receiver id is set in the Billing Office/Claim Config, then that will be used in the ISA06 in place of the Submitter or Alt Submitter ID.

Security Rights- SecurityUpdate; BillingConfig; BillingModule; Billing Tab- Billing Group- Edit or add new- Alt Sub ID; Billing Tab- Billing Payer- Use Billing Group Alt Sub ID (check)- when batched the Alt Sub ID from the Billing Group will be sent

Appointment History

There is a new Program filter on the Appointment History. The Appointment History icon can be accessed off the client scheduler, top right hand corner. A grey icon (in the shape of an arrow in a counter-clock motion). When accessed, this shows a History screen of visits for the client with links to the day view (calendar) and the visit view. There is a new box for 'Program' to be filtered in.

Security Rights- SecurityUpdate; ClientView or ClientViewAll;

Location: Client Scheduler- App History icon- Program Dropdown

Approval Level Tracking

Multi Stage approval is now recording each approval (not just the last one). An ‘i’ is displayed in the Approved By / On: for the client visit view and update screens. This ‘i’ shows all approvals, by, date, and role. The Approved By / On: is now populated with last multi-stage even if this is not the final approval. Added new filter on visit queue called My Multi-Stg. This will filter on visits that are multi-stage that are currently at my approval role.

Security Rights- SecurityUpdate; ClientVisitList or ClientVisitListAll or ClientVisitListTeam or ClientVisitListTeamOnly; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly; ClientVisitApprove or ClientVisitApproveOwn

Location: Visit Tab- dropdown- My Multi-Stg- Filter

Attachment Scan Feature

This feature allows those people the option to add friendly description and/ select from a dropdown like in the Attach New.

Security Rights- SecurityUpdate; ClientFileAdd; ClientFileView or ClientVisitFileAdd or ClientVisitFileView; EmployeeFileAdd or EmployeeFileView or EmployeeFormFileAdd, or EmployeeFormFileView; Employee Config- Insurance Card / Attachment Scanner;

Location(s): Employee Tab- Attachments (nav bar)- Scan New; Client Tab- Attachments (nav bar)- Scan New; Visit Tab- Visit List ID- Scan New

Authorizations

There are new Authorization dropdown choices that have been added to the Period section: Weekly and Roll Year.

Security Rights- SecurityUpdate; ClientView or ClientViewAll; ClientUpdate; AuthorizationAdd or AuthorizationView;

Location: Client Tab- Authorization (nav bar)- Add New Authorization or update- Period column

Authorizations (use but do not send)

A new Electronic Override field has been added to the Billing Payer called: Do Not Send Authorizations. When checked, the Auth number associated with the visit for that payer will not be sent. Normally, this information is sent in the 2300 Loop (Claim) in the REF segment with the qualifier (REF*G1*auth no).

Security Rights- SecurityUpdate; BillingConfig; BillingModule; ClientView or ClientViewAll; ClientUpdate; AuthorizationView; AuthorizationAdd; Billing Tab- Billing Matrix- Edit or create new Matrix Id- Auth Required; Client Tab- Authorizations (nav bar)- have been setup; Billing Tab- Billing Payer- Do Not Send Authorizations- will not appear in the REF*G1 segment

Billing Matrix Ext ID & Adv Search

A new custom field has been added to Advanced Visit Search: Billing Matrix External ID. This is tied to the Entry Code found in the Billing Matrix Config for a Matrix line for service export purposes.

Security Rights- SecurityUpdate; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly; ClientVisitList or ClientVisitListAll or ClientVisitListTeam or ClientVisitListTeamOnly; BillingConfig; Billing Tab- Billing Matrix- Edit Id or create a new one- External Code; Visit Tab- Advanced Search- Custom Fields- Matrix Ext ID

Client age date on adv search

Two new custom fields have been added to Advanced Search: 'Client Age Date' and 'Past Due Days'. Client Age Date has been added to Advanced Visit search, this will store the date the visit is first put into a client statement. The client_age_date field has also been added to the Visit Billing table in the data dictionary view to have it available in the custom filter. Past Due Days have been added to Advanced Client Search. This is the number of days since the oldest client age date on a visit that has a client due amount for that client.

