# Release 6.2 Configuration

This document describes the enhancements included in Release 6.2. 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.*

Financial



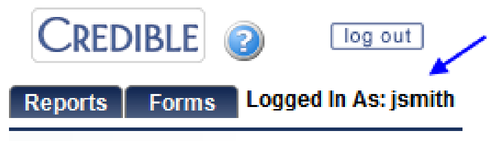
Reports



Forms

## Login Username Added to Credible Banner

The username used to log into Credible is now part of the banner. The new “Logged In As: username” indicator will always be present with the tabs on the Credible screen.




*Settings*

N/A

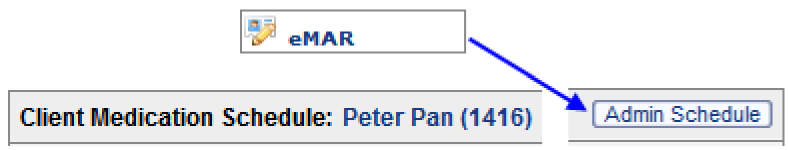
*Steps to Configure/ Steps to Use*

N/A

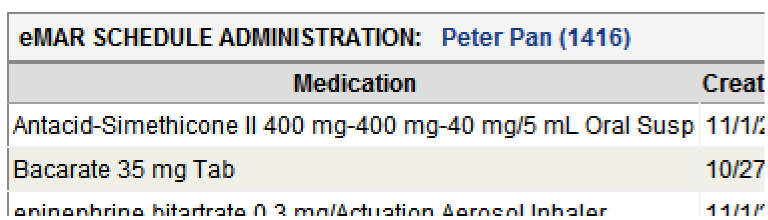
# eMAR: Phase II

## Enhancements to Create Med Schedule Function

One of the first eMAR enhancements you will notice is that the Create Med Schedule function – formerly accessed via the eMAR button on the Client Medications screen – is now accessed via the Client Medication Schedule screen. This means the eMAR button on the Client nav bar is your central point of access for adding a medication schedule and administering medications.




The Admin Schedule button takes you to a new eMAR Schedule Administration screen that lists all meds that are scheduled for administration.



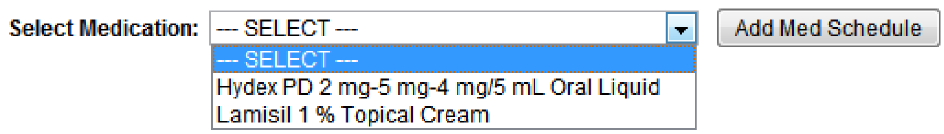

For each medication scheduled for administration, the screen lists the Created date, Last Dispensed date, and Last Scheduled date and indicates if the med will be administered on an as needed (PRN) basis. Each record has a schedule, edit, and discontinue button.

- schedule – displays the individual schedule for med. If it is a PRN med, you will only see the already administered meds, not the PRN grid (with the Administer button) that appears above the main eMAR schedule.

- edit – lets you edit the administration schedule for the med. Note that changes will only apply to missed administrations for the current day and future administer instances.

- discontinue – removes all future “Administer” instances from the schedule and any non-administered instance that is currently in the admin window. For past administrations, the discontinue date will be added to the Log Medication Administration popup. The medication will become available again in the Select Medication dropdown.

At the bottom of the eMAR Schedule Administration screen, there is a Select Medication dropdown that lists all active medications for the client not scheduled for administration.




To access the Create Med Schedule screen you are familiar with, you select a med and click Add Med Schedule.

The Create Med Schedule screen has been enhanced as follows:

- A medication/prescription summary pulled directly from the medication record has been added to the top of the screen.
- The Medication Administering section has PRN and STAT checkboxes, an Admin Window dropdown, and Use Counts and Document Injection checkboxes (see below for more information).

| | |
|---|---|
| PRN | Use to set up a med for administration on an as needed basis (PRN). When you select the checkbox, the Recurrence sections are hidden since you do not need to set up an administration schedule. For information on administering PRN meds in the Client Medication Schedule screen, click here. |

| | |
|---|---|
| STAT | Use to set up a med for administration for a one-time emergency administration (STAT). When you select the checkbox, the Recurrence sections are hidden since you do not need to set up an administration schedule.<br><br>After you set up an admin schedule for a STAT med, it appears in the eMAR schedule with a single Administer button because it is a one-time administration. If another emergency arises where you need to administer the med again, you can edit the original STAT med schedule and generate another administer instance. |
| Admin Window | Plus/minus time from the scheduled administration. For example, if med is scheduled for noon and Admin Window is set to 4 hours, administration window will be from 8 am to 4 pm. Default is determined by a new Partner Config setting Window to Administer eMar Medications (if a default is not set, then the default is 2 hours). |
| Use Counts | When checked, Previous Count and Current Count fields will be available in the Log Medication Administration popup so the employee administering the med can document the current count and view the previous count. |
| Document Injection | When checked, an Injection Site field will be available in the Log Medication Administration popup so the employee administering the med can document where it was injected. |

- If the medication was prescribed via Credible eRx and the Sig Builder tab was used, the dosage, route, and instructions fields are autopopulated and cannot be edited.
- The Dosage Amount field allows decimal amounts.

- Administration comments entered are now displayed in the Client Medication Schedule screen.
- In the Recurrence Times section, the administration times consist of specific times of day and custom administration times you can define with a new eMAR Setup function.
- The Range of Recurrence section has a Notify at End of Schedule checkbox and a note indicating that the maximum number of schedule records that can be created for a medication is 10,000. If an end date is entered that results in more than 10,000 records, the system will end the eMAR schedule at the 10,000th record vs. the end date.
- In the same section, the Administer Medication Starting field now functions like other date fields in Credible where you enter the date and time in the same field. You have flexiblity in the formats you can enter (for example, if you enter 9-22-11 3 p, the system will reformat it to 09/22/2011 03:00 pm). Like before, the field defaults to current date and time.

*Settings*

Partner Config: Use eMAR Functionality, *Window to Administer eMar Medications*

Security Matrix: eMar, eMarCreateMedSchedule

*Steps to Configure*

Set up eMAR groups and patient "Not Taken" responses/custom admin times.

*Steps to Use*

To add a med schedule:

1. Client tab > Client's name or view button > eMAR button on nav bar > Admin Schedule button on Create Medication Schedule screen.
2. Select the medication from the dropdown and click Add Med Schedule. If there are no meds in the dropdown, it means all active medications for the client have been scheduled for administration or the client has no active meds.
3. Fill out the fields in the screen as appropriate and click Create Med Administration Schedule.

To the view the individual schedule for a med, click the schedule button.

To manage an existing med schedule, use the edit and discontinue buttons.

## Set Up Patient "Not Taken" Responses & Custom Admin Times

With a new eMAR Setup function, you can customize the "not taken" responses available in the Log Medication Administration popup.

**eMAR Patient (Non Taken) Response List:**

| Patient Response | Background Color | | |
|---|---|---|---|
| Refused | Coral | edit | delete |
| Spit Out | RoyalBlue | edit | delete |

**Add Patient Response**

**Patient Response:**

**Background Color:** AliceBlue

Add Patient Response

You can also set up custom admin times to meet your organization's needs. For example, you can select different times of day and then label the entry as QD, QOD, BID, TID, or Q n hours.

**Add eMar Custom Admin Time**

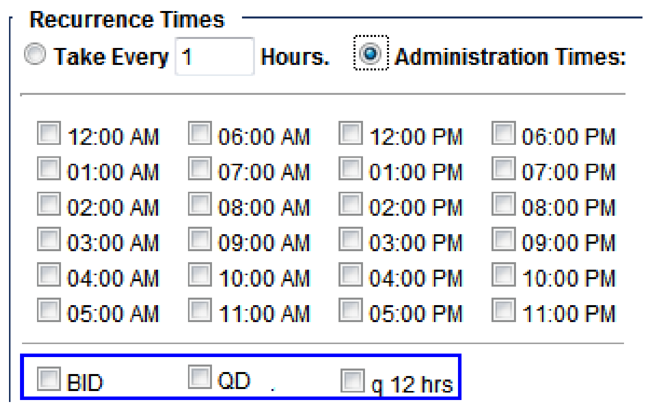
**Admin Time Label:**

**Time List:**

| | | | |
|---|---|---|---|
| 12:00 AM | 06:00 AM | 12:00 PM | 06:00 PM |
| 01:00 AM | 07:00 AM | 01:00 PM | 07:00 PM |
| 02:00 AM | 08:00 AM | 02:00 PM | 08:00 PM |
| 03:00 AM | 09:00 AM | 03:00 PM | 09:00 PM |
| 04:00 AM | 10:00 AM | 04:00 PM | 10:00 PM |
| 05:00 AM | 11:00 AM | 05:00 PM | 11:00 PM |

Add Admin Time

Once the eMAR custom admin times are set up, an employee can select them in the Recurrence Times section on the Create Med Schedule screen.




When selected, the system will create schedules for the times as defined.

*Settings*

Partner Config: Use eMAR Functionality

Security Matrix: eMar

*Steps to Configure*

1. Admin tab > eMAR Setup.
2. To set up a “not taken” reponse, enter the response description, select the background color, and click Add Patient Response.
3. In Add eMAR Custom Admin Time section, enter a label and select the appropriate time(s). The entry is added to the eMAR Custom Admin Time List.

*Steps to Use*

To select a “not taken” response:

1. Client tab > Client’s name or view button > eMAR button on nav bar.
2. Click Administer button.
3. Select the desired response from the Administration Result dropdown.
4. Fill out other fields in Log Medication Administration popup as appropriate and click Submit.

To select a custom admin time when setting up a med schedule:

1. Client tab > Client's name or view button > eMAR button on nav bar > Admin Schedule button on Create Medication Schedule screen.
2. Select the medication from the dropdown and click Add Med Schedule.
3. Fill out the Create Med Schedule screen.
4. In the Recurrence Times section, click the Administration Times radio button and select the desired custom administration time(s).
5. Click Create Med Administration Schedule.

## HIPAA Logging for Medication Schedule Actions

When an eMAR schedule is created, edited, or deleted, the action will be logged in the Global HIPAA Log and the individual client and employee logs. The corresponding actions are: MEDICATION SCHEDULE INSERTED, MEDICATION SCHEDULE UPDATED AND MEDICATION SCHEDULE DELETED.

*Settings*

Partner Config: Use eMAR Functionality

Security Matrix: ReportList, ClientViewLog

Report Security: Global HIPAA Log

*Steps to Configure*

N/A

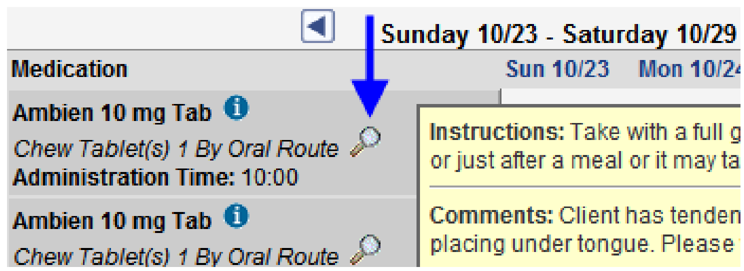
*Steps to Use*

1. Reports tab > Admin on nav bar > Global HIPAA Log or Log button on Client or Employee nav bar.
2. For Global HIPAA Log, select Client or Employee as entity.
3. Select one of the new actions and click Run Report/Filter.

## Enhancements to Client Medication Schedule Screen

The Client Medication Schedule screen has been enhanced as follows:

- To avoid medication administration errors, you can now view prescription instructions and administration comments by hovering over the med magnifying glass in the week view and day view.



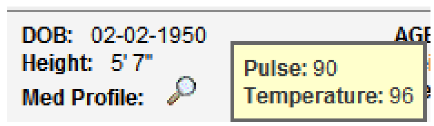

- With two new Security Matrix rights, employees can edit or remove administration results including missed doses.

| | |
|---|---|
| eMarAdminRecordEdit | Lets you edit and remove Taken administration results and “not taken” results such as refused or vomited |
| eMarAdminMissed | Lets you enter the result for a missed dose that was taken later by the client or edit a not taken result and change it to Taken. For a not taken result, you also have the option of removing the record. Note that the change can only be made if it is stillwithin the administration window. |

- The Day view has been updated to have same look and functionality as week view. For example, you can now view and update administration result details in the day view.

- A Print View button has been added to the week view and day view of the eMAR schedule screen. Medication and administration information for each med in the schedule is included at the bottom of the print view.

- Details about the client's medical profile, allergies, and warnings are available when you hover over the corresponding magnifying glass. The medical profile information displayed is a subset of fields from a new custom Medical Profile header that have been flagged with a new Data Dictionary setting "Is eMAR." Click here for more information.




- New My eMAR button to bring you to your eMAR schedule for the eMAR groups you are in (equivalent to the eMAR button on your Employee nav bar).

*Settings*

Partner Config: Use eMAR Functionality

Security Matrix: eMar, eMarAdministerMeds, *eMarAdminRecordEdit*and/or *eMarAdminMissed*

*Steps to Configure*

Flag med profile fields as Is eMar and set up admin schedules for the client's active medications.

