Release 4.2 Configuration

1500 box 24C

An emergency flag on the 1500: is_emergency has been added into the Visit Type link. If Yes, then Y will populate the is_emergency field in the ClientVisit. This will then populate box 24c on the 1500.

Security Rights: AdminView; BillingConfig; Billing Module; BillingCPTCodes; DataDictionary

Steps: Admin Tab-> Visit Type link-> edit existing or Add a New Visit Type Entry-> Is Emergency (Visit Type is an Emergency Visit)-> Admin Tab-> Data Dictionary link-> Table Source: Visit, Type: View/Update-> is_emergency field-> Visit Tab-> select Visit ID-> Update-> Update Visit button-> Visit Tab-> Advanced Search button-> set Filtering criteria-> More Fields button-> is_emergency (name)

Advanced Visit Search

A new Custom Field to Advanced Visit Search (AVS) called Merged Duration has been added. This will show the merged/combined duration for merged visits and will show the same duration for unmerged services.

Security Rights: ClientVisitList; ClientVisitListAll; ClientVisitTeam; ClientVisitTeamOnly

Steps: Visit Tab-> advanced search button-> Custom Fields-> Merged Duration-> select Filtering criteria

Aging Report Range Additions

A new Report: Client Aging by Payer Extended has been created. The functionality is identical to the Client Aging by Payer Report but the aging periods are extended out to 5 years.

Security Rights: AdminView; ReportList; EmployeeList; EmployeeListAll

Steps: Admin Tab-> Security Matrix link-> Reports section-> ReportList right-> Save All-> Admin Tab-> Report Security link-> Client Aging by Payer Extended-> Save All button-> Report Tab-> Client Aging by Payer Extended Report link-> select criteria-> Run Report button

Aging Report date ranges/ Payer Type filter

On the Client Aging by Payer Report the date ranges now read 0-30, 31-60, 61-90 etc. and there is a Payer Filter option available

Security Rights: AdminView; ReportList; EmployeeList; EmployeeListAll; ClientList; ClientListAll

Steps: : Admin Tab-> Security Matrix link-> Reports section-> ReportList right-> Save All-> Admin Tab-> Report Security link-> Client Aging by Payer-> Save All button-> Report Tab-> Client Aging by Payer Report link-> select criteria-> Run Report button

Automated BSU number

A field has been added to the Data Dictionary Client Table: autonum1. When on the view screen, this field will be automatically generated when the Client is inserted. The field will not be displayed on the insert screen. Autonum1 can be updated if added to the update view, (suggest SuperEdit rights on this field).

Security Rights: AdminView; DataDictionary; ClientAdd; ClientUpdate; ClientView; ClientViewAll; ClientSuperView; ClientSuperEdit

Steps: Admin Tab-> Data Dictionary link-> Table Source- Clients; Type-View/Update-> Submit button-> Column Name (select autonum1)-> Client Tab->Add Client button or update existing Client

Balance Due on 1500

A flag has been added into Payer Config under the CMS 1500 Claim Overrides section: Set Box 30 Equal to Box 28. When set on for a Payer, Box 30 in the 1500 will always be populated with the value from Box 28.

Security Rights: AdminView; BillingConfig; BillingModule; ClientView; ClientViewAll

Steps: Billing Tab-> Billing Payer link-> edit existing Payer or Add a New Payer Entry link-> CMS 1500 Claim Overrides section-> Set Box 30 Equal to Box 28-> Billing Tab-> Generate Batch Claim File-> set filtering criteria-> Check box for Force CMS format-> Generate Text File for Batch button-> Click here to open CMS 1500 Report link-> view

Bed Board daily Units per Client

Units have been added to the Client Bed Board Assignment screen. This will be used as the Flex Units when billing for a flex unit Visit Type in Bed Board Billing.

Security Rights: AdminView; AdminLookupUpdate; BedBoardAdmin; BillingConfig; BillingCPTCodes; BillingModule; ClientView; ClientViewAll; ClientBedBoardAssign; ClientBedBoardIntervalEdit

Steps: Admin Tab-> Visit Type link-> edit existing Visit Type or Add a New Visit Type Entry link-> Flex Type-> Units-> Client Tab-> select a Client-> Bed Assign (nav bar)-> set Units-> Billing Tab-> Bed Board Billing link- set criteria-> Filter button-> select-> Continue to Billing Options button-> enter Visit criteria-> Add All button-> Visit Tab-> view Visits

Bed Board Reports

Three new Reports have been built for Bed Board:

1. **Bed Board Count Report** will count the days filled and days open for a house based on interval dates
2. **Bed Board Information Report** will show bed/facility detailed information and the total number of days placed in bed
3. **Bed Board Billing Report** will show the number of units and the total billed

Security Rights: AdminView; BilingModule; ReportList

Steps: Admin Tab-> Report security -> turn on rights for Bed Board Billing Report, Bed Board Counts and Bed Board Information-> Save All button-> Report Tab-> select the Report links for Bed Board-> enter criteria-> Run Report button

Billing Matrix Payer specific Copy

Now when a Billing Matrix line is copied, any associated Payer-Specific lines are copied as well.

