Release 4.3 Configuration

This document lists the changes made to our application in release 4.3. Some of the items described within this document may have settings listed. These are here to point out general settings that could possibly affect access, update and display content. When you see a setting that is in Bold that means it is a new setting specifically needed for the item being described.

Billing Adjustments

This new feature allows Billing Adjustments to now be multi-stage similar to the visit approval process. This will enable billing adjustments to go through an approval process instead of being applied immediately.

Security Rights: AdminView, ManageApprovalRoles, BillingConfig, BillingAddAdjustment, BillingAddCopay, Billing Module, BillingRefundClientPayment, BillingUndo, ClientPayments, FinancialsView, ClientVisitListAll, ClientVisitUpdate, ClientVisitView or ClientVisitViewAll, ClientViewAll, ClientVisitViewLog.

Steps to configure:

1. Setting up Multistage Billing Adjustments is the same as for Visit types.
2. Go to ADMIN Tab-> Daily Activities -> Manage Approval Roles. At the bottom is now a section called: Adjustment Type List.
3. Select the Adjustment Type and Press Add Adjustment Type.
4. Click Edit to open a screen where you can define which approval roles are part of the process and in which order they approve the billing adjustment.
5. Select the appropriate approval roles and chose an order from the dropdown for each role. When finished click Save.

Steps to use:

1. Go to a Visit's Claim Billing Details screen and Add an Adjustment to the Service
2. The adjustment will be listed in the ledger as a Pending Adjustment. The amount of the adjustment is listed, but does not affect the current balance of the visit.
3. Approving the adjustment can occur in two ways:
    a. Go to the Billing Tab, click Service Ledger Advanced Search. Check the box on the right hand side labeled Adj Apprs and click Filter. This will bring up all the Pending

Adjustments. Check the box for each adjustment you wish to approve and click the Approve button located at the bottom left.

b. On a visit with a pending adjustment, go to the Visit's Claim Billing Details. There is a text box labeled "Approve Pending Adjustment for Billing." Enter a note if needed and click the Submit button.
   If there are more roles that need to approve the adjustment, the text box section will be replaced with "Approval waiting from role [name of the next role]." Otherwise, the adjustment will be applied to the visit (effective the date of the last approval).

EXPORT ENHANCEMENTS

Exporting security

The export builder has been given a new security option called Row Level Security. This restricts the export to only contain records the user has a right to see. This works with client, employee, and visit/form exports.

Security Rights: AdminView, ManageApprovalRoles, BillingConfig, BillingAddAdjustment, BillingAddCopay, BillingRefundClientPayment, BillingUndo, ClientPayments, FinancialsView, ClientVisitUpdate, ClientVisitView or ClientVisitViewAll, ClientView, ExportBuild, ExportRun, ReportList.

Steps:

1. Reports Tab > Export Tool > Edit an Export > Select 'Row Level Security
2. Click Next Step and then click Finish to save the Export.
3. The results of the export will now be restricted.

Exports in Report Tab

There is another new setting on the export builder called "Show on Reports Tab". Selecting this will place the export on the users Report Tab as a report.

Security Rights: AdminView, ManageApprovalRoles, BillingConfig, BillingAddAdjustment, BillingAddCopay, BillingRefundClientPayment, BillingUndo, ClientPayments, FinancialsView, ClientVisitUpdate, ClientVisitView or ClientVisitViewAll, ClientView, ExportBuild, ExportRun, ReportList.

Steps:

1. Reports Tab > Export Tool > Edit an Export
2. Check the box for Show on Reports Tab.
3. Click Next Step and then click Finish to save the Export.
4. Go to Admin Tab > Report Security
5. Select the Security Profiles that should have access to the Export.
6. When those users go to the Reports Tab, the Export will be listed alphabetically with the rest of the Reports they have access to in the Report list.

AR/GL Revenue Enhancements

The service ledger now records client and insurance revenue as discrete lines. This allows for improved financial tracking as charges move from insurance to insurance and to the client.

