

February 2014

# Release 9.0 Configuration

Version 1.0



# CREDIBLE

Behavioral Health Software

## Release 9.0 Configuration

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**Note:** an updated version of this document will be available on Friday, February 28<sup>th</sup>.  
It will include the Patch List for Release 9.0.

## BILLING

### Revised CMS 1500 Format Fully Functional

The revised CMS 1500 (02/12 1500 Claim Form) is fully functional in this latest release. The revised version aligns the claim form with changes in the 5010 version of 837P and accommodates ICD-10 reporting needs.

Check with your payers to determine if they are using the 02/12 1500 Claim Form in the dual use period (January 6 through March 31, 2014). Starting on April 1, 2014, payers can only receive and process paper claims on the 02/12 1500 Claim Form.

#### Settings

**Payer Config:** *Use CMS 1500 2012 Form*

The revised CMS 1500 is generated using 8 point font size. Minor alignment adjustments for the revised CMS 1500 can be made using your printer's paper alignment options.

#### Configuration

For each payer using the revised CMS 1500:

1. Billing or Admin tab > Billing Payer > edit.
2. Select *Use CMS 1500 2012 Form* (bottom of CMS 1500 Claim Overrides section).
3. Review the existing claim override settings with the payer to determine whether changes and/or additions are needed for the revised CMS 1500; make any necessary updates.

The settings in the CMS 1500 Claims Overrides section and Use PCP as Referring Provider in the Electronic Claim Overrides section apply to the revised CMS 1500. (Use PCP as Referring Provider impacts Box 17.)

4. Click Save Settings.

#### Use

To generate a batch claim file and print it on the revised CMS 1500:

1. Billing tab > Generate Batch Claim File.
2. Select payer and other filters and click Filter Batch.
3. If payer is set up for 837 Professional or 837 Institutional and you need to force CMS 1500, select it from CMS Format dropdown at the bottom of the screen.
4. Generate Text File for Batch > Click here to open CMS 1500 Report.
5. Select PDF from format dropdown and click Export.
6. Open the PDF and print it out on the 02/12 1500 Claim Form.

## REPORTS

### Logging Added for Generating Time-of-Visit Clinical Summary

If a user generates a time-of-visit clinical summary, the action will now be recorded in the HIPAA logs. Previously, CLINICAL SUMMARY GENERATED was only recorded when done via the Client Profile.

#### *Settings*

[Security Matrix](#): ReportList, ClientViewLog

[Report Security](#): Global HIPAA Log

#### *Configuration*

N/A

#### *Use*

For an individual client or employee: Log button on Client or Employee nav bar > Filter on CLINICAL SUMMARY GENERATED action > details button.

For all clients or employees:

1. Reports tab > Admin button on nav bar > Global HIPAA Log.
2. Client or Employee from Entity dropdown > CLINICAL SUMMARY GENERATED from Action dropdown.
3. Enter desired date range > Run Report button > details button.

## MEANINGFUL USE

Meaningful Use requirements are viewed as absolutely mandatory for Credible. Numerous enhancements have been added to provide for simplified certification.

### Direct Project Support for Sending/Receiving Clinical Summaries to/from Third Parties

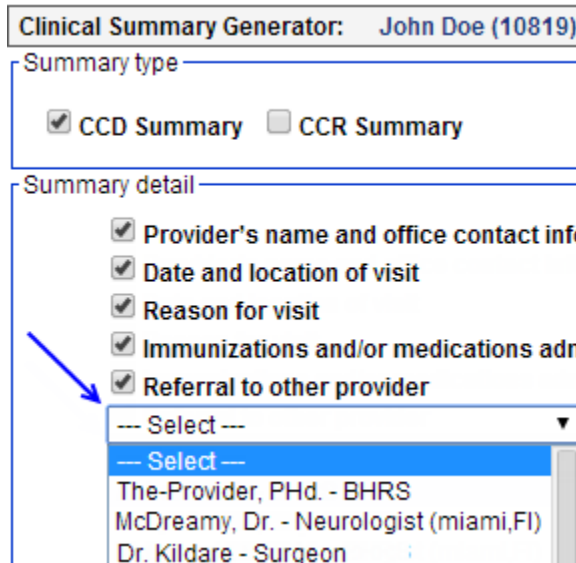
Direct Project defined: the Direct Project is the set of standards, policies, and services enabling simple, secure transport of health information between authorized care providers. The Direct Project enables standards-based health information exchange in support of core Meaningful Use measures, including communication of summary care records, referrals, discharge summaries, and other clinical documents in support of continuity of care and medication reconciliation, and communication of laboratory results to providers.

With newly added support for the Direct Project, Agency staff can now securely send and receive clinical summaries directly to and from *trusted* third-party recipients *from within Credible*. The two-way trust relationship between your Agency and a third party is established by exchanging “credential” certificates and having Credible configure the third-party’s certificate in your system. Credible will generate a Direct certificate for your Agency that you can then give to third parties you want to exchange clinical summaries with. Direct Project support has also been added to the Credible Client Portal.