Security Rights: AdminView; BillingConfig; BillingCPTCodes;

Steps: Billing Tab-> Billing Matrix link-> edit existing Matrix line or Add New Entry button-> Payer Specific Rates & Codes button-> verify or enter Payer Specific Rates & Codes-> Copy New Entry button-> change Matrix Config detail info (something in the matching criteria must change) -> Save Settings button

Blanket Authorizations – Auto Add

Blanket Authorizations is a new feature that allows authorizations to automatically be created for a Client when they receive certain Visit Types. The concept is that you set up predefined authorizations (using the auth levels feature), then link those auths to a billing matrix line - then when a visit is done that matches that billing matrix line, the auth automatically gets created the first time, and that visit plus future visits get decremented from that auth.

Security Rights**:** AdminView; PartnerConfig; BillingConfig; BillingCPTCodes; ClientUpdate; ClientView; ClientViewAll; PlannerAdd; PlannerUpdate; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly; AuthorizationAdd; AuthorizationView

Steps: Admin Tab-> Partner Config link-> Client Settings section-> Use Blanket Authorizations-> Save Partner Config button-> Admin Tab-> Lookups and Code Tables-> Authorization Levels link-> create Blanket Auths-> Add Auth Level button-> Billing Tab-> Billing Matrix link-> edit Billing Matrix line that matches the Visit Type selected when setting up your Blanket Auth-> edit the Blanket Authorization setting to select the Auth just set-> select Auth Required-> Client Tab-> select a Client or Add Client button-> Insurance (nav bar)-> add Insurance for the Payer selected in your Blanket Auth-> create a Visit for that Client that matches the Billing Matrix line-> Auth will be created for that Client-> do another Visit, and will decrement from that Auth

Change in Axis IV

A list of stressor categories is now available for Axis IV. The list of stressors is part of the full Dx injections. A new Partner Config setting: Use Axis IV Stressors.

Security Rights: AdminView; PartnerConfig; ClientUpdate; ClientView; ClientViewAll; DxUpdate; DxView; FormBuilder; FormBuilderEdit

Steps: Admin Tab-> Partner Config link-> Setting section-> Use Axis IV Stressors-> Save Partner Config button-> Forms Tab (to edit an existing form to pull Full Dx Injection)-> Client Tab-> select a Client or Add Client button-> Diagnosis (nav bar)-> Update Assessment or Start New Assessment button -> Axis IV check Stressors related-> create Visit for Client to see Full Dx Injection Axis IV Stressors

Client Home Page and Allergies

The ability to have Allergies visible on the Client Home Page is now available.

Security Rights: AdminView; MyCWAdmin; ClientUpdate; ClientView; ClientViewAll; ClientViewTeam; ClientViewTeamOnly; AllergyUpdate; AllergyView

Steps: Admin Tab-> Home Page Config link-> Client Home Page Admin link-> Allergies-> Save button-> Client Tab-> select Client or Add Client button-> Overview (nav bar)if Client has Allergies will see if not-> Allergy (nav bar) enter in, then select Overview

Client payment receipts post-save

A print button has been added on the Manage Client Payment screen; allows you to print a receipt at any time.

Security Rights: BillingModule or ClientPayments; ClientView; ClientViewAll; ClientViewTeam; ClientViewTeamOnly

Steps: Billing Tab-> Manage Client Payment link-> Print button

Client Team Assignment Multi-pick Employee

The option of multi-selecting Employees for Team Assignments is now available.

Security Rights: AssignTeams; ClientUpdate; ClientView; ClientViewAll; ClientViewTeam; ClientViewTeamOnly; AssignClients; AssignEmployees; AssignPrograms; AssignTeams

Steps: Client Tab-> select Client or Add Client button-> Team (nav bar)-> Assign the Team-> … button to multi select Employees-> Save button-> i icon to view multiple Employee names

ClientVisitUpdate needs split

A new Security Right: ClientVisitUpdateForm, will be set on initially for all who have the ClientVisitUpdate right; when checked off, they will be able to view the form information but not edit the form through Edit Full visit on Form Category hyperlinks; will be able to update billing and visit details not form data.

Security Rights: AdminView; SecurityUpdates; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly; ClientVisitUpdate; ClientVisitUpdateForm; BillingUndo

Steps: Admin Tab-> Security Matrix link-> Client Visits section-> ClientVisitUpdateForm (remove right)-> Save All button-> Visit Tab-> select a Visit with detail information to verify Edit Full is not longer an option

Contact dropdown field needed

A Relationship Types Link is now available in the Lookups and Codes Table section. The Contact tab and Family tab of the Client Nav Bar both have a relation dropdown; they are no longer hard coded but now dynamic

Security Rights: AdminView; AdminLookupUpdate; ClientUpdate; ClientView; ClientViewAll

Steps: Admin Tab-> Lookups and Codes Table section-> Relationship Types link-> Add Relationship Type or edit an existing-> Add Relationship Type button or update button-> Client tab-> select Client or Add Client button-> Family (nav bar)-> Add Family or edit existing-> Relation dropdown-> Contacts (nav bar)-> Add Contact or edit existing-> Relationship dropdown

