

Release 5.3 Configuration

November 2010

This document describes the enhancements included in Credible 5.3 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*.

Credible Client Portal	4
Client	6
New Email Address Field in Foster Home Profile Screen	6
Educational Stressor Added to Axis IV Stressors	6
Address2 Field Added to Contacts Screen	7
Family Members Screen Enhancements.....	7
Order Date Field Added to Physicians Orders Screen.....	8
Severe Allergies Are Listed First and Highlighted	8
Liability Processed if Client Has Insurance Coverage.....	8
Attachments.....	9
Private Folders for Employee Attachments	9
Restrict Employees from Seeing Other Employees' Attachments.....	9
Flag Attachments for HR Use Only.....	10
Renaming Client and Employee Attachments	10
Client/Employee Name Displayed in Attach File Screen	11
Closed Folders as the Default	11
Client Attachments and the Credible Client Portal.....	12
Employee	13
External ID Field Added to Employee Credentials Screen	13
Schedule.....	14
New 12-Hour Maximum for Visit Duration.....	14

Visit 15

 Recipient, Location, and Billing Group Fields Default to Null 15

 New Fields Displayed in Visit Details Screen..... 15

 Name, Title, and Credentials for Approver and 3rd and 4th Signatures 16

 Two New Signature Box Labels 16

 Tie an Authorization Level to a Specific Billing Matrix Line 17

Admin 18

 New Right for Deleting Client Episodes 18

 Client Payment View and Edit Rights Are Separated 18

 New Visit Type Settings for Basic Liability Form 19

 New Partner Config Setting to Disable Quick Visit Function 20

 Credible Library Subscriptions 20

Billing..... 21

 Generate a 270 Batch by Payer Group 21

 Filter by Payer Group for Batch Claim Error Report 21

 Exclude Secondary Visits from a Custom Red X for Approval..... 22

 Red X: No Visit in Prior 2 Months Has Required Recipient Type 22

 Batch Visits Paid in Full by the Client 23

 Reprocess a Completed Visit to Apply a Split Visit Update 23

 New Fields in Billing Matrix Payer-Specific Screen 24

 Allowed Payer Takes Priority When Multiple Matrix Lines Match 24

 New Patient Responsibility Ledger Line..... 25

 Location Dropdown Added to Advanced Ledger Search 26

 Use Ledger Amount in Custom Filter in Advanced Visit Search 26

 Payer Column Added to Processed 835 Batches Screen 27

 Accounting Date in Reconcile Service and Change Status of Service Sections..... 27

 Submit Void from Paper Remit 28

 Other Due Balance Displayed in Client Overview and Client Profile 28

Reports..... 29

 Improved User Interface for Credible Reports 29

 Appointment History Report – DOB Added to Export 29

 Admin Logging Report – Forms and Billing Tables Added 30

 Transcription Productivity Report – For Employee Added 31

Credible eRx 32

 Unapproved Prescriptions on Home Page 32

 Geo Area on Prescription Printout..... 32

 Monograph Access when Creating a Prescription 33

 Med History Note for Discontinued/Rejected Prescriptions 33

Patch List..... 35

CREDIBLE CLIENT PORTAL

Description With the new Credible Client Portal, a client, family member, or other client contact can log into a read-only version of your Credible system to view different parts of his or her record. The client portal functionality is a step towards Meaningful Use certification requirements of providing clients with electronic copies of their health information.

In Credible, the term “client user” refers to any individual who has login rights to the portal to view a client’s record. To set up a username and password for a client user, you add a client user account to the client’s record. Initially, you may want to restrict the use of the portal to your staff so it can get comfortable with the functionality.

Settings You need to have your Implementation or Account Manager turn on the Credible Client Portal for your system.

[Security Matrix: ClientUserView](#)

- Steps to Configure**
1. Select the fields you want client users to view:
 - a. **Admin** tab > **Data Dictionary**
 - b. Make sure Table Source = Clients and Type = View and then click **Submit**.
 - c. For each field that you want a client user to have view access to, select the User View checkbox and click **update**.
 2. Add a Client User Security Profile:
 - a. **Admin** tab > **Login Profiles** > **Add a New Security Profile Entry**. You need to add at least one security profile where Is Client User = True.
 - b. In the Profile Code field, enter the name of the profile.
 - c. Enter a description, select **True** from the Is Client User dropdown, and click **Add Security Profile**.

Set up multiple client user security profiles if you want to vary the parts of a record client users have access to. For example, you can have one full access profile and several partial access profiles. You use the Client User Security Matrix to control the parts of a record profile has access to.
 3. Set up the Client User Security Matrix:
 - a. **Admin** tab > **Client User Security Matrix**.
 - b. Select the options you want each client user profile to have access to and click **Save All**.
 4. Configure the Client User Home Page:
 - a. **Admin** tab > **Home Page Config** > **Client User Home Page Admin**.
 - b. Select the options you want to display on the portal home page and click **Save**.

Steps to Use

1. Set up a client user account for a client:
 - a. **Client** tab > Client Overview screen > **Users** on Client nav bar > **Add User**.
 - b. Enter a username for the client user.
 - c. Enter the first and last name of the client user and enter his or her email address.
 - d. Select the client user profile from the dropdown and click **Add User**. **The Password Update screen displays.**
 - e. 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 portal.

- f. Click **Update Password**. The User Accounts screen displays with the user account you created.
2. Repeat Step 1 for each individual who will be accessing this client's record.

You can update a client user account by clicking the select button, making the necessary changes, and clicking **Update User**. You can also view and update client user with the Client User List function on the Admin tab.

