Admin Tab 2

User Manual

Created: Thursday, August 10, 2017

CredibleHelp

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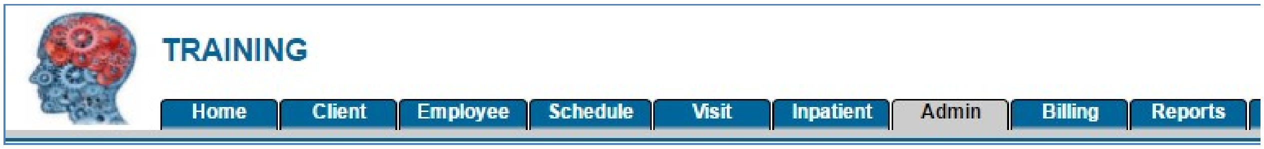
Admin



The **Admin** tab controls most of the configuration of your Credible Domain. This is where you will find the Security Matrix, Partner Config, Data Dictionary, Lookup Items, and much more.

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See also

Updated 8/16/2016 11:40 AM by marchall

Home > Admin > Daily Activities

Daily Activities

This section of the Admin tab let you access commonly used screens and functions.

Home Page	Another way to access the Home Page (same as Home tab). Click here for Home Page help topic.
Visit Queue	Another way to access Client Visit List for all employees (same as Client tab). Click here for Client Visit List help topic.
Employee Form Queue	Lets you access Employee Forms List screen for all employees. The screen is identical to the single employee version (accessed via Forms on Employee nav bar) except it has the additional filtering field of For Employee. Click here for Forms help topic.
Admin Time Queue	Another way to access Admin Time List screen. When accessed via Admin tab, Approved filtering field defaults to No and you have to select an employee. Click here for Admin Time help topic.
Visit Data Entry	Another way to access the Add Visit function on the Employee nav bar. Click here for Add Visit help topic.

Dashboard	Manage Teams	Program Assignments	Manage Resources	Manage Foster Homes	Bed Board Search	Schedule Groups
Notification Triggers	Clinical Support (Admin)	Submit Task Ticket	View Transfer Log	Relink Visits	Reschedules	Manage Approval Roles
Manage Schedule Templates	Indicating Company Holidays in Week & Month	Upload Multiple Attachments -- IE 32-Bit Only	Manage Client Duplicates	Managing Form Mapping Errors	Manage eMAR Groups	eMAR Setup
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Manage TxPlus Templates

See also

Lookups and Code Tables
Security Configuration
Billing Configuration
Site Configuration
Credible eRx Admin
Methasoft Import
Configuring Family Unit As a Client Entity
Case Manager Notes

Home > Admin > Daily Activities > Dashboard

Dashboard

Click on the **Dashboard link** to view the Financial Information of the Dashboard.

The Dashboard is a graphical way of seeing the Client/Employee detailed data and unique statistics regarding the services within the system. Filtering options for Programs and Teams as well as Billable & Non-Billable services are available.

The **Visit Total Chart** displays the total number of visits for the previous year and current year to date. The report is a drillable report from year down to seconds.

The **Aging Chart** displays total insurance due amount for the time frame (30, 60, 90+) for each Payer of Program depending on the selected tab.

The **Billing Summary Chart** displays what the amount for Billed, Collected, Adjusted and Due for first visit (or batch date depending on the selection) from year start to the most current visit date (or batch date depending on the selection). The Billing Summary by Batch Date runs everything based on the batch time and the Billing Summary by Service Date runs everything based on the time in date from the service. The Billing Summary by Batch Date runs everything based on the batch time and the Billing Summary by Service Date runs everything based on the time in date from the service.

The **Authorization Pacing Chart** displays the total client at different pacing levels.

The **Planner Status Chart** displays the status counts for either year to date or month to date depending on the tab selected.

The **Logins Chart** displays web logins, mobile logins and the total logins for the year to date. This is a drillable report and will drill down from month to minutes.

The **Statistics** displays the visits information based on week, month and year whether completed, rescheduled, cancelled, not approved or batched.

The **Not Seen Chart** displays the percentage of clients that have had a service previously but has not been seen in a designated time frame.

See also

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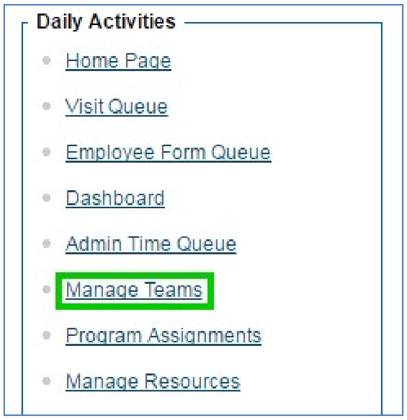
Home > Admin > Daily Activities > Manage Teams

Manage Teams

The **Manage Teams** screen is used to create, edit, and delete teams; manage team assignments; and control client and program associations to teams.

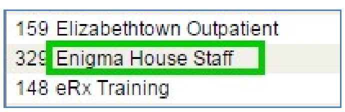
To access this functionality, go to **Admin** tab > **Daily Activities** > **Manage Teams**.



To create a new team:

1. Go to the bottom of the **Team List**.
2. Enter a name for the team in the **Team Name** box.
3. If appropriate, check the **Residential Team** box.
4. Click the **New Team** button.

5. The new team will appear in the list.



To edit a team name:

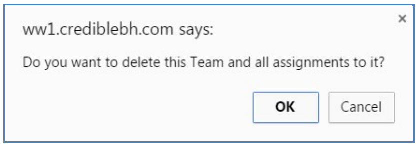
1. Click on the **edit** button on the far right on the line for the name you wish to change.

2. Change the **Team Name, Ext ID**, and **Residential** fields as needed, and then click on the **update** button.

To delete a team:

1. Click on the **delete** button on the far right on the line for the team you wish to delete.

2. Click **OK** on the confirmation dialog.



NOTE: You cannot delete a Team that has any assignments. All assignments must be removed before you can delete the Team.

To edit team employee assignments:

- Click on the **Edit** link in the **Employees** column on the line for the team you wish to update.

Team List:

#	Team Name	Ext ID	Employees	Clients	Programs	Billing Groups	Team Leader
159	Elizabethtown Outpatient		1 Edit	12 Edit	0 Edit	0 Edit	
330	Enigma House Staff		0 Edit	0 Edit	0 Edit	0 Edit	
148	eRx Training		18 Edit	15 Edit	0 Edit	0 Edit	

To assign an employee to a team:

1. Locate the employee you wish to assign to the team.
2. Click on the **assign** button for any employee you wish to assign. The background will be highlighted and the **assign** button will turn into an **unassign** button.

To unassign an employee from a team:

1. Locate the employee you wish to unassign from the team.
2. Click on the **unassign** button for any employee you wish to remove from the team. The background will be highlighted and the **unassign** button will turn into an **assign** button.

To make an employee a supervisor for the team:

1. Locate the appropriate employee.
2. Click the **no** button in their row.

   Please note: An employee can be a supervisor for a team without being assigned to the team.

To edit team client assignments:

- Click on the **Edit** link in the **Clients** column on the line for the team you wish to update.

Team List:

#	Team Name	Ext ID	Employees	Clients	Programs	Billing Groups	Team Leader
159	Elizabethtown Outpatient		1 Edit	12 Edit	0 Edit	0 Edit	
330	Enigma House Staff		0 Edit	0 Edit	0 Edit	0 Edit	
148	eRx Training		18 Edit	15 Edit	0 Edit	0 Edit	

To assign a client to a team:

- Click on the **assign** button for any client you wish to assign. The background will be highlighted and the **assign** button will turn into an **unassign** button.

To unassign a client from a team:

- Click on the **unassign** button for any client you wish to remove from the team. The background will be highlighted and the **unassign** button will turn into an **assign** button.

To edit team program assignments:

- Click on the **Edit** link in the **Programs** column on the line for the team you wish to update.

Team List:

#	Team Name	Ext ID	Employees	Clients	Programs	Billing Groups	Team Leader
159	Elizabethtown Outpatient		1 Edit	12 Edit	0 Edit	0 Edit	
330	Enigma House Staff		0 Edit	0 Edit	0 Edit	0 Edit	
148	eRx Training		18 Edit	15 Edit	0 Edit	0 Edit	

To assign a program to a team:

- Click on the **assign** button for any program you wish to assign. The background will be highlighted and the **assign** button will turn into an **unassign** button.

To unassign a program from a team:

- Click on the **unassign** button for any program you wish to remove from the team. The background will be highlighted and the **unassign** button will turn into an **assign** button.

See also

Residential Teams
Billing Groups Assignment

Updated 6/17/2016 6:21 PM by marchall

Home > Admin > Daily Activities > Program Assignments

Program Assignments

Click on the **Program Assignments link** to manage and view the Program Assignments List.

What would you like to do?

To edit program Employee assignments:

1 - Click on the **Edit** link in the employees column on the line for the program you wish to update

To Assign a Employee to a Program:

Click on the **assign** button for any Employee you wish to assign. The background will be highlighted and the **assign** button will turn into an **unassign** button.

To Unassign a Employee from a Program:

Click on the **unassign** button for any Employee you wish to remove from the Program. The background will be highlighted and the **unassign** button will turn into an **assign** button.

To edit program Client assignments:

1 - Click on the **Edit** link in the Clients column on the line for the program you wish to update

To Assign a Client to a Program:

Click on the **assign** button for any Client you wish to assign. The background will be highlighted and the **assign** button will turn into an **unassign** button.

To Unassign a Client from a Program:

Click on the **unassign** button for any Client you wish to remove from the Team. The background will be highlighted and the **unassign** button will turn into an **assign** button.

To edit program team assignments:

1 - Click on the **Edit** link in the Programs column on the line for the program you wish to update

To Assign a Team to a Program:

Click on the **assign** button for any Team you wish to assign. The background will be highlighted and the **assign** button will turn into an **unassign** button.

To Unassign a Team from a Program:

Click on the **unassign** button for any Team you wish to remove from the Program. The background will be highlighted and the **unassign** button will turn into an **assign** button.

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Home > Admin > Daily Activities > Manage Resources

Manage Resources

See Resource Schedule for information on how to add and manage resources, view the schedule for each resource, and block time on a resource schedule.

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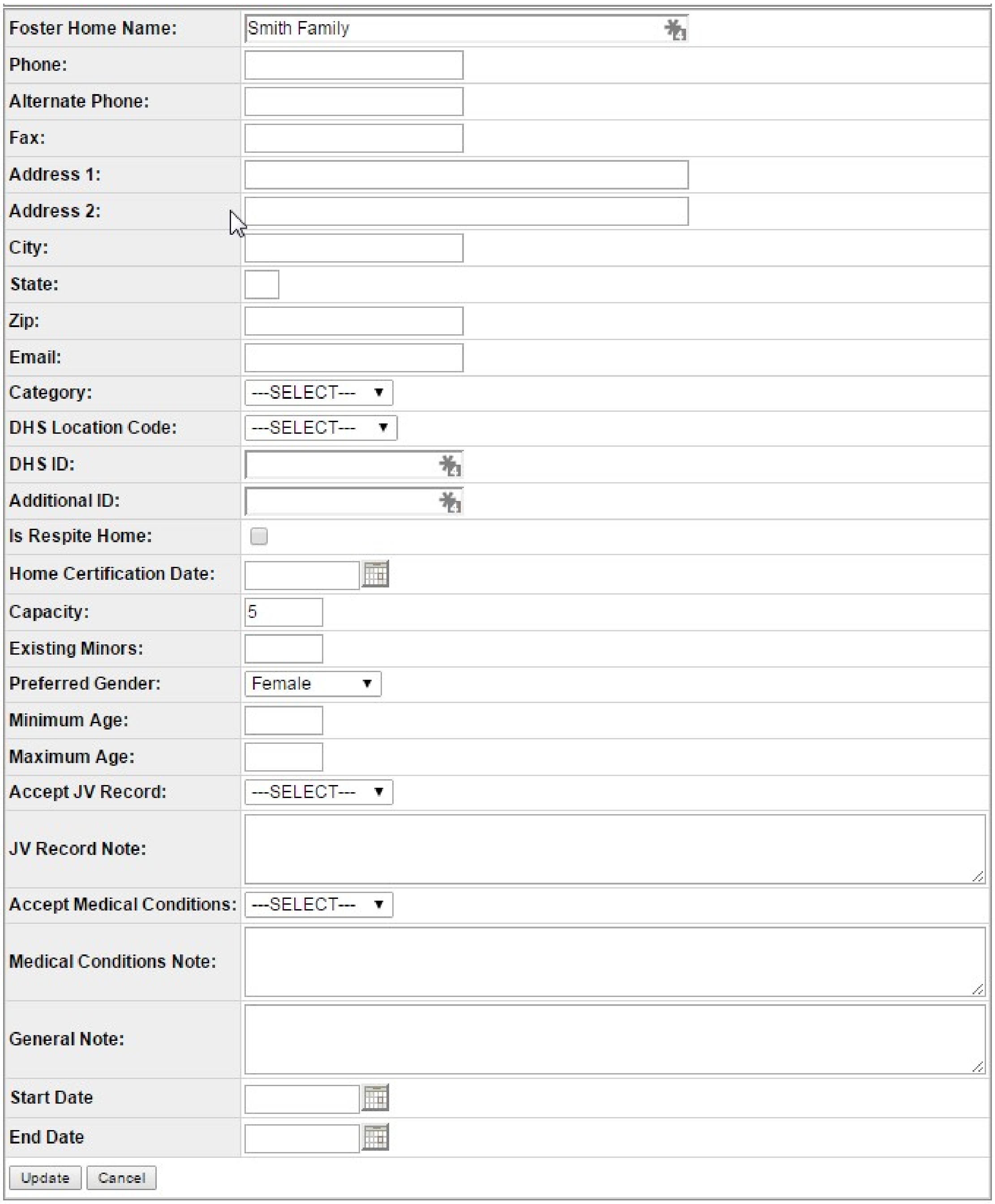
Block Time on Schedule
Resource Schedule

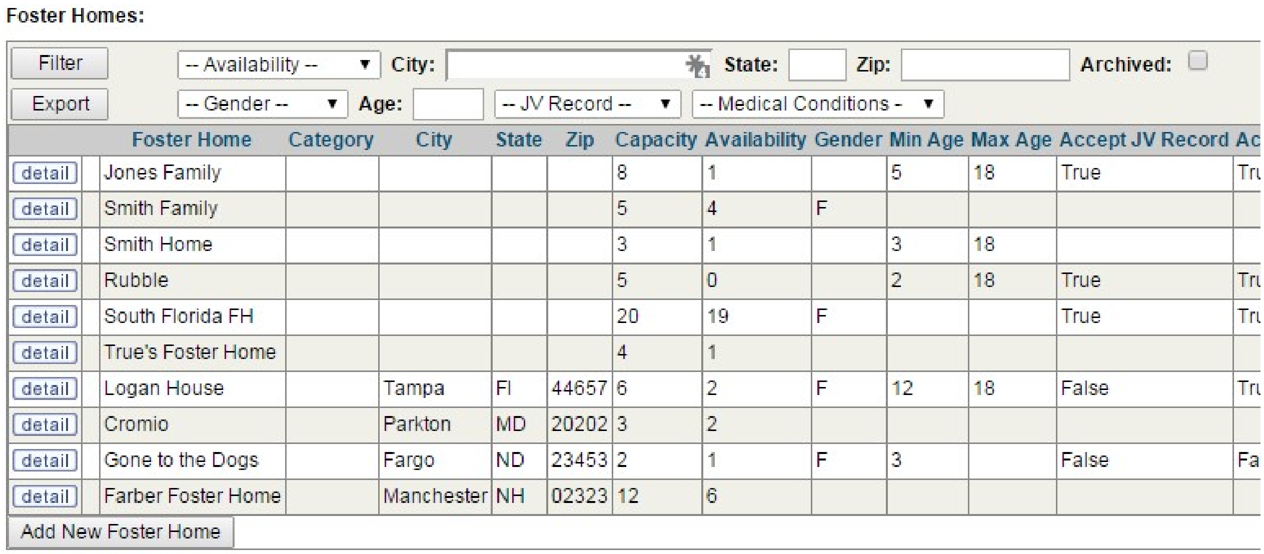
Home > Admin > Daily Activities > Manage Foster Homes

Manage Foster Homes

Use this function to add foster homes to your system and assign foster parents. Foster parents must be set up as clients in the system.



After adding foster homes, you can filter them based on availability, location, and other criteria such as gender accepted.