*Steps to Use*

To administer a med schedule:

1. Client tab > Client's name or view button > eMAR button on nav bar.

2. Click Administer button.

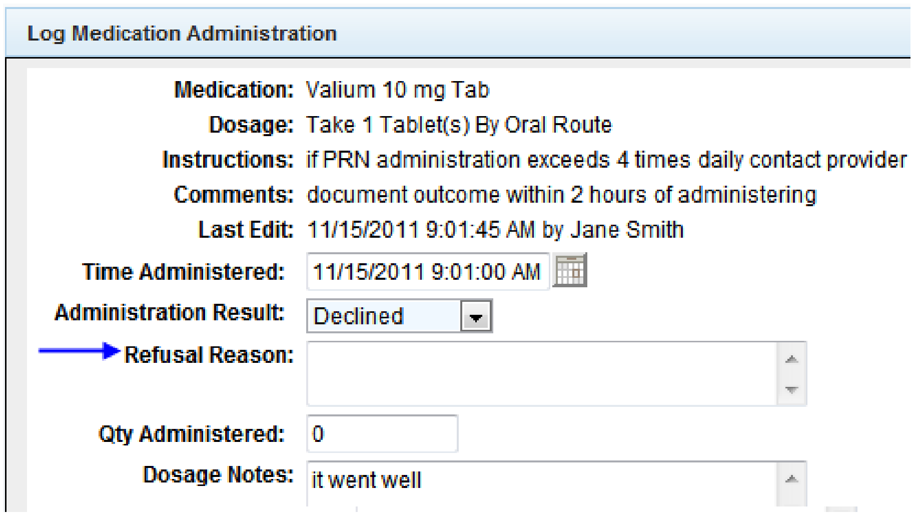
3. Fill out appropriate fields in Log Medication Administration popup and click Submit.

To print a client's eMAR schedule, click the Print View button.

## Enhancements to the Log Medication Administration Popup

- Since you may need to add a note when a dose is taken, the Dosage Notes field is now available for all administration results. Previously, it was only available if you selected a not taken result. You can use the field to document a discrepancy between what was ordered and what is administered – for example, when the dosage of the medication you get from the pharmacy changes.

- When you select one of the not taken results, a new Refusal Reason field displays.




- If enabled when the med schedule was created, an Injection Site and Previous/Current Count fields will be available.

*Settings*

Partner Config: Use eMAR Functionality

Security Matrix: eMar, eMarAdministerMeds, *eMarAdminRecordEdit*and/or *eMarAdminMissed*

*Steps to Configure*

N/A

*Steps to Use*

1. Client tab > Client’s name or view button > eMAR button on nav bar.

2. Click Administer to administer a med or click a result box to edit or remove it.

## Administering PRN Meds with eMAR

After you set up an admin schedule for a PRN med, a PRN grid appears above the client's main eMAR schedule with an Administer button.

| PRN Medication | Dosage | Admin(hrs) | Last Admin | |
|---|---|---|---|---|
| Valium 10 mg Tab | Take Tablet(s) 1 By Oral Route | 24 | | Administer |

Once administered, the result entry is added to the eMAR schedule and the Administer button becomes unavailable until a new administration window begins.

When you access your employee eMAR Schedule screen (via the My eMAR button), the total number of PRN meds for each client is indicated and is a link back to the client's eMAR schedule.

*Settings*

Partner Config: Use eMAR Functionality

Security Matrix: eMar, eMarCreateMedSchedule, eMarAdministerMeds

*Steps to Configure*

Select PRN checkbox when setting up med schedule.

*Steps to Use*

1. Client tab > Client's name or view button > eMAR button on nav bar.
2. Click Administer and fill out the fields in the Log Medication Administration popup.
3. Click Submit.

## Enhancements to Employee eMAR Schedule Screen

- For each client, the number of PRN medications scheduled for administration is indicated (if applicable) and is a link that takes you to the Client Medication Schedule screen.
- Details about the client's medical profile, allergies, and warnings are available when you hover over the corresponding magnifying glass.

- You can click the medication box under the client's name to access the Log Medication Administration screen and make changes if you have the appropriate right.
- Only meds that can currently be administered are listed on this screen.

*Settings*

Partner Config: Use eMAR Functionality

Security Matrix: eMar, eMarAdministerMeds, *eMarAdminRecordEdit* and/or *eMarAdminMissed*

*Steps to Configure*

N/A

*Steps to Use*

Employee tab > My Record button > eMAR on nav bar or click My eMar button on Client Medication Schedule screen.

## Client Medication Screen & eMAR Schedule: Automatic Updates

When a medication is discontinued or rejected, all future "Administer" instances are deleted from the schedule – this includes any non-administered instance that is currently in the admin window. For example, assume a med can be administered for 6 hours and the one scheduled for 8am instance has not yet been administered. If the med is discontinued or deleted at 12pm, the 8am med will be deleted as well as any future administrations. All past administered instances will display the discontinued date.


When a medication is edited or changed on refill, a warning is displayed in the admin schedule for the client's eMar. Once the eMar schedule for the medication is edited, the warning will disappear.

If a non-Credible eRX med has an eMAR schedule, the delete button will not be available on the Client Medications screen. You can discontinue the med through the edit function (change the status to 'discontinued').

*Settings*

Partner Config: Use eMAR Functionality

Security Matrix: eMar, eMarAdministerMeds

*Steps to Configure*

N/A

*Steps to Use*

1. Client tab > Client's name or view button > eMAR button on nav bar.

   If a medication was discontinued or rejected on the Client Medications screen, you can view the discontinued date in the Log Medication Administration popup for past adminstered instances.

2. Click the Admin Schedule button.

   If a med was edited or changed on refill, a red icon appears next to it. When you hover over the icon, the message "Medication Edited or Edited on Refill" displays. The warning icon will go away once the eMAR schedule is updated.

## eMAR Group Button Added to Client & Employee Nav Bars

To make it easier to assign a client or employee to an eMAR group, the corresponding button has been added to the nav bars. To assign multiple clients and employees to an eMAR group at one time, use the Manage eMAR Groups function on the Admin tab.

*Settings*

Partner Config: Use eMAR Functionality

Security Matrix: eMar, eMarManageGroups, eMarClientGroup, eMarEmployeeGroup

*Steps to Configure*

Use Manage eMAR Groups function to create the eMAR groups.

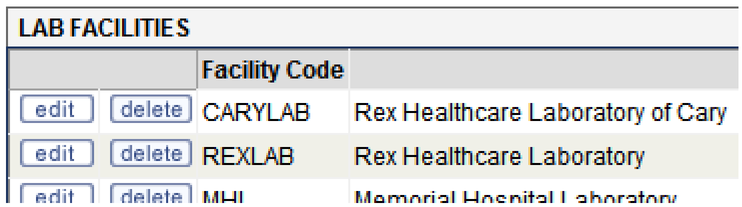
*Steps to Use*

1. Client tab > Client's name or view button > eMAR Group on nav bar.
2. Click Assign button to assign the client/employe to an eMAR group or click Unassign to remove him/her from an eMAR group.
3. Use Show Assigned Only button to display only eMAR groups client/employee is assigned to.

# eLabs

## Enhancements to eLabs

- With this release, there is a new admin function you can use to add and manage lab facilities used in eLabs.



LAB FACILITIES

| | | Facility Code | |
|---|---|---|---|
| edit | delete | CARYLAB | Rex Healthcare Laboratory of Cary |
| edit | delete | REXLAB | Rex Healthcare Laboratory |
| edit | delete | MHL | Memorial Hospital Laboratory |

- External providers have been added to the Physician dropdown in the Lab Results Header screen

*Settings*

Security Matrix: eLabs

*Steps to Configure*

As a reminder, separate contracting is required for the Credible eLabs module that lets you electronically order lab tests, print lab test orders, and electronically receive the results. The average lead time is 12 weeks. For more information, send an email to contracts@credibleinc.com.

Manual entry of lab results is possible without purchasing the Credible eLabs module. Your Implementation or Account Manager needs to turn on the eLabs Result Entry feature.

*Steps to Use*

1. Admin tab > Lab Facilities.
2. Fill out fields in Add Lab Facility sectino and click Add Facility.
3. To edit or delete an existing lab facility, use corresponding buttons.

# Credible eRx

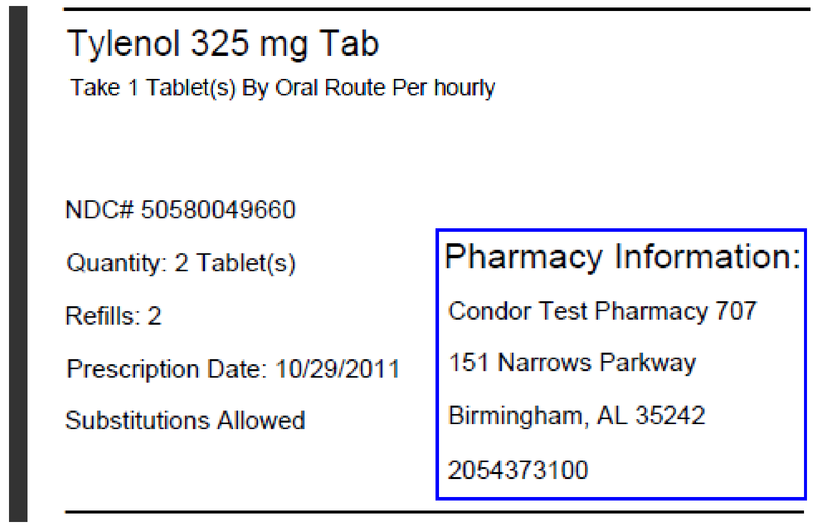
## Pharmacy Screen Enhancements

- Pharmacy Name field has "like" search functionality – To help you find a specific pharmacy, the system will return all pharmacies that contain the search string you enter in the Pharmacy Name field and not ones that start with it. For example, if you enter "cvs," 01468 CVS OF MARYLAND INC will show up as well as all pharmacies starting with CVS.
- Paging added to Pharmacy Search screen – Also, the pharmacy list will return the top three last picked for the client, the top 3 three last picked by the doctor, followed by the favorites in alphabetical order. If a favorite was one of the last picked, it will appear with the last picked group.
- Pharmacy Selection screen skipped for refill if pharmacy already selected – For a more efficient workflow, the Pharmacy Selection screen will no longer display if a pharmacy is already selected. Previously, if you clicked the Dosage Edit button when doing a refill, you would be redirected to the Pharmacy Selection screen even if a pharmacy was selected for the original prescription.

| | |
|---|---|
| *Settings* | Security Matrix: PrescriptionCreate, PrescriptionCreateNonSPI, RxRefill |
| *Steps to Configure* | N/A |
| *Steps to Use* | See Creating a Prescription in the help. |

## Pharmacy Name & Address Added to Copy of Prescription

When you generate a copy of a prescription that was sent to a pharmacy electronically, the pharmacy's name, address, and phone number will be included on the copy if available.


Tylenol 325 mg Tab
Take 1 Tablet(s) By Oral Route Per hourly

NDC# 50580049660
Quantity: 2 Tablet(s)
Refills: 2
Prescription Date: 10/29/2011
Substitutions Allowed

Pharmacy Information:
Condor Test Pharmacy 707
151 Narrows Parkway
Birmingham, AL 35242
2054373100

*Settings*

Security Matrix: PrescriptionCreate, PrescriptionCreateNonSPI, RxReprint

*Steps to Configure*

You need to have the Credible eRx module and your Implementation or Account Manager needs to turn it on as well as the non-SPI prescription ability.

*Steps to Use*

When creating a prescription: Send & Print Copy button

After the prescription has been sent: print button on the Client Medications screen

## Use Prescriber's Geo Area Address When E-Sending Scripts

Previously, using the address of a prescriber's geo area on a prescription was only available when you were printing or e-faxing it. The Geo Area dropdown will now be available when sending a prescription electronically. For all delivery methods, the geo area selection you make will be used if you reprint the prescription and available to use again or change during a refill.

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 will be used.

| | |
|---|---|
| *Settings* | Security Matrix: PrescriptionCreate, PrescriptionCreateNonSPI |
| *Steps to Configure* | You need to have the Credible eRx module and your Implementation or Account Manager needs to turn it on as well as the non-SPI prescription ability.<br>See Geo Areas/Offices in the help. |
| *Steps to Use* | On the finalize prescription screen, select the appropriate geo area from the dropdown. |

## New Discontinue Prescription Right for Nurses

RxDiscontinue right has been added for employees without an SPI. Note that this right is not neeeded for prescribers (employees with an SPI).

| | |
|---|---|
| *Settings* | Security Matrix: PrescriptionCreate, *RxDiscontinue* |
| *Steps to Configure* | You need to have the Credible eRx module and your Implementation or Account Manager needs to turn it on as well as the non-SPI prescription ability. |
| *Steps to Use* | Client tab > Client's name or view button > Medications on Client nav bar > discontinue button |

## Client Medications Screen Enhancements for Non-Prescribers

When non-prescribers access another employee's or their own Client Medications screen (via the Employee nav bar), it defaults to APPROVED status and lists all clients who have prescriptions that have been approved but not completed. (When a prescriber accesses his or her Client Medications screen, it defaults to ALL UNAPPROVED.)