3. Give the login information and your domain name to each client user.
4. Give client users the Credible Client Portal URL www.credibleportal.com and let them know they will need to enter a new password when they first log in.

Once client users start accessing the portal, you can view and export a log of their actions: **Client** tab > Client Overview screen > **Users** on Client nav bar > **User Log**.

You can also view and export a client user login report: **Admin** tab > **Client User Login Report**.

CLIENT

New Email Address Field in Foster Home Profile Screen

Description	When setting up a foster home in your system, you can now record an email address for the facility. You can add an email address to an existing foster home by editing its profile.
Settings	<p>Security Matrix: FosterHomeAdmin</p> <p>Partner Config: Use Foster Care</p>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> Admin tab > Manage Foster Homes. Add a new foster home or edit an existing one. Enter the appropriate address in the Email field and save.

Educational Stressor Added to Axis IV Stressors

Description	The Axis IV stressors were updated to include an educational stressor.
Settings	<p>Security Matrix: DxView, DxUpdate</p> <p>Partner Config: Use Axis IV Stressors</p>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> Client tab > Client Overview screen > Diagnosis on Client nav bar. Start a new assessment or update an existing one. In the Axis IV section, select the Educational checkbox and then select the severity from the dropdown. Save the assessment.

Address2 Field Added to Contacts Screen

Description	To help you capture additional address information for a client contact, an Address2 field has been added to the Contacts screen.
Settings	Security Matrix: ClientUpdate
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Client tab > Client Overview screen > Contacts on Client nav bar. 2. Add a new contact or edit an existing one. 3. Enter the appropriate information in the Address2 field and save.

Family Members Screen Enhancements

Description	<p>ROI Obtained, ROI Start, and ROI Expire fields and a Notes text box have been added to the Family Members screen.</p> <p>Once ROI Obtained is selected, a calendar icon displays next to each ROI date field. You can click it to select a date or enter a date manually. The ROI date fields are not required fields.</p>
Settings	Security Matrix: ClientUpdate Partner Config: Use Client Family
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Client tab > Client Overview screen > Family on Client nav bar. 2. Add a new family member or edit an existing one. 3. Enter the appropriate information in the ROI fields. 4. Add a note to the family member record and save.

Order Date Field Added to Physicians Orders Screen

Description	If you enter an order into the system after the actual Order date, you can enter the correct date with the new Order Date field. If you don't enter a date, the date the order is entered is saved.
Settings	Security Matrix : PhysicianOrdersView, PhysicianOrdersAdd
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> Client tab > Client Overview screen > Orders on Client nav bar. In the New Order section, add a new order. If the actual order date was earlier than today, enter the correct date in the Order Date field and click Add Order.

Severe Allergies Are Listed First and Highlighted

Description	Severe allergies are now listed first and highlighted in red in the Allergies section in the Client Overview and Client Allergies screens.
Settings	Security Matrix : MyCWAdmin, AllergyView
Steps to Configure	<ol style="list-style-type: none"> Admin tab > Home Page Config > Client Home Page Admin. Select Allergies and click Save.
Steps to Use	Client tab > Client Overview screen > Allergy on Client nav bar

Liability Processed if Client Has Insurance Coverage

Description	Previously, if a client did not have insurance coverage, liability was not processed for any visit. The system will now process liability as long as a client has insurance coverage, even if the visit doesn't pull that insurance (assuming there isn't an INSURANCE INIT ledger line in the visit).
Settings	Security Matrix : ClientLiabilityView, ClientLiabilityUpdate
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> Client tab > Client Overview screen > Liability on Client nav bar. Fill out the liability worksheet and save.

ATTACHMENTS

Private Folders for Employee Attachments

Description	You can now set up private folders for employee attachments and control employee access with the new Security Matrix right <code>ViewPrivateFolders</code> . If a user doesn't have the <code>ViewPrivateFolders</code> right, private folders will not be viewable in the Attachments section on an Employee Overview screen or the File Attachments screen.
Settings	Security Matrix: <code>ViewPrivateFolders</code> , <code>CreateFolder</code>
Steps to Configure	<ol style="list-style-type: none"> 1. Admin tab > File Folders Admin. 2. Add a new folder or edit an existing one. 3. Select the <code>Is Private</code> checkbox and save. 4. In the Security Matrix, select <code>ViewPrivateFolders</code> for the profiles that should have access to the private folders.
Steps to Use	N/A

Restrict Employees from Seeing Other Employees' Attachments

Description	<p>There is a new right to restrict employees from seeing another employee's attachments. If <code>EmpFilesViewOwn</code> is selected (and <code>EmployeeFileView</code> is not selected), employees will only have access to their own attachments.</p> <p>If an employee goes to another employee's Overview screen, the Attachments section will not be visible and the Attachments button will not be available on the nav bar.</p>
Settings	Security Matrix: <code>EmpFilesViewOwn</code>
Steps to Configure	In the Security Matrix, select <code>EmpFilesViewOwn</code> and deselect <code>EmployeeFileView</code> for the profiles that should only view their own attachments.
Steps to Use	N/A

Flag Attachments for HR Use Only

Description	If your organization uses the is_hr field in the Employee Profile to identify HR staff members, you can take advantage of the new Is HR setting for employee attachments to attach files that only those with HR rights can view. Only employees that have is_hr = YES in their employee profiles can designate an attachment for HR use only and view attachments where Is HR = True.
Settings	N/A
Steps to Configure	<ol style="list-style-type: none"> 1. Add is_hr to the Employee table (Type = View and Update). 2. Set the employee's profile to is_hr = True.
Steps to Use	<ol style="list-style-type: none"> 1. Employee tab > Employee Overview screen > Attachments on Employee nav bar. 2. Add a new attachment or edit an existing one. 3. Select the Is HR checkbox and save.