Foster Homes:

Filter | -- Availability -- | City: | State: | Zip: | Archived:
Export | -- Gender -- | Age: | -- JV Record -- | -- Medical Conditions -

		Foster Home	Category	City	State	Zip	Capacity	Availability	Gender	Min Age	Max Age	Accept JV Record	Ac
detail		Jones Family					8	1		5	18	True	Tru
detail		Smith Family					5	4	F				
detail		Smith Home					3	1		3	18		
detail		Rubble					5	0		2	18	True	Tru
detail		South Florida FH					20	19	F			True	Tru
detail		True's Foster Home					4	1					
detail		Logan House		Tampa	Fl	44657	6	2	F	12	18	False	Tru
detail		Cromio		Parkton	MD	20202	3	2					
detail		Gone to the Dogs		Fargo	ND	23453	2	1	F	3		False	Fa
detail		Farber Foster Home		Manchester	NH	02323	12	6					

Add New Foster Home

Once foster homes are set up, you can assign a client to a foster home by adding a new episode.

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Episodes

Home > Admin > Daily Activities > Bed Board Search

Bed Board Search

Click on the **BedBoard Search link** to search for Bed information based on the filtering criteria (Room/Bed: Gender, Age and Occupancy). The search details can be Exported; click on the **Export** button.

Once Facilities, Rooms and Beds have been established and the Clients have been assigned; the Bed Board Search link can be accessed

Click on the **schedule icon** to view the Facility/Room/Bed occupancy screen. The Scheduler will be color-coded based on the the status:
Green = Bed Open; Red = Bed Occupied; Yellow = Bed Held for Client.

To return to the search screen, click on the **Return to Bed Board Search link.**

Click on the **Client** name occupying the Scheduler to link to the Client Bed Board screen. To view the History of the Client and Bed, click on the **History** button. Click on the **Show Current Assignment** to view.

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Home > Admin > Daily Activities > Schedule Groups

Schedule Groups

Use this function to create and manage predefined groups of clients who are regularly scheduled for visits. With a Not Group setting, you can also use a schedule group to group clients together for documentation purposes -- that is, the clients do not actually attend a group visit. For example, in a residential facility, you could use a Not Group schedule group to document that all residents were present today.

Security Matrix: AssignPlannerGroups

Access Admin tab > Schedule Groups

By default, the Schedule Group List screen lists active schedule groups. Click Show All to see active and inactive schedule groups.

Schedule Group List:

#	Schedule Group Name	Clients	Programs	Max Client Capacity	Start Date	End Date	Inactive	Not Group	Date Create
136	123 group	4 Edit	0 Edit	15			False	False	9/7/2012
143	Acceptance Group	1 Edit	0 Edit	5	7/18/2012		False	False	9/7/2012
82	Adolescent Cog	11 Edit	0 Edit	20	10/14/2010		False	False	9/7/2012

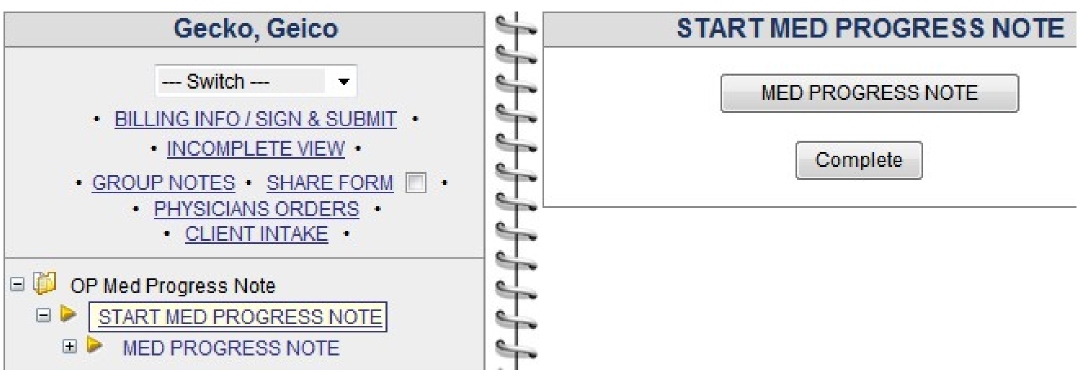
With the Edit links in the Clients and Programs columns, you can assign clients and programs to a schedule group. An employee can assign an individual client to schedule groups via the Schedule Grp button on the Client nav bar.

Program-specific schedule groups:

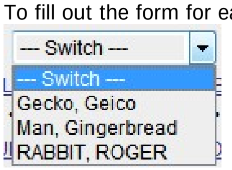
- A client can only be assigned to the schedule group if he/she is also assigned to the program.
- Visits for that schedule group can only be done in the assigned programs.

Note that schedule groups that have no assigned programs remain available for all clients and programs used.

When adding a visit to the schedule, active schedule groups are included in the Client dropdown. When you begin a schedule group Visit, the corresponding web form displays for the first client in the schedule group.



To fill out the form for each of the clients in the group, use the Switch dropdown.



Each Visit is saved independently and you can complete unfinished Visit entries at a later time if you cannot enter all of the data in one sitting.

If a schedule group is no longer active, edit it and enter the appropriate end date.

To add a Schedule group:

1. Enter the name of the schedule group in the **Group Name** field.
2. If desired, specify the maximum number of clients allowed in the group in the Max Client Capacity field. If no maximum is entered, there is no limit.
3. Enter the Start Date (it can be a future date).
4. If you want to use the group for documentation purposes only -- that is, the clients will not actually attend a group visit -- select the Not Group checkbox.
5. Click the **New Group** button.
6. Use the Edit link in the Clients column to assign clients to the schedule group.
7. If appropriate, use the Edit link in the Programs column to make the schedule group program-specific.

To edit a Schedule group: click the **edit** button, make the necessary changes, and click **update**.

To delete a Schedule group:

1. If clients are assigned to the group, click the Edit link in the Clients column and unassign them.
2. Click the **delete** button and then click **OK** when the confirmation popup displays.

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Home > Admin > Daily Activities > Notification Triggers

Notification Triggers

You can have the system automatically notify employees of certain events by setting up triggers. For example, you can set up triggers for when:

- A client is admitted to or released from a bed
- A specific field is updated with a specific value in an employee or client profile
- A resource is scheduled
- A new client or employee is added to a team

Credible has over 50 notification triggers for you to choose from. Several of them are nightly notifications that fire automatically at 3 am.

Please note: Once a specific notification is triggered for a given employee on a particular day, the notification will not fire again for that employee until the first notification has been deleted.

Configuration

To create notifications:

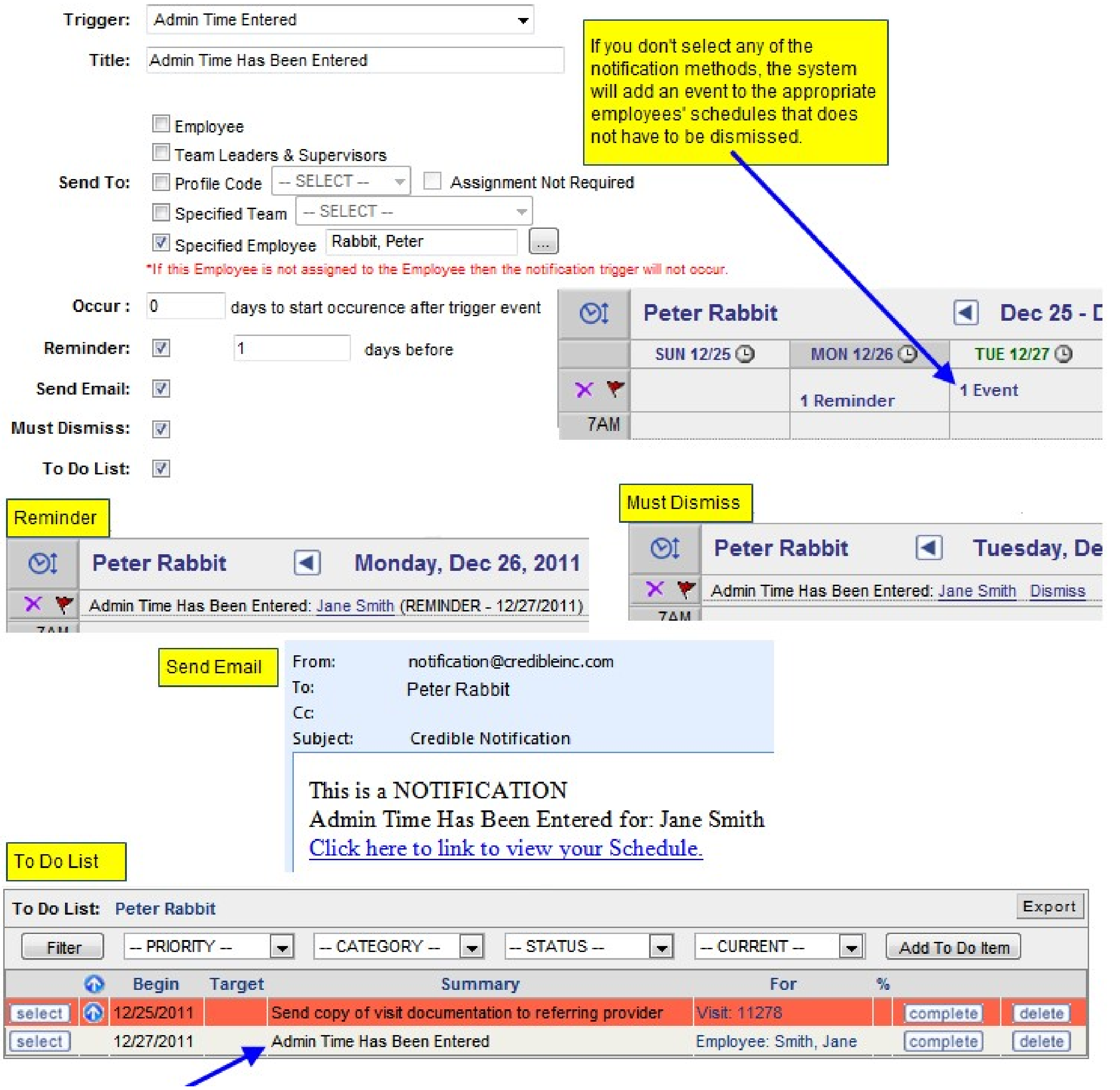
- **Security Matrix: NotificationTriggers** is required to create notification triggers.
- **Security Matrix: NotificationDelete** is additionally required to delete existing triggers.

Usage

When you set up a notification trigger, you specify several criteria. The specific criteria will vary, based on the type of trigger. (Here is a full list of the available triggers.)

- **Trigger**: The event that triggers the notification.
- **Title**: What is displayed by the trigger
- **Send To**: The person, people, and or teams to whom the notification should be sent. Please note: These options will vary by the trigger selected.
- **Occur**: Number of days after the trigger event that the notification should be sent.
- **Notification Methods**: adding an event to the schedule (the default), adding a reminder to the schedule, sending an email, and adding a to-do list item.

Must Dismiss option: force an employee to dismiss a notification event -- the notification will keep reoccurring until the employee opens the notification and clicks the Dismiss link.

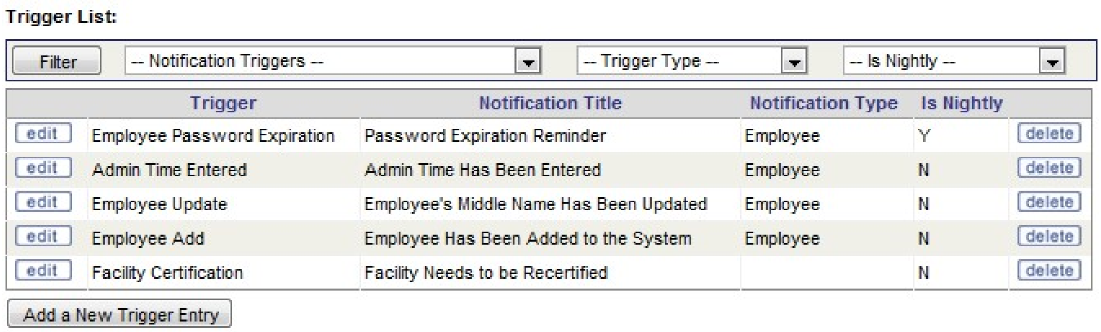


Notification flag color in the Schedule: in the Daily View, indicates whether it is a client, employee, resource, or team event.

For employees to be notified, they must be assigned to the client, employee, or team that the trigger is related to. The exception to this is if you select a Profile and the Assignment Not Required checkbox.

Setting Up a Notification Trigger Top

1. Select the Admin tab and then select Notification Triggers. The Trigger List screen displays. When you have a lot of triggers set up, you can use the filtering fields and Filter button to search for specific triggers.



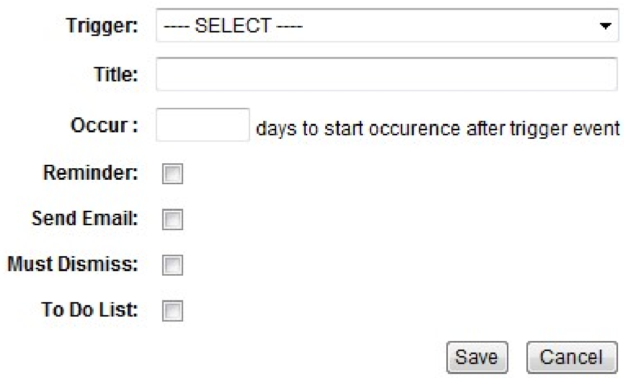
Trigger List:

Filter | -- Notification Triggers -- | -- Trigger Type -- | -- Is Nightly --

	Trigger	Notification Title	Notification Type	Is Nightly	
edit	Employee Password Expiration	Password Expiration Reminder	Employee	Y	delete
edit	Admin Time Entered	Admin Time Has Been Entered	Employee	N	delete
edit	Employee Update	Employee's Middle Name Has Been Updated	Employee	N	delete
edit	Employee Add	Employee Has Been Added to the System	Employee	N	delete
edit	Facility Certification	Facility Needs to be Recertified		N	delete

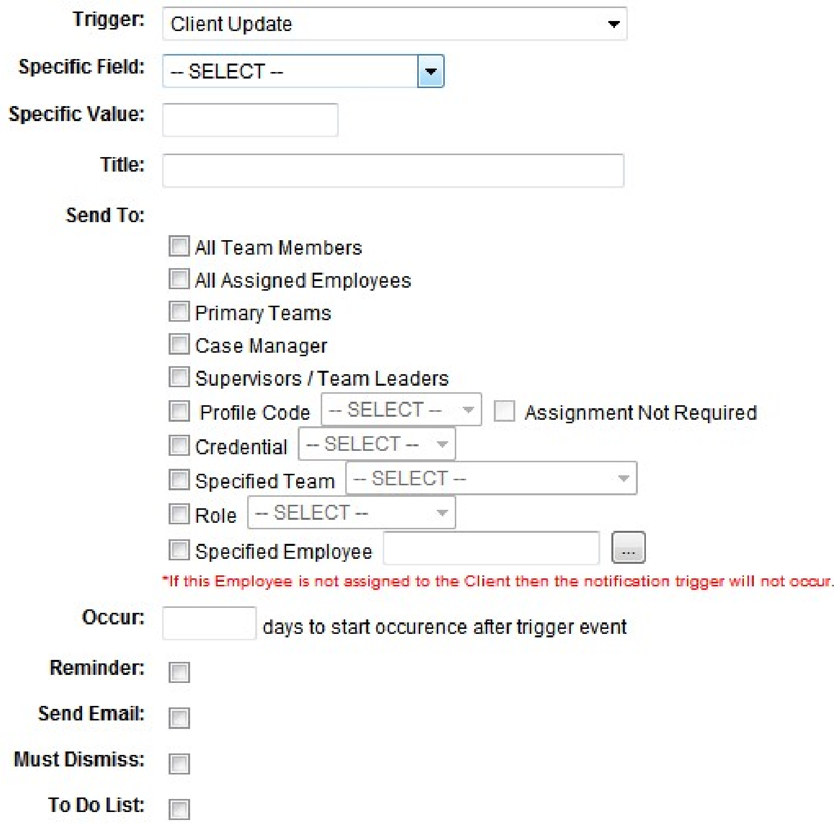
Add a New Trigger Entry

2. Click Add a New Trigger Entry. The Trigger Add screen displays.



3. Select the trigger you want to add from the dropdown. The screen redisplays with Send To options specific to the trigger you selected. If the trigger you selected is dependent on additional criteria, the screen will also contain the appropriate fields. For example, for the Client Update trigger, you need to select the field in the Client Profile and enter the value it needs to contain for the notification to be sent.

   A few notes about triggers based on a specific field/specific value:
   -- If the Specific Field field is a Boolean (Yes/No) field, enter 0 for the No value or 1 for the Yes value instead of entering "No" or "Yes".
   -- If Specific Field is left blank, a notification will be sent when any field in the relevant record (for example, Client Profile) is updated
   -- If Specific Value is left blank, a notification will be sent when the specific field in the relevant record is updated to equal any value



4. Fill in any trigger-specific fields and select the desired Send To options.

- If you need to send a notification to employees with a specific profile regardless of client assignment (for example, Billing Staff), select the profile in the corresponding dropdown and select the checkbox "Assignment Not Required. This feature is recommended for security profiles that have the ClientListAll and ClientViewAll rights, as these people can already see every client regardless of assignment. The Assignment Not Required checkbox is only available if Assignment Not Required is selected in Partner Config.
- If you select the Specified Team send to option and it is a client trigger, both the client and employee must be in the selected team. For employee triggers, the employee must be in the selected team.