Contact fields

Two new fields added to Contacts Table: Has info release checkbox, and date. Will be used to document whether there is a release of information for the contact and when it expires; can be injected and mapped

> Security Rights: AdminView; ClientUpdate; ClientView; ClientViewAll; ClientViewTeam; ClientViewTeamOnly; FormBuilder; FormBuilderEdit
>
> Steps: Form Tab-> edit existing Form or Add Form-> Injection or Map Contacts-> Client Tab-> select Client or Add Client button-> Contacts (nav bar)-> edit existing or Add Contact-> Has Info Release or Info Release Date

Credentials Forcing Visit Types

A new option has been added in the Partner Config: Use Matrix Credentials to determine Visit Types. When scheduling for an Employee, if the matrix line that the Program/Visit Type has a Credential Group set, then the Employee needs to have a Credential in the group to see the Program/Visit Type in the Visit Type drop down for schedule and add visit.

> Security Rights: AdminView; PartnerConfig; BillingConfig; BillingCPTCodes; PlannerAdd; PlannerUpdate; PlannerView; PlannerViewAll; PlannerViewTeam; EmployeeUpdate; EmployeeView; EmployeeViewAll
>
> Steps: Admin Tab-> Partner Config link-> Visit Settings section-> Use Matrix Credentials to determine Visit Types-> Save Partner Config button-> Employee Tab-> select Employee or Add Employee button-> Credentials (nav bar)-> assign or verify Credentials-> Billing Tab-> Billing Matrix link-> edit existing or Add New Entry-> Visit Matching Criteria section-> Credential Group-> Save Setting button

Credits not showing on Profiles

The Client Balance that shows on the Profile and Overview screens now takes into consideration Client due balances on 5 years worth of visits and any unapplied balances of Client payments.

> Security Rights: AdminView; MyCWAdmin; ClientView; ClientViewAll; BillingModule; FinancialsView
>
> Steps: Client Tab-> select Client or Add Client button-> Overview/Profile (nav bar)-> Billing Tab-> Manage Client Payments or Client Tab-> select Client-> Payment (nav bar)

Debt-set off

This gives a third "due" bucket (along with INS due and Client due) that make up the balance of the visit. All visit balances are owed by Insurance, the Client, and now optionally this third bucket. A positive adjustment increases this due amount. There are new fields in both Client and Visit advanced search to display this total. They will only show if you have the partner label set. A filtering option in advanced search as well

> Security Rights: AdminView; PartnerConfig; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly; BillingAddAdjustment;BillingUndo; BillingModule; PaymentControlAlter
>
> Steps: Admin Tab-> Partner Config link-> Labels section-> Billing Other Due (Debt Set-Off) Label-> Save Partner Config button-> Visit Tab-> select a Visit to View-> Claims Billing Details

screen (Billing Tab)-> Adjustment Type dropdown-> Visit Tab-> Advanced Search button-> Billable filter dropdown-> Custom Fields

Effective Date

The effective date for Insurance begin and end on the same date; the start date = end date on Insurance records; Basically just go to Client/Insurance and attempt to add/edit an Insurance record. Now you can have the start and end date be the same

Security Rights: ClientView; ClientViewAll; ClientUpdate

Steps: Client Tab-> select Client or Add Client button-> Insurance (nav bar)-> edit existing or Add Insurance-> start / end dates

Employee Form Service Type Grouping

New fields have been added into the Data Dictionary. An is_hr flag has been added to the Employee Record. An is_hr flag has also been added to the Employee Visit Types table. When setting an Employee Visit Type to is_hr it allows not only those assign to the Employee that the visit is for to view it but also any Employee with the is_hr flag set in their Employee profile to true. If an Employee Visit Type is set to is_hr and is_private then ONLY those with the is_hr flag set in their Employee Profile can view the visit

Security Rights: AdminView; DataDictionary; EmployeeUpdate; EmployeeView; EmployeeViewAll; EmployeeFormView; EmployeeViewAll; EmployeeFormViewTeam; EmployeeFormList; EmployeeFormListAll; EmployeeFormListTeamOnly

Steps: Admin Tab-> Data Dictionary link-> Table Source: Employee, Type: View/Update-> select Column Name dropdown is_hr-> Employee Tab-> select Employee or Add Employee button-> Profile (nav bar)-> Update-> check Boolean Yes/No for is_hr (name)-> Admin Tab-> Lookups and Code Tables section-> Employee Visit Type link-> edit existing or Add a New Visit Type Entry link-> is_hr (name)True/False setting

Employee Homepage Orders section

Physicians now immediately know which Physician Orders need to be signed and completed right from the Employee homepage. Open Unsigned Orders can now be set to display on Employees marked as is_doctor that have orders waiting to be signed.