Renaming Client and Employee Attachments

Description	<p>The edit functionality for attachments has been expanded to include renaming. With the New Name field, you can change the description of an existing attachment.</p> <p>The Move link on the File Attachments screen has been replaced with an edit button. From the Edit File screen, you can move an attachment to another folder and/or rename it.</p>
Settings	Security Matrix : ClientFileView, ClientFileAdd, EmployeeFileView or EmpFilesViewOwn, EmployeeFileAdd
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Client/Employee tab > Client/Employee Overview screen > Attachments on Client/Employee nav bar. 2. Click edit, rename the attachments, and save.

Client/Employee Name Displayed in Attach File Screen

Description	<p>To help ensure that employees add attachments to the correct client or employee record, the client/employee name is displayed in the Attach File screen. The names are also displayed in the Edit File screen. The names are links that take you to the Overview screen for the client or employee.</p> <p>If you are adding an attachment to a visit, the client name and visit ID are displayed.</p>
Settings	<p>Security Matrix: ClientFileView, EmployeeFileView or EmpFilesViewOwn</p>
Steps to Configure	N/A
Steps to Use	N/A

Closed Folders as the Default

Description	<p>If your client records have numerous attachments, it may be easier to locate a specific attachment if the folders are closed when you access the File Attachments screen. The setting Default Client Attachment Folders Closed has been added to Partner Config.</p> <p>Note that if you enable closed folders, the paging navigation bar at the bottom of the screen won't be available.</p>
Settings	<p>Security Matrix: ClientFileView</p> <p>PartnerConfig: <i>Default Client Attachment Folders Closed</i></p>
Steps to Configure	N/A
Steps to Use	N/A

Client Attachments and the Credible Client Portal

Description	With the Is Public checkbox on the Attach File screen for client attachments, you can control whether an attachment is available to clients on the Credible Client Portal. Any employee can set a client attachment to Is_Public = True and the setting does not impact which employee can view the file.
Settings	Security Matrix : ClientFileView, ClientFileAdd
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Client tab > Client Overview screen > Attachments on Client nav bar. 2. Add a new attachment or edit an existing one. 3. Select the Is Public checkbox and save.

EMPLOYEE

External ID Field Added to Employee Credentials Screen

Description	To help with reporting, an External ID field has been added to the Credentials screen. You can use the field to store an optional credential/provider type code for each credential record.
Settings	N/A
Steps to Configure	N/A
Steps to Use	<p>Employee tab > Employee Overview screen > Credentials on Employee nav bar.</p> <ul style="list-style-type: none"> For a new credential, enter an external ID in the corresponding field (alphanumeric up to 25 characters). Fill out the other fields as appropriate and click assign. For an existing credential, you need to temporarily unassign it so you can access the External ID field.

SCHEDULE

New 12-Hour Maximum for Visit Duration

Description You can now select up to 12 hours from the Duration dropdown in the Add To Schedule screen. The increase to 12 hours is also reflected in the duration dropdowns in the following screens:

- Block Time on Schedule
- Block Resource on Schedule
- Employee Config > Default Schedule Duration
- Partner Config > Default Duration on Planner:
- Visit Type > Default Duration
- Add/Edit Form Group > Default Duration

Settings	N/A
Steps to Configure	N/A
Steps to Use	N/A

VISIT

Recipient, Location, and Billing Group Fields Default to Null

Description	<p>To help ensure that an employee selects the correct recipient, location, and billing group when signing and submitting a visit added through the Schedule, the fields now default to null and selecting a value will be required. --SELECT-- appears in each dropdown instead of the first option in the list.</p> <p>You can override the null defaults on the Sign & Submit page in the following ways:</p> <ul style="list-style-type: none"> • Set a Recipient default through Employee Config or Visit Type config or use the new Default Recipient setting in Partner Config. • Have users select a Location in the Add to Schedule screen. • Set a billing group default in the Employee Profile.
Settings	<p>Employee Config: Default Recipient Type = ---- (null)</p> <p>Visit Type: Default Recipient = --SELECT--</p> <p>Partner Config: Default Recipient = --SELECT--</p> <p>Employee Profile: Billing Group = ---- (null)</p>
Steps to Configure	N/A
Steps to Use	N/A

New Fields Displayed in Visit Details Screen

Description	<p>If the following fields are used in a visit, they will be displayed in the Visit Details screen: text1-3, bool1-3, date1-3, num1-3, overlapped_primary_id, auth_level, submission_reason_code, non_release, cascaded_units, cascaded_comb_units, reprocess_for_payroll, subtract_overlapping, bedboardbed_id, and fosterhome_id. Previously, you had to use Advanced Visit Search to capture the data in these fields.</p> <p>If a user doesn't enter value into one of the fields during a visit, it will not be displayed in the Visit Details screen. Note that none of the fields are displayed when you use the View All function.</p> <p>To control which users can view the fields, use the new ClientVisitSuperView right. Only users with this right can view the fields if they are set up to require Super View rights in the Data Dictionary.</p>
Settings	<p>Security Matrix: ClientVisitView, <i>ClientVisitSuperView</i></p>
Steps to Configure	<ol style="list-style-type: none"> 1. Use the Data Dictionary to add the fields to the Visit table (Type = View). <p>If you want to restrict who can view the fields in the Visit Details screen, select Super View and then select ClientVisitSuperView for the appropriate profile.</p>

2. Create a form that uses the text1-3, bool1-3, date1-3, num1-3, overlapped_primary_id, auth_level, submission_reason_code, non_release, cascaded_units, cascaded_comb_units, and reprocess_for_payroll fields.