5. Enter the number of days after the trigger event that you want to the system to send the notification. If you enter 0, the notification will be sent right after the trigger condition has been met.
6. If you want the system to send a reminder, select the checkbox and enter the number of days before the event that you want it sent.
7. If you want the system to send an email and/or add an item to the to do list as part of the notification, select the corresponding checkboxes.
8. If you want to force the employee to dismiss the notification, click the Must Dismiss checkbox.
9. Click Save.

eMAR Group As Send To Option

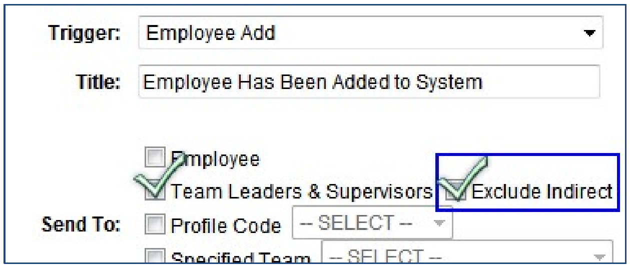
When setting up or editing a trigger for a medication notification such as Medication Add, eMAR group will be one of the Send To options. Note that an eMAR group is not applicable as a Send To option for prescription notifications since they are automatically sent to the prescriber.

Visit Add & Approval Notifications: Send To "Completed By"

If you use the Visit Add or Visit Approval notifications, you can have them sent to the employee who completed the visit. This "Employee Who Completed the Visit" 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.

Prevent Indirect Supervisors from Receiving Employee-Based Notifications

If you select **Supervisors/Team Leaders** as a Send To option for an *employee-based* notification, you can 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. The *Exclude Indirect* checkbox is only available if enabled in Partner Config. As a reminder, the *Exclude Indirect* checkbox will not be available if it is a client-based notification.

Automatically Delete To Do Items for Deleted Notifications

With the 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*.

See also

Notification Trigger Notes
Notification Trigger Events
Notification Removal

Modified 6/16/2017 6:31 PM by CredibleEducation

Home > Admin > Daily Activities > Notification Triggers > Notification Trigger Notes

Notification Trigger Notes

Client Episode Add	For manually created episodes only; notifications will not be sent for episodes created automatically using the Partne Config settings Parent Program Driven Episodes and/or Episodes per Program Assignment. • If your organization is using program roles (Use Program Roles is selected in Partner Config), one of the Senc options will be **Role _____________ in Program of Episode;** you select the role from the dropdown provid • If you are not using program roles, the Send To option Primary Employees in Program of Episode will be available.
Client Episode End Date and Client Episode Start Date	Triggers when an episode start date or end date is entered into the system. Occur field: enter the number of days after the date is entered that you want the trigger to fire. Enter a zero to have notification sent right after the date is entered.
Client Insurance Updated - Specific Payer	Triggers when a field in an existing insurance record for a client has been changed. Note that inactivating or activatir an insurance record will not trigger the notification.
Client Liability Added	Triggers when an employee saves the initial liability form for a client or starts a new form.
Client Profile Date Field Trigger	Triggers when the specified date field in the Client Profile (you select from a dropdown) is assigned a value or updat With the Occur field, you can specify the number of days before or after the date that you want the trigger to fire. Nc that using the Occur field with the DOB field does not currently work because the trigger is based on day, month, anc year.
Client Warning Level	Triggers when a user adds a warning to a client's record. You can select a specific warning level or have the trigger apply to all warnings. Occur field: enter the number of days after the warning is entered that you want the trigger to fire. Enter a zero to h the notification sent right after the warning is entered.
Contact Add and Contact Update	Triggers when an employee adds or updates a contact for a client
eLabs Result Received	Triggers when Change Healthcare (formerly Emdeon, Inc.) sends notification that a lab result has been received. Set up this notification trigger is important because the only other way to determine if a lab result has been received is t into each client's chart individually.
eLabs Unmatched Result	Triggers when the system receives an electronic lab result and cannot find a single client that matches it or finds mo than one client that matches it. Enter 0 in the Occur field and select To Do List.
Electronic Message Received	Triggers when a message is received from Surescripts or a failure message is recevied from the eFax gateway.
Employee Admin Time Approved	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.
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.
Employee Profile Date Field	Triggers based on the specified employee profile date field and the number of days entered in the Occur field. For example, if you enter -30 in the Occur field for a CPR expiration date, the notification is sent 30 days before the expiration date.

Facility Certification and Foster Home Certification	Triggers the specified number of days after an employee adds a certification date to a bed board facility or foster ho This trigger is useful for reminding employees when a facility or foster home needs to be recertified. Bed board facilities and/or foster homes must be set up; security matrix settings required for setup are AdminLookupUpdate, BedBoardAdmin, and FosterHomeAdmin. • Send To options: send the notification to all employees with a specific profile code and/or a specific employee • Occur field: enter the number of days after the certification date is entered that you want the trigger to fire. For example, if a facility needs to be recertified every 180 days, enter 180 in the field.
First Authorization in Auth Level/Visit Type Used	Triggers when the authorization (auth) level and/or visit type you specify is used for the first time. If you don't select a visit type when setting up the trigger, the system bases the trigger on the visit type associated with the auth level you select. This trigger will only fire when a new authorization is added (it will not fire when an existing authorization is updated). For the trigger to fire, the following conditions must be met: • Client must have an authorization with an auth level that matches the auth level set on the trigger • Billing Matrix for the visit type has the **Authorization Required** setting selected
Medication Intra-Class Polyphamacy	Triggers when a medication or prescription in the same drug class as another active medication or prescription is ad 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.
Schedule Cancellation - Employee Has Waitlist	Triggers if an employee has a waitlist and the employee has an appointment cancelled.
Schedule Update – Status Changed To	Triggers if an employee changes the status of a scheduled visit to the status you specify (for example, CANCLD>24H • If you select the SCHEDULED status, a notification is only sent when an existing visit has its status changed from some other status to SCHEDULED – that is, a notification is not sent when a new visit is scheduled. • The trigger works off the date the change occurs and not off the date the visit is scheduled. For example, if the notification is set to occur 0 days from trigger event and you schedule a visit for 9/10/2010 but cancel it on 8/16/10, the notification event will appear on 8/16/10. Send To field: to notify the scheduled employee when the status of a scheduled visit is changed, select Schedule Employee. Note that notification only goes to the main scheduled employee and not to any secondary employees assigned to the visit. Occur field: enter the number of days after the status is changed that you want the trigger to fire. Enter a zero to have the notification sent right after the status is changed.
Treatment Plan End Date	Triggers the specified number of days after the treatment plan end date (if 0 is entered in Occur field, will trigger on end date). Works for Tx Plus and Tx Plan.
Tx Plan Add	Triggers when a treatment plan is added or mapped back from a form. Also triggers when a new Tx Plus plan is add to a client record.
Tx Plus Problem Add	Triggers when a problem (the highest level) is added to a Tx Plus plan. Note that it will not trigger when documentat is added to an existing Tx Plus plan.
Tx Plus Target Date	Triggers a notification to employees when the target date for a treatment plan is entered or updated. Note that TxPlus Target Date triggers based on the target date for the treatment plan – not the target date for the problems/goals/objectives/interventions in the plan.
Visit Manual Red X Set	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.

Nightly Notifications

Contact ROI expiring in Nth Day	Triggers based on the ROI Expires Date on the Client Contacts screen
External Provider ROI expiring in Nth day	Triggers based on the ROI Expires Date on the External Care Providers screen
Form Mapping Failed Nth Day from Transfer Date	Notification fires when form mapping has not happened X number of days after the Transfer Date. In Credible Mobile, Transfer Date is when Send is clicked. If visit was entered on the web, Transfer Date = "signed" date – date Sign & Submit button for web form was clicked.
Service Not Completed in Nth Day in Program	With this trigger, the system looks at scheduled visits in the specified program and determines if any of those visits ha not been completed (signed and submitted) within the Nth day from the scheduled date. For example, if a visit was scheduled on the 1st day of the month and the trigger is set for 10 days, a notification will be sent on the 11th day if a visit has not been signed and submitted.
Visit Not Approved in Nth Day	The trigger is calculated based on the end date of the visit.
Visit Not Completed Since N Days	Triggered when a client has completed a specific visit type in the past but has not completed of visit of the same type again within N days (and the client is still active). The notification only triggers exactly on the Nth day.
Employee Password Expiration	Use this trigger to alert employees when their passwords are about to expire. Settings Partner Config: Password Expiration -- select one of the **Expire Every # Days** options • Specific Value field: enter the number of days in advance of a password expiring that you want to notify employees. For example, if you enter 10 and the Partner Config setting = Expire Every 30 Days, the system will send a notification 10 days in advance of the 30-day expiration. • Occur field: enter a zero. If you enter a number other than zero, it will affect when the notification is sent. For example, if you enter 3 in the Occur field and a 10 in the Specific Value field, the notification will go out 7 days before an employee's password expires.
Authorization Last Period Ending	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	Triggers if Notify at End of Schedule is selected for a med schedule and it is n days before the med schedule is sched to end. Note that the Notify at End of Schedule checkbox in the Create/Edit Med Schedule screen must be selected for notification to trigger.

For notes on all the triggers, click here.

See also
Notification Triggers
Notification Removal

Updated 7/14/2016 11:40 AM by marchall

Home > Admin > Daily Activities > Notification Triggers > Notification Trigger Events

Notification Trigger Events

These are the events available on which triggers can be based. (C: clinical; E: Employee; T: Team; P: Provider Portal; L: Labs; A: Administration; B: Bed Board; I: Inventory)

- Nth or Greater Medication Added (C)
- Admin Time Entered (E)
- Age Change (C)
- Authorization End (C)
- Client Add (C)
- Client Admitted to Bed (C)
- Client Attachment Added (C)
- Client Diagnosis Add/Edit (C)
- Client Episode Add (C)
- Client Episode End Date (C)
- Client Episode Start Date (C)
- Client Ext Update (C)
- Client Extended Date Field Trigger (C)
- Client Form Answer Selected (C)
- Client Form Date Field Trigger (C)
- Client Incident Visit Add (C)
- Client Insurance Added - Specific Payer (C)
- Client Insurance Updated - Specific Payer (C)
- Client Liability Added (C)
- Client Profile Date Field Trigger (C)
- Client Program Assigned (C)
- Client Program Unassigned (C)
- Client Record Granted Emergency Access (C)
- Client Released From Bed (C)
- Client Update (C)
- Client Warning Level (C)
- Contact Add (C)
- Contact ROI expiring in Nth day (C)
- Contact Update (C)
- eLabs Result Received (C)
- eLabs Unmatched Result (L)
- Electronic Message Received (C)
- Employee Form Date Field Trigger (E)
- Employee Add (E)
- Employee Admin Time Approved (E)
- Employee Assigned as Case Manager (C)
- Employee Assigned as Primary (C)
- Employee Form Answer Selected (E)
- Employee Granted Emergency Access (E)
- Employee Incident Visit (E)
- Employee Profile Date Field Trigger (E)
- Employee Update (E)
- Employee Visit Add - Specific Visit Type (E)
- External Provider ROI expiring in Nth day (C)
- Facility Certification (B)
- First Authorization In Auth Level/Visit Type Used (C)
- Foster Home Certification (F)
- Inventory Below Threshold (I)
- Late Client Visit (C)
- Medication Add (C)
- Medication Discontinued (C)
- Medication Intra-Class Polypharmacy (C)
- Medication Update (C)
- Multi-Stage Visit Approval (C)
- New Team Member (T)
- Notify Scheduled Employee (E)
- Notify Scheduled Employee (E)
- Physician Order Line Add (C)

- Prescription - Refill Added (C)
- Prescription - Unapproved Added (C)
- Provider Portal Agreement Rejected (and removed) (P)
- Provider Portal Agreement Saved New (P)
- Provider Portal Agreement Status Change (P)
- Provider Portal Exchange Rolled Back (P)
- Provider Portal Exchange Sent to Staging (P)
- Provider Portal New Exchange Arrived (P)
- Purge Client Records (E)
- Received Direct Message - SureScripts (E)
- Refill Request (C)
- Refill Request Orphan (E)
- Resource Scheduled (R)
- Schedule Cancellation - Employee Has Waitlist (E)
- Schedule Update - Status Changed To (C)
- Treatment Plan End Date (C)
- TxPlan Add (C)
- TxPlus Problem Add (C)
- TxPlus Target Date (C)
- Visit Add - Active Episode (C)
- Visit Add - Specific Visit Type (C)
- Visit Add - Specific Visit Type & Program (C)
- Visit Add - Visit Date Greater than 3 weeks old (C)
- Visit Add -Specific Program (C)
- Visit Approval (C)
- Visit Approval (derived from revised date) (C)
- Visit Approval - Specific Program (C)
- Visit Approval - Specific Visit Type (C)
- Visit Approval - Specific Visit Type & Program (C)
- Visit Manual Red X Set (C)

Nightly Notifications (run at 3am)

- Authorization - Last Period Ending (C)
- eMAR Schedule End (C)
- Employee Password Expiration (E)
- Form Mapping Failed Nth Day From Transfer Date (A)
- Service Not Completed in Nth day in Program (C)
- Visit Not Approved in Nth day (C)
- Visit Not Completed (Incompletes) in Nth day (E)
- Visit Not Completed Since N Days (C)

Updated: 6/16/2017 6:56 PM by public

Home > Admin > Daily Activities > Clinical Support (Admin)

Clinical Support (Admin)

With the Clinical Support module, you can set up clinical support tools based on any combination of medication, medication class, diagnosis, and lab test. If you select a combination of a single medication, medication class, diagnosis, and lab test, it creates an OR matching scenario. If you select multiple options within a category, it creates an AND matching scenario for that category.

You can further qualify the clinical support by entering a lab result range (entry must be numeric), gender, age range, or other client field. If you enter a lab result range and you selected multiple lab tests, the range will apply to all the tests.

A clinical support tool can include text, a URL, and a file. You can also set it up to be pushed out to the Credible Client Portal. When a client meets the conditions specified in the clinical support tool, it is added to his or her record. You can add a Clinical Support section to the Client Overview screen in your internal site and in the Client Portal.

When an employee adds a medication, diagnosis, or lab test to a client record, the system searches existing clinical support tools for a match. If a match is found, the additional clinical support criteria are analyzed. If all of it matches, the clinical support is added to the client record.

The "viewable by" setting limits which employees can view a clinical support when it is triggered.

Notes

- For the addition of a medication, addition/update of a diagnosis, or addition of a lab test to trigger a clinical support, it must be made after the clinical support is set up.
- If a client record matches the same clinical support multiple times, the system will not add another instance of the support until the status of the initial one is no longer New. If the medication, diagnosis, or lab test that triggered a clinical support is deleted, the support will be deleted from the client's record if the status is still set to New. For any other status, the system will delete the primary key (PK), which will make the clinical support no longer active. If the client has a matching medication, diagnosis, or lab test but it was not the trigger for the clinical support, deleting it will not affect the clinical support record.
- The system records clinical support actions in the HIPAA logs.

Settings

Security Matrix: ClinicalSupportAdmin, ClinicalSupportView

Client User Security Matrix: ClinicalSupportCU (to make clinical supports available in the Client Portal). You need to have your Implementation Manager or Partner Services Coordinator turn on the Client Portal for your system.

To use lab results as a trigger, your IM/PSC needs to turn on the lab result entry feature in your system.

To make the Clinical Support section available on the Client Overview screen in your internal site, use the Client Home Page Admin function.
To make the section available on the Client Portal, use the Client User Home Page Admin function.

You need to add clinical support files to the system before you can add them to a clinical support tool.

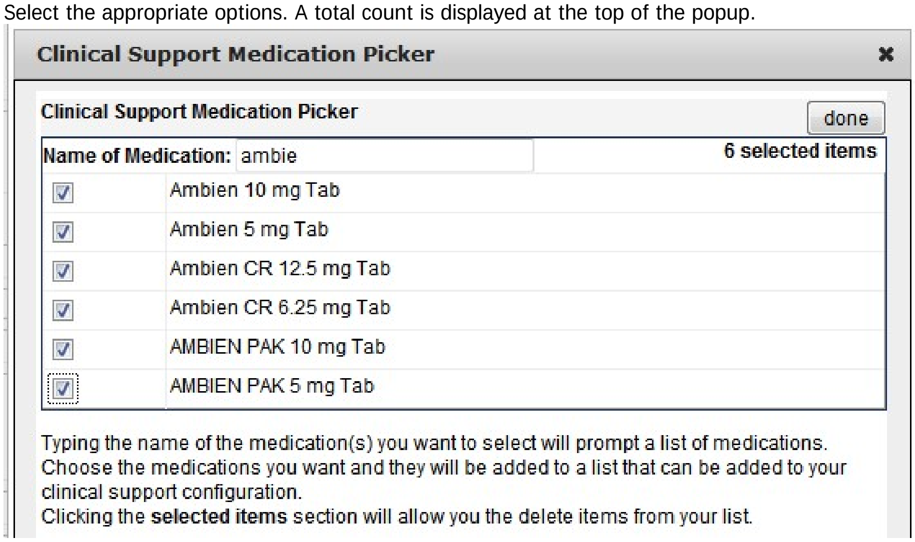
To add a clinical support file to the system:

1. Admin tab > **Clinical Support** > **Clinical Support Files.**
2. Click **Attach New** (or Scan New if appropriate and if your Employee Config is set up for scanning).
3. Specify the folder you want to store the file in and enter a description of it.
4. Browse to select the file and click **Upload File**.

