



Release 5.0 Configuration

This document describes the enhancements included in Credible 5.0 release. Any settings required to enable a new feature are listed, along with the steps for configuration and use. If a setting is in italics, it is a new setting specifically needed for the item being described.

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CLIENT

Name	Client Profile Print Enhancements
Description	The client's list of External Providers is available for printing with the Client Profile. Immunization and Head Circumference have been added to the Medical Profile section.
Settings	N/A
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Click Print from the client's overview screen or open the client's profile and click Print View. 2. Check Medical Profile and External Provider options and click Print View 3. Notice the new header along the top of the print view.
Additional Information	

Name	Family Module Enhancements
Description	The Family module now calculates the age of the family members. Also, you can now choose to display or hide the following family fields: Enrolled, Live at Home, and Removed from Home.
Settings	Partner Config: <i>Hide additional family fields</i> (and Use Client Family to use the Family module)
Steps to Configure	<ol style="list-style-type: none"> 1. ADMIN > Site Configuration > Partner Config. 2. In the Client Settings section, select Hide additional family fields. 3. Click Save Partner Config.
Steps to Use	Decide to show or hide those fields and set Partner Config accordingly.
Additional Information	The age is calculated automatically.

Name	HIPAA Log Enhancements
Description	New actions have been added to the HIPAA log: assigning/unassign PCP, updating/deleting schedule items assigning/unassigning a client to a schedule group; adding, editing, and signing physician's orders
Settings	Security Matrix: ClientViewLog (to view the HIPAA log)
Steps to Configure	The actual logging is automatic. Users who want to view the log itself will need the ClientViewLog security right.

Steps to Use	<p>On the client's or employee's NavBar, click Log. The actions are recorded in the log as follows:</p> <ul style="list-style-type: none"> • SELECT CLIENT AS PCP and UNSELECT CLIENT AS PCP (for setting a client's external provider as the primary care physician) • UPDATE SCHEDULE ENTRY and DELETE EMPLOYEE PLANNER ITEM (for editing or deleting a visit from the schedule) • ASSIGN CLIENT SCHEDULE GROUP and UNASSIGN CLIENT SCHEDULE GROUP (for assigning a client to a schedule group) • INSERT PHYSICIAN ORDER LINE, UPDATE PHYSICIAN ORDER LINE and SIGN PHYSICIAN ORDER LINE (for entering a new, editing an existing, and signing a physician's order)
Additional Information	

Name	Redirect to ClientUpdate on Last Episode
Description	When you close a client's last active episode, you will be offered the choice of going to the client's profile to make changes if needed.
Settings	<p>Partner Config: <i>Redirect to Update on Last Episode</i></p> <p>Security Matrix: ClientEpisodeUpdate</p>
Steps to Configure	<ol style="list-style-type: none"> 1. ADMIN > Site Configuration > Partner Config. 2. In the Client Settings section, select Redirect to Update on Last Episode.
Steps to Use	<ol style="list-style-type: none"> 1. Close a client's last active episode. A popup appears with the message "John Doe's last active episode has been closed. Would you like to proceed to the John Doe's Profile to update their status?" 2. To go to the client's Update Profile screen, click Yes, otherwise click No.
Additional Information	

EXTERNAL PROVIDER

Name	Primary Care Physician
Description	You can specify an external provider as the client's primary care physician (PCP). Also for billing purposes, the PCP can be sent as the Referring Provider on claims.
Settings	<p>Security Matrix: ExternalProviderUpdate (to set an external provider as that client's PCP)</p> <p>Billing Config > Billing Payer: <i>Use PCP as Referring Provider</i> (for CMS 1500) and Sending Referring Provider (must also be checked if sending an 837)</p>

Steps to Configure	<p>No additional configuration is needed if you are just using this feature to mark a provider as the client's PCP.</p> <p>For billing usage:</p> <ol style="list-style-type: none"> 1. BILLING (or ADMIN) > Billing Payer. 2. Click edit for the payer that requires use of the PCP for claims. 3. Select Use PCP as Referring Provider. 4. If 837s are being sent to this payer, also select Sending Referring Provider in the Electronic Claim Overrides section. 5. Click Save Settings.
Steps to Use	<p>To set an external provider as a client's PCP:</p> <ol style="list-style-type: none"> 1. On the client's Nav Bar, click Ext Provider. 2. Click edit for the desired provider. 3. Select Is PCP and click update. <p>Any visit entered after the PCP is set will have that provider's information included. The PCP name and NPI number are visible in the bottom left-hand corner of the Visit Details screen. You can also edit the PCP on a visit-by-visit basis by clicking update on a completed visit and selecting the desired provider.</p>
Additional Information	<p>This feature is not retroactive. Visits completed prior to assigning an external provider as the PCP will need to be manually edited. When used for billing, the PCP appears in CMS box 17 in Loop 2310A for the 837P and in Loop 2310D for the 837I.</p>

MEDICAL PROFILE

Name	Head Circumference on Medical Profile
Description	You can now record Head Circumference in a client's medical profile.
Settings	Security Matrix: MedicalProfileView (to see the information) and MedicalProfileUpdate (for users who can create/edit a client's medical profile)
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. On the client's Nav Bar, click Medical Profile. 2. At the bottom of the first column, just above the box for Check In Notes is the field for Head Circumference. 3. Click Start New Profile if desired (otherwise you will be editing the existing medical profile) 4. Enter the client's measurements. Note that Head Circumference is measured in centimeters (cm). 5. Click Save Medical Profile.
Additional Information	

