Release 6.0 Configuration

February 2011

This document describes the enhancements included in Credible 6.0 release. It lists any settings required to enable a new feature along with the steps for configuration and use. Settings that are new and specifically needed for a feature are in *italics.*

CLIENT

Employee

Schedule

Service

Billing

Reports

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CLIENT

Setting Up Clinical Support Tools for Clients

Description	With the new Clinical Support module, you can set up clinical support tools based on any combination of medication, medication class, diagnosis, gender, age range, or other client field. A clinical support tool can include text, a URL, and a file. You can also set it up to be pushed out to the Credible Client Portal. When a client meets the conditions specified in the clinical support tool, it is added to his or her record. You can add a Clinical Support section to the Client Overview screen in your internal site and in the Client Portal. When an employee adds a medication or diagnosis to a client record, the system searches existing clinical support tools for a match on medication, medication class, or diagnosis. If a match is found, the additional clinical support criteria are analyzed. If all of it matches, the clinical support is added to the client record. Notes: • For the addition of a medication or addition/update of a diagnosis to trigger a clinical support, it must be made *after* the clinical support is set up. • If a client record matches the same clinical support multiple times, the system will not add another instance of the support until the status of the initial one is no longer New. If the medication or diagnosis that triggered a clinical support is deleted, the support will be deleted from the client's record if the status is still set to New. For any other status, the system will delete the primary key (PK), which will make the clinical support no longer active. If a matching medication or diagnosis that did not trigger the client clinical support is deleted then the clinical support record will not be affected. The system records clinical support actions in the HIPAA logs.
Settings	Security Matrix: *ClinicalSupportAdmin, ClinicalSupportView* Client User Security Matrix: *ClinicalSupportCU* (to make clinical supports available in the Client Portal; you need to have your Implementation or Account Manager turn on the Client Portal for your system)
Steps to Configure	• To make the clinical support section available on the home page: **Admin** tab > **Home Page Config** > **Client Home Page Admin** and then select Clinical Support for left bar or center bar. • To make the clinical support section available on the Client Portal home page: **Admin** tab > **Home Page Config** > **Client User Home Page Admin** and then select Clinical Support for left bar or center bar. • To set up a clinical support: 1. **Admin** tab > **Clinical Support** > **Add New Clinical Support Tool.** 2. In the Summary field, enter a description of the clinical support (required). 3. Enter at least one medication, medication class, or diagnosis. You can select multiple meds, medication classes, or diagnoses or any combination of the three.

a. Click the corresponding field. A Clinical Support Picker popup displays.
b. Type the first three letters of the medication, medication class, or diagnosis to display a list of possible matches.
c. Select the appropriate options. A total count is displayed at the top of the popup.
d. Click the total count to view a list of all options selected so far. If you need to remove a selected option, click it.
e. Click **Done.**

4. If applicable, enter additional clinical support criteria: gender, age range, and/or a specific client field. If you select a client field, enter the appropriate value in the Other Client Field Value field.
5. If applicable, include a supporting URL (make sure you include http://) and/or file.
6. If you want to give users the option of pushing the clinical support to the Client Portal, select the Push To Client checkbox.
7. Click **Add Clinical Support Tool.**

Steps to Use

1. **Client** tab > Client Overview screen > **Clinical Support** on Client nav bar (or **All Clinical Support Tools** link in the Clinical Support section). A list of all clinical supports that have not been accepted yet displays (All Active status).
2. To filter the clinical supports, select an option from the Status dropdown.

• All Active	Default selection; all clinical supports that are new, have been flagged to keep active, or have not been accepted, rejected, or “PK deleted”
• All	All clinical supports
• New	Clinical supports that have not been accepted, rejected, or pushed to the Client Portal; new clinical supports are highlighted in green
• Accepted	Clinical supports that have been reviewed and accepted by an employee or client user
• Pushed to Portal	Clinical supports thathave been made available to client users on the Client Portal by selecting Push to Portal checkbox in Client Clinical Support Details screen
• All Closed	Clinical supports that have been accepted, rejected, or PK deleted
• Rejected	Clinical supports that an employee decided were not appropriate for the client and flagged as Rejected
• PK Deleted	Clinical supports that had the triggering record deleted

3. Click **select** to view the details of a clinical support.
4. Enter notes to record relevant information about the clinical support for this particular client. The notes will not display in the Client Portal.
5. If there is a Push to Portal checkbox, select if if you want to push the clinical support to the Client Portal. If necessary, you can deselect this checkbox later on to remove the clinical support from the Client Portal.
6. If you didn't push the support to the Client Portal, accept or reject it by selecting the corresponding option from the Accepted dropdown.
7. To keep the clinical support active, select the corresponding checkbox.
8. Click **Save Clinical Support.**

Steps for a client user to accept a clinical support:

1. Log into the Credible Client Portal and click **Clinical Support** on the nav bar.
2. Click **select** to display clinical support details.
3. After reviewing info, select Accepted checkbox and click **Save Clinical Support.**

Client Search Based on Axis III & Medical Profile Criteria

Description	You can now search for clients based on an Axis III condition (by entering the name or code) and criteria from the medical profile. To see a concatenated list of Axis III conditions and medication classes in the search results, select the corresponding fields in Custom Fields.
Settings	Security Matrix: AdvSearch
Steps to Configure	N/A
Steps to Use	1. **Client** tab > **advanced search.** 2. Enter the code or name of an Axis III condition in the corresponding filter field. 3. Click the Medical button to display the Advanced Search Filter popup. 4. For each medical profile field you want to base the search on, select greater than, less than, or between from the dropdown and then enter the appropriate value in the field to the right. 5. Click **Save.** 6. Select any other filter criteria you want to use. 7. Click **Custom Fields** and select Medications, Med Class, and Axis III Conditions (in the Special Fields section). 8. Click **Filter.** All Axis III conditions in a client's record will be displayed, including those that have been resolved.

