Documentation, Encounter and Client Enhancements

June 2009 Release Schedule Highlights

June 20, 2009

- Documentation and Schedule Updates
- Residential Optimization Reports
- HR Functionality
- Client Enhancements
- Employee Updates
- Print View Changes
- Notification Additions
- New Security Rights
- Billing and Payment Updates

Next Release: September 19, 2009

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

New Features Available June 20, 2009

Credible delivers innovative features and upgrades with Release 4.2. Visit and Schedule updates improve productivity and decreases scheduling errors. Client and Employee View enhancements improve data management and access. Added Security Rights gives your Agency configurable features and options above and beyond industry standards. Residential Features and Reporting enhancements include three additional Bed Board Management reports. Other features include Notification updates, Print View changes, Form enhancements, and Billing improvements.

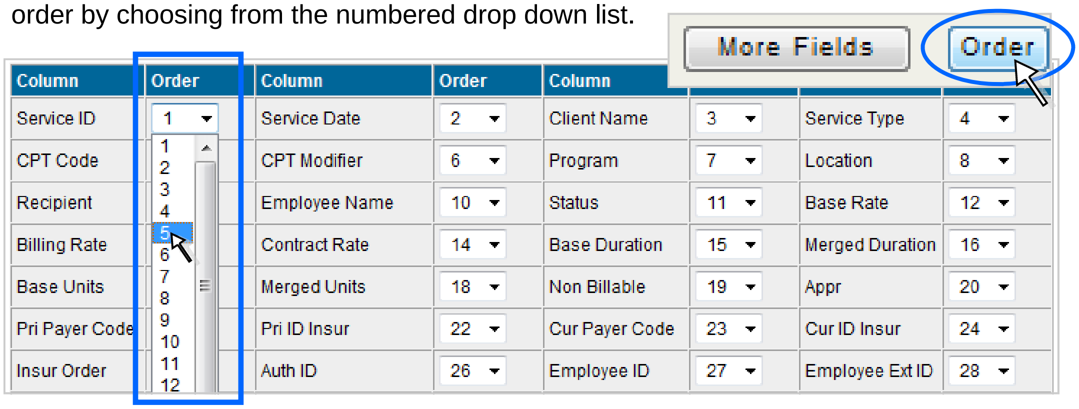
Software Spotlight:
Advanced Visit Search Updates, FormBuilder Upgrade, Expanded HR Functionality, Visit ID Links in Notifications, New Bed Board Management Reports

***Important Note:** We are upgrading to SQL Server 2008, which will affect SQL Server reporting services. Reports from this release will not be available until June 29, 2009.*

Documentation and Schedule Updates

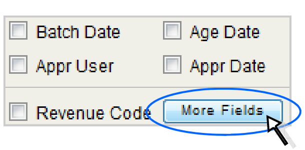
Advanced Visit Search Updates

You can now arrange custom fields by clicking the "Order" button and designating the order by choosing from the numbered drop down list.

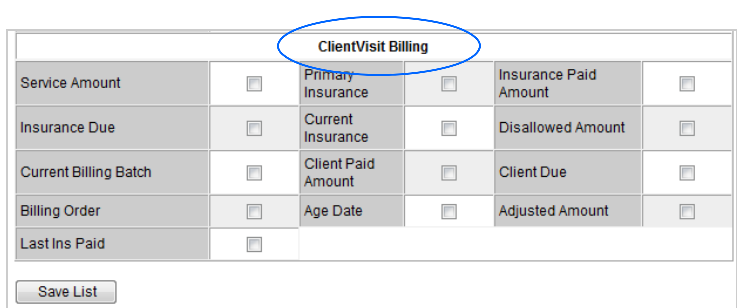


Column	Order	Column	Order	Column			
Service ID	1	Service Date	2	Client Name	3	Service Type	4
CPT Code		CPT Modifier	6	Program	7	Location	8
Recipient		Employee Name	10	Status	11	Base Rate	12
Billing Rate		Contract Rate	14	Base Duration	15	Merged Duration	16
Base Units		Merged Units	18	Non Billable	19	Appr	20
Pri Payer Code		Pri ID Insur	22	Cur Payer Code	23	Cur ID Insur	24
Insur Order		Auth ID	26	Employee ID	27	Employee Ext ID	28

All Client Visit and Client Visit Billing Information is now included in Advanced Visit Search. Click on the "More Fields" button to view the added fields. Custom Red X Note, Revenue Code and Base Duration have also all been added to the standard Custom Fields.