To set up a clinical support:

1. Admin tab > **Clinical Support** > **Add New Clinical Support Tool.**
2. In the Summary field, enter a description of the clinical support (required).
3. Enter at least one medication, medication class, diagnosis, or lab test. You can select multiple medications, medication classes, diagnoses, or lab tests or any combination of them.

a. Click the corresponding field. A Clinical Support Picker popup displays.
b. Type the first three letters of the medication, medication class, diagnosis, or lab test to display a list of possible matches. For a lab test, you can also enter the LOINC.
c. Select the appropriate options. A total count is displayed at the top of the popup.

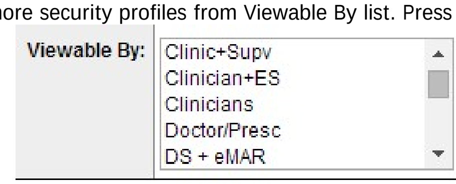


d. Click the total count to view a list of all options selected so far. If you need to remove a selected option, click it.
e. Click **Done.**

4. If applicable, enter additional clinical support criteria: lab test result, gender, age range, and/or a specific client field. If you select a client field, enter the appropriate value in the Other Client Field Value field.
5. If applicable, include a supporting URL (make sure you include http://) and/or file.
6. If you want to give users the option of pushing the clinical support to the Client Portal, select the Push To Client checkbox.
7. Click **Add Clinical Support Tool.**

To limit employee view ability for clinical supports:

1. Go to the Admin Tab and then to Clinical Support.
2. Edit an existing clinical support or add a new one using the steps above.
3. Select one or more security profiles from Viewable By list. Press and hold Shift/Ctrl and click to select range or multiple



profiles.
4. Click Update/Add Clinical Support Tool.

See also
Clinical Support
Credible Client Portal

MU §170.304 (e)(1)

Home > Admin > Daily Activities > Submit Task Ticket

Submit Task Ticket

Click here for more information.

Home > Admin > Daily Activities > View Transfer Log

View Transfer Log

The Transfer Log records the following types of requests/saves from a handheld device or laptop:

- Login
- Planner Download
- Client Lookup
- Visit Save
- Visit Schedule
- Form Download

Security Matrix: AdminView, TransferLogView, TransferLogList

Access Admin tab > View Transfer Log

Use the filtering fields to search for specific transfer actions. If the action was unsuccessful, an error description is provided.

To get additional details on an action (for example, the HTTP Body information which is useful for tracking), click the Transfer Date link in the record row.

Once a record is more than two weeks old, it is moved into the Transfer Log archive through a nightly process. To search for records in the archive, enter any date in the Start Date field and click **Filter Archive**. The End Date field automatically updates to equal the Start Date value.

See also

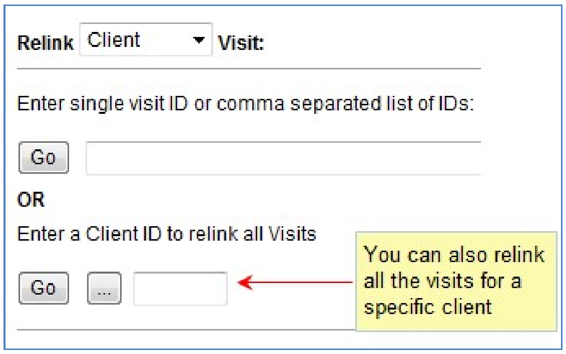
Dashboard
Manage Teams
Program Assignments
Manage Resources
Manage Foster Homes
Bed Board Search
Schedule Groups
Notification Triggers
Clinical Support (Admin)
Submit Task Ticket
Relink Visits
Reschedules
Manage Approval Roles
Manage Schedule Templates
Indicating Company Holidays in Week & Month Views
Upload Multiple Attachments -- IE 32-Bit Only
Manage Client Duplicates
Managing Form Mapping Errors
Manage eMAR Groups
eMAR Setup
Manage Tx Plus Library

Home > Admin > Daily Activities > Relink Visits

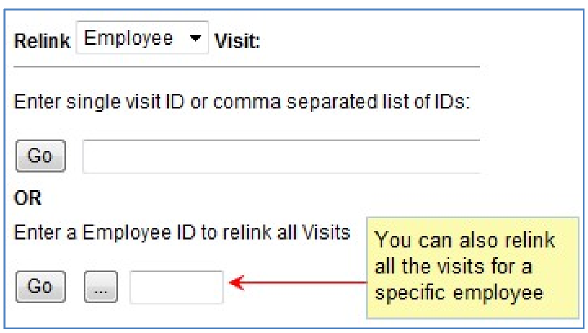
Relink Visits

With the **Relink Visits** function, you can reassign one or more client visits to a different client or employee. Relinking a client visit to another client may be necessary if it is an orphan visit. Relinking client visits to another employee is useful if a new employee is hired to take over a portion of another employee's work load.

Warning: If relinking a visit that uses injected fields, please note that original injected information from client 1 will still appear when relinked. Best practice would be to not relink visits with injected PHI. Instead, the visit should be recreated.



You can also use the function to reassign one or more employee visits (forms) to a different employee. This is useful if an employee selected the wrong employee when he or she filled out the form.



Settings

Security Matrix: ClientVisitRelink

When you relink a visit to a different employee, it will be added to the new employee's visit list and removed from the original employee's visit list. Similarly, when you relink a client visit to a different client, it will be added to the new client's visit list and removed from the original client's visit list.

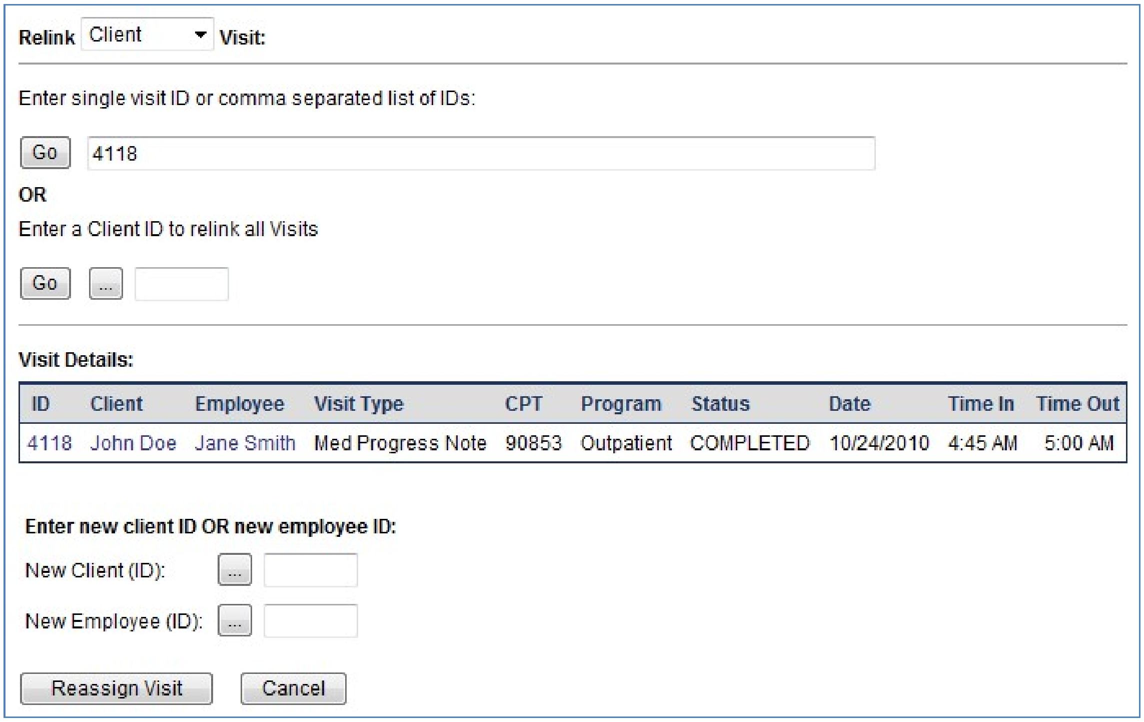
If you need to relink all the visits for a specific client or employee, you can enter his or her ID in the field or click the ellipsis button to access the Search for Clients or Search for Employees popup.

After you enter one or more visit IDs or a client or employee ID and click **Go,** a Visit Details section displays.

To get additional details about a visit, click the visit ID.

- To go the Overview screen for the client or employee, click the appropriate name link.

Relinking a Client Visit



Relink Client Visit:

Enter single visit ID or comma separated list of IDs:

Go 4118

OR

Enter a Client ID to relink all Visits

Go ...

Visit Details:

ID	Client	Employee	Visit Type	CPT	Program	Status	Date	Time In	Time Out
4118	John Doe	Jane Smith	Med Progress Note	90853	Outpatient	COMPLETED	10/24/2010	4:45 AM	5:00 AM

Enter new client ID OR new employee ID:

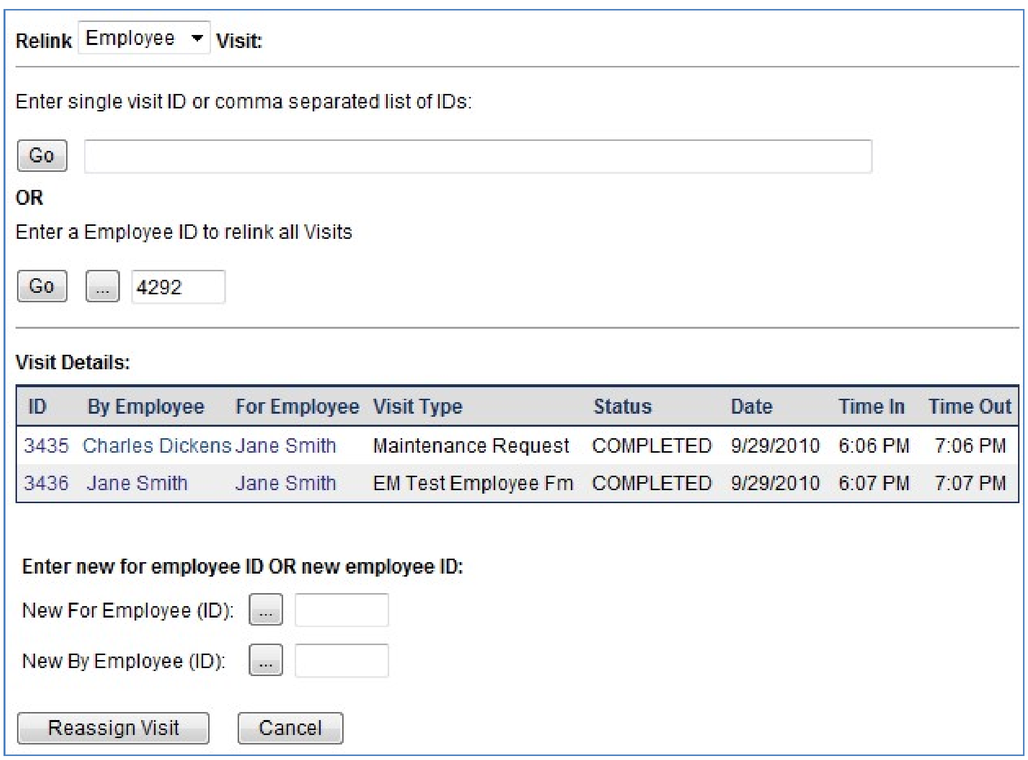
New Client (ID): ...

New Employee (ID): ...

Reassign Visit Cancel

Enter the new client or employee ID or search for it by clicking the ellipsis button and then click **Reassign Visit.** A "Reassign successful" message displays for each visit and the Visit Details are updated with the new client name or employee name.

Relinking an Employee Visit (Form)



Relink Employee Visit:

Enter single visit ID or comma separated list of IDs:

Go

OR

Enter a Employee ID to relink all Visits

Go ... 4292

Visit Details:

ID	By Employee	For Employee	Visit Type	Status	Date	Time In	Time Out
3435	Charles Dickens	Jane Smith	Maintenance Request	COMPLETED	9/29/2010	6:06 PM	7:06 PM
3436	Jane Smith	Jane Smith	EM Test Employee Fm	COMPLETED	9/29/2010	6:07 PM	7:07 PM

Enter new for employee ID OR new employee ID:

New For Employee (ID): ...

New By Employee (ID): ...

Reassign Visit Cancel

Enter the ID of the new "For Employee" and/or the new "By Employee" or search for it by clicking the ellipsis button and then click **Reassign Visit.** A "Reassign successful" message displays for each visit and the Visit Details are updated with the new employee name.

Updated 2/26/2016 2:27 PM by marchall

Home > Admin > Daily Activities > Reschedules

Reschedules

Click the **Reschedules** link to view and manage scheduled client visits that need to be rescheduled (the link won't be available if you don't have the Reschedules right).

Reschedule List: Filter by Employee:
Showing 1 to 3 of 3.

#	Plan Date	Plan Time	Employee Name	Client Name	Client Area	Cancel Date		
7492	8/23/2010	8:45:00 AM	Miguel De Cervantes	Don Quixote		8/24/2010 11:35:00 AM	reassign	cancel
7493	8/23/2010	8:00:00 AM	Charles Dickens	Ebenezer Scrooge		8/24/2010 11:35:00 AM	reassign	cancel
8502	8/26/2010	10:45:00 AM	Jane Smith	John Doe		8/24/2010 11:28:00 AM	reassign	cancel

If the list is large, use the Filter by Employee field to search for visits that need to be rescheduled for a specific employee.

- To reassign the visit to another employee, click the **reassign** button. When an employee changes the status of the visit to something other than RESCHEDULE, the visit will be removed from the Reschedule List.
- To cancel the visit, click the **cancel** button.

You can click the employee or client name to access the corresponding Overview screen.

See also

Dashboard
Manage Teams
Program Assignments
Manage Resources
Manage Foster Homes
Bed Board Search
Schedule Groups
Notification Triggers
Clinical Support (Admin)
Submit Task Ticket
View Transfer Log
Relink Visits
Manage Approval Roles
Manage Schedule Templates
Indicating Company Holidays in Week & Month Views
Upload Multiple Attachments -- IE 32-Bit Only
Manage Client Duplicates
Managing Form Mapping Errors
Manage eMAR Groups
eMAR Setup
Manage Tx Plus Library

Home > Admin > Daily Activities > Manage Approval Roles

Manage Approval Roles

Credible supports multi-stage approval for completed visits and for billing adjustments made to completed visits. With multi-stage approval, you can establish a chain of approval (approvals from multiple employees with different roles) instead of having a single approval point (as with a supervisor). Setting up multi-stage approval is a three-step process:

1. Select the multi-stage approval setting in Partner Config.
2. Add the approval roles and assign employees to the roles.
3. Assign the approval roles to the appropriate visit types and adjustment types.

If the multi-stage approval for a visit has not been completed and the employee is not assigned to the role currently required to approve the visit, the system displays a blue X in the Approve column in the Client Visit List screen. If the employee is assigned to the required role, he or she will be able to approve the visit. An employee can search for all multi-stage visits or for multi-stage visits that he or she can approve (My Multi-Stg).

If the multi-stage approval for an adjustment type has not been completed, an Approve Pending Adjustment section appears in the Claim Billing Details screen for the visit.

Setting Up and Managing Existing Approval Roles

Click the **Manage Approval Roles** link. The Approval Role List indicates the number of employees assigned to each role. It also shows the number of Visit types and adjustment types that an approval role is assigned to. You can hover over the info icon to see the Visit types the approval role is assigned to.

Approval Role List:

#	Approval Role	Employees	Visit Types	Adjustment Types	
9	Administrative Official	9 Edit	2	1	edit delete
12	Billing Supervisor	1 Edit	0	0	edit delete
8	Doctor	8 Edit	3	1	edit delete
3	EVERYONE	All	0	0	edit

New Approval Role **Approval Role Name:**

Visit Type List:

#	Visit Type	Program	Approval Roles	
201	Assessment		Edit	delete
132	Grp Therapy		Edit	delete
330	Med Progress Note	Outpatient	Edit	delete
330	Med Progress Note	Crisis	Edit	delete
322	Senior Serv Outreach	SeniorOutr	Edit	delete

Visit Type: All **Optional Program:** -- Program --

Add Visit Type

Adjustment Type List:

#	Adjustment Type	Approval Roles	
1001	WRITEOFF	Edit	delete

Adjustment Type: Rate Adjustment

Add Adjustment Type

Add an Approval Role and Assign Employees to the Role

1. In the Approval Role Name field (below the Approval Role List), enter the name of the new role and click **New Approval Role**.
2. Click the Edit link in the employees column to assign one or more employees to the approval role. You can use the alphabar and filtering fields to find specific employees. When you assign an Employee, the system highlights the row and the assign button changes to unassign. To review the employees you have assigned, click **show assigned only**.
3. Click the approval role name to return to the Approval Role screen.