Print Views for Multiple Clients in Advanced Client Search

Description	With the new Show Print checkbox on the Advanced Client Search screen, you can now generate print views for clients in the search results. You can select up to 50 clients at a time and only have to fill out the Print Options popup once.
Settings	Security Matrix: AdvSearch
Steps to Configure	N/A
Steps to Use	1. **Client** tab > **advanced search.** 2. Select the **Show Print** checkbox, make your filter selections, and click **Filter.** The search results include a Print/View column and by default, all clients are selected. 3. Deselect the clients you don't want to generate print views for. Note that you the print/view functionality is limited to 50 clients. Click the Print/View column header to deselect/select all clients. 4. Click the **Print/View** button to display the Print Options popup. 5. Make your selections and click **Print View.**

Running Exports Within Advanced Client Search

Description	The Show Template function has been replaced and expanded upon with the Show Exports function. If an export pulls data from a table that has a client ID in it, you can set it up to run within Advanced Client Search. You can also pass parameters such as date range fields. Here are two examples of what you can do with the Show Exports function: • Generate a client reminder list that displays clients' preferred method of contact (a new field added to the Client Profile in this release) • Generate a list of clients between a specific age range that are on a certain medication If needed for reporting purposes, include the export_date in your export to record the date it was run.
Settings	Security Matrix: ReportList, ExportBuild, ExportRun, AdvSearch
Steps to Configure	1. **Reports** tab > **Export Tool** on nav bar. 2. Create a new export that generates a client list or modify an existing one (the table referenced must have the Client ID in it). a. Select **Is Advanced Search.** b. Enter custom parameters if appropriate.

Steps to Use	1. **Client** tab > **advanced search.** 2. Select **Show Exports** checkbox. 3. Enter search criteria and click **Filter.** There is an Export column in the search results and all the checkboxes are selected by default. 4. Uncheck the Export checkbox for any clients you don't want to run the export on. To deselect all the checkboxes, click the Export column header. 5. From the Export dropdown at the bottom of the search results, select the export you want to run and click **Generate Export.** 6. If an Export Parameters screen displays, enter the appropriate values in the Parameter fields • If necessary, change the format of the export results with the dropdown provided. • To display the header row or show line numbers, select the corresponding checkbox. 7. Click **Run Export.**

Allergy Section Added to Client Medications Print View

Description	If a client has active allergies recorded in the system, they will be listed at the top of the Client Medications print view along with the reactions.
Settings	Security Matrix: RxView, AllergyView
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen for client with allergies > **Medications** on Client nav bar. 2. Click **Print View** button.

Flagging an Allergy As a Medical Allergy

Description	You can now flag an allergy as a medical allergy by selecting the new Med Allergy checkbox in the Client Allergies screen. When selected, a value of True appears in the Med Allergy column in the Client Allergies list. The Med Allergy column is also displayed in the Client Allergies screen in the Credible Client Portal. Flagging an allergy as a medical allergy is for reporting purposes only. It has no impact on the drug/allergy interaction check.
Settings	Security Matrix: AllergyUpdate, AllergyView
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen > **Allergy** on Client nav bar. 2. Add a new allergy or update an existing one. 3. Select the Med Allergy checkbox. 4. Click **Add Allergy** or **Update Allergy** as appropriate.

Confirming Client Has Reported No Meds or Allergies

Description	With a new checkbox on the Client Medications and Client Allergies screens, you can confirm that a client has reported no medications (or prescriptions) or allergies. When you add a medication/prescription or allergy record for a client, the value of the corresponding field (no_med_flag or no_allergy_flag) is set to false and the checkbox is no longer displayed. The two new fields are in the Clients table for reporting purposes.
Settings	Security Matrix: AllergyView, RxView
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen > **Medications** or **Allergy** on Client nav bar. 2. If the client does not have any medication or allergy records in the system, a **Client has no reported medications (or allergies)** checkbox displays. 3. Click the checkbox to confirm that the client has reported no medications (or allergies). • If you add a medication/prescription or allergy for the client, the checkbox is no longer displayed. • If you discontinue a medication/prescription or allergy, the checkbox redisplays but is unchecked. *You will need to check it again* to confirm that the client has reported no medications or allergies.

Exporting a Client's Immunizations in HL7 Format

Description	With the new Health Level 7 (HL7) export function, you can generate a client immunization file for immunization registry submissions. If your system is set up to allow HL7 exports, there will be an Export HL7 button at the bottom of the Medical Profile screen.
Settings	Security Matrix: MedicalProfileView, MedicalProfileUpdate Partner Config: Use Immunizations Your Implementation or Account Manager needs to turn on the HL Export function in your system.
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen > **Medical Profile** on Client nav bar. 2. Click **Export HL7** button. A File Download popup displays. 3. Open the file or save it locally.

Recording Additional Details About an Immunization

Description	You can capture more information about an immunization with the new fields in the Medical Profile screen. The Immunizations section now has a Manufacturer dropdown and fields for the Lot Number and Time. The Dosage field has been changed to an Amount field with a units dropdown (currently, ml is the only option). The immunizations available in the Name dropdown now reflect the ones listed on the CDC website. A client's immunization data is displayed in the Medical Profile screen in the Credible Client Portal.
Settings	Security Matrix: MedicalProfileView, MedicalProfileUpdate Partner Config: Use Immunizations Client User Security Matrix: MedicalProfileViewCU
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen > **Medical Profile** on Client nav bar. 2. If the client doesn't have a medical profile, create one. 3. Add an immunization record by filling out the appropriate fields in the Immunizations section and clicking **Add Immunization.** The immunization you added is displayed in a list above the immunization fields. Mouse over the Date to view the Time you entered or the default time of 12:00 AM.