Steps to Use	<ol style="list-style-type: none"> 1. Have a user conduct a visit that uses the form you created or complete a visit via Bed Board Billing or Foster Home Billing. 2. Display the Visit Details screen for the visit and look for the fields in the Additional Fields section.
--------------	--

Name, Title, and Credentials for Approver and 3rd and 4th Signatures

Description	<p>With the new Partner Config setting Display Name, Title and Credentials of Approver selected, you can now have name, title, and credentials displayed underneath the supervisor's signature line in the visit print view when the visit is approved by a supervisor.</p> <p>In addition, the name, title, and credentials will be displayed under signatures 3 and 4 in the Visit Details screen as well as in the visit print view. Note that the enhancement to signatures 3 and 4 is only available if you use the standard print view or have requested that it be incorporated into your custom print view.</p>
-------------	---

Settings	Partner Config: <i>Display Name, Title and Credentials of Approver, ClientVisitView, Show Visit View Signatures, Printout Approval Signature</i>
----------	---

Steps to Configure	<p>The system pulls the name and title from an employee's profile. The credential type needs have Do Not Print On Visit set to False (Admin tab > Credential Types).</p> <p>For an employee to be a supervisor, the is_supervisor_flag field in the profile must be set to Yes.</p>
--------------------	--

Steps to Use	N/A
--------------	-----

Two New Signature Box Labels

Description	Labels for the 7 th and 8 th signature boxes have been added to Partner Config.
-------------	---

Settings	Partner Config: <i>Signature Box 7 Label, Signature Box 8 Label</i>
----------	--

Steps to Configure	<ol style="list-style-type: none"> 1. Enter labels in the Partner Config fields. 2. Configure a visit type to display 7 or 8 signature boxes (Admin tab > Visit Type > Visit Sigs field).
--------------------	---

Steps to Use	Complete a visit for the visit type configured above. Labels for the 7 th and 8 th signature boxes will display on the Sign & Submit page and the Signature Capture screen.
--------------	---

Tie an Authorization Level to a Specific Billing Matrix Line

Description	<p>If your organization is providing individual authorizations per tiered rate, you can now configure your system so users can tie client authorizations to specific Billing Matrix lines. When you select the new Partner Config setting Use Auth Level Billing Matrix, you can link an auth level to a specific Billing Matrix line. When a user adds an authorization and selects that auth level, the authorization will be tied to the specific Billing Matrix line.</p>
Settings	<p>Security Matrix: AuthorizationAdd, AuthorizationView</p> <p>Partner Config: <i>Use Auth Level Billing Matrix</i>, Use Authorization Levels, Use Auth Pending</p>
Steps to Configure	<ol style="list-style-type: none"> 1. Admin tab > Authorization Levels. 2. Add a new auth level or update an existing one. 3. From the Billing Matrix/Matrix dropdown, select the Billing Matrix line you want to tie the auth level to. Make sure the matrix line you select has the Authorization Required checkbox selected. <p>Note that you cannot change the matrix line selected for an individual auth when you are in the Authorizations screen for a client – it can only be done at the auth level.</p> <ol style="list-style-type: none"> 4. Add/update other fields as necessary and save.
Steps to Use	<ol style="list-style-type: none"> 1. Client tab > Client Overview screen > Authorization on Client nav bar. 2. Add a new authorization, selecting an auth level that is tied to a specific Billing Matrix line. 3. Conduct/complete a visit for the client for the visit type associated with the authorization. If the visit is for the Billing Matrix line that was selected for the auth level, the auth will be associated with the visit and decrement.

ADMIN

New Right for Deleting Client Episodes

Description	Previously, the right to delete client episodes was controlled by DeleteClient, the same right used to control the right to delete clients. To give you greater control over who can delete episodes, the right has been separated from DeleteClient and is now controlled by the new right DeleteClientEpisode.
Settings	Security Matrix: <i>DeleteClientEpisode</i>
Steps to Configure	Any profiles that previously had DeleteClient selected will automatically have DeleteClientEpisode selected.
Steps to Use	N/A

Client Payment View and Edit Rights Are Separated

Description	<p>Previously, the view and edit buttons were available on the Client Payments screen as long as a user had the ClientPaymentUpdate right. To accommodate the scenario where you only want a user to view payments, the view right has been separated from ClientPaymentUpdate and is now controlled by the new right ClientPaymentView. ClientPaymentUpdate now only controls the edit right.</p> <p>If a user has the ClientPaymentUpdate or ClientPaymentDelete right, he or she will also have access to the view button.</p>
Settings	Partner Config: <i>ClientPaymentView</i>
Steps to Configure	Any profiles that previously had ClientPaymentUpdate selected will automatically have ClientPaymentView selected. If you don't want users in a certain profile to have the right to edit payments, you need to deselect ClientPaymentUpdate.
Steps to Use	N/A

NewVisit Type Settings for Basic Liability Form

Description	<p>If your organization uses the Basic Liability form, you can now set up a liability percent override, liability minimum override, and liability multiplier.</p> <ul style="list-style-type: none"> • Liability Percent Override – overrides the client's per-visit liability amount or per-visit liability percentage but doesn't affect monthly liabilities. Enter 100 to bypass the client's liability and force the full client due amount to the client. Enter 0 to force a client liability amount of 0. • Liability Minimum Override – overrides a client's minimum liability. • Liability Multiplier – the per-visit liability amount or per-visit liability percentage are multiplied by the multiplier value and this new amount is used as the per visit liability.
Settings	<p>Security Matrix: BillingConfig, ClientLiabilityView, ClientLiabilityUpdate</p> <p>Partner Config: Use Basic Liability Worksheet</p>
Steps to Configure	<ol style="list-style-type: none"> 1. Admin tab > Visit Type. 2. Add a new visit type or edit an existing one. 3. Enter the appropriate values in the Liability Percent Override, Liability Minimum Override, and Liability Multiplier fields. 4. Fill out the other fields as necessary and click Save.
Steps to Use	<ol style="list-style-type: none"> 1. Client tab > Client Overview screen > Liability on Client nav bar. 2. Enter the appropriate dates in the date fields with the calendar icons or manually. 3. Enter a monthly liability amount, per visit liability amount, and/or a per visit liability percentage. 4. If needed, enter notes in the text box and then click Save Liability Form.