Security Rights- SecurityUpdate; ClientVisitList or ClientVisitListAll; ClientList or ClientViewAll; Visit Tab- Advanced Search button- Custom Fields- Client Age date; Client Tab- Advanced Search button- Custom Fields- Past Due Days

Client Age Date / statement message

A new Employee Config setting has been added called: Default Statement Message. Once text has been added and saved it will default into the message to be Generated into the Client Statements. This way a user can save a message they use often. On the Client Statement screen a delinquent message is [$pastdue], so when this is added into the message line it will be replaced with the delinquent messages: 60-89 = "Past Due"; 90-119 = "Delinquent"; 120+ "Delinquent Warning." Adding text into the Employee Config field shows up on the Statements on the last page of each client being billed. The default text will replace any text enter in the Billing / Client Statement screen.

Security Rights- SecurityUpdate; BillingModule; BillingConfig; ClientPayments; Employee Tab- Employee Config: Default Statement Message (add text)- save;

Location: Billing Tab- Generate Client Statements- Default message- 'i'' if hover over will see the [$pastdue] message

Cross over batching

There is a new flag in the Billing Payer called: Crossover Secondary. When this is checked, Payer can be a crossover secondary payer. Enabling this will show a Do Not Batch checkbox on the client insurance update, that will prevent claims for that insurance from being batched in billing. With this on you will be able to set a client insurance record to Do Not Batch for that particular Payer. There is a new flag in the client insurance record labeled Do Not Batch. This is useful for crossover billing where they do not need to batch out to the secondary payer because the primary payer sends the claim directly to the secondary payer. Setting this flag for the insurance will prevent any visit from showing up in the Billing tab -> Generate Batch Claim File lists where the visit is currently sitting at this insurance.

Security Rights- SecurityUpdate; ClientView or ClientViewAll or ClientUpdate; BillingConfig; BillingModule; Billing Tab- Billing Payer- Edit- Crossover Secondary; Client Tab- Insurance (nav bar)- edit- Do Not Batch checkbox; Billing Tab- Generate Batch Claim File- filter on the Payer- note will not show

Date Range on Payer Assignments

A new Billing Payer Config option: Use Assigned Staffs, which allows for the use of assigned Staffs to block scheduling visits for Staffs that are not assigned for payer. Also requires Staffs to be associated with payer.

Security Rights- SecurityUpdate; AdminView; PartnerConfig; BillingConfig; EmployeeUpdate or EmployeeUpdateOwn; Partner Config: Block Not Assoc Employee Scheduling; Billing Tab- Billing Payer, edit Payer- Use Assigned Employees- then Assign Staff (**ERROR: Staff is not associated with payer will appear for those attempting to complete a visit)

BEDBOARD

Deleting Bed Board Assignments

A delete button is now available for those who use Bed Board. When a client is assigned to a Bed, a delete button is available; this button will be available until the Bed is released.

Security Rights- SecurityUpdate; AdminView; BedBoardAdmin; AdminLookupUpdate; ClientBedBoardAssign; ClientBedBoardIntervalEdit;

Locaion: Client Tab- Bed Assign (nav bar)- assign a bed- Delete button

Set billing based on bed assign

A Rate field has been added to the Client Bed Assign for those who use Bed Board. When a rate is entered, (billing for that bed assignment) the rate will be used as the unit rate as long as the visit type is set to use flex rates.

Security Rights- SecurityUpdate; AdminView; BedBoardAdmin; AdminLookupUpdate; BillingModule; ClientView or ClientViewAll; ClientBedBoardAssign; ClientBedBoardIntervalEdit; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly. Admin Tab- Visit Type- Edit Visit Type- Set Visit Type to Flex Type = Rate; Client Tab- Bed Assign- Rate (add $)- Billing Tab- Bed Board Billing- (set filtering criteria)- Create visits for the selected clients- Visit tab- Visit View will show rate field added

Display RedX in visit list to All

The Red X will now show up on the list view screen (Visit Tab), if there is one, whether or not you have approval rights. A Red X to the Approved Column on the View and Update screen that will display red X error when moused over. This will show when the visit is not approved and a Red X exists whether or not the user has the right to ApproveAll or ApproveOwn.

Security Rights- SecurityUpdate; ClientVisitList or ClientVisitListAll, or ClientVisitListTeam or ClientVisitListTeamOnly; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly;

Location: Visit Tab- Not Approved or All as Filters

DSM & ICD Mapping

There is a new column available in the Look up and Code Tables sections for Axis I and Axis II called: DSM Code. When editing an Axis I or II Description, the option to add a DSM Code is available.

