

# Productivity and Financial Enhancements



## February 2010 Release Schedule Highlights

### February 20, 2010

- › To Do List Feature
- › Advanced Ledger Search Enhancements
- › Notification Updates
- › Fax to Pharmacy
- › Primary Care Provider Tracking
- › Medication Profile Updates
- › Report Enhancements

**Next Release:**  
**May 22, 2010**

- › Look for an email with more info on what you can expect from the next Credible software release!

## New Features Available February 20, 2010

Credible delivers more innovative features with Release 5.0. New features include a To Do List function, updates to Credible eRx, a new Notification Trigger screen, Advanced Ledger Search Enhancements, and more. Please review the 5.0 configuration notes that detail configuration steps for all Release 5.0 items.

### Software Spotlight:

Increase Productivity with To Do List Feature, Additional Financial Capability with Advanced Ledger Search, Fax to Pharmacy option in Credible eRx

## Increase Productivity with new To Do List Feature

Increase productivity, complete tasks on time, and manage workload with Credible's new To Do List feature. Access To Do Lists on your Home Page, Employee Home Page and Client Home Page. Security rights are available that enable supervisors to add and edit another employee's To Do List.

The screenshot displays the 'Add To Do Item' pop-up window and the 'To Do List' table. The pop-up window includes a text input field for 'Quickly add items here', an 'Add' button, and a 'Detailed To Do List Add' link. Below this is an 'Employee Picture' section showing a photo of a female doctor. The 'To Do List' table lists tasks for Leslie Jones, including 'Employee offsite meeting' and 'Complete personal records'. A dropdown menu for 'Employee Name' is open, showing a list of names with 'Cuna, Andorinha' selected. The 'To Do List' table has columns for 'Begin', 'Target', 'Summary', 'For', and '%'. The 'Employee' column shows 'Employee: Cuna, Andorinha' for the third item.

| Begin     | Target    | Summary                   | For                       | %     | complete | delete |
|-----------|-----------|---------------------------|---------------------------|-------|----------|--------|
| 2/17/2010 | 2/26/2010 | Employee offsite meeting  |                           | 0.00  | complete | delete |
| 1/11/2010 | 1/18/2010 | Complete personal records |                           | 80.00 | complete | delete |
| 2/17/2010 | 2/26/2010 | Check notes               | Employee: Cuna, Andorinha | 10.00 | complete | delete |

### Complimentary Webcast Tutorial on Software Upgrades!

Please email  
andorinha@credibleinc.com  
if you would like to sign up  
for a webcast to review the  
new features. Please  
indicate in the email which  
day you would like to attend.

You will receive a  
confirmation email.

### Webcast Schedule

[Tue, February 23](#)  
[1:00 PM ET](#)

[Thu, February 25](#)  
[10:00 AM ET](#)

[Wed, March 10](#)  
[1:00 PM ET](#)

## Advanced Ledger Search Enhancements

Financial and accounting capability has been enhanced with updates to the Service Ledger Advanced Search. Custom Fields and Filters have been added for more robust financial reports. A new checkbox to Service Ledger Advanced Search reverses (make positives negatives and visa-versa) amounts for payments, adjustments and disallowed lines.

Custom Fields added, including "Ledger ID" and "Ledger DateTime," find the exact sequence of events for a given visit, claim, or payment when searched on. Additional custom fields include Payment Type, Payment Notes, and Payment Retraction Amount.

The screenshot shows the Advanced Ledger Search interface. At the top, there are several filter dropdowns: Ledger Type, Acct Period, Batch ID, Payer, Visit Type, Billing Group, Insurance Ord, Adjustment Type, Start Date, Service ID, Payer Type, Team, Program, Status, HIPAA Adjustment Code, End Date, Claim ID, Ledger Line Payer, Ledger Employee, Service Employee, Sort By, Date Type, Payment ID, Revenue Code, Receipt Code, and Client Name/ID. Below these is a section for Saved Reports, Custom Fields, Custom Filter, Reset, Multi Select, Grp Total, Show Undo, Show Rev, Rev Amnts (checked), and Adj Apprs. The WHERE clause is set to Ledger Amount. A dropdown menu is open showing a list of custom fields: Ledger Amount, Ledger Balance, Ledger DateTime, Accounting Date, Is Reversed, Is Reversal, Adjustment Group, Adjustment Reason, Claim Charges, Date Batched, Recipient Code, Location Code, Clients.1st Appointment Offer, Clients.1st Appointment Offer, Clients ADDRESS / PHONE, Clients Address 1, Clients Address 2, Clients Admission Date, Clients Age, Clients Assigned Benefits, Clients Attending Doctor, Clients Axis 1, Clients Axis 1b, Clients Axis 1c, Clients Axis 2, Clients Axis 2b, Clients Axis 3, and Clients Axis 4.

