CREDIBLE
Behavioral Healthcare Software

Release 4.4 Configuration

This document lists the enhancements made to our application in release 4.4. Some of the items described within this document may have settings listed. These are here to point out general settings that could possibly affect access, update and display content. When you see a setting that is in Bold that means it is a new setting specifically needed for the item being described.

GENERAL

Name	Employee Note Deletion
Description	There is a new Security Right to allow for the deletion of Employee Notes.
Partner Config Settings	N/A
Security Matrix Settings	EmployeeNoteDelete
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	Turn on right in Security Matrix
Steps to Use	1) Click the Notes link from the Employee's Navigation Bar. 2) The 'entered by' line now has a ‘delete’ button to the right; click the 'delete' button to remove the note.

Additional Information	N/A
Name	Word-like formatting for Client Notes and Message Board Message Board Format
Description	When adding a Client Note or a Message Board message, the text can be formatted in various font sizes, colors, etc.
Partner Config Settings	N/A
Security Matrix Settings	ClientList, ClientView, ClientNoteAdd (for client notes); AdminView, MyCWAdmin, MyCWMessageAdmin (for Message Board administration)
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) For Client Notes: Click on Notes in a Client's Navigation Bar 2) For the Message Board: Click on the Admin Tab, then Home Page Config (bottom right) and then Message Admin 3) The Notes/Message will automatically open with the formatting features available. 4) From left to right, the options are: font size (8 to 72), text color (40 options), bold, italics, underline, strikethrough, spell check, spell checker options, numbered list, bulleted list. 5) At the far right is a small triangle icon; click this hide and display the options row.
Additional Information	Click and drag on the bottom right hand corner to resize the text box.

Name	6446 Attachment Icon on Client List and Visit List
Description	The Client List and Visit List now display a light blue paperclip icon to indicate that a client or the visit has attachments.
Partner Config Settings	N/A
Security Matrix Settings	ClientList; VisitList

Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	N/A
Additional Information	N/A

Name	Sorting by Type of External Care Provider
Description	You can now sort on the type of provider when adding a new external provider to a client.
Partner Config Settings	N/A
Security Matrix Settings	ClientUpdate, ClientView, AddExternalProvider, ExternalProviderUpdate
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Go to a client's navigation bar and click Ext Provider 2) Under Add New Client Provider, select the type of provider from the drop down. The Provider box will automatically update to display only those kinds of providers. 3) Select the desired provider and click the 'Add From List' button.
Additional Information	N/A

Name	New Address Fields for Client Contacts and Exporting
Description	The Client Contact screen now has three new fields for addresses. City, State, and Zip Code are now separate fields allowing the export of this information making mailing easier.
Partner Config Settings	N/A
Security Matrix Settings	ClientList, ClientView, ClientUpdate
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Go to a client's navigation bar and click Contacts 2) The new fields for City, State, and Zip Code are available to record this information 3) Click the export button in the upper right hand corner to obtain a file listing all the client's contacts.
Additional Information	Existing contact addresses will not be affected (the information will still reside fully in the Address field until manually edited).

Name	ROI for External Providers

Description	New fields for a Release of Information have been added to a client's External Care Provider record.
Partner Config Settings	N/A
Security Matrix Settings	ClientUpdate, ClientView, ExternalProviderUpdate
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Go to a client's navigation bar and click Ext Provider 2) There are three new optional fields: a checkbox to indicate an ROI has been obtained, and two fields for the when the ROI was obtained and when it expires. 3) There are two ways to input ROI information a. If you select an External Provider from the list or there is an External Provider already saved press the ‘update’ button to access the ROI options. b. If you are creating a new External Provider the places to enter the ROI information has been added along the bottom
Additional Information	N/A

SCHEDULE

Name	Exporting the schedule to Outlook
Description	You can export Appointments and Blocks from your schedule for import into Outlook
Partner Config Settings	Use Outlook Export

Security Matrix Settings	PlannerAdd, PlannerView, PlannerUpdate
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Click on the Admin tab and then on the Partner Config link 2) Check the box for 'Use Outlook Export' (located in the Features section) 3) Click 'Save Partner Config'
Steps to Use	1) Go to an employee's schedule (week view only) 2) Click the Export icon located towards the upper right (flip calendar with a green upwards pointing arrow) 3) Select start and end dates 4) Select the desired Export Option: All (for all scheduled items in the date range); Appointments Only (just scheduled visits); Blocks Only (just blocked time) 5) Select the desired file format (vCal or csv) 6) Click the 'Export' button at the bottom
Additional Information	Only the client's first and last initials are exported. Importing the same scheduled item more than once can result in duplicate calendars in Outlook.