Name	Immunizations on Medical Profile
Description	The Medical Profile now has a section dedicated to recording a client's immunization history.
Partner Config Settings	Partner Config: Use Immunizations Security Matrix: MedicalProfileView (to see the information) and MedicalProfileUpdate (for users who can create/edit a client's medical profile)
Steps to Configure	<ol style="list-style-type: none"> ADMIN > Partner Config. In the Features section, select Use Immunizations. Click Save Partner Config.
Steps to Use	<ol style="list-style-type: none"> On the client's Nav Bar, click Medical Profile. Select the desired immunization from the dropdown; Dosage and Date are optional. Click Add Immunization.
Additional Information	<p>Note that the client must already have a Medical Profile to be able to add an immunization. Otherwise the following error message will appear: "**** You must create a Medical Profile before adding an immunization."</p> <p>You can add additional immunizations to the dropdown by editing the Immunizations lookup category (ADMIN > Custom Lookup Items > select Immunizations, click Display, and then click Add a New Immunizations Entry).</p>

ORDERS

Name	Physician's Orders – Date Created
Description	Once signed, Physician's Orders will show both the date the order was created and the date it was signed by a physician.
Settings	Security Matrix: PhysicianOrdersView (to see the physician's orders for a client), PhysicianOrdersAdd (to create a new physician's order), and PhysicianOrderLineComplete or PhysicianOrdersSignAll (to sign a physician's order)
Steps to Configure	None – automatic
Steps to Use	<ol style="list-style-type: none"> Click the 'Orders' link on a client's Nav Bar. Signed orders will display both the Order Date (the date the order was entered into Credible) and the Sign Date (the date the order was signed).
Additional Information	You will need to be able to sign orders on a client's Orders screen.

Name	Physician's Orders Show Physician that Made the Order or that Signed the Order
Description	There is a new option in Partner Config called 'Physician Order/Assigned Physician'. When checked the order will show the physician that was assigned to the order; when left unchecked the name of the physician signing the order will be shown.
Settings	Partner Config: <i>Physician Order/Assigned Physician</i> Security Matrix: PhysicianOrdersView
Steps to Configure	By default, this feature is not turned on (the physician that signed the order is displayed) To have the ordering physician's name appear, regardless of who signed the order: <ol style="list-style-type: none"> 1. Go the Admin tab and click the link for Partner Config 2. Check the box for Physician Order/Assigned Physician 3. Click the 'Save Partner Config' button
Steps to Use	When viewing Physician's Orders the appropriate (ordering/signing) physician name is shown automatically.
Additional Information	

CREDIBLE eRx

Name	Credible eRx Logo Added to Partner Graphics
Description	When you print a prescription, you can now have your own logo present.
Settings	Partner Config: Partner Graphic
Steps to Configure	<ol style="list-style-type: none"> 1. ADMIN > Site Configuration > Partner Config. 2. Right in the top section is Partner Graphics. Click on Click Here to Add Graphic. 3. The Upload Website Graphic interface comes up; open the Logo Type dropdown. 4. Select Prescription Printout Logo (JPG). 5. Click Browse to locate the image on your hard drive. 6. Once selected, click Upload File Now. 7. Once Uploaded, click Save Partner Config.
Steps to Use	<ol style="list-style-type: none"> 1. Open a client's Medications screen. 2. Create a prescription and click print or click reprint on an existing prescription. Your Logo will now appear on the top of the printout on the left.

Additional Information	Use a JPG image. Credible will resize it so if it is large with a lot of detail, it may not look as you would like it. Make sure to proof it before you depend on it.
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Name	Faxing Controlled Substances
Description	Now Credible offers faxing of controlled substance prescriptions. Prescriptions for controlled substances cannot be sent electronically however they can be faxed thru gateways such as eFax.
Settings	Controlled Substance settings must be configured for you by your Account or Implementation Manager.
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Follow the normal procedures for creating a prescription but select a controlled substance. 2. When you select a controlled substance, you will receive red text at the bottom of the screen the reads: "This medication is a controlled substance and cannot be sent electronically. Controlled substance prescriptions must be printed or faxed." 3. Instead of Send to Pharmacy, there will be a Fax to Pharmacy button. Select a Pharmacy and after verifying the prescription select to Fax or Fax and Print Copy of the prescription.
Additional Information	Because the laws vary by state concerning Schedule II substances, you may elect to send just Schedule III-IV controlled substances, or to also include Schedule II controlled substances.

EMPLOYEE

Name	Attachments on Employee Forms
Description	Files can now be attached to employee forms before submitting the form.
Settings	Security Matrix: EmployeeFormFileAdd (to add attachments); EmployeeFormFileView (to view attachments); EmployeeFormFileDelete (to delete attachments; optional)
Steps to Configure	<ol style="list-style-type: none"> 1. Go to the Admin tab and click the link for Security Matrix 2. Assign the EmployeeFormFile right(s) to the desired security profiles 3. Click the 'Save All' button
Steps to Use	<ol style="list-style-type: none"> 1. On the employee's Nav Bar, click Forms or go to ADMIN and click Employee Form Queue. 2. Click add employee form and select the desired employee and visit type. 3. Click Web Forms and complete the visit. 4. Click the link for Sign & Submit. 5. Click the link for Attachments located at the top just above the date. 6. Click Attach New.

	<p>7. Click Browse and locate the file to be uploaded.</p> <p>8. Enter a name for the attachment using the Description field.</p> <p>9. Click Upload.</p>
Additional Information	

