

Expanded Data Access & Reporting



May 2010 Release Highlights

- Security upgrades
- Advanced Visit Search enhancements
- Query builder
- MDB export format
- Global HIPAA log
- Red X approval view
- Guarantor in Family Members screen & other new fields
- Custom text fields for the Billing Matrix
- Copying forms between test site & live site
- Canceling a client from a group visit
- Bed board & foster home billing enhancements
- New foster home profile fields

New Features Available May 22, 2010

Credible's commitment to helping you meet your current and future reporting and compliance needs is reflected in the features in Release 5.1. This latest release makes it easier to access and report on the extensive data in your Credible system. New features include enhancements to Advanced Visit Search, a query builder in the Export tool, the ability to export to MDB format, and a global HIPAA log.

Please refer to the *Release 5.1 Configuration* document for the steps to configure and use all of the new features.

Software Spotlight

Help ensure appropriate user access with security upgrades and expand your data access and reporting capabilities with Advanced Visit Search enhancements and the query builder.

Security Upgrades

To help you close down unused user accounts, there is an automatic password reset that is based on inactivity. If a user doesn't log into the system for the specified number of days (60, 90, 120, 150, or 180), his or her password will be automatically reset (the default is 120 days). The user will need to contact the Administrator to get a new password.

To ensure that only the user knows his or her password, the system forces a password update whenever someone else sets or changes that employee's password. This security feature helps prevent one user from taking over another user's account. The Password Update screen displays the first time the employee logs into Credible after his or her password has been changed.

PASSWORD UPDATE: Doe, Jr., John	
Passwords:	
New Password:	
New Password Again:	
Update Password	

Complimentary Webcast Tutorial on the New Features!

To register to attend, click on your preferred date and then send the email that is generated. You will receive a confirmation email shortly.

Webcast Schedule

Wednesday, May 26
1:00 PM ET

Friday, May 28
1:00 PM ET

Wednesday, June 2
1:00 PM ET

Advanced Visit Search Enhancements

To help you find and report on visits in your Credible system, the Visit Type dropdown includes expired Billing Matrix line visit types and the Payer dropdown has an Insurance Pending filter. A Location dropdown (multiselect) has also been added.

The screenshot displays the Visit Search interface with several dropdown menus. The 'Visit Type' dropdown is open, showing a list of visit types including 'Nursing Assessment', 'OP MedChk & Phys C', 'OP Tx Recovery Note', 'OP Tx Recovery Plan', 'ORF1', 'Outcome', 'Peer Sprt Rcvry Plan', 'Physician Order', 'Core Export', 'Residential', 'Med Progress Note', 'Peer Spec Form', and 'VISIT TYPE'. The 'Payer' dropdown is also open, showing a list of payers including 'HM SECURITYBLUE', 'HMRK BLUE SHIELD MC', 'HMRK SELECT BLUE PC', 'HUMANA GOLD CHOICE', 'VETERANS AFFAIRS ME', 'X Y Health', 'Your Choice Health Care', 'Zone Health', 'UN-INSURED', and 'INS PENDING'. The 'Location' dropdown is a multiselect showing a list of locations including 'BETH Office', 'SHBH Office', 'CS OutOffice', 'NH OFFICE', 'Other', 'Satellite Site', and 'WRAP In-Home'. A blue arrow points to the 'Location' dropdown.

Payer codes, the Visit Type External ID, and the Recipient External Code have also been added as custom fields.

The screenshot shows the Credible system interface with the Visit Search filters and custom fields section. The filters include Client Name/ID, Start Date, Batch ID, Service Type, Billing Group, Payer, Recipient, Employee Name/ID, End Date, Service ID, Team, Program, Ledger Type, Location, Date Type, Claim ID, Sort By 1, Sort By 2, Status, Billable, Age Date, Adjust Code, Insurance Order, Grp Total, Grp Total Only, Show Unappr Svcs, Show Merged Svcs, Show All Claims, and No Totals. The custom fields section includes checkboxes for Service ID, Service Date, Client Name, Service Type, CPT Code, CPT Modifier, Program, Location, Recipient, Employee Name, Status, Base Rate, Billing Rate, Contract Rate, Base Duration, Merged Duration, Base Units, Merged Units, Non Billable, Appr, Pri Payer Code, Pri ID Insur, Pri Payer Type, Cur Payer Code, Cur ID Insur, Insur Order, Auth ID, Employee ID, Employee Ext ID, Credentials, Billing Group, Service Type Ext, Ins Paid, Client Paid, Balance Due, Disallow Amount, Adjusted Amount, Ledger Amount, Ledger Date, Copay, Client Due, Insur Due, Debt Setoff, Client ID, Client Ext ID, Client SSN, Client DOB, Client Status, Client Axis I, Site, Team Name, Provider Num, Group Service, Group Type, Group Count, Open Claim, Batch Date, Age Date, Adj Codes, Overproduction Units, Transfer Date, Matrix Ext Code, Location POS, Last Ins Paid, Payer Code Seq2, Payer Type Seq2, Payer Code Seq3, Payer Type Seq3, Payer Code Seq4, Payer Type Seq4, Appr User, Appr Date, Supervis Phys, Overrd Sup Phys, Exp Prog Code, Core Svc Code, Client Age Date, RedX Note, Revenue Code, Receivables Code, and Recipient Ext Code.