New Custom Filters include: Ledger Amount, Ledger Balance, Ledger DateTime, Accounting Date, Is Reversed, Is Reversal, Adjustment Group, Adjustment Reason, Claim Charges, Date Batched, Recipient Code, and Location Code.

Additional Payment Filters include: Adjusted Amount, Amount, Applied Amount, Balance, Check Date, Check Number, Client ID, Date Closed, Date Entered, Deposit Date, Emp ID, Load 835 ID, Notes, Paid Claims, Paid Services, Payer, Payer ID, Payment Category, Payment Control ID, Payment Category, Payment Control ID, Payment ID, Payment Location, Payment Type, Ref Number, Retracted Amount, Retracted Services, Retraction Amount, and Status.

## Notification Updates

View and sort notification triggers quickly and easily with the new Notification screen. You can now filter on existing Notification Triggers and Trigger Types. Sort capability is available on all columns to help you find triggers efficiently.

### Trigger List:

The screenshot shows the Trigger List interface. At the top, there are filter dropdowns: Notification Triggers, Client, and Is Nightly. Below these is a table with columns: Trigger, Notification, Trigger Type, Location Type, Is Nightly, and a delete button. The table contains five rows of data. A dropdown menu is open for the Trigger Type column, showing options: Client, Employee, Resource, and Team.

| Trigger  | Notification                 | Trigger Type | Location Type | Is Nightly |                        |
|--|------------------------------|--------------|---------------|------------|------------------------|
| <a href="#">edit</a> Client Add                  | Client Add                   | Client       |               | N          | <a href="#">delete</a> |
| <a href="#">edit</a> Medication Add              | SQA Test                     |              |               | N          | <a href="#">delete</a> |
| <a href="#">edit</a> Medication Update           | Medication Update SQA        | Client       |               | N          | <a href="#">delete</a> |
| <a href="#">edit</a> Client Update               | Test for credential          | Client       |               | N          | <a href="#">delete</a> |
| <a href="#">edit</a> Client Form Answer Selected | A Client Form Answer CM Test | Client       |               | N          | <a href="#">delete</a> |

Navigation: 1 2 3

[Add a New Trigger Entry](#)

## Credible

### Software Tips:

Check here every release for easy-to-use tips from Credible team members.

Save time with new time shortcuts. Use a shorthand format to input time. For instance, use "9-10" in place of "9:00am - 10:00 am." "1a-2a" and "1p-2p" will also work. Start saving time now!

*-John*

John Forma  
Implementation Manager

## Credible eRx Update

Credible eRx now allows for faxing of controlled substances through an eFax® gateway. Controlled substances are currently prevented by law from being transmitted electronically thru the Surescripts gateway but most can be submitted securely and easily by fax.

A warning message will appear on the bottom of the screen indicating that a controlled substance must be faxed or printed. Instead of the "Send to Pharmacy" button, the new "Fax To Pharmacy" option will be available.

Prescription for: **Diana Smith**

Medication: **Oxycodone 15 mg Tab**  
☐ Save this medication in your favorites list?

Drug Class: **Narcotics** Use Alternative:   
Provider: **Sipe, Dr Rob** Start Date: **2/17/2010**

Predefined Dosages:  
**Recommended Dosage:**  
take 1 tablet (15 MG) by ORAL route 1 time per hour

Prescription **Monograph** Contraindications

Sig Builder **Free Text Sig**

Take **1** Tablet(s) ☐ Show All Choices?  
By Oral Route **Per** **daily**  
Instructions/Comments:

Quantity: **24** Tablet(s) Refills: **1** ☐ PRN  
☐ Save prescription as template?