Security Rights: AdminView; DataDictionary; MyCWAdmin; EmployeeView; EmployeeViewAll; PendingOnHomePage; PhysicianOrdersView; ClientView; ClientViewAll

Steps: Admin Tab-> Home Page Config link-> Employee Home Page Admin-> Open Unsigned Orders-> Save button-> Employee Tab-> select Employee-> Overview (nav bar)-> Admin Tab-> Data Dictionary link->Table Source: Employee, Type: View/Update-> Column Name dropdown is_dr-> Employee Tab-> select Employee or Add Employee button-> Profile-> Update-> set is_dr (name) Yes/No

External IDs in Answer

An external ID field has been added to Form Answers. When populated, this field can be used in custom exports. Also when the question maps back to a Data Dictionary field, the external ID will be used for matching when the Data Dictionary field is design as a Lookup and uses the LookupDict or Z_lookupdict. Mapping will be done using the external ID in the answer to the external_id in the custom lookup.

Security Rights: AdminView; DataDictionary; FormBuilder; FormBuilderEdit; ReportList; ExportBuild; ExportRun

Steps: Form Tab-> edit existing Form or Add Form-> Form Answers-> External Code-> Admin Tab-> Data Dictionary link-> Table Source: Client Type: View/Update-> Is Lookup marked

Future Dates

A setting has been added to block future visits greater then X days in the Partner Config. When set any visit greater than the defined days will be blocked from saving thru Webforms and Data Entry; (Block Future Visits Greater then X # of days)

Security Rights: AdminView; Partner Config: PlannerAdd; PlannerUpdate; PlannerView; PlannerViewAll; PlannerViewTeam; ClientVisitList; ClientVisitListAll; ClientVisitListTeam; ClientVisitListTeamOnly; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly

Steps: Admin Tab-> Partner Config link-> Web Forms section-> Block Future Visits Greater then-> enter # of days-> Save Partner Config button-> Any Visits set greater than will be blocked

Hourly Counts for Authorizations

When adding an Auth or Auth level, there is a new option in the dropdown for Counts called Hours. This will total the hours for all visits that match the Auths, and this total will show for the units used. This is useful when your billing units are (for example 15 minutes/unit) but your Authorizations are in hours

Security Rights: AdminView; PartnerConfig; BillingConfig; BillingCPTCodes; ClientUpdate; ClientView; ClientViewAll; PlannerAdd; PlannerUpdate; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly; AuthorizationAdd; AuthorizationView

Steps: Admin Tab-> Partner Config link-> Use Auth Levels-> Save Partner Config button-> Admin Tab-> Lookups and Code Tables-> Authorization Levels link-> update existing Auth Level entry or Add Auth Level-> Client Tab-> select Client or Add Client button-> Authorization (nav bar)-> Count-> Hours -> Billing Tab- Billing Matrix link-> edit existing or Add New Entry-> Units-> create a Visit

Inject Allergies into Forms

Allergies are now able to be injected into Forms

Security Rights: FormBuilder; FormBuilderEdit; ClientUpdate; ClientView; ClientViewAll; AllergyUpdate; AllergyView; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly

Steps: Form Tab-> edit existing Form or Add Form-> pull Injected Allergies -> Client Tab-> select Client or Add Client button-> Allergy (nav bar)-> enter new or edit existing-> create Visit for Client with Allergies

Injected Contacts into Forms

Contacts are now able to be injected into Forms

Security Rights: FormBuilder; FormBuilderEdit; ClientUpdate; ClientView; ClientViewAll; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly

Steps: Form Tab-> edit existing Form or Add Form-> pull Injected Contacts-> Client Tab-> select Client or Add Client button-> Contacts (nav bar)-> enter new or edit existing-> create Visit for Client with Contacts

Last/1st Service Date fields in Advanced Search

Fields have been updated in the ACS (Advanced Client Search); First Bill Service Date, Last Bill Service Date, First Service Date and Last Service Date; If you select any of these fields, and check off "Multiple rows per client", and either sort on a Program/Team or select Programs or Teams as a Custom Field, it will change these fields to calculated columns and separate out the dates by Program/Team. WHERE clause, so you can enter a Value of: Last Bill Service Date (or any of the 4 service date fields) <= DateAdd(d, -90, GetDate())

Security Rights: ClientList; ClientListAll; ClientVisitList; ClientVisitListAll; ClientVisitListTeam; ClientVisitListTeamOnly; ClientVisitView; ClientVisitViewAll; ClientVisitViewteam; ClientVisitViewTeamOnly;

Steps: Client Tab-> Advanced Search button-> Custom Fields-> First Bill Service Date, Last Bill Service Date, First Service Date and Last Service Date-> Multiple rows per Client-> Program or multi select-> Counts Period-> enter WHERE clause Last Bill Service Date (or any of the 4 service date fields) <= DateAdd(d, -*x*, GetDate())

Leading zeros on 1500

Dates in the first line of 24a of the 1500 are formatted as MM DD YY and birthdays are MM DD YYYY

Security Rights: AdminView; BillingModule; BillingConfig; ClientVisitList; ClientVisitListAll; ClientVisitListTeam; ClientVisitListTeamOnly; ClientUpdate; ClientView; ClientViewAll

Steps: Billing Tab-> Generate Batch Claim File link-> select criteria-> Filter Batch button-> select IDs to Submit-> check box for Force CMS format-> Generate Text File for Batch button

Liability Security

Added new rights for ClientLiabilityView and ClientLiabilityUpdate that allow you to view or update a Client's Liability. Also added HIPAA logging for updating a Liability.