Name	To Do List and Past Do
Description	Credible now has an Employee To Do List which can be accessed thru the Employee Nav bar. To Do Items can be added thru the home page, Employee home page, and Client home page. Top 5 To Do List items can be added to the home page and Employee home page. Security rights are available to allow you to add to and edit another employee's To Do List.
Settings	Security Matrix: <i>ToDoListEditOtherEmp</i> and <i>ToDoListAddOtherEmp</i>
Steps to Configure	<p>ADMIN > Site Configuration > Home Page Config</p> <ul style="list-style-type: none"> • Home Page Admin: <ul style="list-style-type: none"> ○ Add To Do Item ○ To Do List • Client Home Page Admin: <ul style="list-style-type: none"> ○ Add To Do Item • Employee Home Page Admin: <ul style="list-style-type: none"> ○ Add To Do Item ○ To Do List
Steps to Use	<p>If you do not turn on any of the configuration settings identified in the Steps to Configure, then the To Do List will only be available through the employee Nav Bar "To Do List" button, which has an icon that is a little clock with a list in front of it.</p> <p>Home Page</p> <p>If you have opted to turn on the Add To Do Item feature in the Home Page Config for any of the Home Pages, continue with section A). The List itself is described in section A) too.</p> <p>If you have turned on the To Do List feature, you will find section B) describes that.</p> <p>A) Adding to the To Do List: When you are at any Home Page, you will see the Add to Do Item section. It offers you two choices:</p> <ol style="list-style-type: none"> 1. Add: This is a single field that adds a To Do Item with text entered as the Summary. <ol style="list-style-type: none"> a. Just type something in the field b. When ready click Add. c. You are now at the To Do List and your Nav Bar will be present with the To Do List button highlighted. Your To Do

Item will be on the list. Here you will see Filters for Priority, Category, Status and Current (which is for filtering on Current to Do Item or Future ones as well as Completed ones. There is an Add to Do Item button to the right of the filters but we will get to that in a bit.

The List: The list has the following features/columns:

- **Select:** clicking this allows you to edit a To Do Item
- **A white arrow in a blue circle:** this is the Priority Column and it is sortable. Please note adding a To Do Item using the Add button does not offer you the chance to set a priority. See Detailed To Do List Add below.
- **Begin:** this shows the date this To Do Item is set to be begun on.
- **Target:** this is to set a Target Date for the To Do Item
- **Summary:** the text describing the To Do Item
- **For:** this records who the To Do Item is for if it is not for you.
- **%:** this is a manual field where you set the percentage done. This is not connected or dependent on any other field and that is why it is described here as a manual field.
- **Complete:** click this button to change it to COMPLETE
- **Delete:** click this to delete a To Do Item. You will get an 'are you sure' pop up with this.

So now let's move onto creating a detailed To Do Item. The Detailed To Do List Add button on the Homepage takes you to the same screen as the Add To Do Item button here on the To Do List. So click it now.

2. Detailed To Do List Add/Add To Do Item

- **Screen Identifier:** First you have the name of the screen along with your name at the top. Below are a number of fields:
- **Employee Name:** This will default to you but if you turned on the two Security Settings "ToDoListEditOtherEmp" and "ToDoListAddOtherEmp" then you will have a button to the right of the Employee Name field. It has an Ellipsis on it.
- **Ellipsis** or **Select Other Employee** button: clicking this opens a Search for Employees dialog which you may have encountered in our application previously. You can search for an Employee based on Name, ID #, Program or Status. Just click Find and once the list is populated you can click on an ID and that Employee will be placed in the Employee Name Field. For now let's stick with you and click Close.
- **Begin Date:** this defaults to today but can be changed to any date. It is a required field so if you accidentally empty it you will be reminded.
- **Target Date:** this defaults to no date, feel free to select any date
- **Summary:** you could call it the name or title of the To Do

	<p>Item. It is the other required field.</p> <ul style="list-style-type: none"> • For: would be filled in automatically if you selected a different employee other than yourself to receive this To Do Item • Priority: offers you Low, Normal, and High • Percent Complete: accepts 0 to 100 • Status: this offers Not Started, In Progress, On Hold, Waiting, and Completed. NOTE: this Completed is separate from the Completed that is available in the 'Current' dropdown that holds Future and Current. • Color Category: this is simply a way to color code your To Do List. • Is Private: Select this if you do not want others to be able to view this particular To Do Item • Description: this text field does not show on the To Do List. It is visible when you have used the 'select' button. • Add To Do Item: this button is what you click when you are ready to save this To Do Item. <p>B) To Do List: This option is for the Home Page and the Employee Home Page only. If you have not yet entered any To Do Items or you have no Current To Do Items then when you go to either the Home Page or the Employee Home Page this feature will not be present.</p> <ul style="list-style-type: none"> • If you do not have any current To Do Item enter one now and return to this Homepage. • Now the compact homepage version of the To Do List is visible. It will show the Priority, Summary, For, and Begin Date. Below it is a link 'All Current To Do List Items'. Clicking this will take you to the To Do List and it will be filtered on all 'Current' To Do Items. • Private: a To Do Item marked as Private will be on this list but the 'For' column will be empty. If you log in as another user and navigate to this page that To Do Item marked private will not be visible.
Additional Information	

SCHEDULE

Name	Program-Specific Schedule Groups
Description	Schedule Groups can have assigned programs. When used this will limit the use of scheduling for the to onlythe programs assigned.
Settings	N/A
Steps to Configure	<ol style="list-style-type: none"> 1. Go to Admin and click the link for Schedule Groups. 2. Click the 'Edit' link under the Programs column for the desired schedule group. 3. Click the 'Assign' button to assign the program to the schedule group.

Steps to Use	<p>Once configured, Schedule Groups with assigned programs are automatically limited to just those programs.</p> <ul style="list-style-type: none"> • A client can only be assigned to the Schedule Group if s/he is also assigned to the program. • Visits for that Schedule Group can only be done in the assigned programs.
Additional Information	Note that Schedule Groups that have no assigned programs remain available for all clients and programs.