New Partner Config Setting to Disable Quick Visit Function

Description	<p>If your organization would prefer not to use the Quick Visit function, you can disable it (remove it from the Client nav bar) by deselecting the new Partner Config setting Use Quick Visit.</p> <p>The new right is selected for all Partners since everyone previously had the ability to use the Quick Visit function.</p>
Settings	Partner Config: <i>Use Quick Visit</i>
Steps to Configure	N/A
Steps to Use	N/A

Credible Library Subscriptions

Description	<p>With the addition of a Ref Area Email Updates list in the User Config screen in the Credible Library, you can now subscribe to receive bimonthly email updates for the reference areas that interest you.</p>
Settings	N/A
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> User tab > User Overview screen > Login on the User nav bar. Enter an email address (if there isn't one) and click Update User. Click Config on the User nav bar. From the Ref Area Email Updates list, select the reference areas that interest you and then click Save User Config.

BILLING

Generate a 270 Batch by Payer Group

Description	If your organization uses payer groups, they will be included in the Payer dropdown in the 270 Batch Generation screen. When you select a payer group, records for all payers in that group will be included in the batch.
Settings	Security Matrix: BillingModule
Steps to Configure	<p>To set up a payer group:</p> <ol style="list-style-type: none"> 1. Billing tab > Billing Payer. 2. Click Add a New Payer Entry and select Is Payer Group Header. 3. Fill out the Name, Config ID, Payer Type, Submits 834, and Can Upload 837 fields and click Save Settings. <p>To link a payer to a payer group, edit the Payer Config for the payer and select the appropriate entry from the Payer Group dropdown.</p>
Steps to Use	<ol style="list-style-type: none"> 1. Billing tab > Generate Eligibility(270) Batch. 2. From the Payer dropdown, select a payer group. 3. Select other filtering criteria as appropriate and click Filter.

Filter by Payer Group for Batch Claim Error Report

Description	Payer groups are now included in the Payer dropdown for the Batch Claim Error report. If you select a payer group, any claims associated with payers in that group will be displayed.
Settings	<p>Security Matrix: BillingConfig, BillingReports (if accessed via the Billing tab), ReportList (if accessed via the Reports tab)</p> <p>Report Security: Batch Claim Error Report (if accessed via the Reports tab)</p>
Steps to Configure	See above
Steps to Use	<ol style="list-style-type: none"> 1. Billing tab > Batch Claim Error Report (or Reports tab > Billing on Reports nav bar > Batch Claim Error Report). 2. Select the payer group from the Payer dropdown. 3. Select other filters as appropriate and click View Report (or Run Report).

Exclude Secondary Visits from a Custom Red X for Approval

Description	You can now set up a custom red X to exclude secondary visits. If a merged visit matches the criteria of the custom red X, only the primary visit will be red X'd in the approval queue (Client Visit List screen). The exclusion isn't necessary for batching since secondary visits cannot be selected when batching.
Settings	Security Matrix: BillingConfig
Steps to Configure	<ol style="list-style-type: none"> Billing tab > Custom Red X. Add a new custom red X or edit an existing one. Select the Primary Only checkbox and click Save Settings.
Steps to Use	N/A

Red X: No Visit in Prior 2 Months Has Required Recipient Type

Description	<p>You can now red X visits for selected visit types for approval and/or batching when a visit was not completed in the prior two months for one of the selected recipient types.</p> <p>There are two exceptions:</p> <ul style="list-style-type: none"> If a visit is created for one of the types specified in the red X rule and it is assigned to one of the specified recipients itself, it will not red X. If the visit type specified in the red X rule is set up to roll and any of the merged visits (primary, secondary, and so on) are associated with the specified recipients, none of the visits will red X.
Settings	Security Matrix: BillingConfig
Steps to Configure	<ol style="list-style-type: none"> Billing tab > Custom Red X. The new rule "Red x visits for selected visit types when no visits within the previous 2 calendar months match the selected recipient types" is at the bottom of the Predefined Red X List. Select the visit types and recipient types you want to base the red X rule on. Click the For Approval and/or For Batching checkboxes and then click Save Predefined.
Steps to Use	N/A

Batch Visits Paid in Full by the Client

Description	When generating a batch claim file, you can now include visits that have been paid in full by the client (client paid – full visit amount = \$0.00). When the insurance company receives the batch, they can apply the amount paid by the client towards his or her deductible.
Settings	Security Matrix: BillingModule
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> Billing tab > Generate Batch Claim File. On the Select Visits for Batch screen, select Show Client Paid. Select other filtering criteria as appropriate and click Filter Batch. If a visit has been paid in full by the client, the status is PAID. Make sure the visits you want to include in the batch are selected for submittal (overriding red Xs if necessary) and then click Generate Text File for Batch.