A Direct certificate can be for an individual (address-specific) or an organization (domain-specific). If a third party has a domain-specific certificate, the clinical summary can be sent to any individual at the organization. For security purposes, the address-specific certificate is the preferred type.

The combination of a clinical summary in C-CDA (CCD) format (released in 8.3) and sending/receiving the summary via Direct Project is necessary to meet certain Meaningful Use interoperability requirements.

**Sending** – When generating a CCD summary, a user selects the “Referral to other provider” checkbox to activate the new Provider dropdown. All external care providers configured in your Agency domain/site will be available in the dropdown.



Clinical Summary Generator: John Doe (10819)

Summary type

☒ CCD Summary ☐ CCR Summary

Summary detail

☒ Provider's name and office contact info

☒ Date and location of visit

☒ Reason for visit

☒ Immunizations and/or medications administered

☒ Referral to other provider

--- Select ---

--- Select ---

The-Provider, PHd. - BHRS

McDreamy, Dr. - Neurologist (miami,FI)

Dr. Kildare - Surgeon

The new output option “Send summary via Direct” brings up a list of the Direct addresses that your Agency can send the summary to. In the example below, the first two addresses correspond to address-specific certificates and the third corresponds to a domain-specific certificate (only the domain is listed). When a user selects a “domain” address, he/she enters the appropriate username in the field provided.



Print summary to screen

☒ Send summary via Direct

Direct Addresses

credpartner1@dev1.credibledirect-dev.com

email1@dev2.credibledirect-dev.com

dev1.credibledirect-dev.com

Chosen Email Address: credpartner1 @dev1.credibledirect-dev.com

**Receiving** – When a user selects the new Direct Summaries radio button in the Import Clinical Summary screen, a Received Clinical Summaries list displays with all clinical summaries that have been received into your system via Direct Project.

☐ Manual Upload
 ☒ Direct Summaries

Import Clinical Summary for John Doe (10819)

File Categorization

Folder

OR 1

Description

Received Clinical Summaries

|                       |                |                           |
|-----------------------|----------------|---------------------------|
| Client: Doe, John     | Date: 20140220 | Referrer: Dillamond, Dr.  |
| Client: Potter, Harry | Date: 20140204 | Referrer: Kildare, Dr.    |
| Client: Bond, James   | Date: 20140204 | Referrer: Higgins, Dr.    |
| Client: Doe, John     | Date: 20140214 | Referrer: Goodfellow, Dr. |

Upload File

After filling out the File Categorization section, the user selects the appropriate file and uploads it.

## Settings

**Partner Config:** Use Clinical Summary Features; fill out CCD Author Address fields

**Security Matrix:** PatientSummaryGenerator, ClientFileAdd

## Configuration

1. Submit a Priority 4 Task requesting that Credible configure and enable Direct Project in your system.
  - a. Attach certificates from third parties (in .der or .cer format) that you want to exchange clinical summaries with.
  - b. For each third-party certificate, indicate if it is address-specific (preferred; allows just one address) or domain-specific (allows emails to be sent to entire domain).
  - c. Specify the email address that your Agency wants to use for its address-specific certificate.

2. Once you are notified that your Agency's certificate is ready, download it from the Task and give it to the third parties that you want to exchange clinical summaries with.
3. Update existing external care provider records with the provider's first name and last name; these fields are new with this release (Admin tab > External Care Providers > edit > add first/last names > save).
4. Make sure there is an external provider record for each third party you are going to exchange clinical summaries with (Admin tab > External Care Providers > Add a New Provider Entry).
5. If appropriate, configure visit types so time-of-visit clinical summaries can be generated (Admin tab > Visit Type > edit > select Include Summary > Save).
6. Optional: add a file folder and name it Clinical Summaries (Admin tab > File Folders Admin > fill out Add Folder section).

## Use

To generate a clinical summary and send it to a trusted third party via Direct Project:

1. Client tab > Profile on Client nav bar > Generate Clinical Summary or Visit tab > view button for visit > Create Clinical Summary (in Transfer XML CDA/CCR field).
2. If necessary, uncheck one or more Summary detail checkboxes and adjust the number of visits. Make sure Referral to other provider is checked.
3. From Provider dropdown, select External Care Provider that you are sending the clinical summary to.
4. Enter the reason for the referral in the corresponding field.
5. Under Output options, select Send summary via Direct and then select the Direct Address that corresponds to the external provider you selected in step 3.
6. If you selected a domain address, enter the external provider's username in the Chosen Email Address field.
7. Click Generate Summary. A "Successful email send" message displays.



To upload a clinical summary received via Direct Project:

1. Client tab > Attachments on Client nav bar > Import Clinical Summary button > Direct Summaries radio button.
2. Fill out the File Categorization section.
3. Select appropriate clinical summary from Received Clinical Summaries list and click Upload File.
4. Close the “Summary successfully uploaded” popup and click the Attachments button on Client nav bar to view uploaded clinical summary.