Click on the "More Fields" button on the bottom to view Client Visit Billing fields



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

Wed, June 24
2:00 PM ET

Thu, June 25
2:00 PM ET

Tue, June 30
2:00 PM ET

Search for Visits with Attachments

Easily search for visits with attachments through this new Advanced Visit Search filter. Select “Has Attachments” and run the filter to view all visits with attachments.

Scheduled Visit Status Report Changes

New enhancements to Scheduled Visit Status Report allow for more filtering flexibility. The multiple statuses can now be selected as filter criteria. Also a new filter for Billable or Non-Billable services is now available.

Schedule Groups Start and End Dates

Limit the dates that a Schedule Group can be used by setting a start and/or an end date for the Schedule Group thru the Admin Schedule Group screen. If outside of the set timeframe, this Schedule Group will no longer be available on the planner for scheduling.

Block Future Dates

A setting has been added to block future visits greater than X days in the Partner Configuration. When set, any visit greater than the defined days will be blocked from saving through Web Forms and Data Entry

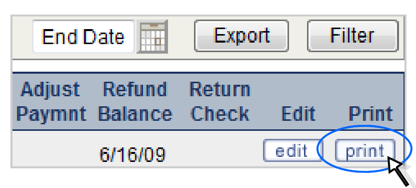
Stop Late Data Entry

Manage productivity by flagging all late visit entries. A late flag has been added to the visit and can be used in Advance Visit Search, Export, or to trigger a notification. Set the determined duration that constitutes a late visit in Partner Configuration. If the difference between the time in of the visit and the signature date is greater than the duration set in Partner Configuration, then visit will be flagged as late. Optionally, you can also select to have a red “LATE ENTRY” text appear on the visit view and printout of any visit flagged as late.

Client Enhancements

Client Payment Receipt

You can now print receipts for old client payments. The Manage Client Payment screen now displays a “print” button for every payment record. Simply click “print” and you will see the receipt.



Relationship Drop Down for Contacts and Family

The relationship dropdown is now dynamically created based upon values that your organization needs. These values can be added thru the new Relationship link under the Admin tab and can be used solely on one screen, or can be displayed on both.

Episodes Driven by Program Assignment

A partner configuration setting has been added that allows episodes to be automatically created on program assignment and closed when the program is unassigned. This will work whether it is a direct assignment thru a program or an indirect assignment thru a Team. When using unassigned reason codes, these can also be saved back to the episode.

Credible Software Tips:

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

You can make your own notifications by going to your schedule and clicking the Red Flag icon. You can even set the notification to send a reminder email back to yourself!

- Rob

Rob Sipe
Implementation Manager

Client Form Updates

Injection: Both Contact and Allergies can now be injected into Client Forms. Rule Out and Axis IV stressors have been added the Full Diagnosis Injection.

Mapping: Rule Out selections can now be mapped back to Client Diagnosis. New Contact Fields Release of Information and Release Expires Date can also be mapped back to Contacts.

Client Allergies on Overview Screen

A summary view of a client's allergies can now be added to the client overview screen.

Stressors in Axis IV

A list of stressor categories is now available for Axis IV. The list of stressors is part of the full Diagnosis injections.