Name	Resource Scheduler
Description	There is a new security right to show or hide the Delete button on a schedule resource.
Settings	Security Matrix: <i>PlannerResourceDelete</i>
Steps to Configure	<ol style="list-style-type: none"> 1. Open ADMIN Tab > Security Configuration > Security Matrix. 2. Go to the Scheduler section. 3. Make sure 'PlannerResourceDelete' is not selected and Save if needed.
Steps to Use	<ol style="list-style-type: none"> 1. With this security right turned off go to your employee page. 2. On the Nav Bar open Resource Sched. 3. Add a New Resource if you do not have any. 4. Click 'schedule' to open the Resource Scheduler 5. Click anywhere to schedule the resource 6. Once scheduled open it back up and there will not be a Delete button. 7. If you go back and select PlannerResourceDelete save and return there will be a delete button.
Additional Information	

VISIT

Name	Manual Red X Visits Are Highlighted
Description	Visits that have a manual red x will now be highlighted yellow in the Visit Queue. Manual Red X is also a filter option in Visit Advanced Search.
Settings	Security Matrix: ClientVisitManualRedX (to mark a visit with a Red X)
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Click on the Visit Tab; any visit that has been manually red x'd will have its entire row highlighted yellow. 2. While on the visit queue screen click the advanced search button. 3. At the bottom of the fifth column of filters is one labeled Billing; click it to open the drop down and select 'Manual RedX'.

	<ol style="list-style-type: none"> 4. Add additional search options as desired and click the 'filter' button. 5. Only visits that are marked with a manual red x (and meet any other criteria selected in step 4) will be shown; each will be highlighted yellow.
Additional Information	Only Manually Red X'd visits will be highlighted yellow. If a visit is red x'd due to a custom or predefined rule but NOT manually red x'd, it will NOT be highlighted.

Name	Block Conflicting Visits by Type
Description	The blocking of overlapping visits for submission can now be based on visit type.
Settings	Partner Config: <i>Block Overlapping Client Visits by Visit Types</i>
Steps to Configure	<ol style="list-style-type: none"> 1. Go to the Admin tab and click the link for Partner Config. 2. Check the box for Block Overlapping Client Visits by Visit Types (located in the Settings section). 3. Select the desired visit type(s) that should not be allowed to be submitted for overlapping times. 4. Click the 'Save Partner Config' button located at the bottom of the screen
Steps to Use	Once configured visits are automatically blocked from being able to be submitted when another completed visit in one of the selected visit types overlaps the visit for the same client.
Additional Information	

Name	Advanced Search Additions
Description	Client Advanced Search and Visit Advanced Search both have new additions to the Visit Type filter: Core Export and Residential.
Settings	N/A
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Open VISIT > advanced search or CLIENT > advanced search and then open the Visit Type dropdown. 2. Scroll to the bottom and you will see Core Export and Residential. 3. Select either one and then run the search.
Additional Information	

ADMIN

Name	Admin Time Types Auto Approve
Description	Admin Times can now be set to Auto Approve.
Settings	N/A
Steps to Configure	<ol style="list-style-type: none"> 1. Open the ADMIN Tab and select Admin Time Types. 2. Either edit an existing Time Type or create a new one and set the value for Auto Approve to True. Don't forget to click Save.
Steps to Use	<ol style="list-style-type: none"> 1. One way to use this is from the Admin TAB open Admin Time Queue. 2. Select 'add admin time' which is located in the top right of the screen 3. Fill out the fields and make sure you select the correct Type. DO NOT check off Approved. 4. When ready click 'Add Admin Time' 5. You will return to the Admin Time List and this item will be approved.
Additional Information	

Name	Bed Board Interval Reason Admin
Description	The Interval Reasons used for Foster Care and Bed Board can be managed through the Admin tab.
Settings	<p>Partner Config: Use Foster Care and/or Use Bed Board</p> <p>Security Matrix: AdminView AdminLookupUpdate</p>
Steps to Configure	<ol style="list-style-type: none"> 1. Go to the Admin tab and click 'Bed Board Interval Reasons' 2. Enter a name for the reason 3. Check the box for 'Is Foster Care' (this interval reason will be available for foster care) and/or 'Is Bed Board' (this interval reason will be available for bed board) 4. Click the 'Add Reason' button <p>Existing Intervals can be edited by clicking 'edit,' making any desired changes, then clicking 'update'</p>
Steps to Use	Once edited/added, the intervals become available to staff to use with foster care and bed board.
Additional Information	Only applicable if using Foster Care and/or Bed Board.

NOTIFICATION TRIGGERS

Name	Nightly Notification Trigger: Service Not Completed in the Nth Day in Program
Description	A notification trigger can be set to inform staff that documentation for a scheduled visit has not been completed in a specified time frame. Each night the system will look at scheduled visits in the specified program and determines if any of those visits have not been completed within the Nth day from the scheduled date. For example, if a visit was scheduled on the first of the month and the trigger is set for 10 days, a Notification will be sent on the 11th if the visit has not been completed.
Settings	Security Matrix: AdminView and NotificationTriggers (to configure the notification triggers)
Steps to Configure	<ol style="list-style-type: none"> 1. Go the Admin tab and click the link for Notification Triggers (in the Daily Activities section). 2. Click the 'Add a New Trigger Entry' button. 3. In the Trigger dropdown, scroll all the way to the bottom of the list and select 'Service Not Completed in the Nth day in Program' located just under the bolded text 'Nightly Notifications'. 4. Select a Program. 5. Specify the Nth value – this is how many days after the scheduled date the documentation needs to be completed by. 6. Enter a Title for this notification. 7. Select the desired recipients of the notification. 8. Enter 0 for the Occur field – this will have the notification be sent on the day the system identifies a service as not being completed. 9. Make any additional selections for reminders, email, must dismiss, and/or placement on the employee's To Do list. 10. Click the 'Save' button.
Steps to Use	None – once configured, notifications will be automatically sent.
Additional Information	Note that to receive a notification the employee must be assigned to the client.