Security Rights: AdminView: SecurityUpdate; ClientView; ClientViewAll; ClientViewLog; ClientLiabilityView; ClientLiabilityUpdate ; partner config use PA liability/Use VA scale client liability

Steps: Admin Tab-> Security Matrix link-> Client Subsidiary section-> ClientLiabilityView and/or ClientLiabilityUpdate-> Save All button-> Client Tab-> select Client-> Liability (nav bar)-> Log (nav bar)-> Action Type dropdown-> Update Client Liability-> Filter button

Log on Provider Profile

The Credentials tab now logs assigned and unassigned in the Employee Nav Bar

Security Rights: EmployeeUpdate; EmployeeView; EmployeeViewAll

Steps: Employee Tab-> select Employee or Add Employee button-> Credentials (nav bar)-> assign or unassign-> Log (nav bar)-> Action Type dropdown-> Assign Credentials or Unassign Credentials-> Filter button

Medical Profile Change

The user who entered the information/updates on the Medical Profile is now available

> Security Rights: ClientUpdate; ClientView; ClientViewAll; MedicalProfileUpdate; MedicalProfileView

> Steps: Client Tab-> select Client or Add Client button-> Medical Profile (nav bar)-> update existing or Start New Profile-> Save Medical Profile button-> Created By

No non-billable visits Duplicate Billing Report

Billable/Non-Billable flag has been added to the Duplicate Billing Report.

> Security Rights: AdminView: BillingConfig; BillingReports; Employee List; EmployeeListAll; EmployeeView; EmployeeViewAll; ClientList; ClientListAll; ClientView; ClientViewAll; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly

> Steps: Billing Tab-> Duplicate Billing Report link-> set criteria-> Billing dropdown: All Bill + NB, Billable or Non-Billable-> View Report button

No Shows

On the Scheduled Visit Status Report, the Status dropdown is now a multi-select and a billable filter is available

> Security Reports: AdminView; ReportList; ExportRun; EmployeeView; EmployeeViewAll; EmployeeList; EmployeeListAll; ClientView; ClientViewAll; PlannerView; PlannerViewAll; PlannerViewTeam;

> Steps: Report Tab-> Scheduled Visits Status link-> select criteria-> Status dropdown multi select-> select Billable dropdown option-> Run Report button

Notification Form Answer

The Notification Trigger: Client Form Answer Selected

> Security Right: AdminView; NotificationTriggers; NotificationDelete; ClientUpdate; ClientView; ClientViewAll; PlannerAdd; PlannerView; PlannerViewAll; PlannerViewTeam

> Steps: Admin Tab-> Daily Activities section-> Notification Triggers link-> Add a New Trigger Entry link or edit existing-> Trigger: Client Form Answer Selected-> select Form-> determine Title, Send To, Occur and Remind (required fields)-> Save button-> view Scheduler Notifications after Visit

Notification Resource Scheduler

A new Notification Trigger has been added; Resource Scheduled. When a Resource is scheduled a notification will be sent to the person or persons selected in the Teams assigned to the Resource.

> Security Rights: AdminView; NotificationTriggers; AssignResources; NotificationDelete; PlannerResourceAdd; PlannerResourceView; PlannerView; PlannerViewAll; PlannerViewTeam

> Steps: Admin Tab-> Daily Activities section-> Notification Triggers link-> Add a New Trigger Entry link or edit existing-> Trigger: Resource Scheduled-> determine Title, Send To, Occur and

Remind (required fields)-> Save button-> Employee Tab-> select Employee-> Resource Sched (nav bar)-> Schedule button-> select date/time/duration-> Add button-> Schedule (nav bar)

Notification Per Insurance

A new Notification Trigger has been added: Client Insurance Added - Specific Payer. This sends a notification when a Client Insurance record is created, only for a specific Payer that is selected when setting the trigger.

Security Rights: AdminView; NotificationTriggers; NotificationDelete; ClientUpdate; ClientView; ClientViewAll; PlannerAdd; PlannerView; PlannerViewAll; PlannerViewTeam

Steps: Admin Tab-> Daily Activities section-> Notification Triggers link-> Add a New Trigger Entry link or edit existing-> Trigger: Client Insurance Added – Specific Payer-> select Payer-> determine Title, Send To, Occur and Remind (required fields)-> Save button-> Client Tab-> select Client-> Insurance (nav bar)-> Add Insurance of specified Payer-> Employee Tab-> select Employee-> Notifications

Notification Trigger- Original Employee

A New Send To type (Employee Who Completed the Visit) has been added for Notification Triggers that are Visit Triggers (any Client visit adds or approves). This will send a notification to the Employee that the Client visit is for.