Security Rights- SecurityUpdate; AdminView; AdminLookupUpdate; DxView or DxUpdate; ClientView or ClientViewAll; ClientList or ClientListAll; ClientUpdate;

Location: Admin Tab- Axis 1/ Axis 2/ Axis 3- Edit an Axis I or Axis II Code/ Description- DSM Code (add);

Duplicate Billing Rpt Modification

In the Duplicate Billing Report two new columns were added: ‘Rate’ and ‘Billable’. There is a Billable link to the Matrix line where you can view what was default.

Security Rights- SecurityUpdate; BillingModule; BillingReports; Billing Tab- Reports and Exports section- Duplicate Billing Report- select viewing criteria- Billable (True/False) link- Rate column (available)

End Date to Credentials

A new field in the Credentials section has been added: End date. The End Date will cause a service and Billing Matrix to not match if the service ends after the Credential End date. The visit will red X and no billing matrix CPT Code will show, when hovering over the red x you will see:’ No match on the Credential Group in the Billing Matrix.’

Security Rights- SecurityUpdate; EmployeeUpdate; EmployeeList or EmployeeListAll; EmployeeView or EmployeeViewAll; ClientVisitList or ClientVisitListAll or ClientVisitListTeam or ClientVisitListTeamOnly;

Locations:

Employee Tab- Credentials (nav bar)- End Date (field);

Visit Tab- Visit List ID- Red X (view)

Export for any Credible Data Table

In the Export Builder, there is a new section of the Form / Table Name dropdown called TABLES when creating a New Export. This allows any table that is defined in the data dictionary to be exportable (Authorizations, ClientNote, Payers, etc). 1) Set up in the Data Dictionary all the fields you want to be available in the export. This includes lookups, etc. This must be in the View section of the data dict. Also set up any tables that may be relationally related to the primary table. 2) Go to the export module and create a new export using the table that was set up in the data dict. build this as you would any other export. The base table and any parent relational tables will be available in the export. The WHERE clause and the custom parameters are more of an advanced feature. They must be written in SQL and reference the underlying table and column names directly.

Security Rights- Security Update; AdminView; DataDictionary; ReportList;

Location: Report Tab- Export Tools- create

Incident Reporting Feature

A new field has been added to the form builder when building a Client form. Once you create a form and press the Edit button you will see a new selection: 'Incident Form'. When this is set to true then anyone can complete the form, but only those with the ViewIncidentForm can view the completed form in the list/view or update screens. Also new Notification Triggers have been added for both Client Incident Visit and Employee Incident Visit. When set, once an incident visit is complete it will send a notification to anyone with the ViewIncidentForm who are assigned to the client (or employee if employee form). When ViewIncidentForm is OFF then a visit with details will not appear in your Visit List.

Security Rights- SecurityUpdate; AdminView; NotificationTriggers; ViewIncidentForm; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly; ClientVisitList or ClientVisitListAll or ClientVisitListTeam or ClientVisitListTeamOnly; FormBuilder; FormBuilderCopy; FormBuilderEdit; NotificationTriggers;

Locations: Forms Tab- Add Form- Edit- Incident Form;

Visit Tab- Visit List ID- view visit with Incident form;

Admin Tab- Notification Triggers- Client Incident Visit Add or Employee Incident Visit- set criteria for trigger

Override Supervising Physician (Advanced Search Item)

A new custom field has been added in Advanced Visit Search called: Override Supervising Physician

Security Rights- SecurityUpdate; ClientVisitList or ClientVisitListAll or ClientVisitListTeam or ClientVisitListTeamOnly; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly;

Location: Visit Tab- Advanced Search- Custom Fields: Overrd Sup Phys

List by payer of assigned employees

A new report has been created called: Payer / Employee Assignment. The report shows all Employees assigned to a Payer and the start and end date when available (requires Employees to be associated with payer).

Security Rights- SecurityUpdate; AdminView; ReportList; BillingConfig; EmployeeUpdate; EmployeeViewAll; Report Security- Payer/Employee Assignment;

Location:

Billing Tab- Billing Payer- Edit a Payer- Use Assigned Employees (check)- Assign Employees;

Reports Tab- Payer/Employee Assignment- select filtering criteria- Run Report; EmployeeViewAll

Login RPT - ip address

A new column has been added to the Login Report: IP Address. An Export button has been added so the Report can now be exported to a csv.

Security Right- AdminView; SecurityUpdate; EmployeeViewAll; Admin Tab-

Location: Login Report- filter on selected criteria- IP Address (can then Export)

Medical Profile weight / height

The Medical profile page now measures height and weight using decimals.