Credible Software Tips

Check here every release for an easy-to-use tip from a Credible team member.

To quickly find information on a screen in Credible (for example, in Partner Config), press **F3** or **Ctrl F** on your keyboard. Enter the word or part of the word you are looking for in the Find text box.

Find: reset

The system displays the number of matches and takes you to the first match.

Previous Next Options 1 match

Block Dictionary Words in Password:
Password Expiration:
Password [Reset](#):

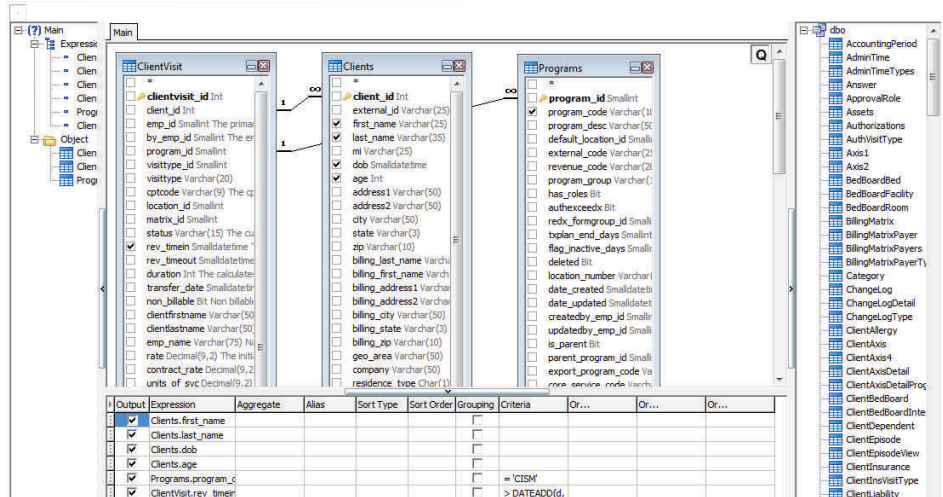
Click **Next** to go to subsequent matches.

– Amy
Amy Bucklin
Technical Writer

Query Builder

With the integration of a query builder with the Export tool, you can use an intuitive visual interface to build complex SQL queries to extract and report on the data in your Credible system. A knowledge of SQL and building SQL queries will be helpful in using the query builder.

The Custom Ad Hoc option in the Form/Table Name dropdown of the Export tool lets you access the query builder.



Exporting to the MDB File Format

When you build an export, you can now select MDB as the file format. With this file format, you can open the export with Microsoft Access.

Global HIPAA Log

With the Global HIPAA log, you can view log information across multiple clients, employees, or visits. You can switch the entity (client, employee, or visit) while in the log and view information for all actions or a single action.

Global HIPAA Log:

Filter	Client	-- Action --	5/12/2010	5/13/2010	Export
Date	Client Name/ID	User	Action	Record	Description
5/13/2010 4:48 PM	Smith, J (43016)	Doe, Jr., J	ACCESS CLIENT RECORD	43016	
5/13/2010 4:48 PM	Smith, J (43016)	Doe, Jr., J	UPDATE CLIENT RECORD	43016	
5/13/2010 4:48 PM	Smith, J (43016)	Doe, Jr., J	ACCESS CLIENT RECORD	43016	
5/13/2010 4:48 PM	Smith, J (43016)	Doe, Jr., J	ACCESS CLIENT RECORD	43016	
5/13/2010 4:47 PM	Smith, J (43016)	Doe, Jr., J	INSERT CLIENT DEPENDENT	117(ClientDependent)	Johnny Smith
5/13/2010 4:46 PM	Smith, J (43016)	Doe, Jr., J	ACCESS CLIENT RECORD	43016	
5/13/2010 4:43 PM	Smith, J (43016)	Doe, Jr., J	INSERT CLIENT VISIT WEBFORMS	(ClientVisit)	

**Next release:
August 21, 2010**

Look for an email
With information on what
you can expect from
the next Credible
software release!

Red X Approval View

With the new Only RedX filter in the Status dropdown in the Client Visit List screen, you can search for and view all unapproved client visits that have a red X. The reason for the red X is included in each record row.

Client Visit List:

1 to 21 of 1198

Not Approved

☒ ID ☒ Approve ☒ Client ☒ Employee ☒ Type
 123922 ☒ ☒ ☒ ☒
 124171 ☒ ☒ ☒ ☒
 124573 ☒ ☒ ☒ ☒
 124933 ☒ ☒ ☒ ☒
 124944 ☒ ☒ ☒ ☒

All
 Approved
 Not Approved
 Billed
 Not Billed
 NB Approved
 Orphan Visits
 Multi-Stage
 My Multi-Stg
 Only RedX

Home Client Employee Schedule Visit Adm				
Client Visit List:				
page 1 of 1		Only RedX	Visit Type	
ID	Approve	Client	Employee	Type
125309	☒	Smith, Jane	Doe, Jr.	Bed B
X CPT code is required to Approve. Client/Visit Merged Units field to				
125306	☒	Baggins, Bilbo	Doe, Jr.	MedPr
X Client Insurance Is Pending is true.				
125302	☒	Aardvark, Aaron	Harris	Intake
X CPT code is required to Approve. Client/Visit Merged Units field to				
125297	☒	Baggins, Babette	Johnson	Outcor
X CPT code is required to Approve.				
124856	☒	Liability, Lucy	Sipe	CISMT
X Did not attend.				