Name	New Send To Options for the 'Client Episode Add' Notification Trigger
Description	<p>The Notification Trigger 'Client Episode Add' has a new Send To choice 'All Assigned Employees in Program of Episode'. It also has two new conditional choices:</p> <ul style="list-style-type: none"> • If Use Program Roles is turned on in Partner Config, the option to send to employees with the specified 'Role in Program of Episode' will be available. • If Use Program Roles is not turned on in Partner Config, the option to send to 'Primary Employees in Program of Episode' is available.
Settings	Partner Config: Use Client Episodes and Use Program Roles (optional)

	Security Matrix: AdminView, NotificationTriggers (to configure the notification triggers), and ClientEpisodeUpdate
Steps to Configure	<ol style="list-style-type: none"> 1. Go the Admin tab and click the link for Notification Triggers (in the Daily Activities section). 2. Click the 'Add a New Trigger Entry' button. 3. In the Trigger dropdown, scroll to 'Client Episode Add'. 4. Enter a Title for this notification. 5. Select the desired recipients of the notification – with Program Roles turned on 'Program Role (Role in Program of Episode)' is available, with Program Roles turned off 'Primary Employees in Program of Episode' is available. 6. Enter a number of days for the occurrence. 7. Make any additional selections for reminders, email, must dismiss, and/or placement on the employee's To Do list. 8. Click the 'Save' button.
Steps to Use	None – once configured, notifications will be automatically sent
Additional Information	<p>This notification is for manually created episodes only; notifications will not be sent for episodes created automatically using the Partner Config settings Parent Program Driven Episodes and/or Episodes per Program Assignment.</p> <p>Also note that to receive a notification the employee must be assigned to the client.</p>

Name	Notification Trigger Admin Screen Enhancements
Description	Notification triggers can now be filtered by the kind of trigger, the type of trigger and whether it is nightly.
Settings	Security Matrix: AdminView and NotificationTriggers
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Go to Admin and click the link for Notification Triggers. Three drop downs are available: <ul style="list-style-type: none"> • Listing of the actual triggers • Type (client, employee, resource, or team) • Nightly (whether the trigger runs as a nightly process) 2. Select the desired combination of criteria and click the 'Filter' button.
Additional Information	

BILLING

Name	Advanced Ledger Search Enhancements
Description	<p>Advanced Ledger Search has been improved with more custom fields, custom filters, and other functionality.</p> <p>Rev Amnts checkbox (reverse amounts): when checked, will reverse the sign of payments and adjustments</p> <p>Custom Fields: Ledger ID shows the unique internal ID of the ledger action and Ledger Date-Time shows the date and time a particular action occurred (in a dd/mm/yyyy hh:mm:ss format)</p>
Settings	Security Matrix: BillingReports
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Open BILLING Tab > Service Ledger Advanced Search 2. Select Custom Filter 3. Open the WHERE column dropdown 4. At the Top are Ledger Amount, Ledger Balance, Ledger DateTime, Accounting Date, Is Reversed, Is Reversal, Adjustment Group, Adjustment Reason, Claim Charges, Date Batched, Recipient Code, and Location Code 5. Scroll down to locate the Payment section. Adjusted Amount, Amount, Applied Amount, Balance, Check Date, Check Number, Client ID, Date Closed, Date Entered, Deposit Date, Emp ID, Load 835 ID, Notes, Paid Claims, Paid Services, Payer, Payer ID, Payment Category, Payment Control ID, Payment Category, Payment Control ID, Payment ID, Payment Location, Payment Type, Ref Number, Retracted Amount, Retracted Services, Retraction Amount, and Status.
Additional Information	

Name	Primary Care Physician Red X Rule
Description	Visits can be set to Red X for approval and/or batching when the client is under the age of 21 AND the visit is not associated with a Primary Care Physician.
Settings	<p>Security Matrix: BillingConfig (for accessing the Custom Red X setup)</p> <p>Billing Config: Custom Red X > Predefined Red X > "Red X whereby a PCP in Client Profile is missing AND if client is under the age of 21"</p>
Steps to Configure	<ol style="list-style-type: none"> 1. Go to the Billing Tab and click the link for Custom Red X. 2. The predefined Red X rules are listed on the bottom half of the screen; locate the one for "Red X whereby a PCP in Client Profile is missing AND if client is under the age of 21". 3. Check the box labeled 'For Approval' and/or 'For Batching' to prevent those visits from being approved and/or batched when there is no PCP

	<p>associated with the visit.</p> <ol style="list-style-type: none"> 4. Optionally one or more payers can be selected using the multi-pick box; if none are specifically selected then the rule applies to all payers. 5. Click the 'Save Predefined' button.
Steps to Use	Red Xing of visits is automatic once configured
Additional Information	Visits set to auto-approve in the billing matrix bypass all approval Red X rules See the release notes for External Provider as PCP for instructions on assigning a client's primary care physician

Name	Overproduction Unit Capping in Payer Specific
Description	An Overproduction value can be set within a Billing Matrix item within a Payer Specific Rates & Codes setting.
Settings	N/A
Steps to Configure	<ol style="list-style-type: none"> 1. Open a Billing Matrix item and then access the Payer Specific Rates & Codes. 2. Either Add a New Payer Line or edit an existing one by setting a value in the Overproduction field at the far end. <p>Now this will work when the requirements for this Payer Specific line are met so that the number of units charged which will equal the value you set in the payer specific line.</p>
Steps to Use	
Additional Information	

Name	Sum Codes on Payer Specific Lines
Description	Sum Codes have been added to Billing Matrix / Payer Specific Rates & Codes.
Settings	N/A
Steps to Configure	<ol style="list-style-type: none"> 1. Open BILLING Tab > Billing Config > Billing Matrix. 2. While creating a new or editing an existing Billing Matrix line open the Payer Specific Rates & Codes. 3. Add a new or edit an existing Payer Line and enter a Sum Code. Now when this Payer is called and the specific conditions are met the visits will use this Sum code.
Steps to Use	N/A
Additional Information	

Name	Batch List and Edits Status Dropdown Now Has ---ALL---
Description	Batch List and Edits has a new value in the Status dropdown. This now allows you to filter on all the Status at the same time.
Settings	N/A
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Open BILLING Tab > Billing > Batch List and Edits. 2. Locate the Status dropdown. 3. Open it and select ---ALL--- 4. When ready click Export or Filter.
Additional Information	