## Medication Dosage and Frequency in Clinical Summary Generation and Import

When generating a clinical summary for a client – via the Client Profile or Visit Details screen – it will now include the dosage and frequency for each medication.

```
*****
Medications
*****
```

| Medication         | Dosage   | Instructions/Comments | Start Date | Status |
|--------------------|--|-----------------------|------------|--------|
| Paxil 10 mg tablet | Take 1 tablet (10 MG) By Oral Route 1 time per day | NO DATA AVAILABLE     | 20131203   | Active |

Likewise, when importing a clinical summary and choosing to update the client record with a medication in the summary (via Merge Record button), the dosage and frequency will be displayed in the Dosage/Frequency field in the Client Medications list.

| CLIENT MEDICATIONS: John Doe (10819) |  |                              |            |
|--------------------------------------|--|------------------------------|------------|
| Filter                               |  | ALL ACTIVE                   | Medication |
| Medication                           |  | Dosage / Frequency           |            |
| Zoloft 100 mg tablet                 |  | take 1 tablet 1 time per day |            |

In the medication record (accessed via the edit button), the dosage and frequency appear in the Frequency field; the user needs to manually move the dosage into the Dosage field.

*Settings*      **Partner Config:** Use Clinical Summary Features; fill out CCD Author Address fields  
**Security Matrix:** PatientSummaryGenerator, ClientFileAdd, ClientFileView, RxUpdate

*Configuration*      See [Configuration for Generating Clinical Summaries](#) in the help.

*Use*      See the following topics in the help:


- [Generating a Clinical Summary](#)
- [Importing a Clinical Summary](#)
- [Updating Client Record with Imported Clinical Summary](#)

After updating a client record with a medication from an imported clinical summary:

1. Medications on Client nav bar > edit.
2. Move the dosage from the Frequency field into the Dosage field and click Update Medication.

## Uploading Lab Results with Parent-Child Structure

The manual upload function for lab results has been updated to accommodate files with a parent-child structure. In this type of file, the child results appear below the Collection Date field.

| Results <span>Close</span>  |   |   |       |            |
|---|---|---|-------|------------|
| Procedure   | Value   | Abnormal  | Range | Panic Flag |
| 1) Bacteria identified in Stool by Culture (code: 625-4)                               | 103429008 Enterohemorrhagic Escherichia coli, ser | A   |       | False      |
| <b>Facility:</b><br>Century Hospital<br>2070 Test Park<br>Los Angeles, CA, 90067 USA  |   | Result comments: Full result value: 103429008<br>Enterohemorrhagic Escherichia coli, serotype O157:H7 |       |            |
| <b>Ordered Date:</b>  |   |   |       |            |
| <b>Received Date:</b>   |   | 2/5/2014 11:04:00 AM  |       |            |
| <b>Result Date:</b>   |   | 5/30/2011 12:35:00 PM   |       |            |
| <b>Collection Date:</b>   |   | 5/30/2011 12:35:00 PM   |       |            |
| <b>Child Results</b>  |   |   |       |            |
| <b>Ampicillin [Susceptibility] by Minimum inhibitory concentration (MIC)</b><br>Result Value: < 0.06<br>Abnormal: S<br>Range:<br>Panic Flag: False<br>Result Comments:  |   |   |       |            |
| <b>Gentamicin [Susceptibility] by Minimum inhibitory concentration (MIC)</b><br>Result Value: 0.05<br>Abnormal: S<br>Range:<br>Panic Flag: False<br>Result Comments:    |   |   |       |            |
| <b>Ciprofloxacin [Susceptibility] by Minimum inhibitory concentration (MIC)</b><br>Result Value: 0.05<br>Abnormal: S<br>Range:<br>Panic Flag: False<br>Result Comments: |   |   |       |            |

**Settings** Your IM/PSC needs to turn on the manual upload function in your system.

[Security Matrix: eLabs](#)

**Configuration** N/A

**Use** See "Uploading a Lab Results File" in the [eLabs](#) help topic.

## Nine Clinical Quality Measures for Meaningful Use Attestation

In 2014, eligible providers must report on 9 of the 64 approved clinical quality measures (CQMs). To meet the measure selection requirements of the Centers for Medicare & Medicaid Services (CMS), Credible has developed reporting procedures for the following 9 measures:

- CMS2 Preventive Care and Screening: Screening for Clinical Depression and Follow-Up Plan
- CMS50 Closing the Referral Loop: Receipt of Specialist Report
- CMS62 HIV/AIDS: Medical Visit
- CMS68 Documentation of Current Medications in the Medical Record
- CMS139 Falls: Screening for Future Fall Risk
- CMS149 Dementia: Cognitive Assessment
- CMS155 Weight Assessment
- CMS156 Use of High-Risk Medications in the Elderly
- CMS165 Controlling High Blood Pressure

While your Agency can generate reports for the measures via the CQM module, it cannot submit the results as official results until Credible has completed Stage 2 certification in full. Additional details for reporting on the above measures will be provided in the Meaningful Use Stage 2 Configuration Guide, which will be made available no later than March 31, 2014.