Security Rights- SecurityUpdate; ClientAdd; ClientView or ClientViewAll; ClientUpdate; MedicalProfileView; MedicalProfileUpdate; Client Tab- Medical Profile (nav bar)- Height/Weight

Medication Notes

A new Partner Config setting called: Hide Medication Notes. This will hide the notes section on the Medication screen

Security Rights- SecurityUpdate; AdminView; PartnerConfig; ClientView or ClientViewAll; ClientUpdate; RxView; RxUpdate; Admin Tab- Partner Config: Hide Medication Notes;

Location: Client Tab- Medications (nav bar)- notes will not appear

Medication Screen Links

There is now a link available between the Medication screen and the External Care Provider screen. When adding a new medication, the Add Provider link brings you to the External Care Provider screen (which is also a nav bar tab) and then Medication link bring you back the Medication screen.

Security Rights- SecurityUpdate; ClientView or ClientViewAll; ClientUpdate; RxView or RxUpdate;

Location: Client Tab- Medication (nav bar)- Add Medication button- Add Provider link- Medications link (to return)

Message Log of Messages sent

"To" has been added to the message log so all messages either sent from you or to you will be displayed. It is a new field, so is not retro-active.

Security Right- SecurityUpdate; SendEmpMessage; (EmployeeMessageLogViewAll); Employee Config- Credible Staff Messaging; EmployeeView or EmployeeViewAll; EmployeeUpdate;

Location: Employee Tab- Messaging- Add Text- Message Log (nav bar)- View To and From

Multi Pick Payer Type Allowed Payers

The Payer Type dropdown in the Billing Matrix now allows you to multi select.

Security Rights- SecurityUpdate; BillingConfig; BillingModule; Billing Tab- Billing Matrix- edit or add new- Allowed Payer Type;

Location: Billing Tab- Generate Batch Claim File; If you need to set up your Payer Type dropdown selections- Billing Tab- Billing Payer Types- Add New Payer Type Entry

No Client Pay (837)

There is a new section in the Billing Payer called: No Patient Paid Amount. When checked it does not send the AMT*F5 segment in the 2300 loop - Patient Paid Amount

Security Rights- SecurityUpdate; BillingConfig; BillingModule; Billing Tab- Billing Payer- edit- No Patient Paid Amount;

Location: Billing Tab- Generate Batch Claim File- note AMT*F5 does not appear

Notes on Liability Form

A Notes section has been added to the Liability Form.

Security Rights- SecurityUpdate; AdminView; PartnerConfig; ClientView or ClientViewAll; ClientUpdate;

Location: Partner Config (either): Use PA Client Liability or Use VA Scale Client Liability- Client Tab- Liability (nav bar)- Notes section

Note field on Auth

A Notes section has been added to the Authorizations.

Security Rights- SecurityUpdate; ClientView or ClientViewAll; ClientUpdate; AuthorizationAdd, AuthorizationView;

Location: Client Tab- Authorizations (nav bar)- Notes section

Open/Close header sections profile

On the client and employee profile pages, there are header sections that are in different colors...such as 'Client Info' and 'Employee Info'. Now, when you click these sections, they collapse (whether you click the minus box or just the header section), If you click it again, they expand.

Security Rights- SecurityUpdate; ClientView or ClientViewAll; ClientUpdate; EmployeeView or EmployeeViewAll; EmployeeUpdate or EmployeeUpdateOwn;

Locations:

Client Tab- Profile- Update;

Employee Tab- Profile-Update

Payer Specific Write Off Reporting

In the Payer Config, there is a new dropdown of billing adjustment types next to the checkbox for Auto Write-off Ins Balance. This dropdown will allow you to specify which adjustment type will be used when the balance is written off. (if this is checked it will automatically write off the entire insurance balance at the time of entry for every visit done for this payer.)

Security Rights- SecurityUpdate; BillingConfig; BillingModule; BillingAddCopay; ClientVisitUpdate; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly; Billing Tab- Billing Payer- Auto Write-Off Ins Balance (check), select from the dropdown;

Location: Visit Tab- Visit View- Billing- Service Adjustment (dropdown selected from Payer Config)- Balance shows for the Client

Payment Screen additions

New pieces have been added to the Payment Screens: Emp Name/ID and Emp ID as a column on client and insurance payment list screen. Deposit Date field added in Srch dropdown, can be used for filtering, and will show in the export. Added date type dropdown on client payment list screen to work like insurance payment filter. Column headers are clickable to sort on.