Viewing Growth Charts for a Client

Description	You can now view height and weight/BMI charts for a client from the Medical Profile screen. The client must have a date of birth in his or her client profile and one or more medical profiles saved for the chart functionality to work. These charts are not accessible in the Credible Client Portal.
Settings	Security Matrix: MedicalProfileView
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen > **Medical Profile** on Client nav bar. 2. Click the **View Height & Weight Charts** link above the Check In Notes box**.** The charts display in a separate window.

Recording Requested Date for a Client User Account

Description	When you set up a client user account for the Credible Client Portal, you now need to record the date the client user requested access to an electronic copy of his/her health information. The Requested Date field defaults to the current date. The system records the date you add the client user account for the calculation of the time between the requested date and account creation date. Meaningful Use requires that you provide clients with an electronic copy of their health information within three business days of the request. A client user can view the Requested Date when logged into the Client Portal (via the Users button on the nav bar). If necessary, you can edit the Requested Date for an existing client user account.
Settings	Security Matrix: ClientUserView You need to have your Implementation or Account Manager turn on the Client Portal for your system.
Steps to Configure	Refer to the online help for the steps to set up the Client Portal.
Steps to Use	1. **Client** tab > Client Overview screen > **Users** on Client nav bar > **Add User.** 2. Enter a username for the client user. 3. Enter the first and last name of the client user and enter his or her email address. 4. If the date the client user requested access is different than the current date, enter the appropriate date in the Requested Date field. The date must be between 1/1/2000 and the current date.

5. Select the client user profile from the dropdown and click **Add User.** The Password Update screen displays.
6. Enter a password for the client user in the New Password field and then enter it again in the second password field.

   A client user will have to change his or her password during the initial login to the Client Portal.
7. Click **Update Password.** The User Accounts screen displays with the user account you created.

Episode Program & Medical Profile Date Added to Print View

Description	The print view of the client profile has been enhanced as follows: • Each Episode section now indicates the code of the program the episode is associated with • The Profile Date has been added to the Medical Profile section
Settings	Partner Config: Use Client Episodes
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen > **Profile** button on Client nav bar > **Print View** button. 2. Select checkboxes for Client Episodes and Medical Profile and click **Print View**.

Episode LOS Calculated from Admission Date to Current Date

Description	The episode length of stay (LOS) is now calculated from the admission date (or episode creation date if there isn't an admission date) to the current date. If the episode has a discharge date or an "auto close date," the LOS is calculated from the admission date to the discharge date or auto close date if there isn't a discharge date. The auto close date is set when an episode status that is not an active status is selected (for example, a Discharged or Closed status).
Settings	Security Matrix: DataDictionary, AdminLookupUpdate, ClientEpisodeUpdate Partner Config: Use Client Episodes

Steps to Configure

1. **Admin** tab > **Data Dictionary** > Table source = Client Episode.
2. Add the following fields:
   - length_of_stay – select Is Numeric, set Max Length to 10, and enter an appropriate view label such as LOS
   - admission_date and discharge_date – select Is Date, set Max Length to 10, and enter the appropriate view label
3. Make sure you have at least two episode status types where Is Active = True for one and Is Active = False (the Discharged status) for the other. (**Admin** tab > **Episode Status Types**)

Steps to Use

1. **Client** tab > Client Overview screen > **Episodes** on Client nav bar.
2. Open an active episode to see that the LOS is now calculated based on the current date.

Tip: use the "Add columns to list view" icon to add an LOS column to the Client Episodes list.

New Demographic Fields Available for Client Profile

Description

You can now add dropdowns for Preferred Contact Method, Preferred Language, Ethnicity, Race, and Smoking Status to the client profile. These fields can be set up in the Data Dictionary using the custom lookup categories that have been added to your system. Custom lookup items – values from the CDC website – have been added for Preferred Language, Ethnicity, Race, and Smoking Status.

Settings

Security Matrix: DataDictionary, AdminLookupUpdate, ClientUpdate, ReportList

Steps to Configure

1. **Admin** tab > **Data Dictionary** > Table source = **Clients** | Type = **View.**
2. Add the following fields: preferred_contact, preferred_language, ethnicity_omb, race_omb, and smoking_status.
   a. Set the following Lookup parameters: Lookup Table = LookupDict, Lookup Description = lookup_desc or lookup_code, Lookup Category = category that corresponds to the field.
   b. Select the User View checkbox for each field.
   c. Make sure to add the same fields to the Update type.
3. **Admin** tab > **Custom Lookup Items**.
4. Select preferred_contact_method from the Category dropdown and click **Display.**
5. Add different methods of contact to the category (for example, email, regular mail, or phone).

The lookup items for preferred language, ethnicity_omb, race_omb, and smoking_status have been set up in your system.