Additional Comments:

**This medication is a controlled substance and can not be sent electronically. Controlled substance prescriptions must be printed or faxed.**

| CLIENT MEDICATIONS: Diana Smith                               |  |            |             |                      |  |   | <input type="button" value="Print View"/> |
|---|--|------------|-------------|----------------------|--|---|---|
| <input type="button" value="Filter"/>                         | ALL ACTIVE                               | Medication | Start Date  | End Date             | <input type="checkbox"/> Has Prescription Messages |   |   |
| Medication  | Dosage / Frequency                       | Quantity   | Provider    | Status               | Start Date   | Change  |   |
| <input checked="" type="checkbox"/> OxyContin 10 mg 12 hr Tab | Take 2 Tablet(s) By Oral Route Per daily | 20         | Dr Rob Sipe | FAX - PENDING        | 3/15/2010  |   | <input type="button" value="discont"/>    |
| <input checked="" type="checkbox"/> Oxycodone 15 mg Tab       | Take 1 Tablet(s) By Oral Route Per daily | 24         | Dr Rob Sipe | <b>FAX - CURRENT</b> | 2/17/2010  | <input type="button" value="refill"/> <input type="button" value="print"/> <input type="button" value="discont"/> |   |
| Pharmacy: Adams Drugs   |  | Refills: 1 | Rationale:  | Prescription: True   | SUCCESS  |   |   |

Fax status is indicated on the Client Medications screen once a fax has been submitted. Hover over the status to view a description. Status types are FAX-PENDING (Prescription that has been created and faxed but still awaiting confirmation), FAX-CURRENT (Prescription successfully faxed) or FAX-FAILED (Fax to Pharmacy has failed).

**Release 5.1  
Available in  
May 2010**

Credible's commitment to innovation continues with new features and upgrades available on May 22, 2010. Look for an email from us with more info on what you can expect from the next Credible software release!

## Primary Care Provider Tracking

EXTERNAL CARE PROVIDERS: **Diana Smith** Template

| Name          | Specialty    | Phone        | Start Date | Term Date | ROI Obtained | ROI Obtained Date | ROI Expires Date | Is PCP |  |
|---------------|--------------|--------------|------------|-----------|--------------|-------------------|------------------|--------|--|
| Amanda Jones  | Psychologist | 202-555-5202 |            |           |              |                   |                  |        | <a href="#">detail</a>   |
| John Smith II | Therapist    |              | 2/1/2010   | 6/30/2010 | True         | 2/16/2010         | 12/30/2010       | True   | <a href="#">detail</a> <a href="#">edit</a> <a href="#">delete</a> |

**Client Visit:**

|                  |                             |
|------------------|-----------------------------|
| Client Name:     | <a href="#">Diana Smith</a> |
| Visit Type:      | Psychosocial                |
| Time In:         | 9:00 AM                     |
| Revised Time In: |                             |
| CPT Code:        | 50015                       |
| Rate:            | 2,500.00                    |
| Approved:        | False                       |
| Billing:         | False                       |
| Status:          | COMPLETED                   |
| Schedule Date:   | 2/15/2010                   |
| Form : Version:  | 493 : 1599                  |
| Insurance 1:     | VBH1 : 5999999999           |
| PCP:             | John Smith II               |

The Primary Care Provider (PCP) for a client can now be flagged with the client's External Providers. When a PCP is set for a client any subsequent visit will reflect that client's PCP. If needed this PCP can be sent as the Referred By Provider for Billing. Any changes to the PCP will be logged in the client's HIPAA log.

Use PCP as Referring Provider : ☒

## Medication Profile Updates

You can now record a patient's immunization record in the Medical Profile. Enter a new immunization by selecting it from a drop down, and entering the dosage and date administered. If your state requires different Immunizations they can be added and/or deleted through the admin lookup tool.

**Immunizations:**

| Date     | Name           | Dosage |                        |
|----------|----------------|--------|------------------------|
| 2/1/2010 | H1N1 Influenza | 5 ml   | <a href="#">delete</a> |

Name:  Dosage:  Date:

[Add Immunization](#)

## Report Enhancements

### Client Aging Extended Report

View and report client debt in detail out to 5 years with the Client Aging Extended Report. This report will also reflect the client's other due (also known as debt set off) balance.