The non-prescriber can use the new Provider column to identify the prescriber for each prescription and sort the medication list by prescriber.

| | |
|---|---|
| *Settings* | Security Matrix: PrescriptionCreate |
| *Steps to Configure* | N/A |
| *Steps to Use* | Employee tab > My Record button > Medications on nav bar |

## Non-SPI Ability to Refill Script Prior to Prescriber Approval

A non-SPI user with the PrescriptionCreateNonSPI right can now refill a medication the same way he or she can create a new medication. The non-SPI user will be sent as the Prescriber Agent and the prescriber will have this medication in his or her queue for approval.

*Settings*

Security Matrix: PrescriptionCreate, PrescriptionCreateNonSPI

*Steps to Configure*

You need to have the Credible eRx module and your Implementation or Account Manager needs to turn it on as well as the non-SPI prescription ability.

*Steps to Use*

See Creating a Prescription and Managing Prescriptions in the Medication List (for steps to refill a script) in the help.

## Non-SPI Can Print Schedule II - V Scripts Prior to Approval

If your system is set up to block electronic signatures, an employee with the PrescriptionCreateNonSPI right can print a Schedule II - V prescription with no electronic signature prior to getting the prescriber's approval. Once printed, the prescriber will then need to physically sign the prescription.

*Settings*

Security Matrix: PrescriptionCreate, PrescriptionCreateNonSPI

*Steps to Configure*

You need to have the Credible eRx module. Your Implementation or Account Manager needs to turn it on as well as the non-SPI prescription ability and the Block Electronic Signatures setting.

*Steps to Use*

On the finalize prescription screen, the print button will be available to non-SPIs and prescribers. Note that even if a prescriber prints the Schedule II - V prescription, his or her electronic signature will still be blocked.

## Additional Logging for Rx Eligibility and PBM Med History

The following actions are now logged in the Global/Client/Employee HIPAA logs:

- MEDICATION ELIGIBILITY FAILED
- MEDICATION ELIGIBILITY UPDATED
- PBM MEDICATION HISTORY FAILED
- PBM MEDICATION HISTORY UPDATED

| | |
|---|---|
| *Settings* | Security Matrix: Report List, ClientViewLog<br>Report Matrix: Global HIPAA Log |
| *Steps to Configure* | An addendum to your contract is required for the formulary, Rx eligibility, and medication history functionality in Credible eRx. For more information, send an email to contracts@credibleinc.com. For setup information, refer to reference 33110 in the Credible Library. |
| *Steps to Use* | 1. Reports tab > Admin on nav bar > Global HIPAA Log or Log button on Client or Employee nav bar.<br>2. For Global HIPAA Log, select Client or Employee as entity.<br>3. Select one of the new actions and click Run Report/Filter. |

# Client

## Date Updated & Updated By Added to Client Med History

Though previously available in the HIPAA logs, Date Updated and Updated By have been added to the Client Medications History screen to make it easier to track changes made to a medication record.

*Settings* Security Matrix: RxView

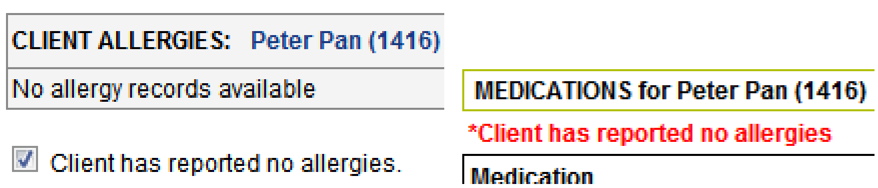
*Steps to Configure* N/A

*Steps to Use*

1. Client tab > Client's name or view button > Medications button on nav bar.
2. Click the history button for a medication record.

## "Client Reported No Allergies" on Client Medications Print View

If a client has reported no allergies and the "affirmation" checkbox in the Client Allergies screen was checked, a corresponding message will be on the print view of the Client Medications screen.




*Settings* Security Matrix: AllergyView, AllergyUpdate, RxView

*Steps to Configure* N/A

*Steps to Use* See Allergy in the help.

## Physicians Orders Enhancements

- Client Nav Bar added to Physicians Orders screen – The addition will make it easier to navigate to another function after completing an order.
- Hide discontinue button for current orders – With a new Partner Config setting, you can now prevent employees from discontinuing a current order in the Physician Orders screen.
- Recreate current orders – With a new recreate button in the Order History section, you can recreate current or discontinued orders. The system automatically discontinues the existing order (if applicable) and recreates a new order, eliminating the need to reenter data. Note that if the order is for a Credible eRx prescription, there will be a refill button instead of a recreate button.

*Settings*

Security Matrix: PhysicianOrdersView, PhysicianOrdersAdd

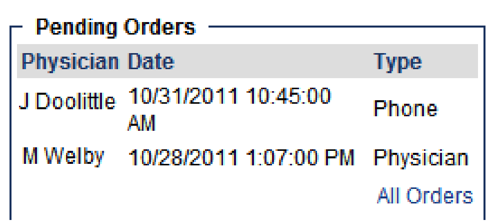
*Steps to Configure*

N/A

*Steps to Use*

1. Client tab > Client's name or view button >Orders button on nav bar.
2. Click recreate for current or discontinued order in Order History section. The new order displays in the Current Orders section.

## Add Pending Orders to Client Overview Screen




You can now make it easier for your staff to follow-up on a client's pending orders by adding a Pending Orders section to the Client Overview screen. The All Orders link brings you to the Physicians Orders screen for the client.

*Settings*

Security Matrix: MyCWAdmin

*Steps to Configure*

1. Admin tab > Home Page Config > Client Home Page Admin.
2. Select Pending Orders and click Save.

*Steps to Use*

Click All Orders to go to the Physicians Orders screen for the client.

## Customize Fields in Medical Profile Header & Display in eMAR

You can now control which fields appear in the header section of the Medical Profile screen – in your system and in the Credible Client Portal. This customization extends to the Client Profile print view when you select the Medical Profile print option and the fields injected into a form when the answer format is Injected Medical Profile Header.

When you select a field for the Medical Profile header, you can also set it up to display in the Client Medication Schedule screen by selecting the Is eMAR checkbox.

In addition to selecting standard profile fields, you can use 20 custom text and date fields. Due to a Meaningful Use requirement, Height, Weight, and BMI will automatically be included and displayed first – you do not need to select these fields manually. Any field you select will be available as a custom field in Advanced Client Search.

You can also customize the fields that appear in the summary table in the Medical Profile History screen.

| History: | ID | Date | Hgt | Wgt | BMI | Girt | HDL | Temp | Resp | BP R | BP S | Head |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| view | 100 | 08/12/2010 | 6ft 0in | 175 | 23.73 | 40.00 | 60 | 98.6 | 12 | 115 | 121 | 59.00 |
| view | 101 | 08/13/2010 | 6ft 1in | 175 | 23.09 | | | | | | | |

*Settings*

Security Matrix: DataDictionary

*Steps to Configure*

To select the fields for the Medical Profile header section:

1. Admin tab > Data Dictionary > ClientMedicalProfile as the table source and View as the type.

2. For each field you want to include:

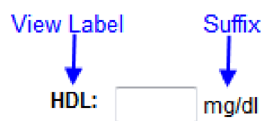
    a. Select the field from the Column Name dropdown.

    b. Enter a View Label – field name.

    c. Select the View Ord – the order in which the field will display.

    d. Set the max/min length (optional) – how many characters a user can enter in the field; does not apply for date fields.

    e. Set the suffix (optional) – value to display after the field data on the Medical Profile screen




    f. Select the Is Printview checkbox – necessary for the field to display.

    g. To include the field in the Client Medication Schedule screen, select the Is eMAR checkbox.

    h. Click update.

3. When you are done adding fields, click Match Update to View.

To select the fields for the summary table in the Medical Profile History screen:

1. Change the Type to List and click Submit.

2. For each field you want to include:

    a. Select the field from the Column Name dropdown. The following fields will automatically be included in the history record and displayed first: ID, Date, Height, Weight, and BMI.

    b. Enter a list label (field name) that is no longer than four characters.

    c. Click update.

For information on setting up a form to inject, see [Setting Up a Question to Inject Data into a Form]() in the help.

*Steps to Use*

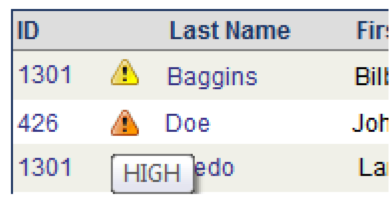
To view a client's medical profile: Client tab > Client's name or view button >Medical Profile on nav bar.

To generate a Client Profile print view with medical profile information: Profile on nav bar > Print View button > Select Medical Profile and click Print View.

To see the medical profile fields injected into a form, start a visit that uses a form with the Injected Medical Profile Header answer format.

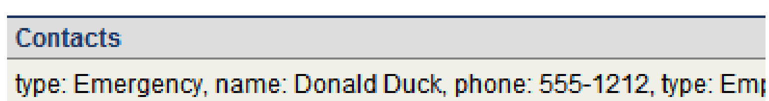
## Advanced Client Search Enhancements

- Warning icon added to Advanced Client Search results. If a client has one or more warnings in his or her record, a color-coded warning icon will appear in the advanced search results to the right of the client ID. If you hover over the icon, you can view the warning level. If a client has multiple warnings, the icon that corresponds to the highest level warning will display. Note that the warning indicator is not included when you export the advanced search results.




- Insurance ID/Payer 4 and 5 have been added as custom fields (in the Special Fields section) so you can display the Insurance ID/Payer in the search results.

- Contacts has been added as a custom field (in the Special Fields section). When selected, a concatenated list of contact type, name, and phone will display in the search results.



- Medical Conditions has been added as a custom field. When selected, the system generates a concatenated list of all medical conditions each client has recorded in his or her medical profile.

| ID | Last Name | First Name | Medical Conditions |
|---|---|---|---|
| 1416 | Pan | Peter | Diabetes , Seizure Disorder, Other |

- Primary Employee dropdown is now a multi-select field and has been added to the top row in the Advanced Client Search screen.

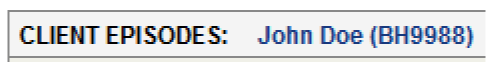
*Settings* Security Matrix: AdvSearch

*Steps to Configure* N/A

*Steps to Use* See Advanced Client Search in the help.

## ID Displayed Along with Client Name

In the majority of client screens in Credible and in the Client Portal, the client name is at the top of the screen. To help ensure proper client identification, the client's ID will now follow his or her name.




If the client has an external ID, that will be used. If not, his or her Credible ID (client ID) will be used. Note that the external ID/Credible ID is not shown on the Schedule and Notification screens.

*Settings* N/A

*Steps to Configure/ Steps to Use* N/A

## Program and Team Available As Predefined Fields in Profile

You can now add Program and Team as predefined fields in the Client Profile. When you add the fields, you can set their view order such that they are included in the Client Info section on the Client Overview screen. The fields will also be available in the List Column Config popup for the Client List screen.

*Settings*

Security Matrix: DataDictionary

*Steps to Configure*

1. Admin tab > Data Dictionary.
2. Clients as Table Source and View as the Type.
3. Select programs from the Column Name dropdown and click Insert Column.
4. Enter a view label and select the view order.To display the field in the Client Info section on the Client Overview screen, select an order number that is within the number specified for the Profile Fields On Homepages setting in Partner Config.
5. Select the Double Wide checkbox and click update.
6. Repeat steps 3-5 for the teams field.

*Steps to Use*

Client tab > Client's name or view button >Profile button on nav bar.

## Contact Address Included in Client Profile Print View

Previously, the Client Profile print view included the name, type, and phone number for each contact. With this release, the address for each contact will also be provided.

*Settings*

N/A

*Steps to Configure*

N/A

*Steps to Use*

1. Client tab > Client name or view button > Profile on nav bar > Print View button.
2. Select Contacts as a print option and click Print View.

## ON HOLD Status Indicated When Searching for a Bed

Previously, when a bed was put on hold for a client, the Bedboard Search screen listed the status of the room as OCCUPIED. To help staff distinguish between beds that are being held for an upcoming admit or actually occupied, the true ON HOLD status will be reflected when searching for a bed. Note that a bed with an ON HOLD status will not be eligible for billing until it is no longer on hold.

*Settings*

Partner Config: Use Bed Board

Security Matrix: BedBoardAdmin, ClientBedBoardAssign

*Steps to Configure*

See Bed Board Facilities, Bed Board Rooms, and Bed/Foster Interval Reasons in the help.

*Steps to Use*

1. Client tab >Client's name or view button > Bed Board on nav bar.
2. Click the Assign Bed button to bring up the Bedboard Search popup.
3. Select the desired facility from the dropdown and select – Available – from the status dropdown.