Reprocess a Completed Visit to Apply a Split Visit Update

Description	If the Split Visit setting for a visit type or Billing Matrix payer-specific record is changed to True, you can reprocess a completed visit associated with the visit type/Billing Matrix entry and have it split into two visits. Note that if Split Visit is changed to False, updating a split visit will not remove the split.
Settings	Security Matrix: BillingModule, ClientVisitUpdate
Steps to Configure	<p>For visit type:</p> <ol style="list-style-type: none"> Admin tab > Visit Type. Edit an existing visit type, select Split Visit checkbox, and save. <p>For Billing Matrix:</p> <ol style="list-style-type: none"> Admin tab > Billing Matrix. Edit an existing entry. Click Payer Specific Rates & Codes. Edit an existing payer line, select the Split Visit checkbox, and save.
Steps to Use	<ol style="list-style-type: none"> Visit tab > Visit Details screen. Click Update and then click Update Visit. The Merged field changes to Merged/Split: /Primary. Click the Primary link to access the secondary visit.

New Fields in Billing Matrix Payer-Specific Screen

Description	<p>You can now use two fields that have been available for a Billing Matrix entry on a payer-specific basis. A POS Override dropdown and Provider for Rendering checkbox have been added to the Billing Matrix Payer Rates and Codes screen.</p> <ul style="list-style-type: none"> • With POS Override, a payer can specify a certain location to send in the 2300 CLM segment of a batch file. • With Provider for Rendering, a payer can opt to send billing provider information at the rendering provider level (2310B).
Settings	<p>Security Matrix: BillingConfig Partner Config: Location Billing Flag</p>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Admin tab > Billing Matrix. 2. Add a new entry or edit an existing one. 3. Click Payer Specific Rates & Codes. 4. Add a payer line or edit an existing one. 5. From the POS Override dropdown, select the appropriate override location. 6. If appropriate, select the Provider for Rendering checkbox and save.

Allowed Payer Takes Priority When Multiple Matrix Lines Match

Description	<p>If a visit matches multiple Billing Matrix lines, the system will first check to see if one of the lines has an allowed payer that matches the client's primary payer. If there is an allowed payer/primary payer match, the system will pull that Billing Matrix line even if one of the other matching lines is a more specific match. If there isn't an allowed payer match, the order of priority matching will be the default of more specific before general.</p> <p>As an example, assume a visit matches the following two lines:</p> <ul style="list-style-type: none"> • Line 1 has the client's secondary payer, a Credential Group that matches employee's credential, and a rate of \$100. • Line 2 has the client's primary payer, no Credential Group specified, and a rate of \$75. <p>The system will pull Line 2 for the visit because priority is given to the primary payer match over the credential match.</p> <p>Note that if a visit only matches one Billing Matrix line, the system will pull it even if the allowed payer and primary payer don't match.</p>
-------------	--

Settings	Security Matrix: BillingConfig
Steps to Configure	<ol style="list-style-type: none"> 1. Admin/Billing tab > Billing Matrix. 2. Add a new entry or edit an existing one. 3. Click Edit Allowed Payers, select the payers allowed for the entry, and click Save.
Steps to Use	N/A

New Patient Responsibility Ledger Line

Description	<p>If an employee applies a Patient Responsibility (PR) disallowed amount to a visit, a new ledger line is created. If you need to remove the PR amount, the ledger line can be undone in the Visit Billing screen. In the Claim Billing Details section, Patient Resp is the sum of the PR disallowed amounts.</p> <p>You can apply disallowed amounts in the Visit Billing screen when applying an additional insurance payment or reconciling a visit and in the Reconcile Batched Claims screen. You can search for visits based on this new ledger type in Advanced Ledger Search.</p> <p>A PATIENT RESPONSIBILITY ledger line will also be created if a PR disallowed amount is applied through an 835.</p>
-------------	---

Settings	Security Matrix: ClientVisitView, BillingModule, BillingAddAdjustment, Billing Undo, BillingReports
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Access the Visit Details screen for a transferred, reconciled, retracted, batched, or pending visit and then click Billing. 2. In the Apply Additional Ins Payment or Reconcile Service section, click the plus sign next to the Disallowed Amount field. 3. Enter the amount disallowed due to patient responsibility, select PR from the Adjust Group/Codes dropdown, and enter/select the appropriate adjust code. 4. Fill out the other fields in the section and click submit. A PATIENT RESPONSIBILITY ledger line is created for the disallowed amount. <p>To undo a PATIENT RESPONSIBILITY ledger action, click undo.</p> <p>To access the Reconcile Batched Claims screen: Billing tab > 835/EOB Claim Payment Advice > Display Previous 835/EOB Batches > View Claims.</p>

Location Dropdown Added to Advanced Ledger Search

Description	You can now select a location as part of your filtering criteria for Advanced Ledger Search. If you want to select more than one location, click Multi-Select to change the dropdown to a multi-select list.
Settings	Security Matrix: AdvSearch, BillingReports
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Billing tab > Service Ledger Advanced Search. 2. Select a location from the Location dropdown. 3. Select other filtering criteria as necessary and click Filter or Export.

Use Ledger Amount in Custom Filter in Advanced Visit Search

Description	<p>Ledger Amount is now available in the Column dropdown when setting up a custom filter in Advanced Visit Search. The Ledger Amount is the sum of the amount for all ledger lines that match the ledger type or adjustment type you select from the Ledger Type dropdown. For example, you can search for payment adjustments that you didn't correct.</p> <p>To filter by Ledger Amount a Ledger Type is required. You can select more than one ledger type if you activate multi-select.</p>
Settings	Security Matrix: AdvSearch
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Visit tab > Advanced Visit Search (or Client tab > Client Overview screen > Claims on Client nav bar). 2. Select one or more ledger or adjustment types from the Ledger Type dropdown. 3. Click Custom Filter and select Ledger Amount from the Column dropdown. 4. Select an operator and enter a value. 5. Select other criteria as necessary and click Filter or Export.