Security Rights: AdminView; NotificationTriggers; NotificationDelete; PlannerAdd; PlannerView; PlannerViewAll; PlannerViewTeam

Steps: Admin Tab-> Daily Activities section-> Notification Triggers link-> Add a New Trigger Entry link or edit existing-> Trigger: select Visit related-> Send To section: Employee Who Completed the Visit-> finish setting notification criteria-> Save button-> Employee Tab-> select Employee Completing Visit-> Notifications

Notification Visit Employee Form

A new Notification Trigger has been added: Employee Visit Add - Specific Visit Type. When an Employee Visit is created for a Visit Type specified in the Notification Trigger a notification is sent out.

Security Rights: AdminView; NotificationTriggers; NotificationDelete; PlannerAdd; PlannerView; PlannerViewAll; PlannerViewTeam

Steps: Admin Tab-> Daily Activities section-> Notification Triggers link-> Add a New Trigger Entry link or edit existing-> Trigger: Employee Visit Add - Specific Visit Type-> select Visit Type-> determine Title, Send To, Occur and Remind (required fields)-> Save button-> Employee Tab-> select Employee-> Notifications

Notification Visit

A new Notification Trigger Link is available by Visit (visit add, visit approval, particular visit field); the Visit followed by the ID will be a hyperlink that will take you to the Visit.

Security Rights: AdminView; NotificationTriggers; NotificationDelete; PlannerAdd; PlannerView; PlannerViewAll; PlannerViewTeam; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitTeamOnly

Steps: Admin Tab-> Daily Activities section-> Notification Triggers link-> Add a New Trigger Entry link or edit existing-> Trigger: select Visit related-> determine Title, Send To, Occur and Remind (required fields)-> Save button-> create Visit for Client-> Employee Tab-> select Employee-> Notifications-> Visit ID link

Notification Visit Add

The Notification Trigger: Visit Add – Visit Date Greater than 3 weeks old; allows for a trigger to be set for a visit in the future.

Security Rights: AdminView; PartnerConfig; NotificationTriggers; NotificationDelete; PlannerAdd; PlannerView; PlannerViewAll; PlannerViewTeam;

Steps: Admin Tab-> Daily Activities section-> Notification Triggers link-> Add a New Trigger Entry link or edit existing-> Trigger: Visit Add – Visit Date Greater than 3 weeks old-> determine Title, Send To, Occur and Remind (required fields)-> Save button-> create Visit for Client-> Employee Tab-> select Employee-> Notifications

Option to search attachments

In AVS (Advanced Visit Search) there is a new filter option in the Billable filter called Has Attachments. Selecting this will return only visits that have attachments on them.

Security Rights: ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly; ClientVisitFileView; BillingReports

Steps: Visit Tab-> Advanced Search button-> Billable Filter dropdown-> Has Attachments-> set other filtering criteria-> view Visits that have attachments

Plain Paper Appointment Card

There is now the option in the print icon of a Visit to print an appointment card. The address will only show if there is an associated GEO address with the appointment (Appointment Card Message)

Security Rights: AdminView; PartnerConfig; PlannerUpdate; PlannerAdd; PlannerView; PlannerViewAll; PlannerViewTeam; Reschedule;

Steps: Admin Tab-> Partner Config link-> Appointment Card Message: enter text-> Employee Tab-> select Employee-> Schedule button-> click on Scheduled appointment-> click on printer icon top right corner

Print Team Schedule

In the Day View for a Team Schedule, there is now a ’Printer View’ icon on the toolbar at the top right.

Security Rights: PlannerAdd; PlannerUpdate; PlannerView; PlannerViewAll; PlannerViewTeam

Steps: Employee Tab-> select Employee assigned to Team-> Schedule button-> Team icon-> printer icon

Private Program

A flag has been added to Program called Private. When this is set, relevant Program information is only displayed when in the program for the following Client sections : Assignments - Includes - Client Program Assignment, Assignment list on the Client Overview, Assignment list on the Client Profile, Assignments in

Print View, Assignments in ACS, Assignment list thru Program Admin (no Edit available when Employee is not in Private Program) Episode - Includes - Episode list/view/update, Episodes in print view, Episodes info on ACS Tx Plans - Includes - TxPlan list/view/update, Txplans in print view, Txplans on Homepage

Security Right: AdminView; BillingCPTCodes; AssignPrograms; AssignClients; ClientView; ClientViewAll; ClientList; ClientListAll; ClientUpdate; TxUpdate; TxView

Steps: Admin Tab-> Programs link-> edit existing or Add a New Programs Entry-> Private-> Add Programs button-> Client Tab-> select Client or add Client button-> Overview (nav bar)-> A Private Program will only block Program Assignments, Program Specific Tx Plans, Episodes, and ACS of that Program to anyone who is not directly assigned to the Program

Program dropdown from Client/ Employee Assignment

The program dropdown on the Client/Employee Assignment screen is now limited to a list of the Clients and the Employees Programs (the dropdown will show the union of both)

Security Rights: AssignClients; AssignEmployees; ClientView; ClientViewAll; EmployeeView; EmployeeViewAll; ClientUpdate; EmployeeUpdate

Steps: Client Tab-> select Client or add Client button-> Employee (nav bar)-> assign Employees-> Program dropdown will show the union of both OR Employee Tab-> select Employee or add Employee button-> Client (nav bar)-> assign Clients-> set Primary to Yes-> Program dropdown will show the union of both Employee and Client Program assignments

Program/Team start and end time

A new Partner Config option: Episodes per Program Assignment. When set, an Episode is created for any Program Assignment and closed when that Program is unassigned. This can be used with Parent Program Driven Episodes by not setting Parent Episode Only flag for the Parent Program. Episode date can already be exported in the Client Export. The GAF would have to be added to Episodes and recorded there also to have it with the Client Episode information.