Security Rights: AdminView, ManageApprovalRoles, BillingConfig, BillingAddAdjustment, BillingAddCopay, BillingRefundClientPayment, BillingUndo, ClientPayments, FinancialsView, ClientVisitUpdate, ClientVisitView or ClientVisitViewAll, ClientViewAll.

Steps:

1. Go to a visit's billing detail screen.
2. Click on the word “Balance” in the claim details section. This will expand the ledger details, showing the debits and credits to both Client Revenue and Insurance Revenue.

Advanced Ledger Search

A powerful new feature has been added to the Billing Tab – Advanced Ledger Search. This enables advanced searches of the service ledger. Previously this detail could only be seen on an individual visit. The functionality is the same as the other Advanced Searches (Client, Employee, and Visit). To access this feature, a user will need to have the BillingReports security right.

Security Rights: AdminView, BillingConfig, EditAdvancedSearches, BillingAddAdjustment, BillingAddCopay, BillingRefundClientPayment, BillingUndo, ClientPayments, FinancialsView, ClientVisitUpdate, ClientVisitView or ClientVisitViewAll, ClientViewAll, ExportBuild, ExportRun

Steps:

1. Open the Billing Tab
2. Go to Reports and Exports section
3. Click the link for Service Ledger Advanced Search

Recipient Type default setting

The ability to set a default Recipient Type been added to the Visit Type Admin screen and the Employee Config screen. If both are set the Visit Type Recipient Default trumps the Employee Recipient Default. Note: this has not been applied to Quick Visit.

Security Rights: AdminView, BillingConfig

Steps:

1. To set at the Visit Type level (where it will apply to all employees):
    a. Open ADMIN Tab
    b. Go to the Billing Configuration section
    c. Select Visit Type
    d. Add a New Visit type or Edit an existing one
    e. Select the desired Default Recipient type
    f. Press Update
2. To set at the Employee Level (where it will only apply to that employee):
    a. Go to the Employee Nav Bar
    b. Open Employee Config
    c. Select the desired Default Recipient type
    d. Press Save Employee Config

Control Insurance Payer

This new partner configuration restricts the use of an insurance payment to only those payers that are in the client's record.

Security Rights: AdminView, BillingAddAdjustment, BillingAddCopay, BillingConfig, BillingModule, PartnerConfig, ClientVisitList, ClientVisitListAll, ClientList, ClientListAll, ClientView, ClientViewAll, ClientVisitView, ClientVisitViewAll

Partner Config : **Block Apply Payments With No Insurance**

Steps:

1. Open the ADMIN Tab
2. Select Partner Config
3. Locate and check the box for " **Block Apply Payments With No Insurance**."

After activating this setting, there will be an error message displayed when trying to apply an insurance payment to a client's visit when that client does not have that insurance. "Error processing claim [number]: Invalid payment payer id. No client insurance record exists for this payer."

Multiple Disallowed Amounts in Ledger

When a claim comes back in an 835, or has disallowed amounts entered manually, each disallow will be reported individually in the ledger. Previously, these were combined into a single line. Patient Responsibility (PR) amounts do not receive a ledger line, but are reported in the third column of the billing details (below Status and Copay). This automatically occurs and is searchable using the new Service Ledger Advanced Search.

Security Rights: AdminView, BillingAddAdjustment, BillingAddCopay, BillingConfig, BillingModule, PartnerConfig, ClientVisitList, ClientVisitListAll, ClientList, ClientListAll, ClientView, ClientViewAll, ClientVisitView, ClientVisitViewAll

Bed Board Initial On Hold

A bed can now be initially placed On Hold for a client. While On Hold, that bed cannot be assigned to another client, however it also does not start a Bed Board Billing interval.

Security Rights: AdminView, ClientVisitList, ClientVisitView, ClientList, ClientView, ClientBedBoardAssign, ClientBedBoardIntervalEdit

Steps:

1. Go the client's Nav Bar and click Bed Assign
2. Click the Assign Bed button the right to open the list of available beds.
3. Assign the Bed.
4. Check the box labeled 'Bed Is Initially On Hold' and enter the Admission Date.
5. Click Save.
6. The bed will now be On Hold for this client. Note that the client is *not in the bed* at this time – it is just being reserved. To move the client into the bed, put a date in the Board Billing Intervals calendar box and click 'In.'