Assign Approval Roles to a Visit Type

1. Scroll down to the Visit Type List.
2. Add a Visit type or Visit type/program combination by using the dropdowns below the list and clicking **Add Visit Type.** The visit type is added to the list.

   Note If you want to add a visit type/program combination but the visit type already exists without a program, you need to delete that record first. If a visit type/program combination already exists, you cannot add same the visit type unless you select a different program (that is, you cannot just select the visit type).
3. Click the **Edit** button in the Approval Roles column**,** select an order number for the roles you want to assign to the visit type, and click **Save Order.**

Assign Approval Roles to an Adjustment Type

1. Scroll down to the Adjustment Type List.
2. Add an adjustment type by selecting it from the dropdown and clicking **Add Adjustment Type.** (Adjustment types are set up through the Adjustment Types function on the Billing tab.)
3. Click the **Edit** button in the Approval Roles column, select an order number for the roles you want to assign to the adjustment type, and click **Save Order.**

Edit an Approval Role

In the Approval Role List, you can change the name of the approval role (the edit button) and change the employees assigned to the approval role (via the Edit link in the employees column). To view only the employees assigned to the approval role, click **show assigned only**. After you change the approval name, click update to save.

Delete an Approval Role

In the Approval Role List, click the delete button and then click OK when the confirmation popup displays. Note that you cannot delete the EVERYONE role.

See also
Adjustment Types
Visit List
Adding a Billing Adjustment
Approving a Pending Adjustment

Home > Admin > Daily Activities > Manage Schedule Templates

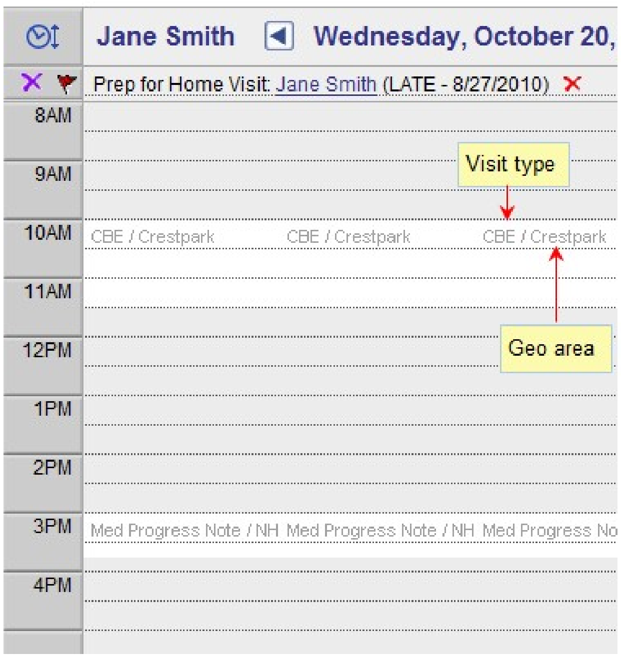
Manage Schedule Templates

With a schedule template, you can set up one or more time blocks a day that are associated with a specific visit type and/or geo area. A geo area is a physical place where a client visit takes place. Associating a geo area with a block is useful for employees who travel between different geo areas. After schedule templates are set up, you use the Edit Mode for Schedule Template in the month view to assign a schedule template to an employee schedule.

Schedule Template Line: Two Blocks w/ Visit Types

Start Time	End Time	Visit Type	GeoArea		
10:00 AM	11:30 AM	CBE	Crestpark	edit	delete
3:00 PM	3:45 PM	Med Progress Note	NH	edit	delete

Add Block **Start Time:** **End Time:** **Visit type:** --- Select Visit Type --- **GeoArea:** ---Select Geo



Click here for the steps to add a visit type to the system and here for the steps to add a geo area to the system.

To add a schedule template to the system or manage existing templates: **Admin** tab > **Manage Schedule Templates** (under Daily Activities). The Schedule Template List screen displays.

Schedule Template List:

#	Template Name	Background Color			
132	Dr. T's Schedule	Cyan	edit	view	delete
151	Two Blocks w/ Visit Types & GeoAreas	DarkKhaki	edit	view	delete
146	Crisis follow-up	Gold	edit	view	delete

New Template **Template Name:** **Background Color:** -- Color --

To add a schedule template:

1. In the Template Name field at the bottom of the Schedule Template List screen, enter the name of the new schedule template.
2. Select a background color that will be used to identify the template in the Month view of an employee schedule.
3. Click the **New Template** button. The template is added to the list.

4. Click the **view** button for the template. The Schedule Template Line screen displays.
5. Enter a start time and end time.
6. Select a visit type and/or geo area from the corresponding dropdowns and then click **Add Block.**
7. Repeat steps 5 and 6 for each block you want to add to the schedule template.
8. Click the name of the schedule template to return to the Schedule Template List screen.

To change the name or background color of an existing template:

1. Find the template in the Schedule Template List and click the **edit** button.
2. Make the necessary changes and click **update.**

To change or delete a block in an existing template:

1. Find the template in the Schedule Template List and click the **view** button. The Schedule Template Line screen displays.
    - To change a block: click the **edit** button, make the necessary changes, and click **update.**
    - To delete a block: click the **delete** button and then click **OK** when the confirmation popup displays.
2. Click the name of the schedule template to return to the Schedule Template List screen.

To delete a schedule template:

1. Find the template in the Schedule Template List and click the **delete** button.
2. Click **OK** when the confirmation popup displays.

See also
Assign a Schedule Template to an Employee Schedule

Dashboard
Manage Teams
Program Assignments
Manage Resources
Manage Foster Homes
Bed Board Search
Schedule Groups
Notification Triggers
Clinical Support (Admin)
Submit Task Ticket
View Transfer Log
Relink Visits
Reschedules
Manage Approval Roles
Indicating Company Holidays in Week & Month Views
Upload Multiple Attachments -- IE 32-Bit Only
Manage Client Duplicates
Managing Form Mapping Errors
Manage eMAR Groups
eMAR Setup
Manage Tx Plus Library

Home > Admin > Daily Activities > Indicating Company Holidays in Week & Month Views

Indicating Company Holidays in Week & Month Views

Use the Company Holidays function to specify which dates are holidays for your organization.

- In the Week view of the Schedule, company holidays are indicated by a lighter shading in the Day/Date header. If you mouse over the header, “Holiday” displays in a tooltip.
- In the Month view, company holidays have a white background. If you mouse over a holiday in the Client Month view, “Holiday” displays in a tooltip.

Marking a day as a holiday has no impact on being able to schedule an appointment for that day. Also, the colors selected for schedule templates trump the white background for company holidays in the Employee Month view.

Settings

Security Matrix: PlannerView, PlannerViewAll, or PlannerViewTeam
Partner Config: Use Company Holidays

1. Admin tab > **Company Holidays**.
2. Use the Year and Month dropdowns and the **Filter** button to go to the desired month.
3. Click on a date to mark it as a holiday.

See also

Dashboard
Manage Teams
Program Assignments
Manage Resources
Manage Foster Homes
Bed Board Search
Schedule Groups
Notification Triggers
Clinical Support (Admin)
Submit Task Ticket
View Transfer Log
Relink Visits
Reschedules
Manage Approval Roles
Manage Schedule Templates
Upload Multiple Attachments -- IE 32-Bit Only
Manage Client Duplicates
Managing Form Mapping Errors
Manage eMAR Groups
eMAR Setup
Manage Tx Plus Library

Upload Multiple Attachments -- IE 32-Bit Only

Due to an ActiveX limitation, the 32-bit edition of Internet Explorer is the only browser that supports the use of the Upload Multiple Attachments function.

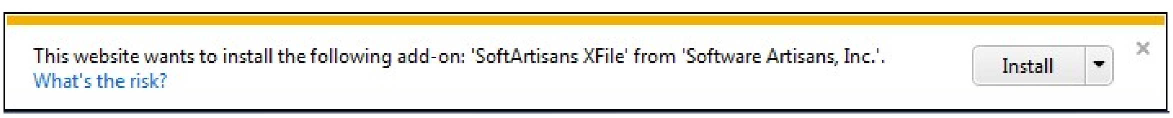
To find out which edition of IE you are using...

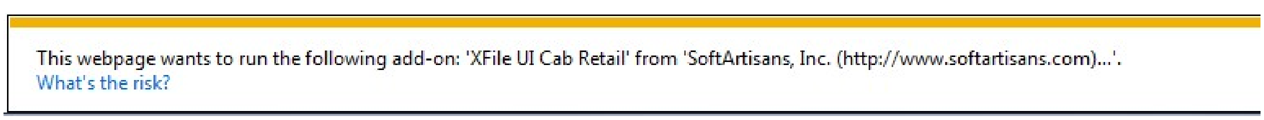
Tools (gear icon or Atl + X) > About Internet Explorer

If nothing follows the Version number, you are using the 32-bit edition.

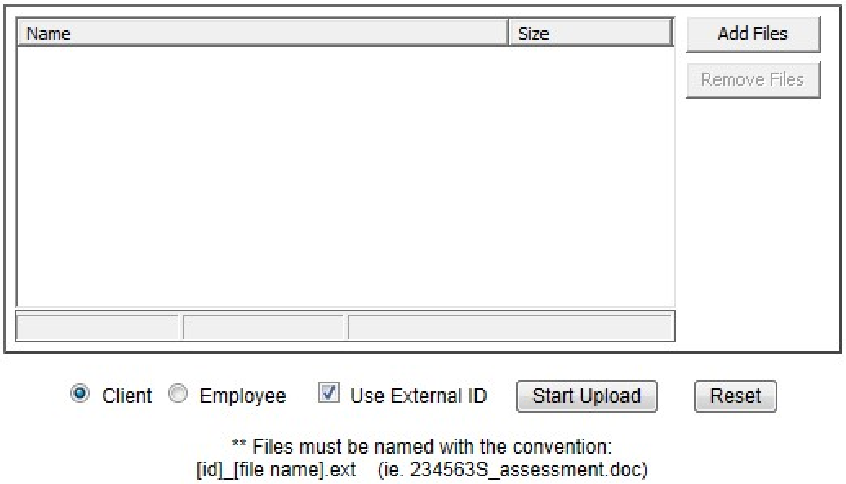
If "64-bit Edition" follows the version number, you are using the 64-bit edition.

To be able to use Upload Multiple Attachments, you need to install/allow two add-ons from Software Artisans/SoftArtisans. You will get prompted to install/allow the add-ons when you first access the function.





Once the add-ons are installed, the Multi-File Upload screen displays as follows:

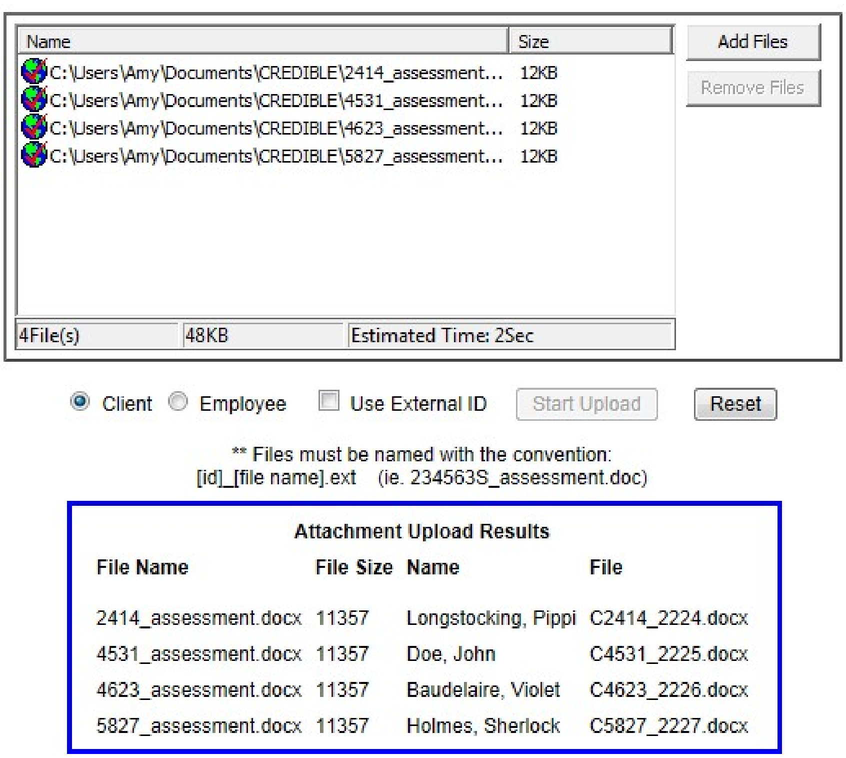


While you can upload multiple files to one or more client or employee records, you cannot include client and employee files in the same upload. *Before uploading files,* make sure each one has the client/employee Credible ID or external ID followed by an underscore as a prefix for the filename. When each file is uploaded to the client/employee record, the ID and underscore will be removed. For example, if you upload 4351_assessment.docx, it appears as assessment.docx in the client's File Attachments screen.

If you are uploading files with external IDs, make sure the external IDs are in the profiles for the clients and/or employees.

To upload multiple attachments:

1. Click Add Files, browse to the appropriate folder, and select the file(s) you want to upload. After selecting the initial file, Shift + click to select a range of files or Ctrl + click to select multiple files not in a range.
2. If you need to upload files in another folder, repeat the above step.
3. If uploading employee files, select the Employee radio button.
4. If uploading files with Credible IDs in the filenames, uncheck Use External ID.
5. Click Start Upload. The Attachment Upload Results display.



6. If you need to upload additional files, click Reset to clear the screen and repeat the above steps.

See also
Client Attachments
Employee Attachments

Home > Admin > Daily Activities > Manage Client Duplicates

Manage Client Duplicates

Use this function to view a list of possible duplicate client records and then merge the data from one record to another (the primary record). After the merge, the system changes the status of the nonprimary record to DUPLICATE and logs the action (REMOVE CLIENT DUPLICATE). However, please note that both records remain visible in Credible.

One of the following conditions must be met for two client records to be considered duplicates:

- Same first and last name, and same DOB
- Same last name and same SSN
- Same SSN and same DOB (neither can be null)

Note: The last name match has to be exact. For example, if two clients have the same last name but one is hyphenated and the other is not, it will not be considered a match.

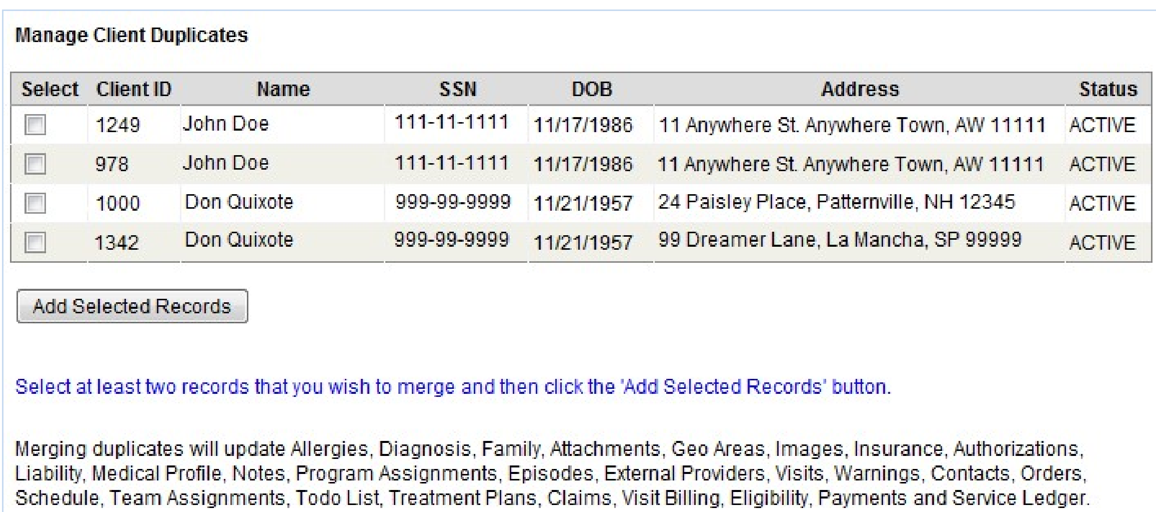
You can also view duplicate client records with the Client Duplicate Check report.