ADVANCED SEARCH

Name	Client Advanced Search Units Field
Description	Client Advanced Search has a new Custom Field called Total Units. This will give a total of unmerged units per client.
Partner Config Settings	N/A

Security Matrix Settings	N/A
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	Open the Client Tab then press the ‘advanced search’ button. Open Custom Fields, locate Total Units and check it off. Select Filters and run search.
Additional Information	N/A

Name	Group Totals in Advanced Visit and Client Searches Exporting Group Totals in Advanced Visit and Client Searches
Description	Advanced Search Exports now use the Grp Totals and Grp Totals Only features.
Partner Config Settings	N/A
Security Matrix Settings	ClientVisitList, ClientVisitView, ClientList, ClientView.
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	N/A
Steps to Use	Using either Client Advanced Search or Advanced Visit Search select the criteria you want. Choose a Sort By and make sure there is a field for that data to appear in. Select Group Totals and run the Export. You can also select Group Totals Only for an export that just has the totals.

Additional Information	N/A

Name	Advanced Visit Search / Custom Filter now can use Billing Matrix fields
Description	Billing matrix fields can be added as custom filters for advanced visit searches.
Partner Config Settings	N/A
Security Matrix Settings	AdminView, DataDictionary (to configure); ClientVisitList (to use)
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Go to Admin > Data Dictionary 2) Select 'Billing Matrix' as the table; click 'Submit' 3) Select the desired field using the Column Name dropdown and click 'Insert Column' 4) A view label can also be added (otherwise the display will use the actual column name from the database)
Steps to Use	1) Click the Visit tab and click Advanced Search 2) Click the Custom Filter link 3) The fields from the Billing Matrix will be listed last in the Where -column-dropdown
Additional Information	Only those Billing Matrix fields that have been specifically added through the data dictionary will be available in the Custom Filter list

MEDICATIONS

Name	Self-Reported Medications
Description	The Add Medication screen now has a drop-down field named 'Is Prescription' to identify if the medication was self reported or verified as a prescription.
Partner Config Settings	N/A
Security Matrix Settings	N/A
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Go to a Client Nav Bar and select Medications. 2) Click on the Add Medication button. 3) While adding information locate the ‘Is Prescription’ drop down. 4) Open it and make a Yes or No selection. 5) You have the option to not select form this drop down which will behave the same as No.
Additional Information	Add Medication is different than using Credible Rx to create a prescription; it is used to record medications the client reports taking.

MEDICAL PROFILE

Name	Blood Pressure Resting or Standing
Description	The Medical Profile screen now offers two recordable values for Blood Pressure; Standing and Resting.
Partner Config Settings	N/A
Security Matrix Settings	MedicalProfileUpdate, MedicalProfileView

Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Go to a Client Nav Bar and open Medical Profile. In the top section there is now 'BP Resting' and 'BP Standing'. 2) Fill in these fields and Save the profile.
Additional Information	BP Resting and Standing are also recorded in the Medical Profile History

Name	Girth added to Medical Profile
Description	The Medical Profile screen now has Girth as a new field. It will hold numbers from 1.00 to 499.99 inches.
Partner Config Settings	N/A
Security Matrix Settings	ClientUpdate, ClientView, MedicalProfileUpdate, MedicalProfileView
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Go to a client's navigation bar and click Medical Profile 2) Click the 'Start New Profile' button at the bottom 3) Enter a numeric value from 1.00 to 499.99 in the Girth box 4) Click the 'Save Medical Profile' button at the bottom
Additional Information	Girth is also visible in the history summary line (click the 'History' button in the upper right).

TREATMENT PLANS

Name	Treatment Plan Module History
Description	Changes to treatment plans are now available for review via a 'history' button.
Partner Config Settings	N/A
Security Matrix Settings	ClientUpdate, ClientView, TxFormsAdd, TxUpdate, TxView
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Go to a client's navigation bar and click Tx Plan 2) Click the 'history' button located on the right 3) A change summary list will appear. Click the 'view' button on the left to read the treatment goal text. 4) Click the 'Return' button in the upper right to go back to the main Treatment Plan screen.
Additional Information	While in the history view, the current treatment plan will have a change date of 'Current.' Only changes made after the release will be viewable through the History.