Billing Matrix Roll Codes

You can now set Payer Specific roll codes for a billing matrix line. This allows for visits to be billed singly for some payers while combining together for other payers.

Security Rights: AdminView, BillingConfig, BillingCPTCodes, BillingModule

Steps:

1. Go to the Billing Matrix and select the desired Billing Matrix line (or click Add New Entry to create a fully new matrix line)
2. Click Edit to open the Matrix Line's details and click the "Payer Specific Rates & Codes" button.
3. Edit or Add a New Payer Line; the Rollup Code text box is located at the far right.
4. Enter the desired code and click the Update button.
5. The roll code will affect all newly entered services. You will have to reprocess old visits to have them use the new roll code.

Medical Profile Update

The Medical Profile has been enhanced to allow for the recording of Blood Sugar Level and Pulse Oxygen Level. Also, the Profile Date is now editable.

Security Rights: AdminView, ClientList , ClientListAll , ClientUpdate , ClientView, ClientViewAll, MedicalProfileUpdate, MedicalProfileView

Steps:

1. Click Medical Profile on the client's Nav Bar
2. Click the "Start New Profile" button
3. Enter up to a three digit number for Blood Sugar Level
4. Enter a number from 0 to 100 in Pulse Oxygen Level (don't include a '%')
5. Click the "Save Medical Profile" button

Increased number of clients in a group

The number of clients that can be in a group visit or in a Schedule Group has been increased to 75.

Security Rights: AdminView, ClientList , ClientListAll , ClientUpdate , ClientView, ClientViewAll, PlannerAdd, PlannerUpdate, PlannerView, PlannerViewAll

Steps:

1. For pre-defined groups
   a. go to Admin > Daily Activities,
   b. click Schedule Groups.
   c. Once 75 clients have been assigned to the group, and you try to add another then a message will appear "ERROR: Unable to add client to group. There is a maximum of 75 clients per group."
2. For an ad-hoc group, click the Schedule.
   a. In the Add to Schedule pop-up check the "Group Activity" box to allow for multi-picking clients.
   b. Select up to 75 clients then click either Schedule or Begin Visit.

NEW REPORTS

Appointment History Report

This new report shows the appointment history of clients based on date ranges, Visit Status, Program, Client Team, Employee or any combination of these. You can also specify Appointment Only and or Group Only. It is similar to Appointment History report available for an individual client off of his/her schedule.

Security Rights: ReportList ALSO an ADMIN has to turn on this report in Report Security

An additional feature of this report is while reviewing the results, you can change the search criteria and re-run it without having to return to the report list.

Employee Productivity Report

There is a new version of the Employee Productivity Report and it is named Employee Productivity. The original version of the report is still available and it is now named Employee Productivity by Team. The new version, Employee Productivity, is grouped by Employee then Program. Expected Units are calculated from the Employee Profile. There is also the option to select Weekdays only.

Security Rights: AdminView, ReportList, EmployeeList, EmployeeListAll

Attendance Report

This is a new report that shows attendance in any Program or Programs per day. This report may also be filtered by Visit Type(s).

Security Rights: Go to Admin > Report Security and select which profiles should have access to these reports. The reports will then be available under the REPORTS Tab.

Visit type Is Overlap to Subtract Update

Is Overlap to Subtract has been updated to calculate when there is only a partial overlap with a Subtract Overlapping Duration visit. If you have the two visit types already set up then there are no changes needed.

Security Rights: SecurityUpdate; FormBuilder; FormBuilderCopy; FormBuilderEdit; BillingConfig; BillingCPTCodes; BillingModule; ClientVisitList or ClientVisitListTeam or ClientVisitListTeamOnly; ClientVisitView or ClientVisitViewAll or ClientVisitViewTeam or ClientVisitViewTeamOnly;

Steps:

1. Requires two billing matrix lines.
2. Go to the billing matrix and click edit on the each desired matrix line.
3. The first line has Subtract Overlapping Duration (or Subtract Overlapping Units) checked.
4. The second line (that will be deducted from the first line) has Is Overlap to Subtract checked.