HR Functionality and Employee Management Updates

Private Program Employee Assignment

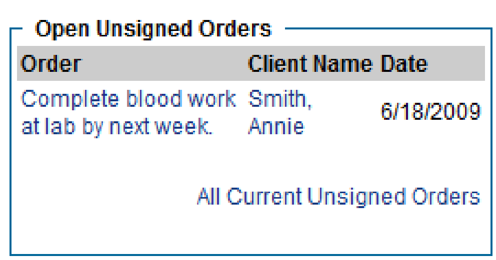
You now have the ability to restrict a Program to select employees assigned to that Program, regardless of other team or client assignments. A flag has been added to Programs called “Private.” When set to true, relevant client Program information is only displayed when the Employee is in Program.

Employee Form HR View

Human Resources management has been improved with this new feature. Designate employee visit types as HR to allow access to HR staff without having to directly assign all employees to HR staff. A new “is_HR” flag has been added to the Employee Record and Employee Visit Types table. Employee Visit types can also be set to HR only by selecting both the private and HR flags. This will only allow access to set employee form to HR staff.

Open Unsigned on Employee Homepage

Physicians now immediately know which Physician Orders need to be signed and completed right from the Employee homepage. Open Unsigned Orders can now be set to display on employees marked as “is_doctor” that have orders waiting to be signed.



Open Unsigned Orders

Order	Client Name	Date
Complete blood work at lab by next week.	Smith, Annie	6/18/2009

All Current Unsigned Orders

Printing View Changes

Print Team Schedule

You can now print a team schedule for a single day. From Team View, click the Printer View icon along the top of the screen to print that day’s team schedule. You can also navigate through this view to other days and print those team schedules.

Release 4.3 Available in September 2009

Credible's commitment to innovation continues with new features and upgrades available on September 19, 2009. Look for an email from us with more info on what you can expect from the next Credible software release!

Appointment Card

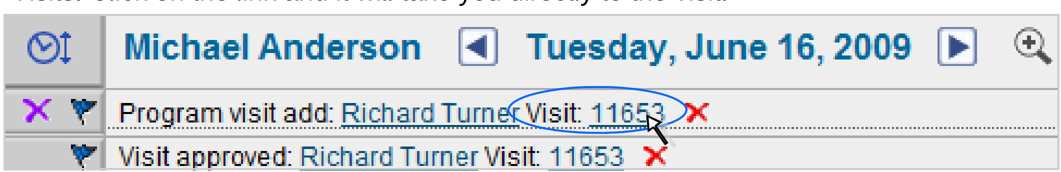
Print appointment details for a client in an organized manner with this new feature. The new appointment cards displays Client Name, Type of Appointment, Date, Time, Employee, and Location. A phone number and a message at the bottom can also be configured to also be included.

Click the print icon and a window with appointment details will pop-up

Notification Additions

Visit ID Links Displayed in Notifications

View the visit that triggered a notification with this new feature. Notifications now include a Visit ID number in the form of a hyperlink to the visit for both Client and Employee Visits. Click on the link and it will take you directly to the visit.



Notification per Insurance

Get notified when a specific payer has been added to your client's insurance screen. A new trigger 'Client Insurance Added - Specific Payer' sends a notification when a Client Insurance record is created, for the Payer specified in the notification trigger.

Notification to Employee Who Completed Visit

A "Send To" type is available for notification triggers based on a visit. When triggered this will send a notification to the employee who completed the visit.

Employee Visit Add

A new Notification Trigger has been added: Employee Visit Add - Specific Visit Type. When an Employee Visit is created for a Visit Type specified in the Notification Trigger, a notification is sent out.

Resource Scheduler Notifications

Get notified when a resources is scheduled. Once a resource has been scheduled, employees assigned to the team of the resource can now be notified.

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!

Residential Enhancements

Residential features have been enhanced with the addition of three detailed Bed Board Management reports. All reports enable you to search on Start and End Dates and by Facility.

Bed Board Information Report

Displays client bed admission to release dates, providing total days placed from the facility level to the client bed detail level.