Name	See Units in Visit Summary View
Description	The Client Visit View Summary now shows Units. A bottom row has been added to the Visit View Summary that shows CPT Code, Units, and Non-Billable.
Settings	Security Matrix: ClientVisitViewSummary
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Open a Visit View. 2. Look at the rows of information and notice the bottom most row contains CPT Code, Units, and Non-Billable.
Additional Information	

Name	Recalculate Copay id Payer if Secondary
Description	There is a new payer setting called 'Recalculate Copay if Secondary' that will recalculate a copay when the insurance cascades down to secondary. This setting combined with the 'Auto Write-off Ins Balance' payer setting will recalculate the copay then write-off the insurance balance when the payer is secondary and it cascades.
Settings	Billing Config > Billing Payer: Self Pay, <i>Recalculate Copay if Secondary</i> , Auto Write-off Ins Balance
Steps to Configure	<ol style="list-style-type: none"> 1. Open BILLING Tab > Billing Config > Billing Payer. 2. Add a New or edit an existing Payer. 3. In the top section select 'Auto Write-off Ins Balance' and 'Recalculate Copay if Secondary:'.

	4. In the Payer Type section select Self Pay.
Steps to Use	<ol style="list-style-type: none"> Using a Client with more than one Insurance Provider, configure the secondary provider using the steps above. Process a Visit and once the Primary provider pays a portion of the balance have the balance written off. When the Balance Cascades the Copay will now be recalculated and applied to the Client.
Additional Information	

Name	Undo Service Adj Retain Adj Type
Description	Now when a Service Adjustment is Undone it will retain the Adjustment Type.
Settings	N/A
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> Open a Visit's Claim Billing Details screen for a visit that has Service Adjustments applied. You'll need one that has an UNDO. Click Undo and you will see the Adjustment type is now retained whereas before it was not.
Additional Information	

Name	Link to Insurance Payment(s) from 835 Reconciliation Screen
Description	A new section has been added to the top of the Reconcile Batched Claims screen that lists payments and allows you to Update the payment
Settings	Security Matrix: billingmodule
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> Open BILLING Tab / Billing / '835/EOB Claim Payment Advice' and click 'Display Previous 835/EOB Batches' Either click on a Batch ID # or View Claims You will find yourself at the Reconcile Batched Claims screen. The Batch ID is there on the top and directly underneath is the new Payment section. This will show you the Payment ID, Payer, Check Number, Amount, Check Date, Deposit Date and the Update button. If you click the Update button then you will get the Payment Update Pop Up.
Additional Information	

Name	Statement Payment Display Date
Description	You can now select what date appears on the Client Statement for payments applied to visits.
Settings	Partner Config: <i>Payment Display Date</i>
Steps to Configure	<ol style="list-style-type: none"> 1. Go the Admin tab and click the link for Partner Config 2. In the Billing section of Partner Config is a drop down labeled 'Payment Display Date' 3. Select the desired date type to be shown: <ul style="list-style-type: none"> • Ledger (default) – the actual date funds were applied to that visit, regardless of the dates associated with payment itself • Deposit – the manually entered deposit date of the payment the applied funds came from • Check – the manually entered check date of the payment the applied funds came from
Steps to Use	Once configured, payments will automatically show the selected date on client statements.
Additional Information	<p>By default, Ledger Date will be shown</p> <p>Note that this is for display purposes only and does not change how accounting dates are associated with payments</p>

Name	Payment Control Rights
Description	The right to Close a Payment Control has been split from the right to Alter Payment controls.
Settings	<p>Partner Config: Use Payment Controls</p> <p>Security Matrix: <i>PaymentControlClose</i> and <i>PaymentControlAlter</i> (to be able to create them)</p>
Steps to Configure	<p>ADMIN Tab</p> <ol style="list-style-type: none"> 1. Open Partner Config. 2. In the Billing section select Use Payment Controls then Save. 3. Now open the Security Matrix. 4. In the Billing section select <i>PaymentControlAlter</i> and the new option <i>PaymentControlClose</i> and Save.
Steps to Use	<ol style="list-style-type: none"> 1. Open BILLING Tab. 2. In the Billing section open Payment Controls. 3. In between the 'report' button and the 'delete' button there is now a 'close' button. 4. Clicking it will close that Payment Control. 5. If you have <i>PaymentControlReopen</i> assigned to you then you can

	reopen it anytime.
Additional Information	

Name	Limit Claims in Batch
Description	When Batching you can now set the maximum number of allowable services to be sent. This will include override-able Red X'd services. When using this feature after clicking Filter Batch the onscreen list will show all possible batchable services but restrict how many you can check off to send based on this setting.
Settings	Security Matrix: BillingModule Billing Config > Billing Payer: Max Claims Per Batch
Steps to Configure	<ol style="list-style-type: none"> 1. Open BILLING Tab > Billing Config > Billing Payer. 2. While either adding a new payer or editing an existing one look in the first section for 'Max Visits Per Batch'. 3. Enter any number from 1 to 999999. 4. Save Settings.
Steps to Use	<p>For example let's say you selected 10 as your Maximum:</p> <ol style="list-style-type: none"> 1. Open the BILLING Tab > Generate Batch Claim File. 2. Filter your Batch like normal. 3. The results will place the first 10 visits at the top of the list. Remember they could have a RED X if you can override. 4. The remaining visits on the list will show all of the other potential visits if of course the Maximum number you set is less than the possible batchable visits.
Additional Information	