When you merge two duplicate records, the system updates the following data in the primary record:

- Family members and contacts
- Attachments including the client picture
- External providers, insurance coverage, and authorizations
- Medical profile, allergies, diagnoses, and treatment plan
- Notes, warnings, and orders
- Program, team, and geo area assignments
- Schedule and to do list items
- Episodes and visits
- Liability, claims, visit billing, eligibility, payments, and service ledger

To manage client duplicates:

1. Go to **Admin** tab > **Daily Activities** > **Manage Client Duplicates**. The Manage Client Duplicates screen displays with a list of possible duplicate records.



Manage Client Duplicates

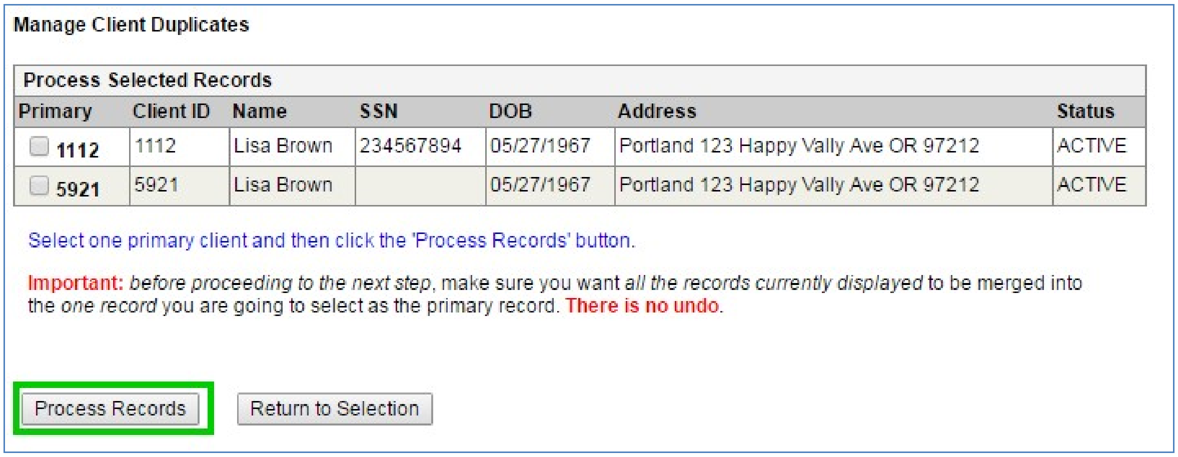
Select	Client ID	Name	SSN	DOB	Address	Status
☐	1249	John Doe	111-11-1111	11/17/1986	11 Anywhere St. Anywhere Town, AW 11111	ACTIVE
☐	978	John Doe	111-11-1111	11/17/1986	11 Anywhere St. Anywhere Town, AW 11111	ACTIVE
☐	1000	Don Quixote	999-99-9999	11/21/1957	24 Paisley Place, Patternville, NH 12345	ACTIVE
☐	1342	Don Quixote	999-99-9999	11/21/1957	99 Dreamer Lane, La Mancha, SP 99999	ACTIVE

Add Selected Records

Select at least two records that you wish to merge and then click the 'Add Selected Records' button.

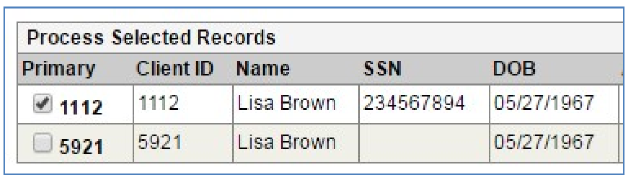
Merging duplicates will update Allergies, Diagnosis, Family, Attachments, Geo Areas, Images, Insurance, Authorizations, Liability, Medical Profile, Notes, Program Assignments, Episodes, External Providers, Visits, Warnings, Contacts, Orders, Schedule, Team Assignments, Todo List, Treatment Plans, Claims, Visit Billing, Eligibility, Payments and Service Ledger.

2. If you determine that two or more records are duplicates, click the corresponding checkboxes and click **Add Selected Records**. The screen refreshes with records you selected.



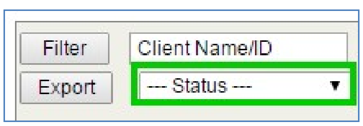
Important: *before proceeding to the next step,* make sure you want all the records currently displayed to be merged into *one record*. **There is no undo.**

3. Select the checkbox for the client record you want to set as primary and click **Process Records.** The system updates the primary client record with data from the nonprimary record and changes the status of the nonprimary to DUPLICATE.

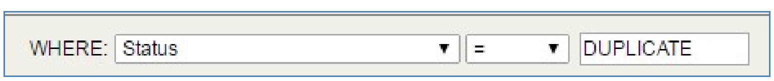


You can search for these nonprimary records in Advanced Client Search by using a custom filter.

1. Set the **Status** dropdown as shown:

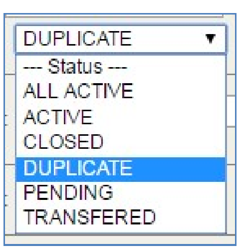


2. Set the filter WHERE **Status** = **Duplicate.**



3. Click the **Filter** button to display all non-primary records.

As an alternative to the WHERE statement, have your Administrator add **Duplicate** as a client status type so that it will appear in the **Status** dropdown.



Updated 7/29/2016 7:43 PM by marchall

Home > Admin > Daily Activities > Managing Form Mapping Errors

Managing Form Mapping Errors

Set up the nightly notification trigger Form Mapping Failed Nth Day from Transfer Date to receive an email and/or to do list item when a form mapping is not successful. Examples of fields that are mapped to include diagnoses, medications, and treatment plans. Note that if one field mapping in a treatment plan errors, all field mappings in the plan will fail and have an error associated with them.

Once you have been notified of a form mapping error, use the SavedVisitMapping Manager function to view the error and then reprocess it (after fixing the issue) or archive it. Archiving is for errors that do not need to be fixed such as when an employee without the appropriate rights tries to map to a treatment plan. When you archive a form mapping error, the system moves it from the savedvisitmapping table to a behind-the-scenes table called savedvisitmappingarchive.

Security Matrix: NotificationTriggers, SavedVisitMappingManager

When setting up the trigger, enter 0 in the Nth day and Occur fields to have the error detected as soon as possible after the Transfer Date.

To manage form mapping errors:

1. Admin tab > SavedVisitMapping Manager.

SavedVisitMapping Table

clientvisit_id			
31293	Select	Reprocess	Archive
31250	Select	Reprocess	Archive
31006	Select	Reprocess	Archive
31003	Select	Reprocess	Archive
30882	Select	Reprocess	Archive

2. Find the error and click Select to view details about it. Some examples are shown below.

clientvisit_id	question_id	is_external_id	data_dict_id	field_value	completed	failure_log
654530	376652	False	616	06/11/2013 	False	Lookup is returning blank field value for @question_id=376652. Please make sure that t exists in the lookup or if using external_id that th external_id set to external_id.
654530	376653	False	2812	7890 	False	Lookup is returning blank field value for @question_id=376653. Please make sure that t exists in the lookup or if using external_id that th external_id set to external_id.
654530	376654	False	637	calendar is 61113 numeric is 7890 	False	Conversion failed when converting the varchar v , ' to data type bit.

clientvisit_id	question_id	is_external_id	data_dict_id	field_value	completed	failure_log
30165	245453	False	1123	OPEN	False	No client_id associated with Client'

Tip: in Form Builder, when you hover over a question in the tree structure on the left, the question_id will be displayed in the URL at the bottom of the screen. To view the IDs associated with Data Dictionary fields, you will need to use the Export Tool to create a custom query.

3. Determine if the issue should be fixed and reprocessed or archived and then use the corresponding button. Another option is to just leave the error in the savedvisitmapping table.

   If the form mapping is successful when you reprocess it, the system will remove it from the savedvisitmapping table.

See also

Dashboard
Manage Teams

Home > Admin > Daily Activities > Manage eMAR Groups

Manage eMAR Groups

Setting up eMAR groups makes it easier for staff to administer medications to multiple clients. The system combines the schedules of the clients assigned to the group into a single schedule that an employee can access from his or her Employee nav bar.

Settings

Security Matrix: eMar, eMarManageGroups
Partner Config: Use eMAR Functionality

To add a new eMAR group:

1. Admin tab > Manage eMar Groups.
2. Enter the group name and click **Add New Group.**
3. Click the **Edit** links and assign employees and clients to the group. To search for a specific employee or client, use the filtering fields in the Add to eMar Group popups.
4. Click **Done**.

If employees have the eMarClientGroup and eMarEmployeeGroup rights, they will have access to an eMAR Group button on the corresponding nav bar to assign a client or employee to the eMAR groups you set up.

See also
eMar - Employee Nav Bar
eMAR Group: Client Nav Bar

Dashboard
Manage Teams
Program Assignments
Manage Resources
Manage Foster Homes
Bed Board Search
Schedule Groups
Notification Triggers
Clinical Support (Admin)
Submit Task Ticket
View Transfer Log
Relink Visits
Reschedules
Manage Approval Roles
Manage Schedule Templates
Indicating Company Holidays in Week & Month Views
Upload Multiple Attachments -- IE 32-Bit Only
Manage Client Duplicates
Managing Form Mapping Errors
eMAR Setup
Manage Tx Plus Library

Home > Admin > Daily Activities > eMAR Setup

eMAR Setup

Use this function to customize the “not taken” responses available in the Log Medication Administration popup and 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. 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.

To set up a “not taken” reponse, enter the response description, select the background color, and click **Add Patient Response**.

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.

See also
eMAR: Client Nav Bar
Adding a Med Schedule

Dashboard
Manage Teams
Program Assignments
Manage Resources
Manage Foster Homes
Bed Board Search
Schedule Groups
Notification Triggers
Clinical Support (Admin)
Submit Task Ticket
View Transfer Log
Relink Visits
Reschedules
Manage Approval Roles
Manage Schedule Templates
Indicating Company Holidays in Week & Month Views
Upload Multiple Attachments -- IE 32-Bit Only
Manage Client Duplicates
Managing Form Mapping Errors
Manage eMAR Groups
Manage Tx Plus Library

Home > Admin > Daily Activities > Manage Tx Plus Library

Manage Tx Plus Library

The custom treatment plan library consists of clinical areas specific to your organization. For each one, you predefine problems and the related goals, objectives, and interventions to standardize treatment plan building.

When an employee selects a clinical area, he or she will only be able to choose from the problems you defined for it. Similarly, when the employee selects a problem, only the goals/objectives/interventions you associated with it will be available.

Settings

Partner Config: Use Tx Plus, Use Custom Tx Plus Library, Force Custom/Wiley Library (optional)

Select Force Custom/Wiley Library if you want to force staff to use the predefined items in the custom library (and Wiley library if a defining treatment plan items on the fly.

Security Matrix: TxPlusBuild

Use

1. Admin tab > Manage Tx Plus Library.

2. Click Add Clinical Area, add a description of the clinical area, and save.

3. Select the clinical area and click Add Problem. Add a summary and description of the problem and save.

4. Select the problem and click Add TxPlus Element. Goal is selected by default. Add a summary and description and save.

5. Repeat step 4, adding more goals, objectives, and interventions to the problem. When done, click Go Back.

6. Add additional problems and related goals, objectives, and interventions as necessary. When done, click Go Back.

7. Add additional clinical areas as necessary. When done, close the popup window.

See also

Dashboard
Manage Teams
Program Assignments
Manage Resources
Manage Foster Homes
Bed Board Search
Schedule Groups
Notification Triggers
Clinical Support (Admin)
Submit Task Ticket
View Transfer Log
Relink Visits
Reschedules
Manage Approval Roles
Manage Schedule Templates
Indicating Company Holidays in Week & Month Views
Upload Multiple Attachments -- IE 32-Bit Only
Manage Client Duplicates
Managing Form Mapping Errors
Manage eMAR Groups
eMAR Setup

Home > Admin > Lookups and Code Tables

Lookups and Code Tables

This section of the Admin tab is based on the ability to create and customize the Lookups and Tables of the site. These are specific to each Facility's utilization of the categories within the section.

Custom Lookup Categories	Custom Lookup Items	Admin Time Types	Geo Areas/Offices	Axis 1/Axis 2/Axis 3	Care Provider Types	External Care Providers
Agencies	Group Activity Types	Credential Types and Groups	Client Status Types	Episode Status Types	Contact Types	Relationship Types
File Folders Admin	Tx Categories	Roles	Program/Role Assoc	Form Groups (Admin)	Form Group Visit Types	Authorization Levels
Employee Visit Type	Attachment Names	Medical Conditions	Bed Board Facilities	Bed Board Rooms	Bed/Foster Interval Reasons	Med Severity Levels
ICD-10 Recode						

See also
Daily Activities
Security Configuration
Billing Configuration
Site Configuration
Credible eRx Admin
Methasoft Import
Configuring Family Unit As a Client Entity
Case Manager Notes
Employee-Specific Time Zones
Flag Attachments for HR Use Only
Recipient, Location, & Billing Group Fields Default to Null
Additional Fields in Visit Details Screen
Drug Schedule & NDC for Client Medications
Setting Up the Credible Client Portal
Outcome Tracking Setup
Setting Up Your System to Use a Cancellation/No-Show Form
Setting Up eLabs
Setting Up eMAR
Setting Up Bed Board
Configuration for Generating Clinical Summaries

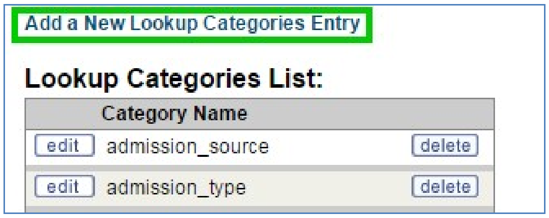
Purging Client Records
User Management Best Practice

Home > Admin > Lookups and Code Tables > Custom Lookup Categories

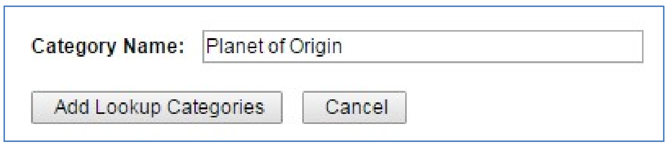
Custom Lookup Categories

Click on the **Custom Lookup Categories** link to create and manage a list of predefined lookups. **Lookup Categories** become part of the Data Dictionary, and the setup of **Where Clauses**. These fields will be applied to the **Table Source** (e.g., *Client, Employee, Visit*, etc.).

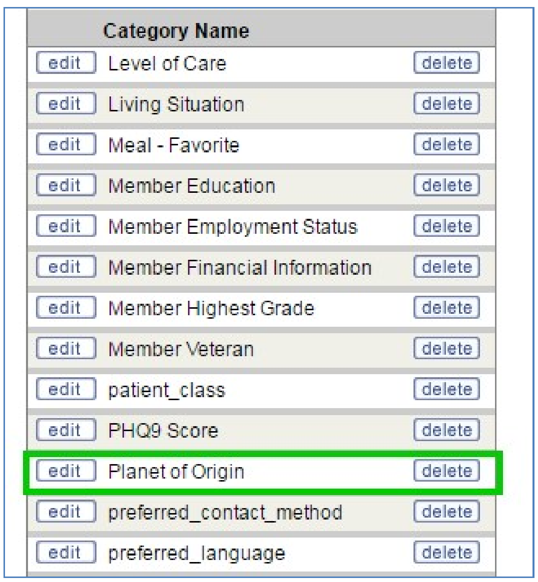
To add a Lookup Category, click on the **Add a New Lookup Categories Entry** link on the Custom Lookup Categories page.



Enter the desired **Category Name**, then click the **Add Lookup Categories** button.



Your new category now appears in the list. To change the name or correct an error, click the **Edit** button, then **Save**. To remove the category, click **Delete,** and **OK** on the confirmation box.