Security Rights: AdminView; PartnerConfig; DataDictionary; ClientView; ClientViewAll; ClientUpdate; BillingCPTCodes; DxUpdate; DxView; ExportRun; ExportBuild

Steps: Admin Tab-> Home Page Config link-> Features section Use Client Episodes, Parent Program Driven Episodes and Episodes per Program Assignment-> Client Tab -> Client -> Program Nav bar link -> Assign Program Admin Tab -> Program Assignments link -> Edit Client -> Assign Client to Program-> When you have the Episodes per program assignment turned only, a program assignment will automatically create an episode so to track the client in and out of the program.   If you have parent programs set in your programs list, and associations of other programs to the parent, as well as the right Parent Program Driven Episodes, then when you assign a client to a “child” program an episode will be created for both the Parent Program, as well as the Child Program.

Referring Provider in 837 File

A new flag has been added into Payer in the Electronic Claims Override section: Sending Referring Provider. When checked, the referred_by and the referred_npi, from the Clients Profile, will be sent in the 837 file. If no referred_by is found this loop will not be included. The DN in the NM1 loop indicates that this is the referring provider.

Security Rights: AdminView: BillingConfig; BillingModule; ClientUpdate; ClientView; ClientViewAll

Steps: Admin Tab -> Billing Payer -> edit existing or Add a New Payer Entry link-> Electronic Claim Overrides section-> Sending Referring Provider-> Save Setting button-> Admin Tab-> Data Dictionary link-> Table Source: Client, Type View/Update-> fields set using the referred_by, and referred_npi-> Billing Tab-> Generate Batch Claim File-> Filter Batch criteria-> select Visit IDs to Submit-> Generate Text File for Batch button-> Click here to view 837 batch on screen link-> now the Referring Provider will be sent in loop 2310A of your 837P file.

Removing Client Insurance from Print View

A new Partner Config option is now available: Hide Insurance ID & Code on Schedule Print. When on, the Client's Insurance ID will not appear in the Print view of the Scheduler

Security Rights: AdminView; PartnerConfig; SecurityUpdate; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly; PlannerAdd; PlannerView; PlannerViewAll; PlannerViewTeam

Steps: Admin Tab-> Partner Config link-> Settings section-> Hide Insurance ID & Code On Schedule Print-> Save Partner Config button-> Client Tab-> select Client-> Insurance (nav bar)-> verify Insurance ID or Add New Insurance-> Employee Tab-> select Employee-> Schedule button-> view scheduled Visit-> Print icon

Report of Manual Red X visits

There is a new custom field in AVS called RedX Note that will show Manual Redx approval notes. There is also a new filter under the Billable dropdown called Manual RedX that will filter for all visits that have a Manual Redx.

Security Rights: AdminView; SecurityUpdate; ClientVisitManualRedX; ClientVisitList; ClientVisitListAll; ClientVisitListTeam; ClientVisitListTeamOnly; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly; DataDictionary; BillingModule

Steps: Admin Tab -> Security Matrix link-> ClientVisitManualRedX right-> Visit Tab -> select Visit ID -> Update -> Set Manual RedX-> Visit Tab-> Advanced Search button-> Billable dropdown-> filter for Manual Red X, that will pull only visits that have the manual red x set. (Also if you have the manual red x data dictionary field set in the billing table you can search on the manual red x in the Custom Fields)

Revenue Code Matrix Changes

Added Payer Type and Order to the Revenue Code Matrix. Order allows for a multi-part revenue code when you mark one line primary and another line secondary. This will calculate the revenue and receipt codes for a visit. Viewable on the billing details screen.

Security Rights: AdminView; BillingConfig;

Steps: Billing tab-> Revenue Code Matrix-> Add Revenue Code Line or edit existing line-> Visit Tab-> View

RO on all Axis

The RO in Client Axis (both the checkbox - Is RO and the textbox - RO text) can now be mapped and injected to and from forms for all ClientAxis fields in Axis 1-3.

Security Rights: ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly; ClientView; ClientViewAll; DxUpdate; DxView; FormBuilder; FormBuilderEdit

Steps: Form Tab-> edit existing Form or Add Form-> pull fields for Injecting Full Dx or Text Field for Field Mapping of Is RO or RO Text -> Client Tab-> select Client-> Diagnosis (nav bar)-> Update Assessment button-> Scroll icon for Axis I, II, and/or III-> check for RO add text-> Save button-> complete visit-> Visit Tab-> select Visit ID to view mapping or injecting

Scheduled Groups Start and End Dates

If you create a Schedule Group with dates in the future, it now shows up in the list of groups you can select from on the 'add schedule' screen, however, if you pick a group and pick a date, it does a check on the server side to make sure the date ranges match up. If they do not, you get an error message. An Added warning to informing that there is something scheduled for after the date and asks if want to proceed.