## Enhancements to Diagnosis Function

- New right to start an assessment – With the new Security Matrix right DxAdd, you can control the availability of the Start New Assessment button on the Diagnosis screen. The existing DxUpdate right will now only control the Update Assessment button. By selecting DxAdd and deselecting DxUpdate for a profile, you can now force employees to add a new diagnosis vs updating the existing one – the Update Assessment button will not be available.
- Diagnosis update details added to Global/Client/Employee HIPAA logs – To make it easier to view the changes made to a client's assessment, the details (old values/new values) have been added to the HIPAA logs. Previously, this information was only available through the Diagnosis History.

Because there are multiple diagnoses within each axis, each axis field name in the Log Details popup has a letter to identify which diagnosis it is. For example, “AXIS 1 e” corresponds to the sixth Axis I diagnosis.

| | |
|---|---|
| *Settings* | Security Matrix: *DxAdd,* ClientViewLog, ReportList<br><br>Report Security: Global HIPAA Log |
| *Steps to Configure* | N/A |
| *Steps to Use* | To start new assessment: Client tab > Client name or view button > Diagnosis on nav bar > Start New Assessment button.<br><br>To view log details for diagnosis updates:<br><br>1. Client/Employee tab > Client/employee name or view button > Log button on nav bar<br><br>or Reports tab > Admin on nav bar > Global HIPAA Log > Select Client as entity > Run Report button<br><br>2. Filter on UPDATE CLIENT DIAGNOSIS and click the details button. |

## Active/All Filter Added to Insurance Coverage Screen

If insurance coverage from a specific payer is no longer active, the record will no longer display when you first access the Insurance Coverage screen. An insurance record is considered inactive if the Coverage End Date precedes today’s date or it has been flagged as inactive with the Inactivate button.

To view inactive and active insurance records, select ALL from the new status filter.

| | |
|---|---|
| *Settings* | Security Matrix: ClientInsuranceView |
| *Steps to Configure* | N/A |
| *Steps to Use* | 1. Client tab > Client’s name or view button > Insurance on nav bar<br><br>2. To view all insurance records for the client, select ALL from the status dropdown. |

## New Period Type for Authorization Levels: Month by Day

With the new period type MONTH BY DAY, you can set up an authorization level to start on a specific date and have the system create additional auths on the same day for each month that follows until the period ends. For example, if the first auth is 4/10/11-5/9/11, the next one will be 5/10/11-6/9/11. Note that this period type is only available when setting up an authorization level via the Admin tab.

*Settings*

Partner Config: Use Authorization Levels

Security Matrix: AdminTimeList or AdminTimeListAll

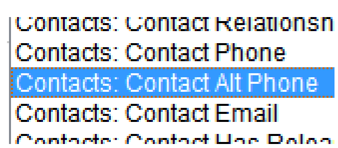
*Steps to Configure/Use*

See Authorization Levels in the help.

## Contacts: New Screen Layout &Mapping Alternate Phone Number

For easier reading, the records in the Contacts screen are now displayed in a table. Another change you will notice is the edit button is now a select button in the leftmost column.

In the Field Map dropdown:




If you have a web form that maps a client’s contacts back to his or her record, you can update it to include a contact’s alternate phone number.

*Settings*

Security Matrix: ClientUpdateContactsFamily, FormBuilder, FormBuilderEdit

You need the Form Builder module to create or edit web forms.

*Steps to Configure*

N/A

*Steps to Use*

See Contacts Mapping in the help.

## Enhancements to Client's External Care Provider Screen

- Multiple PCP time frames per provider – To accommodate the situation when a client's PCP changes based on time period, you can now enter multiple PCP time frames for each provider. When a visit is completed, the system assigns the appropriate PCP based on the time frames entered. If no dates are set in the PCP time frame fields, then the external provider set with the PCP flag is used.


- New Notes field – Once notes have been added to an external provider record, you can hover over the info icon in the Notes column to view them.

*Settings*

Security Matrix: ExternalProviderView, AddExternalProvider, ExternalProviderUpdate

*Steps to Configure*

N/A

*Steps to Use*

1. Client tab > Client name or view button > Ext Provider on nav bar.
2. To enter PCP time frames for a provider:
   a. Click the detail button, enter the start and end dates for the first PCP time frame for the provider, and click Add PCP Time Frame.
   b. Repeat for each time frame.
3. To manage PCP time frames for a provider, click the detail button and use the edit and delete buttons.
4. To enter notes about the provider: click the edit button, enter the information in the Notes field, and click update.

## Payment Button Nav Bar Removed If No Right

Previously, if an employee did not have the ClientPaymentView, ClientPayments, ClientPaymentUpdate, or ClientPaymentDelete right, an insufficient rights message would display when he or she tried to access the Payments function on the Client nav bar. With this release, the Payment button will not be available on the nav bar if an employee does not have one of the rights listed above.

| | |
|---|---|
| *Settings* | N/A |
| *Steps to Configure/ Steps to Use* | N/A |

## Treatment Plan Screen Defaults to Active Status

Previously, when you accessed the Treatment Plan screen, the default status was All. To help you focus on active treatment plans, the default status has been changed to Active.

| | |
|---|---|
| *Settings* | N/A |
| *Steps to Configure* | N/A |
| *Steps to Use* | Client tab > Client name or view button > Tx Plan on nav bar |

# Employee

## Export Your To Do List & Import It into Microsoft Outlook

You can now export the items currently displayed in your To Do List into a csv file and then import the file into the Tasks folder in Microsoft Outlook.

*Settings*

N/A

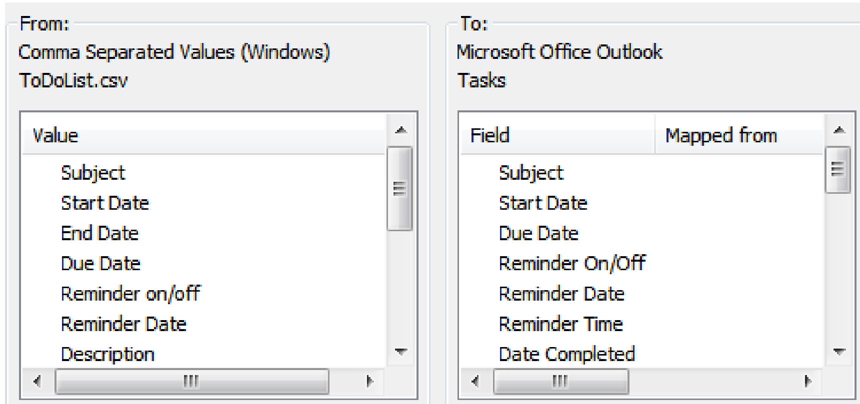
*Steps to Configure*

(Optional) To display the to do list on the Home Page and/or Employee Overview screen:

1. Admin > Home Page Config> Home Page Admin/Employee Home Page Admin.
2. Select To Do List and click Save.

*Steps to Use*

1. Access your to do list (To Do List button on Employee nav bar or if applicable, All Current To Do List Items link on Home Page/Employee Overview screen).
2. Apply any desired filtering to the to do list (for example, you may only want to export high priority items).
3. Click the Export button and save the ToDoList.csv file locally.
4. In Microsoft Outlook, select File > Import and Export.
5. Select Import from another program or file as the action and click Next.
6. Select Comma Separated Values (Windows) as the file type and click Next.
7. Browse to and select the csv file you saved locally, select the desired duplicates option, and click Next.
8. Select Tasks as the destination folder and click Next.
9. Click Map Custom Fields.




A few of the field names in the exported csv file are different than what you see in Credible for export/import purposes (for example, Subject =Summary). The first time you export your to do list, you need to map the csv fields to the Tasks fields.

10. Drag the following csv fields to the corresponding field in the Tasks pane: Subject, Start Date, Due Date, Description, Status, Priority, Private, % Complete, and Date Completed. For the Description field, drag it to the Notes field.

11. Click OK and then click Finish to import the file.

## New Right to Control Deleting To Do Items

You can now control the availability of the delete button in an employee's To Do List with the new right ToDoListDelete. If an employee does not have the right, the delete button will not be available.

*Settings* — Security Matrix: *ToDoListDelete*

*Steps to Configure* — N/A

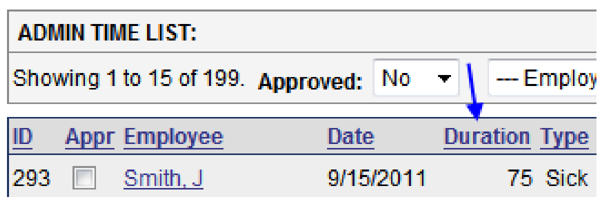
*Steps to Use* — Employee tab > Employee name or view button > To Do List on nav bar

## Admin Time List Screen Enhancements

- With the new right AdminTimeListOwn, you can prevent an employee from seeing another employee’s admin time from that employee’s nav bar. Note that this right trumps the AdminTimeListAll right.

- If an employee does not have the Security Matrix rights for updating or deleting an Admin Time entry, he or she will no longer see the corresponding buttons.

- The system calculates and displays the duration for each admin time record (in minutes) instead of displaying the Time In and Time Out.




- All column headers are sortable.

*Settings* — Security Matrix: *AdminTimeListOwn,* AdminTimeList or AdminTimeListAll

*Steps to Configure* — N/A

*Steps to Use* — See [Employee Admin Time] in the help.

## Employee List Sortable by Column Headers

You can now sort the employee list by clicking any of the column headers.

*Settings* — Security Matrix: EmployeeView or EmployeeViewAll

*Steps to Configure* — N/A

*Steps to Use* — Employee tab > click on the column header you want to sort the employee list by.

## New Right for Edit Button on Employee Attachments Screen

With a new Security Matrix right, you can control the availability of the Edit button on the Employee Attachments screen. If you only want an employee to be able view attachments (for example, for audit purposes), make sure the new right is not selected for his or her profile.

| | |
|---|---|
| *Settings* | Security Matrix: *EmployeeFileEdit* |
| *Steps to Configure* | N/A |
| *Steps to Use* | N/A |

## Security Enhancement for Resource Schedule/Manage Resources

You can now separate the ability to add a new resource to the system from the ability to schedule it.

- Existing right PlannerResourceAdd has been renamed ResourceAdd since it now controls the ability to set up a new resource – New Resource fields and button will not be available if you do not have the right.
- New right PlannerResourceSchedule lets you block time on the schedule for a resource

| | |
|---|---|
| *Settings* | Security Matrix: AssignResources or ScheduleResources, *ResourceAdd, PlannerResourceSchedule,* PlannerResourceDelete, PlannerResourceView |
| *Steps to Configure* | Admin tab > Manage Resources or Resource Sched button on Employee nav bar to add a new resource to the system |
| *Steps to Use* | See Manage Resources in the help. |

## Restrict Employee Records that Supervisors Can View

Previously, if a supervisor had the EmployeeViewAll right, he or she could view the record of other supervisors if they were on the same team. With the new right EmployeeViewSupervise, you can restrict supervisors so they can only view their own records and the records of the staff that they supervise. Note that EmployeeViewAll trumps EmployeeViewSupervise so a profile should have one or the other selected.

| | |
|---|---|
| *Settings* | Security Matrix: *EmployeeViewSupervise* |
| *Steps to Configure/ Steps to Use* | N/A |

# Schedule

## Cancellation/No-Show Form for CNCLD BY PROV & RESCHEDULE

CNCLD BY PROV (Cancelled by Provider) and RESCHEDULE have been added to the Cancellation/No-Show Form functionality for scheduled visits. If your system is set up to use a cancellation/no-show form, a Begin Cancellation/No-Show Form button will be added to the Scheduled Visit popup when an employee changes the status of the visit to CANCELLED, CNCLD BY PROV (Cancelled by Provider), CNCLD>24, NOSHOW, NOTPRESENT, or RESCHEDULE.

*Settings*

Partner Config: Use Cancellation Form

*Steps to Configure*

See Setting Up Your System to Use a Cancellation/No-Show Form in the help.

*Steps to Use*

See Cancelling a Scheduled Visit in the help.

## Date Waitlisted Added to Waitlist Screen

If you add a client to the waitlist when scheduling an appointment, the date he or she was added to the waitlist will now appear in the Waitlist screen.

| WAITLIST: Jane Smith | | | |
|---|---|---|---|
| Client Name | Scheduled Date | Visit Type | Date Waitlisted |
| Doe, John | 9/20/2011 | Assess Crisis Plan | 9/19/2011 |

*Settings*

N/A

*Steps to Configure*

N/A

*Steps to Use*

To add a client to the waitlist: in the Add to Schedule popup, select the Add to Waitlist checkbox, enter waitlist notes if applicable, and click Schedule.

To view the Waitlist screen for an employee: access his or her schedule and click the Waitlist icon.

## Geo Area Phone Number Used for Appointment Cards

If a scheduled visit is going to be at a location that is associated with a geo area and that geo area has a phone number, that phone number will appear on the appointment card. If there is no location/geo area association or the geo area does not have a phone number, the system will use the Partner Re-Schedule Phone # specified in Partner Config.

| | |
|---|---|
| *Settings* | N/A |
| *Steps to Configure* | See Geo Areas/Offices in the help. |
| *Steps to Use* | See Client Schedule in the help. |

# Visit

## Configurable Header Fields in the Visit Print View

With a new setting and table in Data Dictionary, you can now define which fields you want to appear in the print view for completed visits. Both versions of the print view – HTML and PDF – use the user-defined fields. You can include fields from seven different tables (see below).