See also
Custom Lookup Items
Admin Time Types
Geo Areas/Offices
Axis 1/Axis 2/Axis 3
Care Provider Types
External Care Providers
Agencies
Group Activity Types
Credential Types and Groups
Client Status Types
Episode Status Types
Contact Types
Relationship Types
File Folders Admin
Tx Categories
Roles
Program/Role Assoc

Form Groups (Admin)
Form Group Visit Types
Authorization Levels
Employee Visit Type
Attachment Names
Medical Conditions
Bed Board Facilities
Bed Board Rooms
Bed/Foster Interval Reasons
Med Severity Levels
ICD-10 Recode

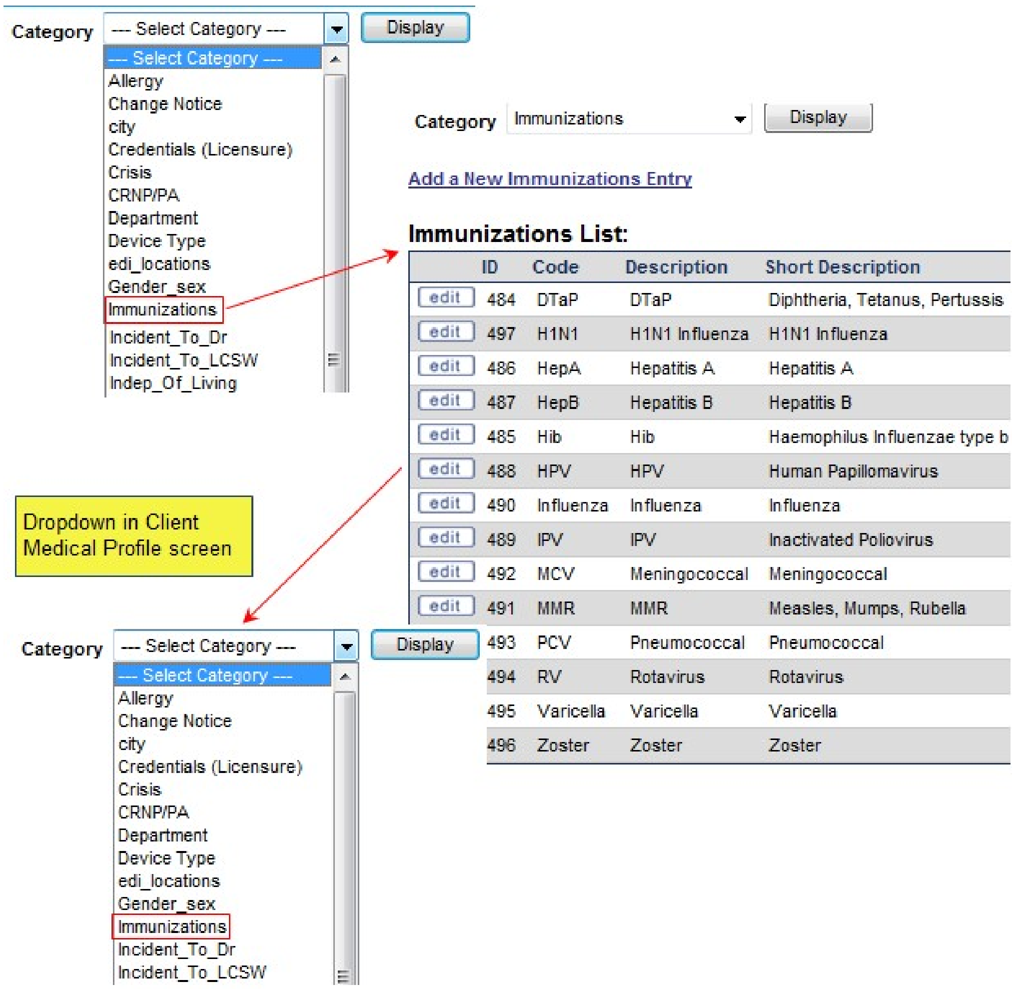
Modified 10/25/2016 3:10 PM by CredibleEducation

Home > Admin > Lookups and Code Tables > Custom Lookup Items

Custom Lookup Items

Add and manage the options available in many of the dropdowns in the system

Example: with the Immunizations category, you control the options in the Immunizations dropdown in the Client Medical Profile screen



You can add a new lookup category with the Custom Lookup Categories function.

Access Admin tab > Custom Lookup Items (under Lookups and Code Tables)

From the Category dropdown, select the type of dropdown you need to manage and click **Display.** If the dropdown already has options, the existing list displays along with a link to add a new entry.

- To add a new entry: click **Add a New [category name] Entry**; fill out the Code, Description, Short Description, and Ext Code fields; and click the **Add [category name]** button. Once a category lists has been established, the Lookup data can be provided based on the Data Dictionary.
- To edit an exiting entry: click the **edit** button, make the necessary changes, and click **save.**
- To remove an entry: click the **delete** button and then click **OK** when the confirmation popup displays.

Lapsing Codes in Custom Lookups in the Clients, Employee, Clients Ext, and Client Episode Tables

> The delete function is designed to help you phase out codes in a custom lookup category -- necessary when your state mandates the expiration of lookup codes used for state reporting. When you delete a code in the Clients, Employee, Clients Ext, or Client Episode table, it will be retained in records where it already exists but will no longer be available to select going forward.

See also
Custom Lookup Categories
Admin Time Types
Geo Areas/Offices
Axis 1/Axis 2/Axis 3
Care Provider Types
External Care Providers
Agencies
Group Activity Types
Credential Types and Groups
Client Status Types
Episode Status Types
Contact Types
Relationship Types
File Folders Admin
Tx Categories
Roles
Program/Role Assoc
Form Groups (Admin)
Form Group Visit Types
Authorization Levels
Employee Visit Type
Attachment Names
Medical Conditions
Bed Board Facilities
Bed Board Rooms
Bed/Foster Interval Reasons
Med Severity Levels
ICD-10 Recode
Data Dictionary

Home > Admin > Lookups and Code Tables > Admin Time Types

Admin Time Types

If your agency requires employees to record administrative (admin) time - time that is not billable or visit-based, you need to set up administrative time types in your system. Note that administrative time entered by employees displays on the Payroll Report.

Access Admin tab > Admin Time Types

Add a New Admin Time Type Entry

Admin Time Type List:

	Type Code	Type Description	Ext Code	Program	Deleted	Auto Approve	Is Leave	
edit	Bonus	Bonus Time Off	3.3		True	False	False	delete
edit	Exp Report	Time spent filling out an expense report			True	False	False	delete
edit	Sick	Sick Time Off			False	False	False	delete
edit	Holiday	Holiday Time Off	5		False	False	False	delete
edit	Lunch	Lunch			False	False	False	delete

To add a new admin time type: click **Add a New Admin Time Type Entry**, fill out the fields (see below), and click **Add Admin Time Type**.

- Type Code - Required; 10 character maximum
- Type Description - Required; 20 character maximum
- Ext Code - Used for exporting; 20 character maximum
- Program - If the admin time type is applicable to all programs, leave this field blank. If it is only applicable to one program, select it from the dropdown. If you select a program, only employees assigned to that program will see the admin time type in the Type dropdown in the Admin Time Add screen.
- Deleted - Defaults to False; select True if the admin time type should no longer be used.
- Auto Approve - Defaults to False; select True if you want the system to automatically approve this type of admin time versus having another employee review and approve it.
- Is Leave - Defaults to False; select True to indicate the admin time is associated with a leave.

To edit an admin time type: click **edit**, make the necessary changes, and then click **save**.

To delete an admin time type: click **delete** and click **OK** when the Confirmation popup displays.

See also
Employee Admin Time

Home > Admin > Lookups and Code Tables > Geo Areas/Offices

Geo Areas/Offices

Click the **Geo Areas/Offices** link to add and manage a list of geo areas/office list entries that can be associated with service locations and billing. The Geo Areas/Office List screen displays.

Please note: Geo Areas are no longer used for prescribing. They have been replaced by Clinic Locations for eRx and EPCS.

Add a New Geo Areas / Office Entry

Geo Areas / Office List:

	Code	Description	External ID	Address 1	City	State	Zip	NPI	
edit	MD	Bethesda Md		Credible Street	Credible Town	MD	11111	1234567890	delete
edit	NH	Dover NH		Brewer Street	Dover	NH	22222	0987654321	delete

To add a new geo area/office list entry:

1. Click the corresponding link. The Add Geo Area/Office Entry screen displays.

Code:	
Description:	
External ID:	
Address 1:	
City:	
State:	
Zip:	
NPI:	
2nd ID Qual:	---Choose---
2nd ID:	
BG Color:	---Choose---
Phone Number:	
Fax Number:	

Add Geo Areas / Office   Cancel

2. Fill out the fields and then click **Add Geo Areas/Office** to save.

To change the details of a geo area/office entry, click the **edit** button.

To delete a geo area/office entry, click the **delete** button and then click **OK** when the confirmation popup displays. Note that you cannot delete a geo area if it is associated with a schedule template.

Service Locations

To link a geo area to service locations, select the **Admin** tab and click the **Locations** link. The Service Location List screen displays.

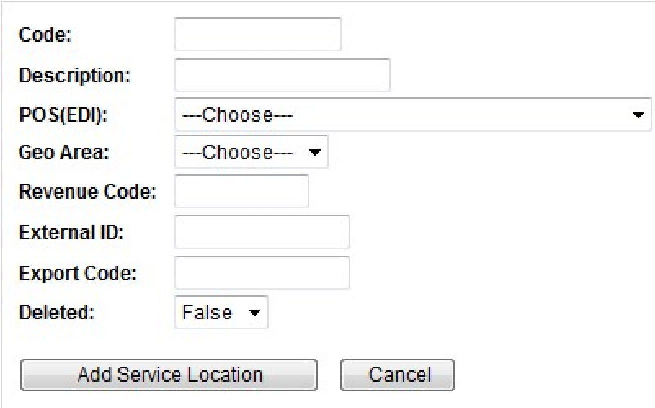
Add a New Service Location Entry

Service Location List:

	ID	Code	Description	POS(EDI)	Geo Area	Revenue Code	External ID	Export Code
edit	1	Beth Office	Bethesda Office	Office	MD		11	
edit	5	NH Office	New Hampshire Office	Office	NH		11	

To add a new service location:

1. Click the corresponding link.



2. Fill out the fields and select a geo area if appropriate. Click **Add Service Location** to save.

To link a geo area to an existing service location (and/or make other changes), click the **edit** button.

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.

Location NPI Info

When you configure a payer, you can specify whether the NPI should be sent in loop 2310C (Service Facility Location). If you select the Send NPI w/2310C setting (in the Electronic Claim Overrides section in Payer Config), the NPI for the geo area associated with the location for the service will be in the NM109 element in the 2310C loop.

There are two other settings in the Electronic Claim Overrides section that pertain geo areas and loop 2310C:

- Fill 2310C w/Actual Address -- Fills loop 2310C Service Facility Location - Uses GeoArea address or client address when applicable versus the Billing Provider
- Fill 2310C w/Geo Area Address -- Fills loop 2310C Service Facility Location - Uses GeoArea address when applicable versus the Billing Provider. Does not send client's address when POS=Home(12).

In addition to having the NPI in the geo area, you need to assign the geo area to the location.

1. Select the **Admin** tab and then select **Locations** (under Billing Configuration).
2. Select the Location you want to work with and Edit by assigning the geo area you just assigned an NPI to.

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Updated 4/26/2017 12:51 PM by CredibleEducation

Home > Admin > Lookups and Code Tables > Axis 1/Axis 2/Axis 3

Axis 1/Axis 2/Axis 3

These three functions control the Axis I, II, and III diagnoses that are available when adding or updating the Multiaxial Assessment for a client (Diagnosis off the Client nav bar).

Axis I and Axis II

The steps to add or update an axis I or axis II diagnosis are the same.

On the Admin tab under Lookups and Code tables, click the Axis 1 or Axis 2 link. The diagnosis list displays.

To add a new diagnosis:

1. Scroll down to the Add Axis I/II Record section and fill in the fields. The Axis I/II Code and Description fields are required. You can enter up to 80 characters including spaces in the Description field.
2. Click the **Add Axis 1/2** button.

About the SNOMED Coding Field

SNOMED stands for Systematized Nomenclature of Medicine; ICD stands for International Classification of Diseases. Meaningful Use Stage 2 has defined SNOMED as the common language that providers and electronic medical records need to use -- specifically for the problem list (diagnoses) in a client's record. For more information, click here.

If there is a SNOMED code that matches an ICD-9 code for a diagnosis and it is a one-to-one correspondence, the linking of the two codes will be done automatically behind the scenes (there will only be one option in the dropdown). If multiple SNOMED codes match an ICD-9 code, select the appropriate one from the dropdown. If an ICD-9 code does not have a corresponding SNOMED description, the dropdown will be empty.

To change an existing diagnosis, enter multiple descriptions for one code, or enter multiple duplicates of one code, click the **edit** button, make the necessary changes, and click **update.**

To delete axis I or II diagnoses that does not apply to your facility, click the **delete** button and then click **OK** when the confirmation popup displays.

Axis III

To add an axis III record or update an existing one:

1. On the Admin tab, click the Axis 3 link. The Axis III Category List screen displays.
2. Click an existing major code or description or add a new major group using the fields at the bottom of the screen. The Axis III List screen displays with the IDC9 codes for the category you selected displays. If you added a new major group, there is a placeholder record.
   - To add a new Axis III diagnosis, fill out the fields in the Add Axis III Record section and click **Add Axis 3.**

     Description: 100 characters max; Long Description: 255 characters max; Common checkbox: when True, the diagnosis will be in a subset of diagnoses considered when the Common Only filter in the ICD-9 CM Selector is used. Long descriptions of common diagnoses are displayed in green in the ICD-9 CM Selector. See above for information on the SNOMED Coding dropdown.
   - To edit an existing Axis 3 diagnosis, click edit, make the necessary changes, and click **update.**

To delete an axis III diagnosis that does not apply to your facility, click the **delete** button and then click **OK** when the confirmation popup displays.

When you are done adding or editing axis III records, click Back To Axis III Category Selection and then click Back To Admin.

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Home > Admin > Lookups and Code Tables > Care Provider Types

Care Provider Types

Click on the **Care Provider Types** link to add and manage various Provider "roles" to help define External Care Providers. External Care Providers are located on the Client Nav Bar (Ext Prov); the created Care Provider Type list will be available in the Type dropdown when Adding a new Client Provider.

What would you like to do?

On the Admin Tab, click on the **Care Provider Types** link.

Add Care Provider Type:
To Add a new Care Provider Type, click on the **Add a New Care Provider Type Entry** link.

Edit Care Provider Type:
To Edit a Care Provider Type, click on the **edit** button next to the Care Provider Type you wish to change. Make necessary changes, then click on the **save** button.

Delete Care Provider Type:
To Delete a Care Provider Type, click on the **delete** button next to the Care Provider Type. Click **OK** on the Confirmation dialog box.

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Home > Admin > Lookups and Code Tables > External Care Providers

External Care Providers

Click on the **External Care Provider link** to add and manage External Care Providers used for Billing purposes as well as for Client Medications/Prescriptions. The **Consolidate Provider Duplicates link** will eliminate Provider duplicates entered. External Care Providers are located on the **Client Nav Bar** (**Ext Prov**); added Providers will also appear in the Add New Client Provider section in the Choose from list dropdown of the External Care Provider screen.

What would you like to do?

- Add External Care Provider
- Edit External Care Provider
- Delete External Care Provider

On the Admin Tab, click on the **External Care Providers** link.

Add External Care Provider:
To Add a new External Care Provider, click on the **Add a New Provider Entry** link.
1 - Enter **Provider Name**.
2 - Enter Provider **Phone** Number. (optional)
3 - Enter **Alternate Phone** Number. (optional)
4 - Select a **Provider Type**.
5 - Select True or False for **Global View**. The default is False. If it is set to True, the Provider will be displayed for all Clients in the system.
6 - Click on the **Add Provider** button.

Edit External Care Provider:
To Edit an External Care Provider, click on the **edit** button next to the External Care Provider you wish to change. Make necessary changes, then click on the **save** button.

Delete External Care Provider:
To Delete an External Care Provider, click on the **delete** button next to the External Care Provider. Click **OK** on the Confirmation dialog box.

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Home > Admin > Lookups and Code Tables > Agencies

Agencies

If your organization works with outside agencies, use the Agencies function to add them to your Credible system. Once added, users can associate an agency with an external care provider and/or client contact.

To add an agency:

1. Admin tab > **Agencies.**
2. Complete the fields in the Add Agency section and then click the **Add Agency** button to save.

To update an agency's information, click **edit**, make the necessary changes, and then click **update**.

To remove an agency from the system, click **delete** and then click **OK** when the Confirmation popup displays.

Agencies and External Care Providers

To associate an agency to an external provider:

1. Client tab > Client's name > 

 on Client nav bar (or Admin tab > **External Care Providers**).
2. In the Add New Client Provider section, select the appropriate agency from the corresponding dropdown.
3. Fill out the other fields as necessary and click **Add New Provider.**

To associate an agency with an existing external provider, you need to access the agency record via the External Care Providers link on the Admin tab.

To view the agency associated with an external provider, click the **detail** button. To view details about the agency, click the agency name or the detail button next to it.

Agencies and Client Contacts

To associate an agency with a client contact:

1. Client tab > Client's name > 

 on Client nav bar.
2. Add a new contact or edit an existing one.
3. Select the appropriate option from the Agency dropdown and save.

See also
External Care Providers & PCP
Contacts

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Home > Admin > Lookups and Code Tables > Group Activity Types

Group Activity Types

Click on the **Group Activity Type link** to add and manage Group Activities used for Scheduling Group Visits. A Code and Description is required for each Group Activity Type entered. Once set, the Group Activities list will appear in the Activity Type dropdown when scheduling a Group Activity.

What would you like to do?

On the Admin Tab, click on the **Group Activity Types** link.

Add Group Activity Type:
To Add a new Group Activity Type, click on the **Add a New Group Entry** link.