LOGGING

Name	Log - client episode activity
Description	The creation and updating of episodes is now logged. This occurs whether the episode is created/updated manually (through the Episode link off the client's navigation bar or through a form question that maps the answer to the Episode) or

	automatically (requires that Parent Program Driven Episodes and/or Episodes per Program Assignment also be checked in Partner Config).
Partner Config Settings	Use Client Episodes
Security Matrix Settings	ClientViewLog (in order to see the log; the actual logging of activity is automatic)
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Go to a client's navigation bar and click Log 2) Actions related to the client's episode will be listed and are also available for filtering using the drop down.
Additional Information	CLIENT EPISODE INSERTED – the manual adding of an episode (clicking Episodes on the client's navigation bar and clicking the 'New Episode' button) CLIENT EPISODE AUTOMATICALLY INSERTED – an episode was created via a program assignment (requires use of Parent Program Driven Episodes and/or Episodes per Program Assignment) UPDATE CLIENT EPISODE RECORD – the episode information was updated by clicking Episodes on the client's navigation bar and clicking the 'update' button UPDATE CLIENT EPISODE FROM FORM – the episode information was updated via a form that maps back to a field on the episode CLIENT EPISODE AUTOMATICALLY UPDATED – an episode was closed automatically by unassigning the related program (requires use of Parent Program Driven Episodes and/or Episodes per Program Assignment)

BILLING

Name	Location code on 837P by Payer
Description	The Place of Service (POS) can now be set by payer for electronic claims. This will override the location POS code set during a visit.
Partner Config Settings	N/A
Security Matrix Settings	BillingConfig, BillingModule
Billing Config Settings	Billing Payer > Electronic Claim Overrides > Override Place of Service
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Go to the Billing tab, click Billing Payer, and click edit for the desired payer 2) In the Override Place of Service drop down, select the desired Place of Service (POS) code and click the 'Save Settings' button
Steps to Use	Once configured, the selected POS will appear automatically in each claim (Service Loop 2400 SV105) to that payer.
Additional Information	This is the electronic counterpart to the CMS 1500 location override (Override Location Box 24b).

Name	Subtract Overlapping no longer blocked.
Description	The 3 Billing Matrix settings for Subtracting Overlaps in schedules will no longer be blocked by Partner Config settings for Blocking Overlapping Visits.
Partner Config Settings	This pertains to the items in the Webforms section pertaining to Blocking
Security Matrix Settings	N/A
Billing Config Settings	Subtract Overlapping Duration, Subtract Overlapping Units, Is Overlap to Subtract
Form Builder Settings	N/A

Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	N/A
Additional Information	N/A

Name	Roll into batch visit
Description	This works with a roll code to allow a merged service to roll/merge into a service that is in BATCHED status. This should only be used for flat rate visits with the Rollup Month setting also set.
Partner Config Settings	N/A
Security Matrix Settings	N/A
Billing Config Settings	Billing Matrix: Allow Merge into Batched Visit
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	N/A
Steps to Use	Turn on in Billing Matrix for each Matrix line that share the same roll code.
Additional Information	The billing rate of the batched visit will not be affected by the merge ever, but units and visit base rate could be - though its best to be used with flat rate visits. The main purpose of this setting is to allow monthly rolls while batching weekly, and still only batch one primary service per month

Name	Rolling based on the Authorization time frame

Description	Changes rolling and summing to merge all visits that occur within the period of the matching authorization
Partner Config Settings	N/A
Security Matrix Settings	N/A
Billing Config Settings	Billing Matrix: Rollup Auth Period
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	Turn on in Billing Matrix
Steps to Use	Steps to Use: You will need to include 'Authorization Required' and a Rollup Code or Sum Code. 1. Select this feature in the Billing Match for a certain Visit type. 2. Create an Auth that spans across the beginning of a month such as 11/15/09 to 12/15/09. 3. If you follow the date range example run a visit near the end of November and another in the beginning of December.
Additional Information	N/A

Name	Force a visit to be the Primary Visit for a roll/sum
Description	This setting allows you to specify (based on the matching matrix line) which visit will be considered the Primary visit for rolling and summing. Without this setting, the Primary visit is always the one that occurs first (based on visit date/time).
Partner Config Settings	N/A
Security Matrix Settings	BillingConfig, BillingModule
Billing Config Settings	Billing Matrix: Force as Primary in Merge

Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Go to the Billing tab, click Billing Matrix, and click edit for the desired matrix line 2) In the Merging / Rolling / Summing / Bundling section, check the box for Force as Primary in Merge 3) Click 'Save Settings'
Steps to Use	None - once configured, the visit is automatically flagged as the Primary
Additional Information	N/A

Name	Add employer info in Subscriber page
Description	The Client’s Insurance Subscriber Details screen now has 'Employer' and 'Employer Address' fields.
Partner Config Settings	N/A
Security Matrix Settings	ClientView, ClientInsuranceAdd, ClientInsuranceView
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	N/A
Steps to Use	1) Click 'Insurance' on a client's navigation bar 2) Click the 'subscr' button located to the right of the client's insurance information 3) The Employer and Employer Address fields are located at the bottom. At a minimum, Subscriber First Name, Subscriber Last Name and Subscriber Date of Birth must also be completed

Additional Information	The subscriber details button is only available after first adding an insurance to a client.

Name	Selecting Primary vs Non-Primary Payer when Batching
Description	Batches can now be generated for when the selected payer is the primary payer for the visit or for when it is non-primary (secondary, tertiary, etc).
Partner Config Settings	N/A
Security Matrix Settings	BillingModule (to access the Billing tab and Generate Batch Claim File)
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Click on the Billing Tab and click the link for Generate Batch Claim File and select a payer 2) On the far right is a drop down labeled 'Insur Order' 3) Select Primary to generate a batch where the payer is always the primary payer for the claim 4) Select Non-Primary to generate a batch where the payer is always the secondary (or greater) payer for each claim 5) Click Filter Batch
Additional Information	If no selection is made, the batch will generate all claims for that payer, regardless of order.

Name	Duplicate Billing Report Enhancement
Description	Merged services can now be included in the Duplicate Billing Report.
Partner Config Settings	N/A
Security Matrix Settings	BillingReports
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Click on the Billing Tab and click the link for Duplicate Billing Report 2) In the Additional Matching Criteria section ,check the box for 'Include Merged Services’. 3) Click the 'View Report' button
Additional Information	N/A

AUTHORIZATIONS

Name	Cascade Authorizations to Secondary Payer
Description	There is a Payer setting called Cascade Authorization. Set on the second payer sp that if you have 2 insurance providers with auths that cover a visit and the first insurer does not pay anything it will now cascade to the 2nd Auth.
Partner Config Settings	N/A
Security Matrix Settings	BillingConfig, BillingCPTCodes, BillingModule
Billing Config Settings	N/A

Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	N/A
Steps to Use	Set up 2 insurance payers with Auths to cover a visit. Set the second payer to Cascade Authorization = Yes. Process the visit and do not have the 1st payer pay anything to make it cascade to the second payer.
Additional Information	N/A

Name	Authorization ordering
Description	You can now set an Insurance Authorization to be Primary. If multiple Authorizations match a service the one set to Primary is applied first.
Partner Config Settings	N/A
Security Matrix Settings	AuthorizationAdd, Authorization View
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Click 'Authorizations' on a client's navigation bar 2) When adding a new authorization, check the box labeled 'Primary.' When editing an existing authorization, check the box labeled 'Prim' 3) Click the 'Add Authorization' or 'Save Changes' button
Additional Information	If checked, the primary box will be unchecked when cloned. Designating an authorization as primary must be done manually.

Name	Authorization Copying
Description	Existing authorizations can now be copied/cloned for easier entry.
Partner Config Settings	N/A
Security Matrix Settings	AuthorizationAdd, Authorization View
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - automatic
Steps to Use	1) Click 'Authorizations' on a client's navigation bar 2) Click the 'clone' button located on the far right of an authorization 3) Make any edits needed and click 'Save Changes'
Additional Information	All details of the authorization are copied forward when cloning EXCEPT the Primary checkbox. This must be selected manually.

Name	Exceeded Authorizations pass on to next Authorization
Description	A single visit can now use the rates, units, or hours available on two authorizations.
Partner Config Settings	Use Auth Spanning
Security Matrix Settings	N/A
Billing Config Settings	N/A

Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Click on the Admin Tab and click the link for Parnter Config 2) Check the box for 'Use Auth Spanning' (located in the Client Settings section) 3) Click the 'Save Partner Config' button
Steps to Use	1) The client must have two authorizations that match the visit 2) If a visit causes an authorization to max out, the visit will pull units (or rates / hours) from the second authorization so that all available authorized units are used.
Additional Information	The second authorization must have enough units (or rates / hours) available to accommodate the excess.