**Important:** custom print views will be eliminated after the May 2012 release. Please take time between now and then to set up your print view using this new functionality.

*Settings*

Partner Config: Print in PDF Format (if you want to enable PDF version of print view)

*Steps to Configure*

1. Admin tab > DataDictionary.
2. From the Table Source dropdown, select one of the following tables: Clients, Employee, Visit, Clients Ext, Client Episode, ClientInsurance, or ClientVisitBilling. These are the tables with the new Is Printview setting.


3. With Type set to View, click Submit.
4. For each field you want to include in the print view header, select the Is Printview checkbox and click update. You can include lookup fields in the print view header.
5. Repeat steps 2 - 4 for each table that contains fields you want to include in the print view header.
6. Select Client Visit Printview as the Table Source.
7. With Type set to View, click Submit. The Manage PrintView screen displays. You use this screen to control the appearance of the fields in the print view header.
8. For each field, click the Edit button and set the field label and order of the field in the print view header.

9. Set the New Column, Spacer, and Double Wide values as appropriate. These values relate to concatenating fields and the two-column format used in the print view header.
   - To concatenate one or more fields (for example, Start Date/Time and End Date/Time or multiple address fields):
     i. Set New Column to True for the first field.
     ii. For the subsequent fields you are combining, set New Column to False (since labels do not print when New Column = False, you could leave them blank).
     iii. For the subsequent fields, use the Spacer field to put a space (indicated by a red underline), character, or word between it and the previous field (see example below).
   - To make a field span both columns, set Double Wide to True. This is useful for lengthy fields like a notes field.

| Label | Order | New Column | Spacer | Double Wide |
|---|---|---|---|---|
| Client's Last Name: | 3 | True | _ | False |
| Date/Time: | 4 | True | | False |
| Time Out | 5 | False | to | False |
| Visit Notes: | 6 | True | | True |

Client's Last Name: **Doe**

Date/Time: **9/20/2011 6:01 AM to 9/20/2011 6:19 AM**

Visit Notes: **Visit went well. Client reported good compliance with medication regimen. At next visit, will discuss possibility of weaning client off anti-anxiety medication.**

*Steps to Use*

See Printing the Visit Details in the help.

## Enhancements to eFaxing Client Visit Information

- eFax client visit information functionality has been extended to include visit templates.
- With a new Security Matrix right, you can control which employees can eFax client visit details and visit templates to outside agencies.
- When an employee eFaxes a visit or template, the action will be logged in the Global/Client/Employee HIPAA logs.

*Settings*

Security Matrix: ClientVisitViewForm, *ClientVisitFax,* ReportList, ClientViewLog

Report Matrix: Global HIPAA Log

As a reminder, an addendum to your contract is required for this functionality. For more information, send an email to contracts@credibleinc.com. Your Implementation or Account Manager needs to turn on the eFax client visit information function in your system.

*Steps to Configure*

1. Admin tab > Agencies.
2. Edit an existing agency or add a new one.
3. Make sure the agency has a Site Fax number.
4. Click update (or Add Agency).

For information on creating a template, see Templates for Web Forms in the help.

*Steps to Use*

1. Visit tab > fax button for the visit you want to eFax *or* view button > Template button in Visit Details screen. A PDF version of the visit details or the PDF template displays. Note that the fax cover sheet does not appear on the screen – only the fax recipient will see it.
2. Select the appropriate agency from the corresponding dropdown and click Fax.

If the eFax is successful, the message “Service Successfully Faxed” displays. If the agency has an invalid fax number, the message “Service Fax Failed” displays.

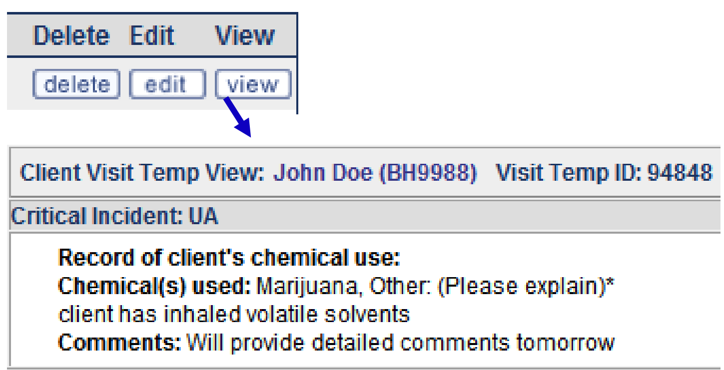
To view eFaxing actions in a log:

1. Reports tab > Admin on nav bar > Global HIPAA Log or Log button on Client or Employee nav bar.
2. For Global HIPAA Log, select Client or Employee as entity.
3. Select Client Visit Faxed or Client Visit Template Faxed and click Run Report/Filter.

## View Functionality Added for Incomplete Visits

A new view button has been added that lets you view all the different sections (categories) in the form in one screen for easy reading – similar to the view button for completed visits. Previously, the view button for incomplete visits functioned as an edit button; it has been renamed accordingly in this release.

You can also access the incomplete visit view when you are documenting a visit with the new Incomplete View link.




*Settings*

N/A

*Steps to Configure/ Steps to Use*

N/A

## Enhancements to Late Visit Calculations

- With a new Partner Config setting, you can set up your system to exclude weekends and holidays when calculating late time. Note that if you choose to exclude weekends/holidays, the day an appointment is scheduled will be included in the late hours For example, if you schedule on Sunday, Sunday will be included in the late hours.
- Late visits are now calculated based on minutes. For example, If Flag Late When Greater Than is set to 16 hours, a service signed at 15 hours 59 minutes is not late.

*Settings*

Partner Config: *Only Include Workdays for Late Entry,* Mark Late Entries, Use Time Out For Late Entries, Flag Late When Greater Than (select desired number of hours), Use Company Holidays

Security Matrix: ClientVisitFlagLate

*Steps to Configure*

See Indicating Company Holidays in Week & Month Views in the help.

*Steps to Use*

N/A

## Block Services for Parent Programs

With a new Partner Config setting, you can set up your system to prevent services being created for or updated to parent programs. Any program that is set up as a parent programwill not be an option in the Add to Schedule or Scheduled Visit popups or the Add Visit screen. Note that parent programs will still be available via Advanced Client Search and Mobile.

*Settings*

Partner Config: *Block Services for Parent Programs*

*Steps to Configure*

To set up a program as a parent program: Admin > Programs and then set Is Parent to True.

*Steps to Use*

N/A

## Enhancements to Add Visit Data Entry via Client Nav Bar

With this release, you will notice two changes when you access the Add Visit function from the Client nav bar and use Data Entry to document the visit:

- When the # of Entries = 1 and no Daily Dates are entered, the Visit Date field on the next Add Visit screen will be blank (previously, the current date was supplied).
- When the # of Entries = more than 1 and just the Start Date is entered, there will be one entry on the Start Date and an entry for each day after with the number of days corresponding to the # of entries (previously, the multiple entries were on the same day and the current date was used)

*Settings* Security Matrix: VisitDataEntry

*Steps to Configure* N/A

*Steps to Use* See Documenting a Group Visit in the help.

# Admin

## Keep Employees Informed with New Notifications

Use the following new notifications to keep employees informed:

- Client Insurance Updated - Specific Payer – triggers when a field in an existing insurance record for a client has been changed. Note that inactivating or activating an insurance record will not trigger the notification.

- Employee Assigned As Case Manager and Employee Assigned As Primary – triggers when an employee has been assigned as the Case Manager or a primary employee for a client. The Case Manager assignment triggers both notifications since the assignment automatically sets the employee as Primary.

- Visit Manual Red X – triggers when an employee selects the Set Manual Red X checkbox when updating a completed visit. By selecting the checkbox and entering a manual red X note, a supervisor can inform the employee who conducted the visit that it cannot be approved and the reason why.

- Employee Admin Time Approved notification – triggers when an admin time entry is approved. When employees know that their admin time entries have been approved, they can block time on their schedules accordingly.

- Client Liability Added – triggers when an employee saves the initial liability form for a client or starts a new form.

- Schedule Cancellation - Employee Has Waitlist – triggers if an employee has a waitlist and the employee has an appointment cancelled.

- Authorization Last Period Ending (nightly notification) – triggers if the number of days specified equals the number of days before a client's authorization ends. If the client has multiple authorizations *of the same auth level* with different end dates, the system will look at the authorization with the latest end date to determine if the notification should be sent.

- eMAR Schedule End (nightly notification) – triggers if Notify at End of Schedule is selected for a med schedule and it is n days before the med schedule is scheduled to end. Note that the Notify at End of Schedule checkboxin the Create/Edit Med Schedule screen must be selected for the notification to trigger.

- Medication Intra-Class Polyphamacy – triggers when a medication or prescription in the same drug class as another active medication or prescription is added to a client's medication list. Underlying premise: a single medication should be sufficient to treat a condition (for example, Abilify *or* Zyprexa for a psychotic disorder). When a client is on multiple medications, particularly of the same class, the chance of adverse side effects increases –and this can decrease compliance with the medication regimen. If Intra-Class Polyphamacy is needed, the rationale for it should be documented.

- Prescription – Refill Added – triggers when a prescription has been refilled and needs a prescriber's approval. Note that the notification does not apply to refill requests received electronically from pharmacies.

*Settings*

Partner Config: Use eMAR Functionality

Security Matrix: NotificationTriggers, eMar, eMarCreateMedSchedule

*Steps to Configure*

N/A

*Steps to Use*

See Notification Triggers in the help.

To set up/edit a med schedule to notify at end of schedule:

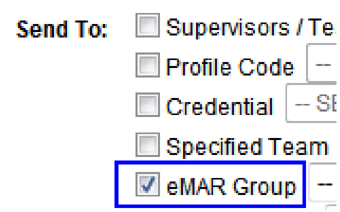
1. Client tab > Client's name or view button > eMAR button on nav bar > Admin Schedule button on Create Medication Schedule screen.

2. Edit an existing med schedule or add a new one.

3. Select the Notify at End of Schedule checkbox and click Edit/Create Med Administration Schedule.

## eMAR Group Added to Notification Send To Options

When setting up or editing a trigger for a medication notification such as Medication Add, you can now select an eMAR group as one of the Send To options. Note that an eMAR group is not applicable as a Send To option for prescription notifications since they are automatically sent to the prescriber.




*Settings* Partner Config: Use eMAR Functionality

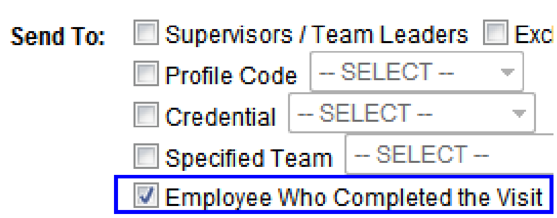
Security Matrix: NotificationTriggers

*Steps to Configure* N/A

*Steps to Use* SeeNotification Triggers in the help.

## Visit Add & Approval Notifications: Send To “Completed By”

If you use the Visit Add or Visit Approval notifications, you can now have them sent to the employee who completed the visit. This new Send To option can be useful for notifying an employee via his or her To Do List that a client’s treatment plan needs to be reviewed. Using the Visit Add – Specific Visit Type & Program notification, enter number of days between the initial treatment plan and the review date in the Occur field and select the To Do List checkbox.



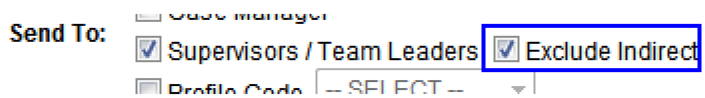

*Settings* Security Matrix: NotificationTriggers

*Steps to Configure* N/A

*Steps to Use* See Notification Triggersin the help.

## Prevent Indirect Supervisors from Receiving Notifications

If you set up a notification to send to supervisors and team leaders for employee based notifications, you can now prevent indirect supervisors from receiving it with the Exclude Indirect checkbox. All team leaders will still receive the notification. An indirect supervisor assignment occurs automatically when a supervisee is a supervisor of other employees (in other words, an indirect is the supervisor's supervisor). Whether or not an assignment is indirect is indicated in the Supervisor Assignment screen.




*Settings* — Partner Config: *Allow Exclusion of Indirect Supervisors/Leaders*

*Steps to Configure* — N/A

*Steps to Use* — SeeNotification Triggersin the help.

## Automatically Delete To Do Items for Deleted Notifications

With the new Partner Config setting Delete Associated To Do Items, you can set up your system to automatically delete to do items that are associated with a deleted notification. The deletion of the to do list item only occurs if the notification is automatically deleted due to one of the "delete" notification settings in Partner Config such as When Client Is Unassigned From Employee.