Security Rights- SecurityUpdate; ClientView or ClientViewAll, ClientUpdate, BillingModule; ClientPayments;

Locations:

Client Tab- Payments (nav bar);

Billing Tab- Billing section- Manage Client Payments- Manage Insurance Payments- Srch Date dropdown- Emp Name/ID and Emp ID

Primary Employee

There is a new Partner Config option: Use Case Managers. This Allows an Employee to be assigned as a Case Manager for a client. A client can only be assigned one Case Manager

Security Rights- SecurityUpdate; AdminView; PartnerConfig; ClientView or ClientViewAll; ClientUpdate; EmployeeView or EmployeeViewAll; EmployeeUpdate; Partner Config- Use Case Managers;

Location: Client Tab- Employee (nav bar)- Assign Employees- Case Manager (set one to yes);

Productivity Report

A new Report called: Employee Productivity has been created. This report shows productivity for an Employee based upon the expected_units field and the number of units for the week ending on the date proved. A new field has been added to Employees table in the data dictionary and will need to be added to the Employee Table. (results: for time range week end date to week end date - 7).

Security Rights- SecurityUpdate; AdminView; DataDictionary; ReportList; EmployeeUpdate; Admin Tab- Data Dictionary- Employees- add expected_units- Employee Profile Update (fill in field); Employee Tab- Employee Profile (update) or Add new Employee- Expected Units (add amount); Admin Tab- Reports Security- Employee Productivity Report-

Location: Reports Tab- Employee Productivity Report- filter on selected criteria

Program codes on adv search

New Custom Fields have been added to Advanced Visit Search: 'Exp Prog Code' and 'Core Svc Code' (Program Export Program Code & Core Service Codes).

Security Rights- SecurityUpdate; BillingConfig; ClientVisitList or ClientVisitListAll or ClientVisitListTeam or ClientVisitListTeamOnly; Admin Tab- Billing Config- Programs- Edit or add new- Export Program Code/ Core Service Code (add);

Location: Visit Tab- Advanced Search- Custom Fields- Exp Prog Code and Core Svc Code

Releases per Provider

There is a new option to template off the External Care Provider screen. This will allow a form letter to be generated for each provider in the list. To get the template button to show, you must first create an export on the ClientProviders table. On the ClientProviders export, you must have a WHERE clause of: ClientProviders.client_id = @param1 and a custom param 1 of: client_id

Security Right- SecurityUpdate; AdminView; DataDictionary; ReportList; ClientView or ClientViewAll; ClientUpdate; Admin Tab- Data Dictionary- Client Tab- select ClientProviders as the Table Source- Type: View- Add provider_id and client_id as columns; Reports Tab- Export Tool- create new export using Client Providers from the Form/ Table Name dropdown- Build the export as needed;

Location: External Provider (nav bar)- Template button

RO on all Axis

RO and RO Text have been added to all diagnosis in Axis1-Axis3. The Partner Config setting: Show RO field in Diagnosis, would need to be turned on to see these fields.

Security Rights- SecurityUpdate; PartnerConfig; AdminView; ClientUpdate; ClientView or ClientViewAll; DxUpdate; DxView; Admin Tab- Partner Config: Show RO field in Diagnosis;

Location: Client Tab- Dx (nav bar)- RO- Update Assessment: access the Note scroll and you will see the RO and text field.

Security Right AR-GL export

A new Security Right: ARGLExport - to control rights to all AR/GL export functionality.

Security Rights- SecurityUpdate; ARGLExport; BillingReport; BillingModule;

Location: Billing Tab- Revenue Export or Revenue Export List or Ledger Receipts Export or Ledger Receipts Export List- set criteria for filtering

Separate Security Right for Data Entry

A new Security Right has been added called: VisitDataEntry. This new Security Matrix feature limits a user's right to use Data Entry to create visits.

Security Right- SecurityUpdate; VisitDataEntry; EmployeeView or EmployeeViewAll; ClientView or ClientViewAll;

Locations:

Client Tab- Add visit- Data Entry;

Employee Tab- Add visit- Data Entry;

Visit Tab- Add visit- Data Entry;

Scheduler- Add visit- Data Entry

SSN Field

A new field exists and can hold a Social Security number. This is strictly an information field for the billing staff.

Security Rights- SecurityUpdate; ClientView or ClientViewAll; ClientUpdate; ClientAdd;

Location: Client Tab- Insurance (nav bar)– Subscriber button (select) – SSN (field w/in the Update Insurance Subscriber Detail Screen)

Subtract Overlapping Visit Duration

Two new features have been added to the Billing Matrix allowing you to set up a visit that covers a day of treatment and have individual services used by the client within that day be deducted from the Day Tx. The two fields that have been added to the Billing Matrix: ‘Subtract Overlapping Duration’ and ‘Is Overlap to Subtract.’ Only one of these fields should be used on a matrix line. If ‘Is Subtract Overlapping’ is set, then other visit's duration that is set with the ‘Is Overlap to Subtract’ flag to true and overlaps (it will be subtracted from the duration of the visit with ‘Subtract Overlapping Duration’ set). This will in turn affect the units/rates.