Payer Column Added to Processed 835 Batches Screen

Description	When viewing previous 835/EOB batches, you can now see which payer sent the payments in a batch. If an 835 didn't include any payments and there weren't any matching claims in the system, the Payer field will be blank. If there are multiple payers in an 835, the last payer in the file is displayed in the Payer column.
Settings	Security Matrix: BillingModule
Steps to Configure	Each preexisting batch will be automatically updated to display the payer associated with it.
Steps to Use	Billing tab > 835/EOB Claim Payment Advice > Display Previous 835/EOB Batches

Accounting Date in Reconcile Service and Change Status of Service Sections

Description	<p>With an Accounting Date field in the Reconcile Service and Change Status of Service sections of the Visit Billing screen, you can now enter an accounting date for the action taken (for example, a payment or resubmit).</p> <p>A few notes:</p> <ul style="list-style-type: none"> • If the action is a payment and you don't enter an accounting date, the system will use the Deposit Date (and if that is left blank, the Check Date) of the payment itself as the accounting date. If you enter an accounting date, it will override this functionality for this single transaction; the actual deposit date/check date on the payment itself is not changed. • In all cases, if the accounting date corresponds to a closed accounting period, the system will use the posting date (the action date that is the actual real-time date) as the accounting date. • You cannot enter an accounting date that is in the future.
Settings	Security Matrix: ClientVisitView
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Access the Visit Details screen for a visit and then click Billing. 2. In the Reconcile Service or Change Status of Service section, enter the accounting date you want to use. 3. Fill out the other fields in the section and click submit.

Submit Void from Paper Remit

Description	<p>You can now manually enter the ICN (internal control/claim number) when a payer sends a paper remit and an adjustment/void is required. An ICN field has been added to the Change Status of Service section of the Visit Billing screen.</p> <p>If you are submitting a void on a visit that has been reconciled and a payment was applied (not via the 835*), the ICN field will become active when you select Resubmit.</p> <p>*Since a payment from an 835 already has an ICN on the claim, you don't need to enter it manually.</p> <p>To display the ICN in the results when using Advanced Ledger Search, add Payer Claim ID as a custom field (this is the ICN). The ICN will be on the Batch Claim and Ins Payment lines related to the void.</p>
Settings	<p>Security Matrix: ClientVisitView, BillingConfig</p> <p>Payer Config: Can Resubmit Voids</p>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Access the Visit Details screen for a reconciled visit that has had a payment applied (not via the 835) and then click Billing. 2. In the Change Status of Service section, select Resubmit and then enter the ICN. 3. Fill out the other fields in the section and click submit.

Other Due Balance Displayed in Client Overview and Client Profile

Description	<p>If a client has an other due balance on one or more billable visits, the sum of all the other due amounts will be displayed in the Billing Info section on the Client Overview and Client Profile screens. The name of the new field will correspond to the other due label you set up in Partner Config.</p>
Settings	<p>Security Matrix: MyCWAdmin, FinancialsView</p> <p>Partner Config: Billing Other Due (Debt Set-off) Label</p>
Steps to Configure	<ol style="list-style-type: none"> 1. Admin tab > Home Page Config > Client Home Page Admin. 2. Select Billing Info and click Save.
Steps to Use	<p>Client tab > Client Overview screen or Client tab > Client Overview screen > Profile on Client nav bar</p>

REPORTS

Improved User Interface for Credible Reports

Description	<p>The reports in Credible have been grouped into categories and are now accessible via a Reports nav bar. The Reports tab defaults to a new Last Run category that lists the most recently run reports. The system tracks usage at the employee level and does not include custom reports or exports in the list.</p> <p>The Other category is for exports where Show on Reports Tab has been selected. The nav bar also includes buttons for the Export, Import, and Saved Reports functions.</p> <p>With this release, the transition of reports (including the client statement) to Microsoft SQL Server Reporting Services is complete. The last few reports that were upgraded will have a slightly different look and feel.</p>
-------------	--

Settings	Security Matrix: ReportList
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Reports tab. 2. Select one of the Last Run reports or click a category button on the nav bar and then select the report you want to run.

Appointment History Report – DOB Added to Export

Description	The client DOB is now listed on the export of the Appointment History Report.
Settings	<p>Security Matrix: ReportList</p> <p>Report Security: Appointment History Report</p>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Reports tab > Visit on Reports nav bar > Appointment History Report. 2. Select the filters you want to use and click Run Report. 3. After the results are displayed, click Export.

Admin Logging Report – Forms and Billing Tables Added

Description You can now use the Admin Logging report to capture changes made to the following tables:

- 835 Adjustment Codes
- Billing Office/Claim Config
- Form Version and Forms
- Payment Controls
- Billing Custom Lookups and Billing Lookup Categories

Several of the existing tables were renamed to match the naming used in the Admin and Billing tabs.