*Settings* — Partner Config: *Delete Associated To Do Items* and at least one of the automatic notification delete settings

*Steps to Configure/ Steps to Use* — N/A

## Schedule Group Admin Enhancements

- View only active schedule groups by default – When you first access the Schedule Group List screen, only active schedule groups will be listed. To view active and inactive, click the new Show All button.

- Include up to 100 clients in a schedule group – The maximum number of clients allowed in a schedule group has been increased from 75 to 100.

*Settings* Security Matrix: AssignPlannerGroups

*Steps to Configure* N/A

*Steps to Use* See Schedule Groups in the help.

## Control Number of Profile Fields on Client/Employee Home Pages

With a new Partner Config setting, you can control the number of Profile fields that appear on the Client and Employee home pages. The minimum number of fields is 12 (the default) and the maximum is 36.

| Client Info | | | |
|---|---|---|---|
| **Last Name** | Doe | **First Name** | John |
| **Middle Initial** | A | **Status** | ACTIVE |
| **Client ID** | 1249 | **Gender** | M |
| **SSN** | 111111111 | **DOB** | 5/28/1953 |
| **Marital Status** | Divorced | **Is family unit?** | NO |

*Settings* Partner Config: *Profile Fields On Homepages*

*Steps to Configure* N/A

*Steps to Use* Select the desired number of fields from the dropdown in Partner Config.

## Only Display Critical/Expiring Auths if Employee Is Primary

If you display critical and expiring authorizations (auths) on the Home Page, you can set up your system to only display them for clients that the employee is assigned to as Primary.

When Auths by Primary is *not* selected, critical and expiring auths will appear on the Home Page whenever the employee and client are assigned to each other— no Primary designation is required.

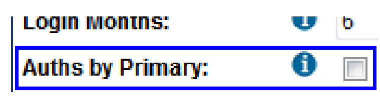
*Settings*

N/A

*Steps to Configure*

1. Make sure Critical Auths and Expiring Auths are selected in the Home Page Admin screen (Admin > Home Page Config).

2. Access the Home/Client Page Config screen (Admin tab > Home Page Config), select Auths by Primary, and click Save Config.




*Steps to Use*

N/A

## Show Assigned Only Added to Manage Approval Roles Screen

To make it easier to identify the employees assigned to an approval role, a show assigned only button has been added to the assignment screen. Like other assignment screens in Credible, the button toggles to show all so you can return to the full employee list.

*Settings*

N/A

*Steps to Configure*

N/A

*Steps to Use*

Admin tab > Manage Approval Roles > Edit link in Employees column

# Billing

## Next Insurance Payer Identified When Transferring Balance

With the best practice of setting up a self-pay payer for each client, it was difficult to know based on the “Next Ins” transfer balance option whether or not the client had a secondary insurance. Because a payer may have different requirements for secondary claims (for example, Medicaid does not allow electronic secondary claims), you need to know if the balance is transferring to a secondary insurance or the client via the self-pay payer.

To identify where the claim will go when the Next Ins option is selected, the electronic claim code for the payer is now shown in parentheses. In the first example below, if the balance is transferred to Next Ins, it will go to Medicaid. In the second example, the balance due will go to the client.


The enhanced Next Ins option will also be in the Transfer Balance dropdown in the Claim History, List Batch Claims, and 835 Reconcile Batched Claims screens.

*Settings*

Security Matrix: BillingConfig

*Steps to Configure*

Make sure each payer has an electronic claim code that identifies who the payer is (Billing tab > Billing Payer).

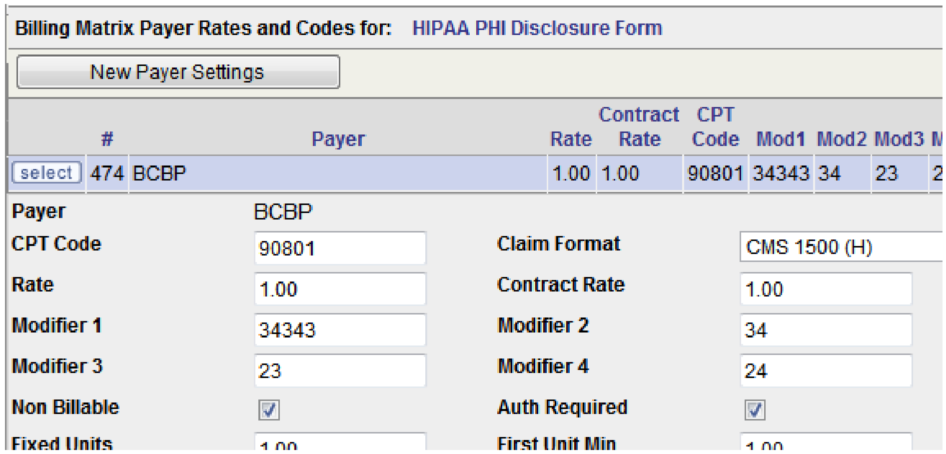
*Steps to Use*

Select the Next Ins transfer option if appropriate.

## New Layout for Payer-Specific Rates and Code Screen

To make the Payer-Specific Rates and Code screen easier to read:

- A subset of the fields are presented in the list
- The fields are presented in two columns when in edit mode




| | |
|---|---|
| *Settings* | Security Matrix: Billing Module |
| *Steps to Configure* | N/A |
| *Steps to Use* | 1. Billing tab > Billing Matrix.<br>2. Edit an existing entry or create a new one.<br>3. Click Payer Specific Rates & Codes button. |

## Bill 1 Unit for Billing Matrix Payer Specific Rates & Codes Screen

When the new field Bill 1 Unit is checked, the system will send a 1 for total units. Note that the Visit Details screen will display the actual unit count. Only use this setting when the payer specifies it is necessary.

Note: the Billing Matrix setting will trump the Payer setting.

| | |
|---|---|
| *Settings* | Security Matrix: BillingConfig |
| *Steps to Configure* | 1. Billing tab > Billing Matrix<br>2. Edit an existing payer record (or create a new one) and click Payer Specific Rates & Codes.<br>3. Click select for an existing payer (or create a new one), select the Bill 1 Unit checkbox, and click Update. |
| *Steps to Use* | N/A |

## Deposit Date Enhancements

- Deposit date added to Client Payments screen – Your billing staff no longer has to access the Client Payment Update screen to view the deposit date for a payment. You can also sort the Client Payments list by deposit date.
- Deposit date added to Sort By dropdown in Advanced Ledger Search

*Settings*

Security Matrix: ClientPaymentView, BillingModule (for Manage Client Payments), AdvSearch

*Steps to Configure*

N/A

*Steps to Use*

To access Client Payments screen: Client tab > Client's name or view button > Payments on nav bar or Billing tab > Manage Client Payments

To sort advanced ledger search results by deposit date:

1. Billing tab > Service Ledger Advanced Search> Select appropriate criteria.
2. Select Deposit Date from Sort By dropdown, select Deposit Date as a custom field (optional but recommended), and click Filter.

## Hyperlinked Service IDs in Payment Logs

When you are viewing the log for a client or insurance payment, you can now click the service ID to display the corresponding visit details. Note that the visit details will replace the payment log in the popup.

*Settings*

Security Matrix: ClientPaymentView, BillingModule (for Manage Client/Insurance Payments)

*Steps to Configure*

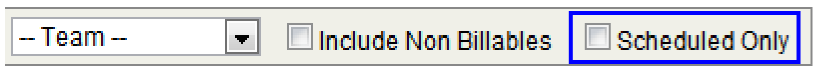
N/A

*Steps to Use*

1. Client tab > Client's name or view button > Payments on nav bar *or* Billing tab > Manage Client Payments or Manage Insurance Payments
2. Log button > Service ID in popup.

## Include Non "Scheduled" Planned Visits in a 270 Batch

By default, when you generate a 270 batch, the system only pulls a planned visit if its status is scheduled. You now have the option of pulling any planned visit regardless of its status – making it possible to include completed visits. To accomplish this, you need to *uncheck* the new Scheduled Only checkbox before generating the batch (it is checked by default). Consult your payer's companion guide as not all payers will accept 270 requests for past dates.




*Settings*

Security Matrix: BillingModule

Employee Profile: default Billing Group value must be set

*Steps to Configure*

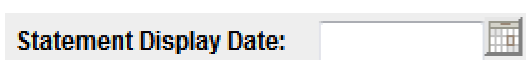
As a reminder, an addendum to your contract is required for 270/271 functionality. For more information, send an email to contracts@credibleinc.com.

*Steps to Use*

1. Billing tab >Generate Eligibility(270) Batch
2. Uncheck the Scheduled Only checkbox.
3. Set the other filtering fields as appropriate and click Filter.
4. Select the desired clients and then build the 270 file.

## Specify Statement Display Date When Generating Statements

By default, the system uses the current date as the statement display date when you generate client statements. You can now specify the date that will be displayed with the new Statement Display Date field.




*Settings*

Security Matrix: BillingModule

*Steps to Configure*

N/A

*Steps to Use*

1. Billing tab > Generate Client Statements.
2. Fill out screen including the date you want to display on the statements.
3. Preview the statement and then print.

## Block Saving Visits that Occurred Before Specific Month/Day

With a new Partner Config setting, you can now prevent employees from saving a visit if the visit date precedes the specified month/day. Typically, the month/day marks the beginning of a fiscal year and prevents visits from being saved in the prior fiscal period.

For example, assume the cutoff date is 4/19.

- Current date is 8/19/11 – you cannot save visits with a visit date before 4/19/11
- Current date is 2/12/12 -- you still cannot save a visit with a visit date before 4/19/11
- Current date is 4/19/12 – now you cannot save a visit with a visit date before 4/19/12

When an employee tries to sign & submit the visit, the following message displays: "This visit cannot be saved because the visit date is before the m/d cut off for the year."

*Settings*

Partner Config: *Block Past Visits Before This Date (M/d)*

*Steps to Configure/ Steps to Use*

N/A

## Nine-Digit Zip Code Sent Without Dash in Batch Claim File

If a zip code is exactly nine digits after removing any space or dash characters, then the nine-digit zip code will be reported for billing. If it is not nine digits, then just the first five digits will be reported.

| | |
|---|---|
| *Settings* | Security Matrix: Billing Module |
| *Steps to Configure* | N/A |
| *Steps to Use* | See Generating a Batch Claim File in the help. |

## Filter the Edit Batched Claims List by Payer Group

Payer groups are now included in the Payer dropdown on the Edit Batched Claims screen. If you select a payer group, the list will contain all batches for all payers associated with the payer group.

| | |
|---|---|
| *Settings* | Security Matrix: Billing Module |
| *Steps to Configure* | N/A |
| *Steps to Use* | See Making Updates to Batch Claims in the help. |

## Authorization Enhancements

- When you recalculate a client's authorizations, PAID, BATCHED, and PENDING services will no longer be affected.
- You can now manually release an auth from a visit. In Visit Details, when you click on the Auth number, you are linked to a list of auths that match the service, a visit ID filter, and a Release button to detach the auth from the visit.

  Note that you can only release a visit from one auth at a time. So if three auths match the visit, you cannot release it from the first two and get it to attach to the third.

| | |
|---|---|
| *Settings* | Security Matrix: AuthorizationView, AuthorizationAdd |
| *Steps to Configure* | N/A |

*Steps to Use*

1. Visit tab > Visit ID or view button for completed visit
2. Click the Authorization ID to access the Client Authorization screen. The Service ID filter, next to the level dropdown, contains the Service ID
3. Click release for the auth attached to the service. The release button becomes an unrelease button, the service is attached to the next auth, and the next auth has a release button.

## Enhancements to Bed Board & Foster Care Intervals

Bed Board intervals have been updated for more flexible billing and to allow for multiple entries per day for a bed (for example, one client gets checked out at noon and another gets checked in at 2 pm to the same bed). Previously, if a client was in a bed on a given day for any length of time, no one else could be in it for the rest of the day.

- Times are now captured along with dates on the Bed Board and Foster Home screens
- Behind-the-scenes enhancement – the way in which Bed Board and Foster Home intervals are stored was revised. Two new tables, ClientBedBoardInterval and FosterHomeInterval, now store the respective daily interval records to allow for more flexible billing.
- Bedboard and bedboard interval actions are now logged.

*Settings*

Partner Config: Use Bed Board, Use Foster Care, Use Client Episodes

Security Matrix: BedBoardBilling, FosterCareBilling, ReportList, ClientViewLog

Report Security: Global HIPAA Log

*Steps to Configure*

N/A

*Steps to Use*

1. Reports tab > Admin on nav bar > Global HIPAA Log or Log button on Client or Employee nav bar.
2. For Global HIPAA Log, select Client or Employee as entity.
3. Select one of the new actions and click Run Report/Filter.

# Financial

## Support for "As Of" Reporting Capabilities

Based on Partner requests for "As Of" reporting capabilities, the database structure has been rebuilt to capture the necessary data. Canned "As Of" reports will be available in the Winter 2012 release.

To implement the improved back-end structure, a script will be run on your system by November 30th. Your productivity will not be impacted and your Account Manager will let you know when the update is complete. Note: this has no impact on Partners currently in implementation.