Security Rights: AdminView; AssignPlannerGroups; AssignClients; PlannerAdd; PlannerUpdate; PlannerView; PlannerViewAll; PlannerViewTeam; Reschedule; ClientList; ClientListAll; ClientView; ClientViewAll; ClientUpdate; EmployeeList; EmployeeListAll; EmployeeView; EmployeeViewAll

Steps: Admin Tab-> Daily Activities section-> Schedule Groups link-> edit existing or add New Group-> Edit Clients-> assign Clients-> OR Client Tab-> select Client or add Client button-> Schedule Group (nav bar)-> Assign-> Employee Tab-> select Employee-> Schedule button-> schedule Visit

Security Right – Open Payment Control

A new Security Right has been added: Added PaymentControlReopen; gives you the right to reopen the payment control once closed. A Partner Config setting has been added: Use Payment Control.

Security Rights: AdminView; PartnerConfig; SecurityUpdate; PaymentControlReopen; PaymentControlAlter; BillingModule

Steps: Admin Tab-> Partner Config link-> Billing section-> Use Payment Controls-> Save Partner Control button-> Admin Tab-> Security Matrix link-> Billing section-> PaymentControlReopen, PaymentControlAlter-> Save All button-> Billing Tab-> Payment Controls link-> Add a Payment Control-> Show Closed button when Payment Control has been Closed will allow for you to reopen-> Open button

Security Right- Refund/Retract payment

A new Security Right has been added that allows for refunding and returning of Client payments from the Manage Client Payments screen. This also affects retracting Client payments from the Claim details screen. Right is called BillingRefundClientPayment.

Security Rights: AdminView; SecurityUpdate; BillingRefundClientPayment; BillingModule; BillingAddAdjustments; BillingAddCopay; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly; ClientView; ClientViewAll; ClientPayments

Steps: Admin -> Security Matrix link-> Billing section -> BillingRefundClientPayment-> Save All button (This was a split out of a right for being able to refund or return Client payments)-> Client

Tab -> select Client-> Payments (nav bar)-> Refund/Return. Now if you have the security right to ClientPayments you must have this new right to be able to refund or return Client Payments.

Security Right for Adjustments

Added a new Security Right for manual billing adjustments called BillingAddAdjustment. This controls adding an adjustment to a visit from the Claim Billing Details screen. It also controls the options in the Transfer Balance dropdown when applying a payment that does not cover the full balance.

Security Rights: AdminView; SecurityUpdate; BillingAddAdjustment; ClientVisitView; ClientVisitViewAll; ClientVisitViewTeam; ClientVisitViewTeamOnly; ClientPayment; BilingUndo; BilingAddCopay

Steps: Admin Tab -> Security Matrix link -> Billing section-> BillingAddAdjustment-> Save All button-> Visit Tab -> select Visit to View-> Visit Billing Tab-> Claim Details screen-> Add Adjustments-> Transfer dropdown for any payment that does NOT cover the full balance on the visit

Stop Late DataEntry

A new Partner Config option has been added Flag Late When > Then when this is set AND the user has the new security right ClientVisitFlagLate on then if the difference between the timein of the visit and the signature date >= the Partner Config hour set then the Client Visit field is_late is set. This field can be used in AVS in the custom filters. Also a new notification for late visits has been added. As far as partners that already have Mark Late Entries set. The same logic will still be used as before, but the is_late flag will be set instead when the visit is inserted and/or updated. If they choose to set the late hours, then this will be used in place of the default logic. Also the Mark Late Entries must be checked to get the red LATE ENTRY text on the visit view and printout. Anyone who had Mark Late Entries will have the right turned on for all profiles.

Security Rights: AdminView; Partner Config; SecurityUpdate; ClientVisitFlagLate; DataDictionary; NotificationTriggers; PlannerAdd; PlannerUpdate; PlannerView; PlannerViewAll; PlannerViewTeam; ClientVisitList; ClientVisitListAll; ClientVisitListTeam; ClientVisitListTeamOnly; ClientVisitView; ClientVisitViewAll; ClientVisitTeam; ClientVisitViewTeamOnly

Steps: Admin Tab-> Partner Config link-> Visit Settings-> Flag Late When > Then-> set # of Hours-> Save Partner Config button-> Admin Tab-> Security Matrix link-> Client Visits section-> ClientVisitFlagLate-> Save All button-> Admin Tab-> Data Dictionary link-> Table Source: Visit, Type: View/Update-> set field for is_late-> create/complete Visit late as set in Partner Config-> Visit Tab-> Advanced Search button->Custom Fields-> More Fields button-> is late (name)-> set Filtering criteria-> Admin Tab-> Notification Triggers link-> edit existing or Add a New Trigger Entry link-> Trigger: Late Client Visit-> determine Title, Send To, Occur, Reminder (required fields)-> Save button-> Employee Tab-> select Employee-> Notifications/Schedule