Steps to Use	1. **Client** tab > Client Overview screen > **Profile** on Client nav bar. 2. Click **Update,** select the appropriate value from each of the new dropdowns, and then click **Update Client.**

Created, Updated, and Resolved Dates Added to Diagnosis Screen

Description	The date a multiaxial assessment was created for a client – either directly or through form mapping – is now displayed in the top right corner of the Diagnosis screen. The date an Axis I-III diagnosis was added or changed (directly or through mapping) is displayed as the Date Updated in the corresponding diagnosis section. You can now document when an Axis I-III diagnosis has been resolved by filling in the new Resolved Date field. If the Resolved Date field has a value in it, the diagnosis won't be copied over when you start a new assessment for the client. The Created, Updated, and Resolved Dates – required for Meaningful Use – are also displayed in the Diagnosis screen in the Credible Client Portal. Injection notes: • To inject Date Created into a form, use the Injected Diagnosis answer format. • To inject Date Updated and Date Resolved into a form, use the Full Injected Diagnosis answer format.
Settings	Security Matrix: DxView, DxUpdate Client User Security Matrix: DxViewCU You need to have your Implementation or Account Manager turn on the Client Portal for your system.
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen > **Diagnosis** on Client nav bar. 2. Start a new assessment or update an existing one. 3. To indicate an Axis I-III has been resolved, click the scroll icon for the diagnosis and enter the appropriate date in the Date Resolved field. 4. Click **Save.**

Radiology Tab Added to Physicians Orders Screen

Description	You can use the new Radiology tab in the Physicians Orders screen to electronically record/update, store, and retrieve orders for radiology/imaging. Physicians' orders do not display in the Credible Client Portal. Radiology has been added to the Category filter for the Physicians Order Report.
Settings	Security Matrix: PhysicianOrdersView, PhysicianOrdersAdd Report Security: Physicians Orders Report
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen > **Orders** on Client nav bar. 2. Select the Radiology tab to enter an order for radiology/imaging.

Client Payment Enhancements

Description	If your organization accepts client payments via the Internet, you can now select Web from the Payment Type dropdown on the Add Client Payment/Copay screen. When you reconcile a client payment, you can now filter the services by Program.
Settings	Security Matrix: BillingModule, BllingAddCopay, ClientPayments, ClientPaymentUpdate, ClientPaymentView
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen > **Payments** on Client nav bar (or **Billing** tab > **Manage Client Payments**). 2. Click the **Add Payment** button. 3. Select **Web** from Payment Type dropdown and fill out other fieldds as appropriate. 4. Click **Save Payment.** The Reconcile Client Payment screen displays. 5. If necessary, filter the services you want to apply the payment to and change the apply amount supplied for each service. 6. Click **Apply Amounts.** You can also access the Reconcile Client Payment screen via the **reconcile** button in the Client Payments screen.

Basic Liability Worksheet Enhancements

Description	If your organization uses the Basic Liability Worksheet for the Client Liability form, you can take advantage of the following enhancements: • Program dropdown – you can now set up a Client Liability form to process liability for a specific program. Multiple active liabilities can exist for different programs. • Per Service Hourly Liability Amount ($) – if you fill in this new field and the service type has Hourly set as the Liability Scale Type, the system calculates liability as service hours * client hourly liability amount. Note that if the Liability Scale Type is hourly but the Client Liability form does not have an hourly liability amount, liability will only be processed if there is a Monthly Liability amount (the Per Service Liability Amount/Percentage is ignored). • Liability Model setting in Service Type config – use it to force liability into either monthly liability or per service liability when both options are filled out in a Client Liability form.
Settings	Security Matrix: ClientLiabilityUpdate, ClientLiabilityView Partner Config: Use Basic Liability Worksheet
Steps to Configure	1. **Admin** tab > **Service Type.** 2. From the Liability Scale Type dropdown, select Hourly. 3. From the Liability Model dropdown, select the desired setting and save the changes.
Steps to Use	1. **Client** tab > Client Overview screen > **Liability** on Client nav bar. 2. Start a new Client Liability form or update an existing one. 3. Select a program from the Program dropdown to set up the Client Liability form for a specific program. 4. Fill out the date fields and fields in the Total Liability section as appropriate. 5. If necessary, enter notes in the text box. 6. Click **Start New Form** or **Save Liability Form** as appropriate.

EMPLOYEE

Enabling Forgot Password Functionality

Description	A Forgot Password link has been added to the Credible login screen. With a new Partner Config setting, you can let employees use the link to reset their passwords without assistance from an administrator. Actions related to the forgotten password process are logged in the HIPAA logs.
Settings	Partner Config: *Enable Forgot Password Functionality*
Steps to Configure	1. **Employee** tab > Employee Overview screen > **Login** on Employee nav bar 2. Enter an email address in the Email field and click **Update User.**
Steps to Use	1. Enter your username and domain in the corresponding fields on the Credible login screen. 2. Click the **Forgot Password** link. 3. Within the next 15 minutes, open the email sent to you from support@credibleinc.com and click the link provided to access the Reset Password screen. If you don't click the link within 15 minutes, you will have to start the process over again. 4. Enter your new password in both fields and click **Update Password.** The login screen redisplays. 5. Login using your new password.

Emergency Access to Another Employee's Clients

Description	If an emergency situation arises with a client and the assigned employee is not available, another employee can "take" emergency access to that client's record if he or she has the new security right *ClientEmergencyAccess.* Note that employees can only take emergency access for themselves – they cannot assign emergency access to another employee. With two new notification triggers, the appropriate staff can be notified when emergency access has been taken. In addition, the emergency client assignment is recorded in the HIPAA logs.
Settings	Security Matrix: *ClientEmergencyAccess,* ClientView, ClientViewLog, NotificationTriggers Partner Config: *Allow Emergency Access*

Steps to Configure	You should set up the notification triggers before enabling the Emergency function. To set up the notification triggers: **Admin** tab > **Notification Triggers** > **Add a New Trigger Entry.** • Employee Granted Emergency Access – Occur = 0, Send To = Team Leaders & Supervisors • Client Record Granted Emergency Access – Occur = 0, Send To = Specified Employee; select employee who is currently assigned to client
Steps to Use	1. **Employee** tab > **My Record** > **Emergency** button on the Employee nav bar. 2. Enter your password in the field provided and click **Continue.** The Emergency Client Assignment screen displays with filtering fields at the top. Searching for the client you need emergency access to minimizes inadvertent access to personal health information. 3. Use the filtering fields to search for the client you need emergency access to. Only clients that you are not already assigned to will be included in the results. 4. Find the client in the search results and click **assign**. The Client Overview screen for the client displays. (At this time, notification triggers will be sent and the emergency assignment will be logged.) 5. Once the emergency access is no longer needed, use the Client function on the Employee nav bar to unassign the client from your record.