Name	Medicaid Voids – 1500/837
Description	When setting a claim to resubmit after it has had a payment from an 835 applied, you will be able to select a resubmission code and Resubmission Reason, if the payer has the setting can resubmit void on.
Settings	Billing Config > Billing Payer: Can Resubmit Voids
Steps to Configure	<ol style="list-style-type: none"> 1. Open BILLING Tab > Billing Config > Billing Payer. 2. In the top section select Can Resubmit Voids. 3. Click Save Settings.
Steps to Use	N/A
Additional Information	This payer will accept voids and adjustments in the 837/1500 that reference

	the original claim id.
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Name	Requested Authorizations
Description	Authorizations now have two informational elements 'Requested Units' and 'Auth Pending' which allows Auths to be entered with Requested Units and a Pending flag. When marked as Pending these Auths will NOT decrement or match against any visits.
Settings	Partner Config: <i>Use Auth Pending</i> Security Matrix: AuthorizationAdd, AuthorizationView, and optionally AuthorizationDelete
Steps to Configure	<ol style="list-style-type: none"> 1. Open ADMIN Tab > Site Configuration > Partner Config. 2. Locate the Authorization Settings section and select 'Use Auth Pending'. 3. Click Save Partner Config.
Steps to Use	<ol style="list-style-type: none"> 1. Go to a Client's Nav Bar. 2. Open Authorizations. 3. Fill in the Add New Authorization section as you normally would but in the bottom right hand corner enter 'Requested Units' and check of 'Auth Pending' and leave the Units/Cap and the Auth Number fields empty. 4. When ready, click the 'Add Authorization' button. 5. If it is not on the list, click Show All. 6. Your Requested Auth will be present and the two new columns Request and Pending will show the number of Requested Units you entered and a TRUE for Pending. Pacing will show 0% / 0%. 7. When the Auth is approved, you then update the Auth by unchecking Pending, emptying the Requested field if you want, and filling in the Units field. Now Units will read something like 0% / 12.
Additional Information	If you add an authorization that is using Requested Units and Auth Pending and it is for a date in the future you have to click the Show All button to see them.

Name	Deposit Date Required for Payments
Description	When entering any payment, Deposit Date can now be a required field.
Settings	Partner Config: <i>Require Deposit Date on All Payment Entries</i>
Steps to Configure	<ol style="list-style-type: none"> 1. Go to the Admin tab and click the link for Partner Config. 2. Check the box for Require Deposit Date on All Payment Entries(located in the Billing section). 3. Click the 'Save Partner Config' button located at the bottom of the screen.

Steps to Use	Once turned on, all payments will require the entry of a deposit date before they can be saved.
Additional Information	

REPORTS

Name	Appointment History Report: Export Schedule Notes
Description	The Exporting of the Appointment History report now includes notes off the scheduler.
Settings	Security Matrix: ReportList Report Security: Appointment History Report
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Open a scheduled item and fill in the Notes field. 2. Open REPORTS / Appointment History Report and select a date range that will cover the appointments and any other filters you want and run the report. 3. Export the report results and the Scheduler Notes will be there.
Additional Information	

Name	Aging Report Summary
Description	Accounts receivable aging report by as-of date, broken out by payer type and payer for 30, 60, 90, 120 and up days. Aging calculated by difference of as-of date and service date or rebill date. Payer is last billed by as-of date. Balance is full balance of service where GL date is less than as-of date. Excludes non-billable, secondary, and unbilled services.
Settings	Report Security: Aging by As-Of Date Summary Security Matrix: ReportList
Steps to Configure	<ol style="list-style-type: none"> 1. Go to the Admin tab and click Report Security 2. Assign the 'Aging by As-Of Date Summary' report to the desired security profiles 3. Click the 'Save All' button
Steps to Use	<ol style="list-style-type: none"> 1. Go to the Admin tab and click Report Security 2. Assign the 'Aging by As-Of Date Summary' report to the desired security profiles 3. Click the 'Save All' button

Additional Information	
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Name	Aging Report Details
Description	Accounts receivable aging report by as-of date, broken out by client and payer type for 30, 60, 90, 120 and up days. Aging calculated by difference of as-of date and service date or rebill date. Payer is last billed by as-of date. Balance is full balance of service where GL date is less than as-of date. Excludes non-billable, secondary, and unbilled services.
Settings	Report Security: Aging by As-Of Date Details Security Matrix: ReportList
Steps to Configure	<ol style="list-style-type: none"> 1. Go to the Admin tab and click Report Security 2. Assign the 'Aging by As-Of Date Details' report to the desired security profiles 3. Click the 'Save All' button
Steps to Use	<ol style="list-style-type: none"> 1. Open REPORTS and select Aging by As-Of Date Details. 2. Set the As-Of-Date for the date you want to report on. 3. Select 1, 2 or more Programs to Report on in the multi-select list. If you do not select a Program then all of the Clients in your system will be reported on.
Additional Information	

Name	Program Admission Report
Description	<p>The Program Admission Report shows all instances of a Client being assigned to a program.</p> <ul style="list-style-type: none"> • The output first shows the Program then the list of Client Names and the Date Admitted. • At the bottom of each Program section will be Total Clients showing how many clients are reported on. It is possible for a client to be assigned to a program more than once in the selected time range so there is also 'Unduplicated Clients' which shows how many unique client were admitted. • On the bottom of the last page are grand totals: Total Client Count & Total Unduplicated Clients
Settings	Report Security: Program Admission Report Security Matrix: ReportList
Steps to Configure	<ol style="list-style-type: none"> 1. Go to the Admin tab and click Report Security 2. Assign the 'Program Admission Report' report to the desired security

	<p>profiles</p> <p>3. Click the 'Save All' button</p>
Steps to Use	<ol style="list-style-type: none"> 1. Go to the Reports tab and click the link for 'Program Admission Report' 2. Select one or more programs from the multipick box (or leave it unselected to report on all program admissions) 3. If desired, enter a start and/or end date to see just those clients admitted during that date range 4. Click 'Run Report'
Additional Information	