Employee Message Log Dates and Time

The Employee message logging now records the time along with the date of each message sent. This is for Date Created as well as Date Read. The Message Log is available on the Employee Nav Bar.

Security Rights: EmployeeList, EmployeeView
Employee Config: / Credible Employee Messaging

Notification Trigger Admin Time

A new Notification Trigger is available to send notification upon the adding of Admin Time to an employee.

Security Rights: ActivityEdit, ActivityView, AdminView, NotificationTriggers, AdminTimeAdd, AdminTimeApprove, AdminTimeDelete, AdminTimeList, AdminTimeListAll , AdminTimeUpdate, AssignSupervisor, EmployeeList, EmployeeListAll, EmployeeView, EmployeeWorkSchedEdit, EmployeeWorkSchedView, NotificationDelete, PlannerAdd, PlannerUpdate, PlannerView

Steps:

1. Open ADMIN Tab > Daily Activities > Notification Triggers
2. Add New Trigger Entry
3. Select Admin Time Entered from the drop down
4. Select the other desired settings (recipients of the notification, occurrence, reminders, email, must dismiss)
5. Click Save.

Remove Notifications

Notifications can now be automatically deleted from the schedule based on selected scenarios. Notifications that have already occurred (those placed on the schedule for a past date) are not removed.

Security Rights: **Notification Removals**

Steps:

1. Go to Admin and click on Partner Config.
2. In the section called Notification Removal are checkboxes for the different scenarios.
3. Check each one as desired.

1. When Client Is Unassigned From Employee – deletes notifications for the employee when the client is no longer assigned to that employee.
2. When Client Is Unassigned From Team - deletes notifications for team members when the client is no longer assigned to that team
3. When Client Status Is Inactive - deletes notifications when the client's status is changed to inactive
4. When Client Is Deleted - deletes notifications when the client is deleted from the system
5. When Visit Is Deleted - deletes notifications resulting from a visit when that visit is deleted from the system
6. When Employee Is Unassigned From Supervisor - deletes notifications for the supervisor when an employee is no longer under his/her supervision
7. When Employee Is Unassigned From Team - deletes notifications for team members when the employee is no longer assigned to that team
8. When Employee Status Is Inactive - deletes notifications when the employee status is changed to inactive
9. When Employee Is Deleted - deletes notifications when the employee is deleted from the system
10. When the trigger is deleted - deletes notifications when the trigger creating the notification is deleted from the system (under Admin > Notification Triggers > Delete)

Filter Orphans Visits

You can now easily locate Orphan Visits in our system. An Orphan Visit is an unscheduled visit created on a mobile device that is not attached to an existing client's record. Orphan Visit is now a status you can filter on the VISIT tab and it is also an option for the Default Visit Queue Status found in the Employee Config.

Security Rights: ClientVisitList, ClientVisitListAll, ClientVisitView ClientVisitViewAll, EmployeeList, EmployeeView

Steps:

1. To search
    a. Open VISIT Tab
    b. In the Status DD select Orphan Visits Filter
2. To set as the default status
    a. Open EMPLOYEE Tab
    b. On the Nav Bar select Config
    c. In the Default Visit Queue Status set to Orphan Visits

Contracted rate - Auths by Dollar Amount - Contract Rate in Visit View

You can now base insurance authorizations (Auth) on Contract Rate. When you create or edit an Auth the Count DD now has a value named Rate. What this does is to sum the contract rate for all visits that match the Auth. This was created because sometimes the contract rate may differ from the base rate, merged rate, or other billable rates. So this is an alternative to Visits, Units, or Hours. When this option is selected it will show in the Visit View.

Steps:

1. On the client Nav Bar click Authorizations
2. Fill in the authorization as before, but in the Units text box enter the dollar amount authorized (without a '$').
3. In the Count DD select Rate
4. Click Add Authorization

When processing an 835 the amount of CO:45 and CO:42 adjustments is reduced by the amount of the initial CONTRACT RATE adjustment.