SCHEDULE

	Printing Reminder Cards for Next 10 Appointments
Description	If a client has multiple services scheduled, you can now print reminders for up to 10 appointments. The new feature is available when you access the Scheduled Service popup from the client's schedule.
Settings	Security Matrix: PlannerAdd, PlannerAddOther, PlannerViewAll
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen > **Schedule** on Client nav bar. 2. Click a scheduled appointment to display the Scheduled Service popup. 3. From the **Appointments to print** dropdown, select the number of appointments you want reminders for. A popup displays with the reminders. The reminders will be for the appointment you opened and appointments scheduled from that date forward.

SERVICE

Creating Service Summaries

Description	With new service summary functionality, you can configure a service type so the form linked to it has a Summary Notes text box. In addition, you can set up questions in the form so they are included in the service summary. This is useful for including injected client data in the summary. The summary created during the service is available on the Service Details screen and in the Credible Client Portal. You can control access to it with Security Matrix settings.
Settings	Security Matrix: FormBuilder, FormBuilderEdit, ClientFormsUpdate, *ClientVisitSummaryView* Client User Security Matrix: *ClientUserSummaryView,* ClientVisitListCU You need to have the Form Builder module. Your Implementation or Account Manager needs to turn on Form Builder and the Client Portal for your system.
Steps to Configure	1. **Admin** tab > **Service Type**. 2. Add a new service type or edit an existing one. 3. Select **Include Summary** checkbox and click **Save.** 4. Select the **Forms** tab and add a new form or edit an existing one. 5. For any question that you want to include in the summary, select the **Include in Summary** checkbox. You may want to include questions that inject current info from a client's record (for example, diagnosis, medications, and allergies). 6. Save the form and link it to the service type you updated above.
Steps to Use	1. Provide a service using a service type/form set up to include a summary. 2. After completing the form, click the SUMMARY NOTES link (under BILLING INFO/SIGN & SUBMIT link on left side of form) to display the Summary Notes box. 3. Enter post-service notes such as service location, provider's office contact information, reason for the service, and so on. 4. Sign and submit the service. 5. In the Service Details screen, click the **Summary** button to display the summary. To view the summary in the Client Portal: **Service List** button on nav bar > **print** button in Summary column.

BILLING

Testing 837 and 270 for ASC X12 Version 5010

Description	With the new 5010 options in the 837 and 270 version code dropdowns in the HIPAA Config screen, you can test your 837 and 270 for HIPAA Accredited Standards Committee (ASC) X12 version 5010.
Settings	Security Matrix: BillingConfig
Steps to Configure	N/A
Steps to Use	1. Add a new config entry for the 5010 standard for testing purposes **(Billing** tab > **Billing Office/Claim Config).** Copy the fields for the config line of the payer you are testing, setting the field below as applicable: a. 837P Version Code dropdown – select 005010X222 b. 837I Version Code dropdown – select 005010X223 c. 270 Version Code dropdown – select 005010X279 d. ICS VersionNum – select 5010 Standard. e. Flag the Claim Usage to Test. 2. Update the payer you will be testing and set the config ID to that of your 5010 test config line **(Billing** or **Admin** tab > **Billing Payer).** 3. Generate 837P and 837I batch files and a 270 eligibility file for the test payer. 4. Submit the test batch to the payer. 5. Update the payer, setting the config line back to the 4010 Production config previously set.

837: Send Rendering Flag Added to Billing Matrix

Description	A Send Rendering Flag has been added to the Billing Matrix config fields and the payer specific rates and codes. With either one, you can now override the Use Rendering flag in the Payer record for a specific Billing Matrix entry.
Settings	Security Matrix: BillingConfig
Steps to Configure	1. **Billing** tab > **Billing Matrix** (you can also access Billing Matrix from the Admin tab). 2. Edit an existing entry. 3. In the Billing section, select True for Send Rendering. 4. To set the flag for a specific payer, click **Payer Specific Rates & Codes** and select True for Send Rendering and save your changes.
Steps to Use	N/A

837: Sending Entity Qualifier of a Person

Description	A Person Entity for Provider Rendering flag was added to the Payer record. When selected along with the Provider for Rendering setting in the Billing Matrix entry, the entity qualifier of person (1) is sent along with the billing provider's information.
Settings	Security Matrix: BillingConfig
Steps to Configure	1. **Billing** tab > **Billing Payer.** 2. Edit an existing entry. 3. In the Electronic Claim Overrides section, select the Person Entity for Provider Rendering checkbox and click **Save Settings.** 4. **Billing** tab > **Billing Matrix.** 5. Edit an existing entry. 6. In the Billing section, select the Provider for Rendering checkbox and click **Save Settings.**
Steps to Use	N/A

837: Only Populate CN1 Element for Case Rate Services

Description	With two new Payer Config fields, Contract Ref ID and Do Not Send Contract Rate, you can configure the way the contract rate segment is sent. Note that the new functionality only applies to services that are flagged in the Billing Matrix with Case/Contract Rate to be true. It does not relate at all to the contract rate set in the Billing Matrix.
Settings	Security Matrix: BillingConfig Billing Payer: *Contract Ref ID, Do Not Send Contract Rate*
Steps to Configure	1. **Billing** tab > **Billing Payer.** 2. Edit an existing payer record or add a new one. 3. Enter the appropriate value in the Contract Ref ID field (in Electronic Claim Settings section) and select the Do Not Send Contract Rate setting (in Electronic Claim Overrides section). 4. Click **Save Settings.** When you batch services, the contract rate will not be send in the second CN1 element.
Steps to Use	N/A