Name	Client Aging Extended Report
Description	An expanded version of the Client Aging report is available 'Client Aging Extended Report' showing aging out to five years. Insurance, client, and other due balances are shown.
Settings	<p>Report Security: Client Aging Extended Report</p> <p>Security Matrix: ReportList</p>
Steps to Configure	<ol style="list-style-type: none"> 1. Go to the Admin tab and click Report Security 2. Assign 'Client Aging Extended Report' to the desired security profiles 3. Click the 'Save All' button
Steps to Use	<ol style="list-style-type: none"> 1. Go to the Reports tab and click the link for 'Client Aging Extended Report' 2. Select any desired filters (date range, program, billing group, team, and employee) or leave these open to report on all visits 3. When the 'With Client Due or Other Due > 0' filter is set to YES, only those clients that have a client due and/or other due balance will reported; all of their visits with balance will be shown 4. When the 'With Client Due or Other Due > 0' filter is set to NO, all clients with any balance will reported; all of their visits with balance will be shown, even if all the balances are only owed by insurance 5. Click 'Run Report'
Additional Information	Other Due is typically called Debt Set Off and is turned on by putting a description in the Partner Config field ' Billing Other Due (Debt Set-off) Label'

Name	Program Closing Report
Description	Reports on clients that have been unassigned from a program.
Settings	<p>Report Security: Program Closing Report</p> <p>Security Matrix: ReportList</p>

Steps to Configure	<ol style="list-style-type: none"> 1. Go to the Admin tab and click Report Security 2. Assign 'Program Closing Report' to the desired security profiles 3. Click the 'Save All' button
Steps to Use	<ol style="list-style-type: none"> 1. Open REPORTS > Program Closing Report. 2. If you want to report on all programs do not make a selection in the Programs list. Otherwise select one or more programs. 3. Change the default date range if you want. 4. Click Run Report. 5. The report name will be on top and the Date Range over to the right. 6. The output will be grouped by the Program being reported on. 7. Then the data shown will be the Client Name, the date when the Program was opened, the date when the program was Closed, The Reason if one was available to select upon closing and any Notes recorded when selecting a Reason. 8. The bottom of each Program section will show Total Clients or Rows and then Unduplicated Clients for a count of the unique names in that section. 9. At the bottom of the last page of the report will give you grand totals for Total Clients and Total Unduplicated Clients.
Additional Information	

Name	Client Aging by Payer
Description	<p>This report now reports on Insurance Total and Responsible Total. The output is grouped first by Billing Group, then by Payer, Client, and Service.</p> <p>Each Billing Group Section will have subtotals along the top of the number of Services being reported on, the Rate, Insurance Total and Responsible Total with balances on the far right. The same information will be given for each Payer. If you expand the output for the Payers then you have access to the subtotals for each Client. Then if you expand the Client you will see a list of Services the Date complete, the Status and the CPT CODE.</p>
Settings	Report Security: Client Aging by Payer
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Open REPORTS > Client Aging by Payer. 2. Select a Date Range. 3. Filter the results by selecting Program, Billing Group, Team, Employee and Payer Type. 4. Click Run Report.
Additional Information	

Name	Administrative Table Logging and Reporting
Description	Updates and deletions to the back-end administrative tables are now recorded. The history is viewable using the 'Admin Logging' report.
Settings	Security Matrix: ReportList
Steps to Configure	<ol style="list-style-type: none"> 1. Go to the Admin tab and click Report Security. 2. Assign the 'Admin Logging' report to the desired security profiles. 3. Click the 'Save All' button.
Steps to Use	<ol style="list-style-type: none"> 1. Open the Reports tab and then click the link for the 'Admin Logging' report. The following filters are available: <ul style="list-style-type: none"> • Table: at least one Table must be selected to be able to run the report • Date: defaults to the current date. If a different date is chosen the report will list all actions from that date until today • Employee: defaults to report on all employees. This is a multi-select list allowing you to select one or more employees • Primary Table ID: a numeric field (primary / unique key) identifying the record in a given table • Description/Detail: This holds information such as a Visit Type's name. Once you have made your selections, click Run Report. 2. When the results are presented, you may change the filters and rerun the report directly from the results screen. The results are also exportable.
Additional Information	Logging is automatic; please note that it is not retroactive to actions done prior to this release. The report may have to be activated in Report Security.

FORMS

Name	Form Embedded Signatures with Tablet Signature
Description	Embedded signatures can be captured within a form using a tablet PC or a mouse.
Settings	<p>Security Matrix: For editing a form to include embedded signatures: FormBuilder FormBuilderEdit</p> <p>Form Builder: For a Category within a form Embedded Signatures is set to 1 2 3 or 4</p> <p>Employee Config: Tablet Signature</p>
Steps to Configure	<ol style="list-style-type: none"> 1. Go to Forms and click 'new version' on the desired form. 2. Click 'edit' and click on the category. 3. Select the desired number of signatures using the Embedded Signatures

	<p>drop down (choices are 0 to 4).</p> <ol style="list-style-type: none"> 4. Click 'Save Category'. 5. Click the blue arrow at the top of the screen to return to the form list 6) Click 'build' then 'activate'. <p>For the employee:</p> <ol style="list-style-type: none"> 1. Click 'Config' on the employee's Nav Bar. 2. Check the box for 'Tablet Signature' (note that this disables use of signature pads for this employee). 3. Click the 'Save Employee Config' button.
Steps to Use	When in a form with embedded signatures simply write in the signature box using the tablet pen. If using a mouse left-click and hold while in the signature box; move the mouse to sign.
Additional Information	Use of Form Builder requires the Forms Module Please contact your Account/Implementation Manager for additional information regarding form building and contracting for the Forms Module.

Name	Inject Family into Forms
Description	The information stored in a Client's Family screen can now be injected into Visit Forms.
Settings	Security Matrix: Form Builder and FormBuilderEdit
Steps to Configure	<ol style="list-style-type: none"> 1. Using Form Builder, modify or create a Client Form. 2. Add a question with Answer Format 'Injected Family'. 3. Build and Activate when done.
Steps to Use	<ol style="list-style-type: none"> 1. Add a Visit that uses the Form you modified. 2. When you begin the visit the Family field will be populated with the Client's family member Name, type of relation, whether the family person is a dependent and date of birth.
Additional Information	