Old Name	New Name
Approval Role	Manage Approval Roles
Billing Groups	Billing Groups Table
Credentials	Credential Types
Data Dict	Data Dictionary
EDI Provider	Provider Config
File Folder	File Folders Admin
Form Group Program	Form Group Visit Types
Lookup Dict	Custom Lookup Items
Lookup Dict Cat	Custom Lookup Categories
Payer	Billing Payer
Payer Type	Billing Payer Types
Planner Group	Schedule Groups
Profile	Login Profiles
Revenue Code	Revenue Code Matrix
Revenue Config	AR/GL Setup and Configuration
Team	Manage Teams

Settings [Security Matrix:ReportList](#)
[Report Security: Admin Logging](#)

Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Reports tab > Admin on Reports nav bar > Admin Logging. 2. Select one or more of the new tables from the Tables list. 3. Select other filtering options as appropriate and click Run Report.
Transcription Productivity Report – For Employee Added	
Description	The Transcription Productivity report now provides the name of the employee who the transcription was for. It also gets the total lines by dividing total characters by 65.
Settings	<p>Security Matrix: ReportList</p> <p>Report Security: Transcription Productivity</p>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Reports tab > Employee on Reports nav bar > Transcription Productivity. 2. Select the filters you want to use and click Run Report.

CREDIBLE eRx

Unapproved Prescriptions on Home Page

Description	<p>To help prescribers stay on top of prescriptions that need to be approved, you can configure the Home Page to include an Unapproved Prescriptions section. If a prescriber has unapproved prescriptions created by a nonprescriber, the first five will be listed on this screen.</p> <p>With the All Unapproved Prescriptions link, the prescriber can go to his or her Client Medications screen to view all unapproved prescriptions and approve them.</p>
Settings	<p>Security Matrix: MyCWAdmin, PrescriptionCreate or PrescriptionCreateNonSPI</p>
Steps to Configure	<ol style="list-style-type: none"> 1. Admin tab > Home Page Config > Home Page Admin. 2. Select Unapproved Prescriptions and click Save.
Steps to Use	<ol style="list-style-type: none"> 1. Review unapproved prescriptions on Home Page. 2. Click All Unapproved Prescriptions to access your Client Medications screen and view all unapproved prescriptions. 3. Select the Approve checkbox and for prescriptions you want to approve and click Approve All Checked.

Geo Area on Prescription Printout

Description	<p>You can now use the address of a prescriber’s geo area when printing a prescription. If you don’t select a geo area (or the selected geo area doesn’t have an address), the Printout Address set up in Partner Config is used.</p> <p>Note that if you print a copy of the prescription, it will have the printout address set up in Partner Config instead of the geo area address.</p>
Settings	<p>Security Matrix: AdminLookupUpdate, AssignEmployeeGeoAreas, PrescriptionCreate or PrescriptionCreateNonSPI or an employee with an SPI</p> <p>Partner Config: Printout Address</p>
Steps to Configure	<p>You need to have the Credible eRx module and your Implementation or Account Manager needs to turn on the non-SPI prescription function in your system.</p> <ol style="list-style-type: none"> 1. Set up geo areas with addresses and phone numbers (Admin tab > Geo Areas/Offices). 2. Assign a prescriber to the appropriate geo area (GeoAreas on Employee nav bar).

Steps to Use	<ol style="list-style-type: none"> 1. Create a prescription (refer to the <i>Creating a Prescription</i> topic in the online help for the steps to create a prescription). 2. Click Print Prescription. A finalize prescription screen displays. 3. From the Geo Area dropdown, select the geo area you assigned the prescriber to. 4. Review the other prescription details and click Print. The printable version of the prescription has the prescriber's name and the address and phone number of the geo area.
--------------	---

Monograph Access when Creating a Prescription

Description	To help prescribers and nonprescribers select the appropriate medication, they can display or print monographs before creating a prescription.
Settings	Security Matrix : RxView, PrescriptionCreate or PrescriptionCreateNonSPI or an employee with an SPI
Steps to Configure	You need to have the Credible eRx module and your Implementation or Account Manager needs to turn on the non-SPI prescription function in your system.
Steps to Use	<ol style="list-style-type: none"> 1. Client tab > Client Overview screen > Medications on Client nav bar. 2. On the Client Medications screen, click Create Prescription. 3. Enter the name (or the first few letters of the name) of the medication you need to prescribe. Each med in the search results list has a blue info icon. 4. Click the blue info icon to display and/or print the monograph for the med.

Med History Note for Discontinued/Rejected Prescriptions

Description	When an employee discontinues or rejects a prescription, you can configure the system to display a popup where he or she can enter the reason for the action. Employees can view med history notes in the Client Medications screen and the Medication History screen.
Settings	Security Matrix : RxView, RxDelete Partner Config : Use Med History Notes
Steps to Configure	You need to have the Credible eRx module to create prescriptions.

Steps to Use

1. **Client** tab > Client Overview screen > **Medications** on Client nav bar.
2. For an existing prescription, click **discont** or **reject**.
3. Click **OK** when the confirmation popup displays. A Reason popup displays.
4. Enter the reason you are discontinuing or rejecting the prescription and click **Save**.

To view the reason for a discontinued or rejected prescription:

1. Select the corresponding status from the Status field and click **Filter**.
 2. Mouse over the info icon in the Notes column. The info icon is also available in the Medication History screen.
-

PATCH LIST

Client

Clients will only show up in a foster home if they are in the facility in the date range specified or status = Active.

The DOB field is now available when adding or editing a family member record.

You can now unassign a Supervising Physician from a visit by choosing --Select-- from the dropdown during an edit.

If your organization limits the locations available for visits based on geo area assignments, you will no longer encounter a Location dropdown with no available options. When an employee is assigned to a geo area but the client isn't assigned to any, the available locations will be based on the employee's geo area.

Pending status is now retained when a user adds an authorization via an auth level that has Auth Pending flag set to Yes.

Users can view discontinued medications by filtering on ALL or DISCONTINUED.

Billing

If a new field is added to the Billing Matrix via Data Dictionary, both the label and field will now appear for existing Billing Matrix entries.