837: Default Unit Count to 1

Description	With a new flag, you can now send a unit count of 1 in the 837, regardless of the actual number of units. Do not use this flag unless the payer requires a value of 1 always be sent in the unit count element of the 837.
Settings	Security Matrix: BillingConfig Billing Payer: *Default Unit Count to 1*
Steps to Configure	1. **Billing** tab > **Billing Payer.** 2. Edit an existing payer record or add a new one. 3. Select the Default Unit Claim to 1 setting (in Electronic Claim Overrides section) and click **Save Settings.**
Steps to Use	N/A

837: Send Allowed Amount

Description	If you select the new *Send Allowed Amount* flag, the AMT*AAE segment will be in the 2320 loop when batching to the secondary payer if the previous payer returned an allowed amount (B6 code) in the 835.
Settings	Security Matrix: BillingConfig, BillingModule Billing Payer: *Send Allowed Amount*
Steps to Configure	1. **Billing** tab > **Billing Payer.** 2. Edit an existing payer record or add a new one. 3. Select the Send Allowed Amount setting (in Electronic Claim Overrides section) and click **Save Settings.**
Steps to Use	N/A

837I and 1450 Claims: Send Revenue Code Based on Diagnosis

Description	You can now set up a Billing Matrix entry with revenue codes that are based on payer, diagnosis (Dx), or both. The appropriate revenue code can be sent in the SV2 element of an 837I (for example, SV2*1234*HC:H0019*25*UN*1*25~). For a 1450, the code is sent in the Procedure Revenue Code box (box 42). A Payer/Dx specific revenue code trumps the main 837I revenue code and any payer specific 837I revenue code.

Settings	Security Matrix: BillingConfig, BillingModule
Steps to Configure	1. **Billing** tab > **Billing Matrix.** 2. Edit an existing Billing Matrix entry or add a new one. 3. Click the **Payer/Dx Specific** button next to the 837I Revenue Code field. 4. Select a diagnosis and/or a payer from the corresponding dropdowns. 5. Enter a four-digit revenue code. If you enter a code less than four digits, it will be prefixed with zeros. 6. Click **Add Matrix Revenue Code.** You can edit or delete existing Payer/Dx specific revenue codes.
Steps to Use	To send a Payer/Dx revenue code in a CMS 1450 claim, select the Force CMS checkbox when generating the text file for the batch.

CMS 1500: Including Accident Info

Description	With a new Partner Config setting, you can add the following accident info fields to the Client Insurance screen: Client's Condition From, Accident Date, and Accident State. If the client's payer record does *not* have *Default Box 10 to No* selected and the accident info fields are filled in, Client's Condition From and Accident Date will be included in the CMS 1500. Accident State is not currently being used.
Settings	Security Matrix: BillingConfig, BillingModule, ClientInsuranceView, ClientInsuranceAdd Partner Config: *Use Accident Info on Client Ins*
Steps to Configure	Make sure the Default Box 10 to No setting in Payer Config is not selected for the client's payer (**Billing** tab > **Billing Payer**).
Steps to Use	1. **Client** tab > Client Overview screen > **Insurance** on Client nav bar. 2. Edit an existing insurance record or add a new one. 3. Select the appropriate value from the Client's Condition From dropdown and enter the accident date. 4. Save the information. 5. **Billing** tab > **Generate Batch Claim File.** 6. Batch services using the CMS 1500 claim format. Client's Condition From = Box 10 and Accident Date = Box 14.

CMS 1500: Sending Batch Date Instead of Service Date in Box 31

Description	The Use Batch Date setting in Payer Config has been updated to include Box 31 (previously it was only for Box 12). Note that the batch date in Box 31 will be overridden if the *Use First Day of Next Month Box 31 Date* setting is selected.
Settings	Security Matrix: BillingConfig, BillingModule Billing Payer: Use Batch Date in Box 12 and 31
Steps to Configure	N/A
Steps to Use	1. **Billing** tab > **Generate Batch Claim File.** 2. Batch services using the CMS 1500 claim format.

Batch Claims Column Added to Batch List and Edits Screen

Description	The Batch List and Edits screen now includes a Batch Claims column that displays the total number of claims in a batch. This number equals the number of services in that batch except when Multiple Services per Claim is selected for payer's configuration.
Settings	Security Matrix: BillingModule
Steps to Configure	N/A
Steps to Use	**Billing** tab > **Batch List and Edits**

Predefined Red X for Secondary Service w/ No Auths on Primary

Description	With a new predefined red X, you can have the system red X a secondary split service – for approval and/or batching – if the associated primary service requires an authorization but does not have one. To determine if the primary service requires authorization, the system checks the Authorization Required setting in the Billing Matrix entry. It does not look at the Auth Req setting in the client's insurance record.
Settings	Security Matrix: BillingConfig
Steps to Configure	1. **Billing** tab > **Custom Red X.** 2. In the Predefined Red X List, find *Red x visits that are secondary splits that do not have auths on the primary split.* 3. Select the payers you want to apply the red X rule to. 4. Select For Approval and/or For Batching checkboxes and click **Save Predefined.**
Steps to Use	N/A