A filter is available on this report for all users to report only on clients that have a Client Due or Other Due balance.

**Filters for Client Aging Extended Report :**

Start Date

End Date

Program

Billing Group

Team

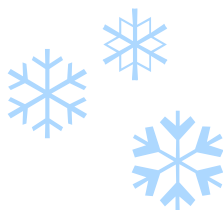
Employee

With Client Due or Other Due > 0  
☒ Yes ☐ No [Report](#)

[Run Report](#)

## We want to hear from you!

If you have an idea, question, or comment regarding Credible Software Releases or our release process, please call or email Credible today!



## Contact Us

888-453-6873

info@credibleinc.com

www.credibleinc.com

## Admin Table Logging Report

Enhanced security is available with the new Admin Table Logging Report. Updates and deletions to multiple administrative tables such as the Billing Matrix, Program, and Data Dictionary are now recorded and reportable.

The report will allow the user to view the old value, the new value it was changed to, the date updated, and the employee who made the change.

Filter by Tables, Start and End Date, Employee, and Action.

Filters for Admin Logging:

Tables (required)

Recipient Type  
Roles  
Team  
Tx Category  
Visit Type

Start Date  
2/11/2010

End Date  
2/18/2010

Employees  
JOHNSON, AUTUMN  
Jones, Leslie  
Keith, AMY  
Kenney, Derek  
King, CAROL

Primary Table ID

Description

Action  
--Choose--  
Delete  
Insert  
Update

☐ Save Report

Report Name

**Run Report**

Tables: Accounting Period  
Approval Role  
Billing Matrix

Employees: Doe, Jodie  
Doe, MELISSA  
Doe, Jr., John

Start Date: 2/11/2010

End Date: 2/18/2010

Primary Table ID: Description: Action: Delete  
Insert

| Table | Primary Table ID | Description     | Column         | Old Value       | New Value       | Date Updated         | Employee      | Action |
|-------|------------------|-----------------|----------------|-----------------|-----------------|----------------------|---------------|--------|
| Team  | 39               |                 | team_id        | 39              |                 | 2/15/2010 1:46:01 PM | Kenney, Derek | Delete |
| Team  | 39               |                 | team_name      | test 4 adminlog |                 | 2/15/2010 1:46:01 PM | Kenney, Derek | Delete |
| Team  | 39               |                 | is_residential | False           |                 | 2/15/2010 1:46:01 PM | Kenney, Derek | Delete |
| Team  | 39               | test 4 adminlog | team_id        |                 | 39              | 2/15/2010 1:45:52 PM | Kenney, Derek | Insert |
| Team  | 39               | test 4 adminlog | team_name      |                 | test 4 adminlog | 2/15/2010 1:45:52 PM | Kenney, Derek | Insert |
| Team  | 39               | test 4 adminlog | is_residential |                 | False           | 2/15/2010 1:45:52 PM | Kenney, Derek | Insert |
| Team  | 38               |                 | team_id        | 38              |                 | 2/15/2010 1:44:18 PM | Kenney, Derek | Delete |

## Program Admission Report and Program Closing Report

A new report for tracking clients program admission has been added. The user can select one or multiple programs and define a timeframe to report on. The report will display all clients assigned and their assignment date and totals for client and unduplicated client counts.

|                                |                    |                                |           |
|--------------------------------|--------------------|--------------------------------|-----------|
| <b>Admission Report</b>        |                    | Start Date:                    | 1/1/2010  |
|                                |                    | End Date:                      | 2/18/2010 |
| <i>Program</i>                 | <i>Client Name</i> | <i>Date Admitted</i>           |           |
| <input type="checkbox"/> CISM2 |                    |                                |           |
| Total Clients: 14              |                    | Unduplicated Clients: 11       |           |
| Total Client Count: 14         |                    | Total Unduplicated Clients: 11 |           |

The Program Closing Report has been enhanced to also include the client and unduplicated client totals and the ability to select multiple programs to report on.

Do you want to share these release notes with a colleague?  
Email [andorinha@credibleinc.com](mailto:andorinha@credibleinc.com) with your request.