> Steps: Automatically occurs, provided there is a contract rate specified in the billing matrix and Auto Contract Rate Adjustments is selected in Partner Config.

Insurance Rights in the Security Matrix

Insurance and Authorization rights have been split, creating 3 new rights in the security matrix: ClientInsuranceView, ClientInsuranceAdd, and ClientInsuranceDelete. These allow you control over who can view, add and or delete insurance providers for a client. There are 4 areas these rights effect: 1) there is the Insurance button on the Nav Bar and when opened you have the ability to Add and Delete, 2) the Client Info Print feature allows you to see the Insurance information for the client, 3) when viewing the Claim Profile in the Billing Info section there is a button named Insurance - when pressed opens the Insurance screen, 4) when viewing the Claim Billing Details screen there are links to the Insurance in the column Ins ID.

> Security Rights: AdminView, BillingConfig, BillingAddAdjustment, BillingAddCopay, Billing Module, BillingRefundClientPayment, BillingUndo, ClientPayments, FinancialsView, ClientVisitListAll, ClientVisitUpdate, ClientVisitView or ClientVisitViewAll, ClientViewAll, ClientVisitViewLog, SecurityUpdate

Steps:

1. Open the ADMIN Tab
2. Select Security Matrix /
3. Locate the CLIENTS SUBSIDIARY section.
4. Check as desired
    a. ClientInsuranceView
    b. ClientInsuranceAdd
    c. ClientInsuranceDelete

New Security Rights:
Split AddExtProv & RxUpdate rights
ExternalProviderUpdate allows the user to add and update the external provider. Also the link to Add a Provider on the New Medication screen will only be there if you have this right. (Located in the CLIENTS SUBSIDIARY section of the security matrix).

Update Episode

ClientEpisodeUpdate allows the user the right to adding and update a client episode. (Located in the CLIENTS section of the security matrix).

ADVANCED SEARCH ENHANCEMENTS

Advanced Visit Search:
1) Recipient Type is now a Multi Select-able field
2) Receipt Code is available as a custom field (Receipt Codes are configured in the Revenue Code Matrix).
3) Cloned Visit ID is available as a custom field (click Custom Fields then More Fields). This will show the ID of the originating visit that was cloned.

> Security Settings: ClientVisitList, ClientVisitListAll, ClientVisitView ClientVisitViewAll, EmployeeList, EmployeeView

Steps:

1. To access the Cloned Visit ID, Open the Admin Tab
2. Open Data Dictionary.

3. Select Visit as the Table and View as the Type.
4. Add the new column “cloned_clientvisit_id”

Advanced Client Search:
1) Length of Stay in an Episode is a new field that calculates the number of days a client was in an episode. It only calculates once the episode is closed or a discharged date is entered. This field must be added to the DataDictionary first.

Steps:
1. Open the Admin Tab
2. In the Site Configuration section select DataDictionary.
3. Select ClientEpisode and the Table and View as the Type.
4. Add the new column “length_of_stay.”
5. To access this field in advanced search, click Custom Fields – it will be located in the section labeled “Episode Fields”

2) Liability Start and End dates (from the liability worksheet) are now available as custom fields (in the Special Fields section). These dates are also available in the “Sort By” and “Where” drop downs.

3) Client Advanced Search can now produce a count of each client's episodes.

Steps:
1. Go to the CLIENT Tab, click Advanced Search
2. Click Custom Fields. At the bottom, in the section labeled “Counts and Totals” check the box for ‘Active Episode Cnt’

If no date range is selected, it will show a count of the client's current active episodes. If a date range is entered, the report will show a count of all episodes that were active during that time period for the client.

4) Axis I and II diagnosis are now available for filtering client searches. This will show any client that has the selected diagnosis. There is also a check box to search on ‘Primary Diagnosis Only’. When you check Primary Diagnosis Only the selected diagnoses must be Primary. You can also use Start and or End Dates to search on the diagnostic history. Note that Diagnosis information on the Client's Profile is the *current* diagnosis (these are selectable as custom fields for an advanced search).