	Overpayment Adjustment Reversal for Rate Increase or Retraction
Description	The system automatically applies an overpayment adjustment to a service when an overpayment is made. With this new release, it will now automatically reverse an overpayment adjustment if the service rate increases or an insurance or client payment retraction is applied to the service.
Settings	N/A
Steps to Configure	N/A
Steps to Use	N/A
	Allowing Duplicate Insurance Payment Entries
Description	By default, the system blocks duplicate insurance payments – payments made to the same service from the same payer for the same amount. You can now remove this constraint by selecting the new Partner Config setting *Allow Duplicate Ins Payment Entries.*
Settings	Partnter Config: *Allow Duplicate Ins Payment Entries.*
Steps to Configure	N/A
Steps to Use	N/A
	Sending a Third Party Liability Denial Date in a Claim
Description	If you know in advance that some services will not be covered by specific payers and the payer you are reporting to requires this information, you can now send a third party liability (TPL) denial date along with the claim. When the *Use Auth TPL Date* setting is selected, a TPL Date field is available in the Authorization screen. If a TPL date is entered, the denial date is included in the batch (for example, DTP*573*D8*20110122 - LINE ADJUDICATION DATE). If a TPL date is not entered, the service date will be sent.
Settings	Security Matrix: BillingModule, AuthorizationAdd Billing Payer: *Use Auth TPL Date*
Steps to Configure	N/A
Steps to Use	1. **Client** tab > Client Overview screen > **Authorization** on Client nav bar. 2. Update an existing authorization or add a new one. 3. Enter the appropriate date in the TPL Date field and save the changes or add the authorization.

New Payer Config to Set Billable As Primary in Merge

Description	When two services roll, the first service is typically the primary service in the merge group. With the new Payer Config setting Set Billable As Primary in Merge, you can change the prioritizing of the primary. When selected, a billable service can be primary over a non-billable service even if it occurs after the non-billable service. Note that the new setting does not override the Force as Primary in Merge setting in the Billing Matrix.
Settings	Security Matrix: BillingConfig Billing Payer: *Set Billable As Primary in Merge*
Steps to Configure	N/A
Steps to Use	N/A

Block Merging for a Specific Payer

Description	If you have a Billing Matrix line set up to roll or sum, you can now block the merging for a specific payer.
Settings	Security Matrix: BillingConfig
Steps to Configure	1. **Billing** tab > **Billing Matrix.** 2. Edit an existing Billing Matrix entry that is set up to roll or sum or add a new one. 3. Click the **Payer Specific Rates & Codes** button. 4. Edit an existing payer specific rate and code record or add a new one. 5. Enter N/A in the Rollup Code or Sum Code field as appropriate and click **update** (or New Payer Settings). Make sure you enter N/A and not NA.
Steps to Use	N/A

COMPLETED Status for Auto Writeoff of Insurance Balance

Description	When a payer record is set to automatically write off the insurance balance, a service will now remain in COMPLETED status. Previously, it changed to PAID status. Note that a client should not have a copay set up for an auto-writeoff payer. If he or she does, the copay will be moved to the client instead of being written off.
Settings	Security Matrix: BillingConfig
Steps to Configure	N/A
Steps to Use	N/A

Two New Detail Report Fields for the AR/GL Export

Description	You can now select Recipient Type and Recipient External Code when setting up the detail report fields for the AR/GL Export tool.
Settings	Security Matrix: BillingConfig, BillingReports, ARGLExport
Steps to Configure	1. To set up recipient types and external codes: **Admin** tab > **Recipient Types.** 2. **Billing** tab > **AR/GL Setup and Configuration.** 3. In the Detail Report Fields section, select the checkboxes for Recipient Type and Recipient Ext Code and click **Update Settings.**
Steps to Use	1. Complete and batch services. 2. **Billing** tab > **AR/GL Export.** 3. Enter the date range for the batch and click **Filter Batch.** 4. Click **Generate File for AR/GL Export Batch.** 5. **Billing** tab > **AR/GL Export List** > **report** for the batch you created.

REPORTS

Drug Schedule & NDC Added to Meds Table

Description	Whenever you add a medication to a client's record or create a prescription for a client, the system records the drug schedule and NDC for the drug in the Meds table. You can build an export that includes these fields for each medication in a client's record.
Settings	Security Matrix: ReportList, ExportBuild, ExportRun
Steps to Configure	1. **Reports** tab > **Export Tool** button on nav bar. 2. Create an export: a. Form/Table Name = Custom Query b. Custom query = select client_id, drug_schedule, ndc, medication from meds where Meds.client_id = @param1 c. In the Export Builder screen, enter Client ID in the Custom Param1 field and select the four fields under the Custom Columns folder.
Steps to Use	Run the export you created, entering the ID of the client you want a medication list for in the Parameters screen.

Primary Assigned Filter Added to Appointment History Report

Description	You can now review past, present, and future appointments for all clients that an employee is assigned to as a primary employee – regardless of who the scheduled employee is. If you export the report results, there are columns for primary assigned employees and the preferred method of contact. If you don't select the new Primary Assigned filter but still select an employee, the report will only show appointments that he or she is the scheduled employee for.
Settings	Security Matrix: ReportList Report Security: Appointment History Report
Steps to Configure	N/A
Steps to Use	1. **Reports** tab > **Service** on Reports nav bar > **Appointment History Report.** 2. Select an employee from the corresponding dropdown and select **Yes** from the Primary Assigned dropdown. 3. Select any other filters you want to use and click **Run Report.**

Export Enhancements for Batch Claim Error Report

Description	When you export the Batch Claim Error Report, the errors are now in their own column so you can sort the report based on error type. The export has another new column – Also Affects – that list the IDs of the other services for this client that would fail for the same reason.
Settings	Security Matrix: ReportList or BillingReports Report Security: Batch Claim Error Report
Steps to Configure	N/A
Steps to Use	1. **Reports** tab > **Billing** on Reports nav bar > **Batch Claim Error Report** (you can also access the report from the Billing tab). 2. Select the filters you want to use and click **Run Report** (or View Report if accessed from the Billing tab). 3. Click **Export File.**