SECURITY MATRIX

Name	Separation of Update through form rights
Description	The rights to update information through a form has been separated from the standard update rights.
Partner Config Settings	N/A
Security Matrix Settings	See Steps to Configure
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Go to the Admin tab, click Security Matrix 2) Check the box for each desired security right for a given profile

	3) Click Save
Steps to Use	1) ClientEpisodeFormsUpdate: the right to edit Client Episode Fields through forms. 2) ClientFormsUpdate: the right to edit Client Profile and Extended Profile fields through forms 3) EmployeeFormUpdate: the right to edit the Employee profile through forms 4) DxFormsAdd: the right to add Diagnosis information through forms 5) RxFormsAdd: the right to Medication information through forms (note this is not adding an actual Prescription)
Additional Information	Requires use of Form Builder and Forms with mapping questions If the user already has the Update right, then s/he also related Form Update right automatically (the additional form update right is not needed).

Name	Treatment Plan Security Rights Enhancment
escription	The Tx Plan rights have been expanded for more control. 1. TxAdd: right to add free text client treatment plans 2. TxDelete: right to delete free text client treatment plans 3. TxFormsAdd: right to add Tx plans (full form client treatment plans) through web forms 4. TxUpdate: right to edit/update free text client treatment plans 5. TxView: right to view client treatment plans
Partner Config Settings	N/A
Security Matrix Settings	TxAdd, TxDelete, TxFormsAdd, TxUpdate, TxView.
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	Turn on in Security Matrix

Steps to Use	N/A
Additional Information	N/A

NOTIFICATION TRIGGERS

Name	Notification Triggers on Client Profile Dates
Description	Notifications can now be sent based on dates entered in the client profile and client extended profile.
Partner Config Settings	N/A
Security Matrix Settings	AdminView; NotificationTriggers
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Go to the Admin tab, click Notification Triggers 2) Click Add a New Trigger Entry and select either Client Profile Date Field Trigger or Client Profile Date Field Trigger 3) Select the Specific Field that will act as the trigger – note that the drop down is limited to only date fields that exist in the profile/extended profile 4) Enter a name for the notification in the Title box 5) Select the categories of employees to receive the notification and the number of days from the trigger that the notification should occur. 6) Check the boxes for Reminder, Send Email, and/or Must Dismiss as desired 7) Click the 'Save' button
Steps to Use	Once configured, the notification is automatic
Additional Information	Note that the trigger is the actual date in the field, not when it was updated.

Name	Notification Triggers on Client Attachments
Description	Notifications can now be triggered by an attachment getting saved to a client’s file.
Partner Config Settings	N/A
Security Matrix Settings	AdminView; NotificationTriggers
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Go to the Admin tab, click Notification Triggers 2) Click Add a New Trigger Entry and select Client Attachment Added 3) Select the categories of employees to receive the notification and the number of days from the trigger that the notification should occur. 4) Enter a name for the notification in the Title box 5) Select the categories of employees to receive the notification and the number of days from the trigger that the notification should occur. 6) Check the boxes for Reminder, Send Email, and/or Must Dismiss as desired 7) Click the 'Save' button
Steps to Use	Once configured, the notification is automatic
Additional Information	N/A

Name	Notification Triggers by Specific Visit Type and Program
Description	Notifications for visits being added and approved can now be triggered based on the combination of Visit Type and Program together.
Partner Config Settings	N/A

Security Matrix Settings	AdminView; NotificationTriggers
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Go to the Admin tab, click Notification Triggers 2) Click Add a New Trigger Entry and select either 'Visit Add – Specific Visit Type & Program' or 'Visit Approval – Specific Visit Type & Program' 3) Select the visit type AND program for the trigger 4) Enter a name for the notification in the Title box 5) Select the categories of employees to receive the notification and the number of days from the trigger that the notification should occur. 6) Check the boxes for Reminder, Send Email, and/or Must Dismiss as desired 7) Click the 'Save' button
Steps to Use	Once configured, the notification is automatic
Additional Information	N/A

Name	Notification Triggers upon Program Assignment/Unassignment
Description	There are 2 Notification Triggers for a Client that gets assigned to a program or unassigned from a program: 1) Client Program Assigned 2) Client Program Unassign
Partner Config Settings	N/A
Security Matrix Settings	To create the Notification Trigger - AdminView, NotificationTriggers

Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Go to the Admin tab, click Notification Triggers 2) Click Add a New Trigger Entry and select either ‘Client Program Assigned’ OR ‘Client Program Unassign‘ 3) Select the visit type AND program for the trigger 4) Enter a name for the notification in the Title box 5) Select the categories of employees to receive the notification and the number of days from the trigger that the notification should occur. 6) Check the boxes for Reminder, Send Email, and/or Must Dismiss as desired 7) Click the 'Save' button
Steps to Use	N/A
Additional Information	N/A

Name	Notifications to Case Manager
Description	Notifications can now be sent to Employees assigned as Case Managers.
Partner Config Settings	Use Case Managers must already be turned on
Security Matrix Settings	To create the Notification Trigger - AdminView, NotificationTriggers
Billing Config Settings	N/A
Form Builder Settings	N/A

Employee Config Settings	N/A
Steps to Configure	1) Go to the Admin tab, click Notification Triggers 2) Click Add a New Trigger Entry and select a trigger. 3) Select the visit type AND program for the trigger 4) Enter a name for the notification in the Title box 5) Select Case Manager to receive the notification and the number of days from the trigger that the notification should occur. 6) Check the boxes for Reminder, Send Email, and/or Must Dismiss as desired 7) Click the 'Save' button
Steps to Use	N/A
Additional Information	N/A

Name	Notification Triggers By Credential
Description	Notifications can now be triggered based on Credential. Of course you have to have a credential that matches the one set in the trigger.
Partner Config Settings	N/A
Security Matrix Settings	To create the Notification Trigger - AdminView, NotificationTriggers
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Go to the Admin tab, click Notification Triggers 2) Click Add a New Trigger Entry and select a trigger.

	3) Select the visit type AND program for the trigger 4) Enter a name for the notification in the Title box 5) Select Credential then select the Credential from the DD and the number of days from the trigger that the notification should occur. 6) Check the boxes for Reminder, Send Email, and/or Must Dismiss as desired 7) Click the 'Save' button
Steps to Use	N/A
Additional Information	N/A

FORMS

Name	Form Groups Billing
Description	Form Groups have been enhanced when being used for Billing.
Partner Config Settings	N/A
Security Matrix Settings	AdminView, AdminLookupUpdate
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	1) Open the ADMIN Tab / Form Group Visit Types 2) Select Form Group 3) Select Program 4) <u>Check Completed Form Group For Billing</u>: use this to set the Form Group to Billing. 5) <u>Do Not Use w/Schedule</u>: which excludes the form group from showing up on the

	schedule and the client form group page. 6) Check off the Visit Types you want to include 7) Configure each Visit Type as needed Is Dependent: when this is set the visittype is dependent on the form group being completed to be able to bill. Num Days: number of days from the other services this visit has to be completed in to make the form group complete. From Approval: Checking this means that the date used to compare Num Days will be the approval date of service not the service date. Initial Date: this field sets a date from the client profile to pull an initial required timeframe from (this only applies to the first time this service has been completed). Num Days from Initial: time frame from the initial date to have this service completed. Both the initial date and the num date from Initial need to be set to use this calculation.
Steps to Use	N/A
Additional Information	N/A

Name	Schedule Groups Function
Description	There is now a flag in the schedule groups admin for 'not group.' When this is set to true then visits completed through that Schedule Group will counted as individual visits (the group flag on the visit will be false).
Partner Config Settings	N/A
Security Matrix Settings	N/A
Billing Config Settings	N/A

Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	N/A
Steps to Use	1) Open ADMIN Tab / Daily Activities / Schedule Groups 2) If creating a new group the Not Group check box is the last item to the right to select. 3) If you want to apply this to an existing group press the ‘edit’ button and in the column named ‘Not Group’ there will be a drop-down giving you the option of True or False. 4) Make your selection then press Update.
Additional Information	This would be used when the same grouping of clients receives services, but the service provided is not technically considered a 'group' service.

CLIENT STATEMENTS

Name	End Dates on Client Statements
Description	Added End date to the client statement
Partner Config Settings	N/A
Security Matrix Settings	N/A
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - Automatic
Steps to Use	N/A

Additional Information	All visits on the bill must be before this date. When an end date is set the client aging date will use that end date in place of the current date.

Name	Client Last Name on Statements
Description	The Client Statements have been changed to show the Client’s last name on statement when there is a alternate billing name.
Partner Config Settings	N/A
Security Matrix Settings	N/A
Billing Config Settings	N/A
Form Builder Settings	N/A
Employee Config Settings	N/A
Steps to Configure	None - Automatic
Steps to Use	N/A
Additional Information	N/A