Security Rights- SecurityUpdate; FormBuilder; FormBuilderCopy ; FormBuilderEdit; BillingConfig; BillingCPTCodes; BillingModule; ClientVisitList or ClientVisitListTeam or ClientVisitListTeamOnly; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly;

Locations: Form Tab-You will need to select or create 2 forms; Admin Tab-Visit Type- create two new Visit Types or edit; Billing Tab- Billing Matrix features: Subtract Overlapping Duration & Is Overlap to Subtract (Subtracting overlap duration= 8 hr program/ set specific visit types to subtract =Is Overlap to Subtract)

Template Print from View All

There are two new ways to generate a template/export from Advanced Client Search (ACS) now. A template is just a special type of export that generates a PDF, but this will work for any export really.

Security Rights- SecurityUpdate; ClientList or ClientListAll or ClientView or ClientViewAll; ClientUpdate; ReportList; FormBuilder; FormBuilderCopy; FormBuilderEdit;

Creating a visit, then a template/export: 1) Create an export based on a form. It can be a PDF template, a CSV export or anything; 2) Go to ACS, check Show Add Visit Checkbox, and run any filter that brings back clients; Click Select Options to Add Visits, then on the next page choose a visit type that matches the form that you created an export on in step 1; 4) Click Add All Visits, then on 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.

Create a template/export directly from the ACS screen: 1) Create an export using the Client Table option in the Form / Table name dropdown (Special section); 2) Go to ACS, check Show Templates, and run any filter that brings back clients; 3) Select any template from the dropdown and press Generate Template.

Transcription Character Count Rpt

A new Report (only for transcriptionist) has been added: Transcription Productivity. This report measures Transcription Productivity by number of characters and total points by visit type. Also calculates points using a transcription weight for each visit type. The Weight field has been added to the Visit Type table and will need to be set. (Weight per visit type is multiplied by the total number of visits of that visit type.)

Security Rights- SecurityUpdate; AdminView; DataDictionary; BillingConfig; Admin Tab- Data Dictionary- Employees- add is_transcritptionist- Employee Profile Update (fill in field);

Location: Admin Tab- Reports Security- Transcription Productivity Report; Reports Tab- Transcription Productivity Report- filter on selected criteria; Admin Tab- Visit Type- Edit- column header Transcription Weight

Tx Switch

A new Security Right: TxSwitch has been added. When this right is given, it allows one to switch injection Tx plans on webforms.

Security Rights- SecurityUpdate; TxSwitch; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly; VisitEntryWeb;

Location: Client Tab /Employee Tab /Schedule Tab- Start Visit w/ Tx Injection and w/ Client who has a Tx Plan- Switch button

Visible Range in Scheduler change

Two fields have been added to the Employee Config: 'Default Start for Schedule' and 'Default End for Schedule'. These will set the default schedule range for the Employee. If the default can be changed off the schedule and will be used for the rest of the session, but is not saved, it will have to be saved in the Employee Config (in order for it to save).

Security Rights- SecurityUpdate; EmployeeUpdate; EmployeeUpdateOwn; EmployeeView or EmployeeViewAll;

Locations:

Employee Tab- Config- Default Start for Schedule and Default End for Schedule;

Schedule Tab- view Scheduler

Warning End Dates

There is a new End date field for Client Warnings.

Security Rights- SecurityUpdate; ClientUpdate; ClientView or ClientViewAll;

Location: Client Tab- Warnings (nav bar)- End date

Web Visit Start Time

A new Partner Config setting called: Actual Times on Webforms has been added.   This allows the 'Begin Visit' to use current date and time for visits that were scheduled for a different time; uses the actual start and end times on webforms, not scheduled times.

Security Rights- SecurityUpdate; AdminView; PartnerConfig; ClientVisitList or ClientVisitListAll or ClientVisitListTeam or ClientVisitListTeamOnly; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly;

Locations:

Admin Tab- Partner Config- Web Forms section: Actual Times on Webforms;

Client Tab/ Employee Tab/ Visit Tab- Visit List- note actual time;

Schedule Tab- add visit/ begin- note actual time