Exports Table Added to Admin Logging Report

Description	When a user creates, edits, or deletes an export, it is logged in the Admin Logging Report.
Settings	Security Matrix: ReportList Report Security: Admin Logging Report
Steps to Configure	N/A
Steps to Use	1. **Reports** tab > **Admin** on Reports nav bar > **Admin Logging.** 2. From the Tables list, select Exports and any other tables you want to report on. 3. Select any other filters you want to use and click **Run Report.**

HIPAA Logs: Incomplete Services, Attachments, Notes, & To Do List

Description	The following actions are now recorded in the employee and client HIPAA logs: • Adding, viewing, and deleting incomplete services and attachments • Adding and deleting notes to an employee or client record Adding and deleting to do list items is also recorded in the employee HIPAA log.
Settings	Security Matrix: ClientViewLog, ReportList Report Security: Global HIPAA Log
Steps to Configure	N/A
Steps to Use	To view the log for an employee or client: **Employee** or **Client** tab > Employee or Client Overview screen > **Log** button on nav bar. To run the Global HIPAA Log: 1. **Reports** tab > **Admin** button on Reports nav bar > **Global HIPAA Log.** 2. Select Employee or Client from the Entity dropdown. 3. Select any other filters you want to use and click **Run Report.**

CREDIBLE eRx

Showing Only Mail Order Pharmacies in Pharmacy List

Description	If you are using Credible eRx, you can now filter the pharmacy list to show only mail order pharmacies. If you do a normal pharmacy search, mail order pharmacies will be included in the results if they match the criteria you enter. You can add a mail order pharmacy to your list of favorites. Note that mail order only trumps fax only – if you select Include 'Fax Only' Pharmacies and click Show Mail Order, only mail order pharmacies will be returned in the search results.
Settings	Security Matrix: RxView, RxUpdate, PrescriptionCreate or PrescriptionCreateNonSPI
Steps to Configure	You need to have the Credible eRx module and your Implementation or Account Manager needs to turn it on.
Steps to Use	1. **Client** tab > Client Overview screen > **Medications** on Client nav bar. 2. On the Client Medications screen, click **Create Prescription.** 3. Create a prescription (refer to the online help for the how-to details) and then click **Send To Pharmacy**. 4. On the Search for Pharmacy screen, click **Show Mail Order** to show only mail order pharmacies. To return to the list of non-mail order pharmacies, click **Search.** 5. Click **Select** to choose a mail order pharmacy and display the 'finalize prescription' screen. 6. Review the prescription details and then process as appropriate.

Drug Class & Condition Filters Added to Drug Search Screen

Description	When creating a prescription, you can now search for a drug by medication name, drug class, condition, or any combination of these three filters.
Settings	Security Matrix: RxView or PhysicianOrdersView, PrescriptionCreate or PrescriptionCreateNonSPI
Steps to Configure	You need to have the Credible eRx module and your Implementation or Account Manager needs to turn it on.
Steps to Use	1. **Client** tab > Client Overview screen > **Medications** (or Orders) on Client nav bar. 2. On the Client Medications screen, click **Create Prescription** (or Add Prescription on the Physicians Orders screen).

3. In the Drug Search screen, enter a medication name, select a drug class, and/or enter a condition name (at least the first three letters) to find the drug you want to prescribe. If you enter a condition name, click the correct condition in the list provided to display medications associated with it.
4. In the Medication results list, click the correct medication.
5. Continue creating the prescription.

Enhancements to Drug/Drug & Drug/Allergy Interaction Warnings

Description	If you are using the Credible eRx module, you can use the new Med Severity Level function to set up a custom severity level message for the interaction tab for the different type/severity level combinations (for example, Drug/Drug 2 – Severe Interaction). You also have the option of suppressing the interaction warning message and tab for each type/severity level combination for different login profiles.
Settings	Security Matrix: *SeverityLevelAdmin*
Steps to Configure	You need to have the Credible eRx module and your Implementation or Account Manager needs to turn it on. 1. **Admin** tab > **Med Severity Levels** (under Lookups and Code Tables). 2. Enter a custom message in the Description field for one or more of the type/severity level combinations. 3. If you want to suppress the warning message for a type/severity level combination for certain login profiles, select them from the Profiles to Suppress list. 4. Click **Save.**
Steps to Use	N/A

Print the Original Prescription when Reprinting & E-Faxing

Description	You can give users the right to print the original prescription (no Duplicate watermark) when using the print button for an existing prescription. If you use e-faxing in Credible eRx, you can also print the original script when you use the Fax & Print Copy function. **Caution:** you should limit the users you give the new *PrintOriginalRx* right to since it gives them the ability to create additional copies of original prescriptions.
Settings	Security Matrix: RxView or PhysicianOrdersView, PrescriptionCreate or PrescriptionCreateNonSPI, *PrintOriginalRx,* RxReprint Partner Config: *Print Original Script When Faxing Controlled Substances*

Steps to Configure	You need to have the Credible eRx module. Your Implementation or Account Manager needs to turn on Credible eRx and the e-faxing functionality.
Steps to Use	**Client** tab > Client Overview screen > **Medications** on Client nav bar. • Refer to the online help for the steps to create and e-fax a prescription. • For an existing prescription on the Client Medications screen, use the **print** button to print the original prescription.

Prescriber Agent Identified in Refill Requests

Description	If the employee approving a refill request does not have the same SPI as the prescriber the refill request was sent for, the system will identify the employee as the Prescriber Agent in the refill request.
Settings	Security Matrix: RxView, RxRefill or PrescriptionCreateNonSPI
Steps to Configure	You need to have the Credible eRx module and your Implementation or Account Manager needs to turn it on.
Steps to Use	N/A