Duration in Advanced Client and Advanced Visit Searches duration is now reported in an hours:minutes (H:MM) format instead of total minutes.

Steps:
1. For Advanced Client Search
    a. click the more fields button and add “Total Duration”
2. For Advanced Visit Search
    a. click the more fields button and add “Base Duration” and/or “Merged Duration.”

Case manager Enhancement

When an employee is set as case manager it will now also set them as a primary employee for that client. (when unchecked, it does not uncheck primary). On the Overview and Profiles, the case manager will now show in bold and in italics in the Assignment lists. For the client, the case manager will be listed first. For the employee, all the clients for which s/he is the case manager will be listed first.

Security Rights: AssignClients, AssignEmployees, ClientVisitList, ClientVisitListAll, ClientVisitUpdate, ClientVisitView ClientVisitViewAll, ClientList, ClientListAll, ClientUpdate, ClientView, ClientViewAll, EmployeeList, EmployeeView

Steps:

1. Open the Admin Tab
2. Select Partner Config
3. In the Settings section, check the box for 'Use Case Managers.'
4. Save the new configuration.
5. In the Employee and Client Assignments there will now be a new column labeled 'Case Manager.'
6. Each client can only have one Case Manager, but an employee can be a Case Manager for multiple clients.
7. Click the assign button.

Bill off Axis III

Axis III diagnoses can now be set as the billable diagnosis for a visit.

Security Rights: AssignClients, AssignEmployees, BillingConfig, BillingCPTCode, BillingModule, ClientVisitList, ClientVisitListAll, ClientVisitUpdate, ClientVisitView ClientVisitViewAll, ClientList, ClientListAll, ClientUpdate, ClientView, ClientViewAll, EmployeeList, EmployeeView

Steps:

1. Open the Admin Tab
2. Select Partner Config.
3. In the billing section, check the box for "Include Axis 3 for billing"
4. Check the box for "Diagnosis Dropdown"(Partner Config – Web Forms section).
5. The client's Axis III diagnoses will now be included in the dropdown when signing & submitting a visit.

Split Secondary services

Added a split visit option in the payer specific line of the billing matrix. If this is set to true and the visit type is set to false for split visit then the visit will only split for that particular payer. If visit type is set to split it will still always split for all payers.

Security Rights: AssignClients, AssignEmployees, BillingConfig, BillingCPTCode, BillingModule, ClientVisitList, ClientVisitListAll, ClientVisitUpdate, ClientVisitView ClientVisitViewAll, ClientList, ClientListAll, ClientUpdate, ClientView, ClientViewAll, EmployeeList, EmployeeView

Steps:

1. Open the Billing Matrix
2. select the desired Billing Matrix line (or click Add New Entry to create a fully new matrix line)
3. Click Edit to open the Matrix Line's details
4. click the "Payer Specific Rates & Codes" button.
5. Edit or Add a New Payer Line
6. the Split Visit check box is located at the far right – check it to activate visit splitting for this payer..
7. Click the Update button.
8. The Split Visit will affect all newly entered services.
9. You will have to reprocess old visits to have them split.

Duration on print view for Visits

You can now show the Duration of a visit on the printout. It will appear in the header next to Program / Location and show total duration in minutes like '60 mins'. *Program / Location / 60 mins*

To turn this modification on you will have to change a setting in the Partner Configuration.

Warning: this is a custom setting so if you already are using this setting and you make this change you will no longer have any of your customizations on your print outs.

Settings: Open the Admin Tab -> Site Configuration section -> Partner Config -> Printouts section -> Visit Printout Popup Page. Enter this ‘clientvisit_printout_psa.asp ‘ into the field and don’t forget to Save Partner Config.

ID Visit List search
If you open the visit list either from the Employee’s Nav Bar or from the Client’s Nav Bar and then you select Advanced Search that person’s ID will pre-populate the Name/ID field.

HIPAA Log - add client id
Client id and clientvisit id to export where stored and applicable for employee log and clientvisit id to export where stored and applicable for the client log.