After the script has been run, you may start seeing the new ledger action SERVICE RATE ADJUSTMENT (see below for the applicable scenarios). If you use the Revenue Recognition exporting functionality, the next export you generate will contain a corrective ledger line if you have transactions that fall into the scenarios described below. The Accounting Date for the ledger line will be the date the script was run. If you have any questions, contact your Account Manager.

The following scenarios have been improved through the back-end structure update:

- Overpayment or adjustment that goes over original balance – SERVICE RATE ADJUSTMENT will be followed by new revenue lines
- Contra adjustment – there will be a reversing SERVICE RATE ADJUSTMENT to take away the negative adjustment, followed by the actual service rate adjustment, and then the write-off
- Revenue split between client and insurance due to copay – after the write-off, there will a SERVICE ADJUSTMENT to both the client and insurance

*Settings* N/A

*Steps to Configure* N/A

*Steps to Use* To view the ledger actions: Visit tab > visit ID or view button > Billing button.

## Advanced Ledger Search Enhancements

- Payment ID as sort option for Advanced Ledger Search – You can now select Payment ID as the Sort By field.
- Geo areas as criteria for Advanced Ledger Search – You can now select a geo area from the Location dropdown. If you want to select multiple geo areas or a combination of geo areas and locations, click Multi Select first.
- No Payer added to Payer dropdown – You can now search for records that do not have a payer associated with them.
- Revenue Code and Receivables Code filters have been replaced with an Account Code filter and Account Code is now a Sort By option.
- Ledger line limit has been increased to 10 million rows for Group Totals and Exports.

*Settings* Security Matrix: BillingReports, AdvSearch

*Steps to Configure* N/A

*Steps to Use* See Advanced Ledger Search in the help.

## Ext Code Length Increased for Payment Category & Location Lookups

Support for long cash account codes has been provided by increasing the External Code field for the payment category and payment location lookups to 28 characters.

*Settings* Security Matrix: BillingConfig

*Steps to Configure*

1. Billing tab > Billing Custom Lookups
2. Select payment_category or payment_location from dropdown and click Display.
3. Edit an existing record (or add a new one) and update the Ext Code field.

*Steps to Use* N/A

## Revenue Code Matrix Matching Based on Parent Program

If a service is submitted for a program that does not have a specific Revenue Code Matrix (RCM) line, the system will check to see if the program has a parent program. If it does and the parent program has a RCM line associated with it, then the service will match on the parent program RCM line.

| | |
|---|---|
| *Settings* | Security Matrix: BillingConfig |
| *Steps to Configure* | To set up parent programs and assign a parent program to another program: Admin tab > Programs. See [Revenue Code Matrix] in the help. |
| *Steps to Use* | N/A |

## Accounting Date for Service Adjustments for Contract Rate/Non Billable Types

Service adjustments that occur for Contract Rate or Non Billable types will now use the date of service for the Accounting Date. If the service has been batched or the Accounting Period is closed, it will use the posting date.

| | |
|---|---|
| *Settings* | Partner Config: Auto Contract Rate Adjustments, Auto Non-Billable Adjustments, Use Accounting Periods<br><br>Do not select Block Updates for BATCHED or PAID Visits |
| *Steps to Configure/ Steps to Use* | N/A |

## Auto Contract Rate Adjustments & Switching the Primary Payer

If your system is set up to automatically apply service adjustments at the time of service and a user switches the primary payer, the contract rate adjustment will now reverse and reapply based on the new payer.

| | |
|---|---|
| *Settings* | Partner Config: Auto Contract Rate Adjustments |
| *Steps to Configure/ Steps to Use* | N/A |

## Enhancements to Mass Write-Off Functionality

- Restrict adjustment types available for Mass Write-Off – To help you restrict the type of adjustment types that are available for a mass write-off in Advanced Visit Search, an “Is Mass Write Off” setting has been added to the Adjustment Types screen. By default, all adjustment types have been set to False for Is Mass Write Off.
- Reason field added for Mass Write-Off – To help you document the reason for a mass write-off, an Adjustment Reason field has been added (255 characters max). Note that the reason you enter will be associated with each visit selected for the mass write-off.


Like the adjustment type and accounting date, the adjustment reason will be a detail of the SERVICE ADJUSTMENT ledger action in the Billing Details screen.

*Settings*

Security Matrix: BillingConfig, AdvSearch, BillingAddAdjustmentMultiple

*Steps to Configure*

To make an adjustment type available for a mass write-off:

1. Billing tab > Adjustment Types.
2. For the desired adjustment type, click edit, select True from the Is Mass Write Off dropdown, and click save.

*Steps to Use*

See Advanced Visit Search in the help.

# Reports

## New Employee Report: To Do List Report

With the new To Do List Report, you can review the to do list items for all active employees on a specific team or one or more employees you select. Additional filters include status (assigned by the user), concurrency (status assigned by the system), category color, and start date.

For each to do list item, the report provides the summary, begin/completion dates, who the item is for (if applicable; type and ID are listed), and the status. A count of to do list items is provided for each employee.

Each employee's name is a link that takes you back to his or her Employee Overview screen.

*Settings*

Security Matrix: Report List

Report Security: To Do List Report

*Steps to Configure*

N/A

*Steps to Use*

1. Reports tab >Employee on nav bar> To Do List Report.
2. Select the desired filters and click Run Report.

## New Visit Report: Wait List Report

With the new Wait List report, you can view a list of clients who are waitlisted on specific employees' schedules versus having to navigate to each employee's schedule to determine which clients are waitlisted. You can run the report for a specific time period for multiple teams, programs, and/or employees. If necessary, you can change the filters from within the report and then rerun it.

Client and employee names are links that take you to the respective Overview screens. The Current Plan Time link takes you the corresponding day view of the client's schedule.

*Settings*

Security Matrix: Report List

Report Security: Wait List Report

*Steps to Configure* N/A

*Steps to Use*

1. Reports tab > Visit on nav bar > Wait List Report.
2. Select the desired filters and click Run Report.

## Client Duplicate Report: First Name Added to Criteria

To avoid having twins, triplets, and other multiples included in the Client Duplicate Report, the First Name is now part of the matching criteria check. The system will only pull clients into the Client Duplicate Report if they share one of the following combinations of fields:

- First Name, Last Name, and DOB
- First Name, Last Name, and SSN
- DOB and SSN (values must not be null)

*Settings*

Security Matrix: ReportList

Report Security: Client Duplicate Check

*Steps to Configure* N/A

*Steps to Use* Reports tab > Client on nav bar >Client Duplicate Check >Run Report

## Program Pre-Closing Report: Primary Program Employees Added

If a program in the Program Pre-Closing Report is the primary program for an employee, his or her name will be listed in the program row. Note that an employee can only have one primary program.

*Settings*

Security Matrix: Report List

Report Security: Program Pre-Closing Report

*Steps to Configure*

1. Employee tab > Employee name or view button > Program on nav bar.
2. For the appropriate program, click the no button in Primary column. The button changes to Yes indicating it is the employee’s primary program.

See Employee-Client Assignment in the help for information on adding a specific program to an employee-client assignment.

*Steps to Use*

1. Reports tab >Client on nav bar >Program Pre-Closing Report.
2. If appropriate, select a specific program and then click Run Report.

## Monthly Units Totals: Specify Week Start Day

With a new Week Start filter, you can run the Monthly Units Totals report according to how your payroll cycles and productivity calculations are set up. By default, the week starts on Sunday. The report header indicates the day the week starts on.

*Settings*

Security Matrix: Report List

Report Security: Monthly Units Totals

*Steps to Configure*

N/A

*Steps to Use*

1. Reports tab > Employee on nav bar > Monthly Units Totals.
2. From the Week Start dropdown, select the day you want the week to start on for reporting purposes.
3. Select other filters as appropriate and click Run Report.

## Transcription Productivity: Expand Detail & Exclude Whitespace

If you prefer to have the Transcription Productivity report default to an expanded view, select Yes from the new Expand Detail dropdown on the filters screen. If your transcription service does not count white spaces, you can now choose to exclude them by selecting Yes from the new Exclude Whitespace dropdown.

*Settings*

Security Matrix: Report List

Report Security: Transcription Productivity

*Steps to Configure*

N/A

*Steps to Use*

1. Reports tab > Employee on nav bar >Transcription Productivity.
2. If desired, select Yes from the Expand Detail and/or Exclude Whitespace dropdowns.
3. Select other filters as appropriate and click Run Report.

## Authorizations Report: Select Multiple Visit Types

When you run the Authorizations Report, you can now select multiple visit types.

*Settings*

Security Matrix: Report List

Report Security: Authorizations

*Steps to Configure*

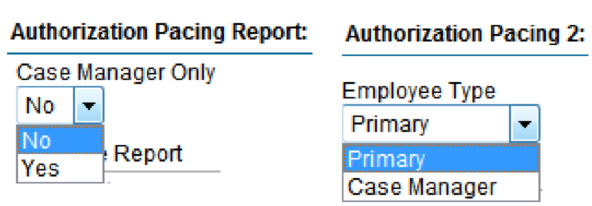
N/A

*Steps to Use*

1. Reports tab >Billing on nav bar >Authorizations.
2. From the Visit Type dropdown, press Ctrl and click to select multiple options. To select a range, click the first option in the range and then press Shift and click the last option in the range.
3. Select other filters as appropriate and click Run Report.

## Authorization Pacing Reports: Filter by Case Manager

With a new Case Manager filter, you can restrict the two Authorization Pacing reports to only report on clients that have a Case Manager assigned. Note that the Case Manager has to be an active employee for a client to be included in the report.




*Settings*

Security Matrix: Report List

Report Security: Authorization Pacing 2, Authorization Pacing Report

*Steps to Configure*

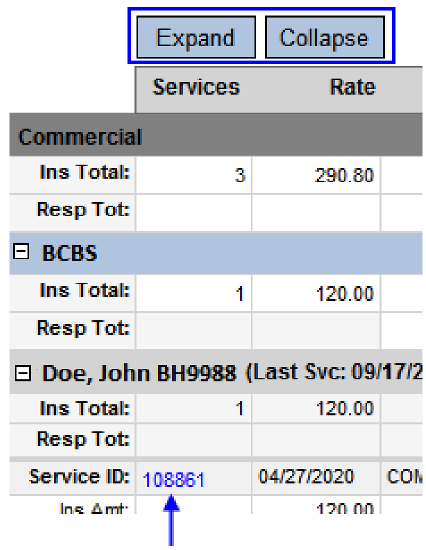
N/A

*Steps to Use*

1. Reports tab >Billing on nav bar >Authorization Pacing Report or Authorization Pacing 2.
2. From the Case Manager/Employee Type dropdown, select Yes/Case Manager.
3. Select other filters as appropriate and click Run Report.

## Client Aging by Payer Extended Report: Multiple Enhancements

When you first run the Client Aging by Payer Extended report, the data is displayed at the payer type and payer level. With the new Expand and Collapse buttons, you can easily view and hide the client data for all payers. Each service (visit) ID is now a link that takes to you the Visit Details screen for the visit.




*Settings*

Security Matrix: Report List

Report Security: Client Aging by Payer Extended

*Steps to Configure*

N/A

*Steps to Use*

1. Reports tab > Billing on nav bar >Client Aging by Payer Extended.
2. Enter the desired filters and click Run Report.
3. Click Expand/Collapse buttons as needed.
4. When the client data is expanded, click the service ID to view the visit details.

## Monthly Visit Totals by Client: Filter by Primary Payer of Visit

With a new Primary Payer filter, you can restrict the Monthly Visit Totals by Client report to clients that have a specific payer for a visit.

*Settings*

Security Matrix: Report List

Report Security: Monthly Visit Totals by Client

*Steps to Configure*

N/A

*Steps to Use*

1. Reports tab >Billing on nav bar > Monthly Visit Totals by Client.
2. From the Primary Payer dropdown, select the payer you want to report on.
3. Select other filters as appropriate and click Run Report.

## Uncovered Visits Report: Run for Specific Time Period

With the new Start Date and End Date filter fields, you can now report on uncovered visits for a specific time period. An uncovered visit is a visit where there is no payer involved at all.

*Settings*

Security Matrix: Report List

Report Security: Uncovered Visits

*Steps to Configure*

N/A

*Steps to Use*

1. Reports tab > Billing on nav bar > Uncovered Visits.
2. Enter the start date and end date for the period you want to report on and click Run Report.

## Custom Query/Ad Hoc Export: New Special Custom Parameters

When you create or edit a custom query or custom ad hoc export, you will have more options for the special custom parameters – the parameters where the system automatically populates the dropdown when the export is run. The new options are Employee, Recipient Type (Rec Type), Location, and Billing Group. Prior to this release, the special custom parameters were Program, Team, Payer, and Visit Type.

*Settings* — Security Matrix: ReportList, ExportBuild

*Steps to Configure* — N/A

*Steps to Use*

1. Reports tab > Export tool on nav bar.
2. Create new custom query or custom ad hoc export (select the corresponding option from Special section in the Form/Table Name dropdown) or edit an existing one.
3. In the Custom Param field, enter Employee (or the corresponding label in Partner Config), Rec Type, Location, or Billing Group.
4. Build/finish export.