Client Bed Information

Start Date: 6/1/2009
End Date: 6/15/2009

Facility	Bed	Client	Admission Date	Est.Release Date	Release Date	Days Placed
⊟ Bed Board Facility 2						1484
	⊟ Bed 1					809
		Jackson, Mary	1/4/2008			532
		Adams, Tammy	9/15/2008	9/22/2008		277
	⊞ Bed 1					319

Bed Board Billing Report

Reports on billing activity related to the Residential Module from the facility level overview to the visit level detail.

Bed Board Billing Report

Start Date: 1/1/2009
End Date: 6/15/2009

Facility	Bed	Client	Visit Date	Visit ID	Units	Billed
⊟ SQA Hospital					250.00	$187500.00
	⊞ Bed 1 Rm 1				75.00	$56250.00
	⊞ Bed 2 Rm 1				75.00	$56250.00
	⊟ Bed 3 Rm 2				40.00	$30000.00
		⊟ Carter, Steven			40.00	$30000.00
			6/7/2009	122401	5.00	$3750.00
			6/8/2009	122402	5.00	$3750.00
			6/9/2009	122403	5.00	$3750.00
			6/10/2009	122404	5.00	$3750.00
			6/11/2009	122405	5.00	$3750.00
			6/12/2009	122406	5.00	$3750.00
			6/13/2009	122407	5.00	$3750.00
			6/14/2009	122408	5.00	$3750.00
	⊞ Bed 2 Rm 3				60.00	$45000.00
				Totals:	250.00	$187500.00

Bed Board Counts

Calculates the amount of days that a facility has beds available, filled, or on hold.

Bed Counts

Start Date: 6/1/2009
End Date: 6/15/2009

Facility	Bed	Client	Days Filled	Days On Hold	Days Open
⊟ Bed Board Facility 2			70	0	0
	⊞ Bed 3		14	0	0
	⊟ Bed 1		14	0	0
		Brown, Adam	14	0	
	⊞ Bed 1		14	0	0

Spread the Word!

Let your Agency know about all the new features that are coming out. Share these release notes with a colleague! Email andorinha@credibleinc.com with your request.

New Security Rights

Client Visit Form Update

You now have the ability to restrict an employee's right to edit form date in a visit. If the new ClientVisitFormUpdate security right is turned off, staff will be able to view the form data in the visit but not update it.

Refund/Retract Client Payment

A new security right, "BillingRefundClientPayment" allows you to refund or retract client payments on two screens. It allows for refunding and returning of client payments from the Manage Client Payments screen with an automatic adjustment to the visit associate with the payment.

Liability Security

Restrict viewing and updating of client liability with the new ClientLiabilityView and ClientLiabilityUpdate security rights. HIPAA logging for updating a liability is also being tracked.

Security Right for Adjustments

'BillingAddAdjustment' has been added for manual billing adjustments which controls adding an adjustment to a visit from the Claim Billing Details screen. It also controls the options in the Transfer Balance dropdown when applying a payment that does not cover the full balance.

Billing and Payment Updates

Revenue Code Matrix Changes

Payer Type and Order has been added to the Revenue Code Matrix, which allows for a multi-part revenue code when you mark one line primary and another line secondary. This will calculate the revenue and receipt codes for a visit. Viewable on the billing details screen and thru Advance Visit Search.

Hourly Counts for Authorizations

Authorizations can now also be measured by hourly duration. When setting the Count field to hours, the duration of the visit will be used to calculate the amount of authorization units decremented for a visit.

Debt-set off

A third "due" account for bad or pending debt is now available that makes up the balance of the visit. The label of this third bucket can be customized for your organization. To transfer bad debt for a visit into this third bucket, add a service adjustment for the desired amount using the "Debt Setoff Adjmnt" selection.

Credentials forcing Visit Types

Option to limit access to scheduling services based on credentials. When partner config option is set an employee's credentials must be part of the credential group set in the billing matrix for the associated visit type.

Do you want to share these release notes with a colleague?
Email andorinha@credibleinc.com with your request.

Contact Us

888-453-6873

info@credibleinc.com

www.credibleinc.com