Guarantor in Family Members Screen & Other New Fields

You can now designate a family member as the guarantor for the client. If a guarantor is set at the time of service, he or she will be associated with the service. If a guarantor has been set for a visit (or visits), the guarantor's name and address will be used when generating client statements and not the client's. To support this, address fields have been added to the Family Members screen.

Client Visit:	ID: 125300
Client Name: Jane Smith	MobileForm Version: Web Entry
Visit Type: SQA Episode Admi	Guarantor: Jim Smith
Time In: 11:45 AM	Date: 5/13/10

With additional new fields in the Family Members screen, you can indicate if a family member is the primary care giver and if his or her rights have been terminated.

FAMILY MEMBERS: Jane Smith							
Name	Relation	Dependent	Guarantor	Pri Care Giver	Rights Term	Enrolled	Living at

Add Family Member

Name	Relation	Dependent	Guarantor	Pri Care Giver	Rights Term
		☒	☐	☐	☐

Phone: DOB:

Address: Address 2:

City: State: Zip:

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

Custom Text Fields for the Billing Matrix

Ten custom text fields are now available to be added to the Billing Matrix. These fields can be used for tracking any data by matrix line and accessed through Advanced Visit Search or Advanced Ledger Search.

In Billing Matrix Config:

Custom:

of Expected Clients

In Advanced Visit Search or Advanced Ledger Search (accessed via the **More Fields** button in Custom Fields):

Billing Matrix					
Auto Approve	☐	External ID	☐	Roll Code	☐
# of Expected Clients	☐				

Copying Forms Between Your Test Site & Live Site

If you have the Form Builder module, you can now copy forms from your test site to your live site and vice versa. The Copy Form screen has a dropdown where you can select your test site or live site.

Copy form "CISM Outcome" :

Select a Partner:

Test

Copy

**** You must click New Version, then Build and Activate for the form after it is copied. The form will not work properly until it has been rebuilt at the destination.**

Canceling a Client from a Group Visit

If a client cancels from a scheduled group visit, you can now cancel that individual client without affecting the status of the group visit as a whole. To cancel an individual client, you must access the scheduled visit through the client's schedule. You can also complete a Cancellation Form for the individual client if set up to do so.

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

Bed Board & Foster Home Billing Enhancements

Bed Board and Foster Home Billing have been enhanced to allow:

- Searching based on program and/or visit type – which can now be assigned at the interval level
- Merging intervals and billing them as one
- Excluding the date out from billing
- Selecting if the date type is based on Date In or Discharge Date

Bed Board Billing:

Filter	-- Facility --	Assigned Only	-- Program --	-- Visit Type --	Merge Interval:	No
Date Type: Date In		Start Date: 5/4/2010	End Date: 5/17/2010		Include Date Out: Yes	
Start Date	End Date	Name	Bed	Type Assignment	Adm Date	Rel Date
☒	5/13/2010	5/13/2010	Baggins, Babet	Residential Facility 1 / Room 102 / Bed A	CISM: # ISPT Mtg	1/29/2010
☒	5/14/2010	5/14/2010	Baggins, Babet	Residential Facility 1 / Room 102 / Bed A	CISM: # ISPT Mtg	1/29/2010
☒	5/15/2010	5/15/2010	Baggins, Babet	Residential Facility 1 / Room 102 / Bed A	CISM: # ISPT Mtg	1/29/2010

Foster Home Billing:

Filter	-- Foster Home --	Assigned Only	-- Program --	-- Visit Type --	Merge Interval: No		
Date Type: Date In		Start Date: 4/1/2010		End Date: 5/21/2010			
				Include Date Out: Yes			
Date	End Date	Name	Foster Home	Type Assignment	Status	Adm Date	Dis Date
☒	4/1/2010	4/1/2010	Baggins, Babet	Community Home	ContrSrvcs: # AAA 111	ACTIVE	4/10/2010
☒	4/2/2010	4/2/2010	Baggins, Babet	Community Home	ContrSrvcs: # AAA 111	ACTIVE	4/10/2010
☒	4/3/2010	4/3/2010	Baggins, Babet	Community Home	ContrSrvcs: # AAA 111	ACTIVE	4/10/2010

New Foster Home Profile Fields

Five new fields are available to be added to the Foster Home profile:

- Is Respite
- Existing Minors
- General Note
- DHS ID
- Additional ID

You can access these and other Foster Home fields in Advanced Visit Search or Advanced Ledger Search (via the **More Fields** button in Custom Fields).