## Export Tool: Excel XLSX As New Output Format

To support newer versions of Excel, you can now select XLSX as the output format when running an export.

*Settings* — Security Matrix: ReportList, ExportRun

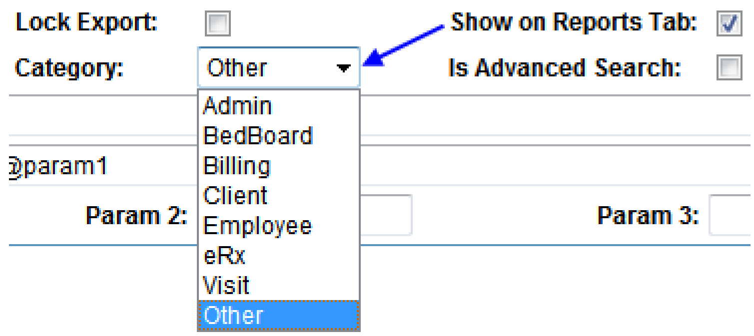
*Steps to Configure* — N/A

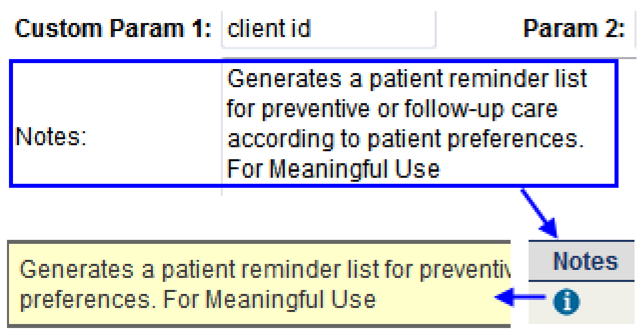
*Steps to Use*

1. Reports tab > Export tool on nav bar.
2. Click run button for an export.
3. Select Excel (XLSX) from the Format dropdown.
4. Select other parameters as applicable and click Run Export.

## Export Tool: Assign Report Category for Exports & Add Notes

If you make an export available on the Reports tab, you can now select the category it goes in. In addition, you can now add notes to an export explain what it does and who it is for. Note that the Category dropdown is only available when you select Show on Reports Tab.




*Settings* — Security Matrix: ReportList, ExportBuild, ExportRun

*Steps to Configure* — Report Security > select the export for the appropriate profiles.

*Steps to Use*

1. Reports tab > Export tool on nav bar.
2. Create a new export or edit an existing one.
3. To specify a reports category, select Show on Reports Tab and then select desired category form dropdown.
4. To document purpose and intended audience, enter the appropriate information in the Notes field.
5. Complete the building or editing of the export.

To view the notes, mouse over the info icon in the Export List or Select a Report screen.

# Forms

## Delay Form Data Mapping Until Service Is Approved

With a new Partner Config setting, you can set up your system so it does not map the data in a form to a client or employee record until the service is approved.

- If a service is set up for multistage approval, the mapping happens when the approval process is complete.
- If a service is automatically approved (due to Billing Matrix setup), the mapping happens when the service is submitted.
- If a service is unapproved, the mapping will *not* be undone

*Settings*

Partner Config: *Map on Approval*

*Steps to Configure*

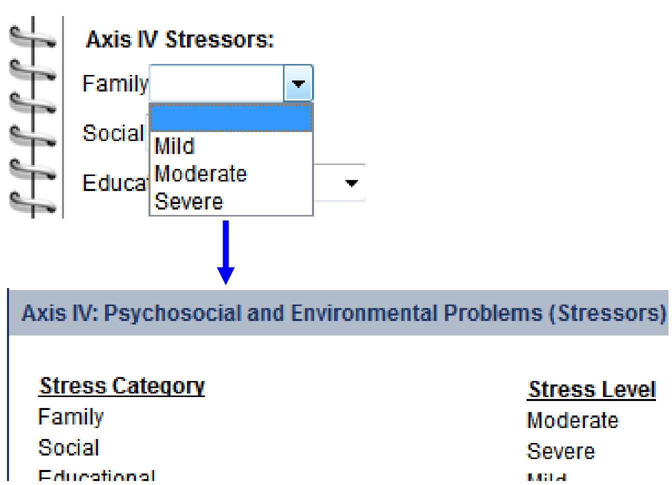
See Mapping a Response in a Field to a Client or Employee Record in the help.

*Steps to Use*

N/A

## Map Axis IV Stressor Answers Back to Client Record

You can now set up a form to map Axis IV stressor answers back to a client's active assessment. The system automatically sets up the question as a dropdown (regardless of the answer format you select) and supplies the standard answers of Mild, Moderate, and Severe.



| | |
|---|---|
| *Settings* | Security Matrix: FormBuilder, FormBuilderEdit |
| *Steps to Configure* | You need to have the Form Builder module. |
| *Steps to Use* | See Mapping a Response in a Field to a Client or Employee Record in the help. |

## Validate Calendar Control Form Answer with GETDATE()

You can now use GETDATE() in the Start Range and End Range fields for a Calendar Control question to create a “moving” date range target when the form is filled out. The date range target moves because it is based on the current date.

For example, if you enter GETDATE(-7) as the Start Range and GETDATE(+7) as the End Range, an employee must enter a date that is 7 days prior to the current date and 7 days from the current date.

*Settings* Security Matrix: FormBuilder, FormBuilderEdit

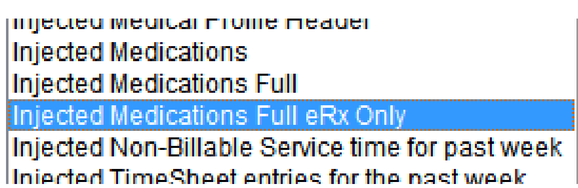
*Steps to Configure* You need to have the Form Builder module.

*Steps to Use*

1. Forms tab.
2. Edit an existing form (or create a new one).
3. Edit an existing calendar format question (or add a new one).
4. In the Question Details section, enter GETDATE(-/+ n) in the Start Range and End Range fields and click Save Question.
5. Build and activate the form.

## Injection Type for Credible eRx Prescriptions Only

With a new injection type, you can restrict the medications that are injected for a client to the active prescriptions created through Credible eRx. Full details about each medication will be injected.



*Settings* Security Matrix: FormBuilder, FormBuilderEdit

*Steps to Configure* You need to have the Form Builder module.

*Steps to Use*

1. Forms tab > new version for an existing form or add a new form.
2. Click the edit button for the form.
3. Add a child category if creating a new form.
4. In the Category screen, click Add New Question.
5. In the Question screen:
   a. Use the text box to describe the information that will be injected (for example, “Active Credible eRx Prescriptions”).
   b. From the Answer Format dropdown, select Injected Medications Full eRx Only and click Save Question.

Click the magnifying glass to preview your form. Note that the data is only injected when the form is used during a visit.

## Empty Injection “Records” Hidden in Completed Visit

If a form is set up to inject a data record such as Full Injected Diagnosis and no data is injected into any of the fields, the empty injection (field labels without data) will not be included in the saved form. However, if data is injected into at least one field in the record, the entire injected data record will be in the saved form.

If you prefer to see an empty injected record in a saved form, select the Show All Questions setting for the visit type associated with the form (Admin tab > Visit Type).

*Settings* Security Matrix: FormBuilder, FormBuilderEdit

*Steps to Configure* You need to have the Form Builder module.

*Steps to Use* N/A

# Patch List

## Saved Employee Sig No Longer Displays if Visit Sigs Set to 0

| | |
|---|---|
| *What was fixed?* | Visit Sigs field in Visit Type Config |
| *What was the issue?* | If the Visit Sigs field for a visit type was set to 0 and the employee submitting the visit had a saved signature, the saved signature would show up in the Visit Details screen and Print View. |
| *The patch* | If the employee submitting a visit has a saved signature, it will not be used in the Visit Details screen or Print View if Visit Sigs = 0. |

## Previous GAF Score Updated when New GAF Is Mapped

| | |
|---|---|
| *What was fixed?* | Updating of Previous GAF score when new GAF is mapped |
| *What was the issue?* | If a current GAF score existed in a client's active assessment and a new GAF was mapped to his or her record, the previous GAF was not being updated with the original GAF (field map = Diagnosis: Axis V). See example below. |
| *The patch* | The Previous GAF will now be updated with the original GAF when a new GAF is mapped.<br><br>Note: If the Partner Config setting Hide Previous GAF in Diagnosis is selected, the Previous field will not display in the active assessment. |

## Employee Now Logged for Revenue Code Matrix Changes

| | |
|---|---|
| *What was fixed?* | Logging the employee responsible for a Revenue Code Matrix change |
| *What was the issue?* | When the system logged a change to the Revenue Code Matrix, it did not capture who made the change – the Employee Name field in the Admin Logging report was blank. |
| *The patch* | The system now logs and identifies the employee who made the change. |

## Inactive Providers Removed from Provider Dropdown

| | |
|---|---|
| *What was fixed?* | Provider dropdown when adding a medication or creating a prescription |
| *What was the issue?* | After the employee status of a provider was changed to Inactive, it was still possible to select him or her from the Provider dropdown. In Credible, a provider is any employee with Is Doctor set to True in his or her Employee Profile. |
| *The patch* | The Provider dropdown will no longer list inactive prescribers unless the prescriber of the medication being edited is inactive. |

## User Interface Updates to eLabs Screen

| | |
|---|---|
| *What was fixed?* | Screens for eLabs |
| *What was the issue?* | If facility name was excessively long, it ran into other fields |
| *The patch* | • Word wrapping added to Facility field<br>• “Header” added to screen and button names where appropriate (for example, Lab Results Header)<br>• Screen title added to initial eLabs screen and client name now links to Client Overview screen |

## Updates to New Calendars

| | |
|---|---|
| *What was fixed?* | New calendars introduced earlier this year |
| *What was the issue?* | Year range ended at 2014 |
| *The patch* | Year range has been extended to 2014. In addition, end/beginning dates from previous/next month have been enabled in current month and there is increased flexibility in date formats accepted. |

## Insurance Notes Tooltip Stays On Screen Longer

| | |
|---|---|
| *What was fixed?* | Insurance notes tooltip |
| *What was the issue?* | It did not stay on the screen long enough to read it |
| *The patch* | The tooltip will now stay on the screen as long as your cursor is positioned over the info icon. |

## Form Groups in Alphabetical Order in Visit Type Dropdown

| | |
|---|---|
| *What was fixed?* | Ordering of options in Program/Visit Type dropdown when scheduling an appointment |
| *What was the issue?* | Form groups were grouped together and alphabetized under "F" for "Form" |
| *The patch* | Form groups are now listed in alphabetical order in the Program/Visit Type dropdown |

## Alpha Order for Switch Dropdown for Schedule Group

| | |
|---|---|
| *What was fixed?* | Switch dropdown when documenting a visit for a schedule group or a schedule group with add-on clients |
| *What was the issue?* | In large groups, client names were hard to find in Switch dropdown since there were not alphabetized |
| *The patch* | Client names are now alphabetized in the Switch dropdown in the form |

## Alphabetical Ordering for Home Page Links and Messages

| | |
|---|---|
| *What was fixed?* | Ordering of Home Page links and messages in the corresponding admin screens |
| *What was the issue?* | Entries were hard to find since there were not in alphabetical order |
| *The patch* | Links and messages are now listed in alphabetical order. In the Home Page Links List screen, the ordering is based on the Label Field. In the Home Page Message List screen, the Message Description field is used. |

## Validation of Time Fields in Forms

| | |
|---|---|
| *What was fixed?* | Time fields in web forms |
| *What was the issue?* | Entries made in time fields in a web form were not being validated – incorrect formats were being allowed |
| *The patch* | The system will now make sure that the value entered in a time field in a web form is a valid time. It will still accept various formats such as 9, 9a, and military time (for example, if you enter 13, the system records 1:00 pm). If you do not specify am or pm, the system assumes am. If you do not enter a valid time, the system warns you that it cannot save the data entered into the form. |

## Ellipsis Button Fixed to Retain Schedule Group Selections

| | |
|---|---|
| *What was fixed?* | Ellipsis button functionality in Scheduled Visit popup |
| *What was the issue?* | When you used the ellipsis button to add an additional client to a scheduled visit for a schedule group, the system would add the client but deselect the clients in the schedule group. |
| *The patch* | Client selected via ellipsis button is now added to the already selected list instead of being the only client selected. |

## Primary Clients & Count in AES for Active Clients Only

| | |
|---|---|
| *What was fixed?* | Primary Clients and Primary Client Count custom fields in Advanced Employee Search |
| *What was the issue?* | Inactive and active clients were returned in search and were reflected in Primary Client Count |
| *The patch* | Only active clients will be returned and counted. |

## Date Changes Included for Block Overlapping Schedules

| | |
|---|---|
| *What was fixed?* | Block overlapping schedules |
| *What was the issue?* | If your system is set up to block overlapping visits, the software would not block an overlap if it resulted from changing the date on an existing appointment. |
| *The patch* | An overlapping check occurs when the date for a scheduled appointment is changed. |