Edit Group Activity Type:
To Edit a Group Activity Type, click on the **edit** button next to the Group Activity Type you wish to change. Make necessary changes, then click on the **save** button.

Delete Group Activity Type:
To Delete a Group Activity Type, click on the **delete** button next to the Group Activity Type. Click **OK** on the Confirmation dialog box.

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Home > Admin > Lookups and Code Tables > Credential Types and Groups

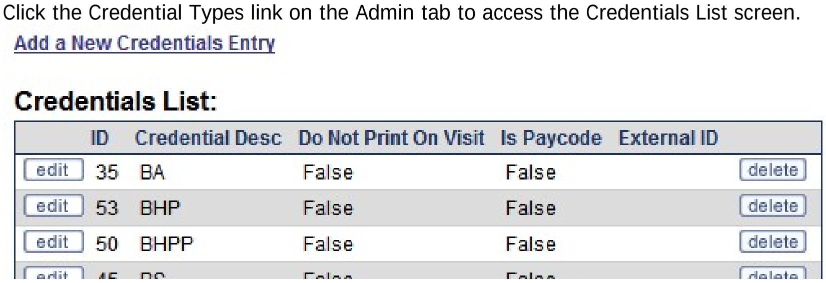
Credential Types and Groups

The Credential Types function lets you add and manage credential types and credential groups used for provider identification and billing purposes. Once credential types are set up, you can assign the appropriate ones to employees with the Credentials function on the Employee nav bar.

If you set up credential groups, a user can set an authorization to be specific to a credential group of the provider that did the visit. You can also select a credential group as matching criteria for a Billing Matrix entry.

Credential Types

Click the Credential Types link on the Admin tab to access the Credentials List screen.

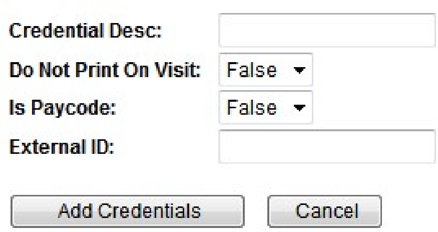

Add a New Credentials Entry

Credentials List:

	ID	Credential Desc	Do Not Print On Visit	Is Paycode	External ID	
edit	35	BA	False	False		delete
edit	53	BHP	False	False		delete
edit	50	BHPP	False	False		delete

To add a credential type:

1. Click the Add a New Credentials Entry link.



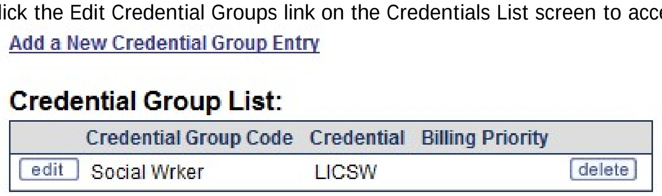
2. Enter a description of the credential or an abbreviation for it (up to 25 characters).
3. By default, credential descriptions appear after an employee's name in the Visit Details screen and print view and in the Employee Profile (assuming the credential field has been added to the Employee table with the Data Dictionary). If you don't want a credential description to appear, select True from the Do Not Print On Visit dropdown.
4. If your organization uses credentials to determine the pay grade for employees, select True from the Is Paycode dropdown if this credential corresponds to a pay grade. Note that this setting is for informational purposes only.
5. If there is an external ID associated with the credential (for example, from a legacy system), enter it in the corresponding field.
6. Click Add Credentials (or Cancel to exit without adding the credential).

To edit a credential type, click the edit button next to it, make the necessary changes, and then click the save button.

To delete a credential type, click the delete button next to it and then click OK when the confirmation popup displays.

Credential Groups

Click the Edit Credential Groups link on the Credentials List screen to access the Credential Group List screen.

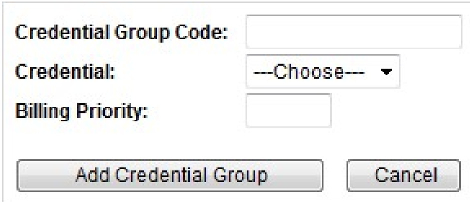

Add a New Credential Group Entry

Credential Group List:

	Credential Group Code	Credential	Billing Priority	
edit	Social Wrker	LICSW		delete

To add a credential group:

1. Click the **Add a New Credential Group Entry** link.



2. Enter a code for the group (up to 12 characters) and select the credential that you want in the group.
3. Optionally, you can enter a billing priority for the credential group.
4. Click Add Credential Group (or **Cancel** to exit without adding the group).

The steps to edit and and delete a credential groups are the same as the ones for a credential type.

See also
Authorizations
Billing Matrix

Home > Admin > Lookups and Code Tables > Client Status Types

Client Status Types

Click on the **Client Status Types link** to add, edit, and delete the Status Types used to manage Clients. You must have at least one Status Type where 'Is Active' is True and one where 'Is Active' is False.

What would you like to do?

- Add Client Status Type
- Edit Client StatusType
- Delete Client Status Type

On the Admin Tab, click on the **Client Status Types** link.

Add Client Status Type:
To Add a new Client Status Type, click on the **Add a New Client Status Entry** link.
1 - Enter a name or description for the **[Client]Status** field.
2 - Enter an **External ID**. *(optional)*
3 - Set **Is Active** to True or False, but remember that at least ONE of the statuses must have this set to True. Inactive Client Status Types could include discharged, deceased, relocated, etc.
4 - Click Add Client Status button.

Edit Client Status Type:
To Edit a Client Status Type, click on the **edit** button next to the Client Status Type you wish to change. Make necessary changes, then click on the **save** button.

Delete Client Status Type:
To Delete a Client Status Type, click on the **delete** button next to the Client Status Type. Click **OK** on the Confirmation dialog box.

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Home > Admin > Lookups and Code Tables > Episode Status Types

Episode Status Types

Click on the **Episode Status Link** to create and manage Episodes. You must have at least one Episode status where **Is Active** is **True** and one where it is **False**. Episodes are used to capture information of a client within a program for an extended time (e.g., Substance Abuse, Incarceration). There can be only one Episode per Program per one time. If an Episode is opened and closed for the same Program same day; you will need to wait until the following day to create a new one. Episodes are not meant to be backdated.

Click on the **Add a New Epsiode Status Entry** link to create a new status, then click the **Add Episode Status** button to save. Each **Episode Status** Line has Edit and Delete buttons. To change the Episode status name and **Is Active**, click on the **Edit** button. To delete the Episode status, click on the **Delete** button; click **OK** on the confirmation box.

To set Episodes for Clients, access the Client tab, select the Client, click on the Episodes tab of the Client navbar. Click on the new episode button, to create a new Client Episode; select the Program, Status, and Admit Date. Click on the Save Episode button to save.

Click on the view button to see the setup of the Episode; click on the update button to make changes then click on the Update Episode button to save. Click on the visits button to see a list/view details of visits associated with that Episode ID.

Programs can be set up for Episodes; this would be in the case of Child based organizations wanting to track through the Parent rather than through the Child. Access the Admin tab, select the Program link, click on the edit button to make changes or click on the Add a New Programs Entry link to create a new Program. The following fields: Is Parent, Parent Program and Parent Episode Only would be determined.

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Updated [Modified Date] by CredibleEducation

Home > Admin > Lookups and Code Tables > Contact Types

Contact Types

Use this function to control the contact types that are available when adding a contact to a client's record (Contacts on the Client nav bar).

To add a contact type, click the Add a New Contact Type Entry link. Enter the name of the contact type and click **Add Contact Type**.

To change the name of an existing contact type, click **edit**, change the name, and click **save**.

To delete a contact type, click **delete** and then click **OK** when the confirmation prompt displays.

See also
Contacts
Relationship Types

Home > Admin > Lookups and Code Tables > Relationship Types

Relationship Types

Use this function to control which relationships are available when adding a contact or family member to a client's record.

To report on the family relationships a client has, associate an export code and external ID with each relationship type. Once that is done, use the Export button on the Family Members screen to create a spreadsheet with the family member records. The export will include the export code and external ID for each relationship type.

See also
Contacts
Family

Home > Admin > Lookups and Code Tables > File Folders Admin

File Folders Admin

If you have the CreateFolder right, you can use the File Folders Admin function to create folders for attachments and manage existing folders. Use the checkboxes provided to control whether a folder will be available on the Client, Employee, and/or Clinical Support File Attachment screens.

You can also set up private folders for client and/or employee attachments and control access to them with the ViewPrivateClientFolders and ViewPrivateEmployeeFolders rights. If a user doesn't have the right, private folders will not be viewable in the Attachments section on a Client/Employee Overview screen or the Client/Employee File Attachments screen. With the ViewPrivateFolderCU right, you can let client users view private Client folders in the Client Portal.

To create a folder:

1. Admin tab > File Folders Admin.
2. Enter a folder name in the Add Folder section.
3. Select Is Client, Is Employee, and/or Is Clinical Support to make the folder available on the respective File Attachments screens.
4. If you want to set it up as a private folder for client and/or employee attachments, click the corresponding checkboxes.
5. Click the **Add Folder** button.

To change the name of an existing folder or its Is Private designation, click the **edit** button. Make the necessary changes and click the **update** button.

To delete a folder, click the **delete** button and then click **OK** in the confirmation popup.

To access the list of file folders for a client or employee: Client/Employee tab > Client's/Employee's name > Attachments on the nav bar > **Attach New**. The list will be available in the Folder dropdown.

To access the list of file folders for Clinical Support:

1. Admin tab > Clinical Support > Clinical Support FIles.
2. In the Attachments section, click **Attach New**. The list will be available in the Folder dropdown.

See also
Client Attachments
Employee Attachments

Home > Admin > Lookups and Code Tables > Tx Categories

Tx Categories'">Tx Categories

Click on the **Tx Categories link** to add and manage a list of Treatment Plan Categories that are used for Client Tx Plans. Once the list is established, click on the Client tab, select a Client, click on the **Tx Plan** tab of the **Client Nav Bar**. To view the created list, click on the **Select Category** dropdown. Click on the **Add Blank Tx**, to create a Tx Plan for the Client (not generated by a particular Visit Type), select from the Program and Category dropdowns, then determine the Goals; click on the **Save** button when completed.

What would you like to do?

On the Admin Tab, click on the **Tx Categories** link.

Add Tx Category:
To Add a new Tx Category, click on the **Add a New Tx Category Entry** link. Enter the Tx Category Name and click on the **Add Tx Category** button.

Edit Tx Category:
To Edit a Tx Category, click on the **edit** button next to the Tx Category you wish to change. You can change the name of the Tx Category, then click on the **save** button.

Delete Tx Category:
To Delete a Tx Category, click on the **delete** button next to the Tx Category. Click **OK** on the Confirmation dialog box.

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Home > Admin > Lookups and Code Tables > Roles

Roles

If your organization uses program roles (enabled in Partner Config), Roles and Program/Role Assoc will be options on the Admin tab. You use the Roles function to create and manage roles. Some examples of roles are: Program Directors, Coordinators, Team Leads, Vocational Workers, and Psychiatrists. Roles are used when specific expectations are required of that party and for the client.

You use Program/Role Assoc to associate a role with one or more programs. Once the program/role associations are set up, you can select a role when assigning an employee to a client or a client to an employee. See Program/Role Assoc for more information.

To add a new role: **Roles** > **Add a New Role Entry.** Enter a role name and description and click **Add Role**.

To change the name or description of a Role, click **edit**, make the necessary changes, and then click **save**.

To delete a role, click **delete** and then click **OK** when the confirmation popup displays.

To return to the Admin screen, click **Back to Admin**.

See also
General Settings
Program/Role Assoc
Client-Employee Assignment

Home > Admin > Lookups and Code Tables > Program/Role Assoc

Program/Role Assoc

If your organization uses program roles (enabled in Partner Config), Roles and Program/Role Assoc will be options on the Admin tab. After you have defined the roles with the Role function, you need to associate them with one or more programs. Once the program/role associations are set up, you can select a role when assigning an employee to a client or a client to an employee.

To make a program available for a program/role association, Has Roles must be set to True in the Program config (Admin tab > Programs).

To associate a role with a program: **Program/Role Assoc** > **Add a New Program/Role Entry.** Select the appropriate options from the Program, Role, and Deleted dropdowns and then click **Add Program/Role**.

To change a program/role association, click **edit,** make the necessary changes, and click **save**.

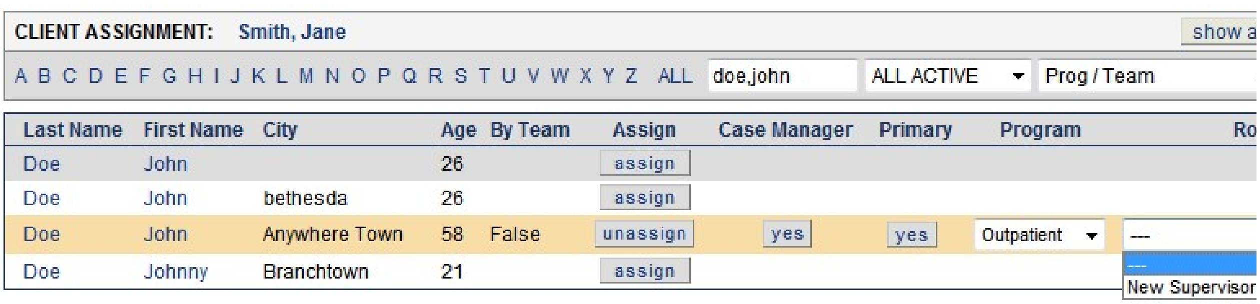
To delete a program/role association, click **delete** and then click **OK** when the confirmation popup displays.

To return to the Admin screen, click **Back to Admin.**

Selecting a Role when Assigning a Client to an Employee

Make sure the employee is assigned to the programs that have roles.

1. Access the Employee tab, select the specified Employee to whom a Client will be assigned, and then click the **Client** button on the Employee nav bar**.**
2. Find the appropriate client and click the **assign** button.
3. Set Primary to yes to make the Program dropdown available.
4. Select a program that has roles associated with it and then select the appropriate role from the dropdown that displays.



You can also assign a role when assigning an employee to a client.

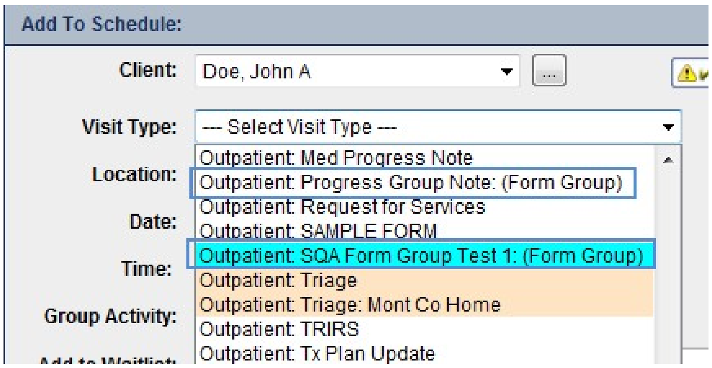
See also
[General Settings]
[Roles]
[Client-Employee Assignment]

Home > Admin > Lookups and Code Tables > Form Groups (Admin)

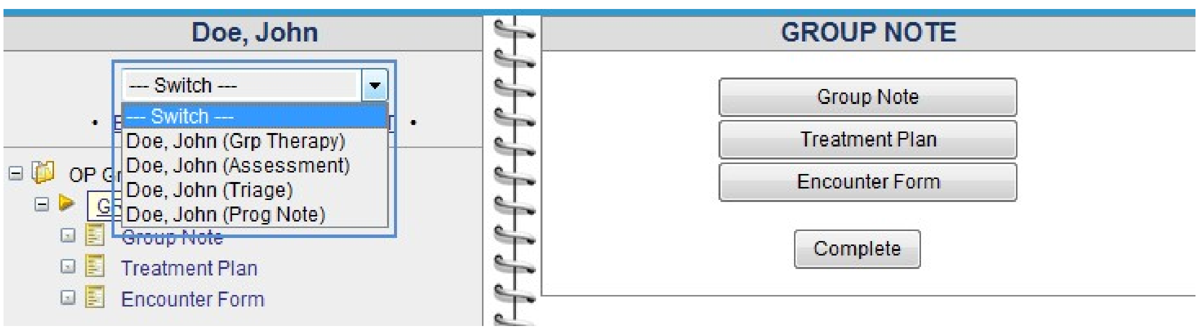
Form Groups (Admin)

A form group allows you to group a set of Visit types (forms) that are commonly used together when performing a given function. For example, if employees always complete forms A, B, C, and D when doing an intake on a Client, you can create a form group to pull each of these four separate forms together into a single group called "Intake." The employees can then access the forms in one documentation session, making the intake process more efficient.

To help employees identify a form group in the Visit Type dropdown, "(Form Group)" comes after the form group name. Optionally, you can also assign a background color to a form group (like you can for individual Visit types).



When an employee starts a form group Visit, the individual forms will be available in the Switch dropdown on the Forms page:



Note

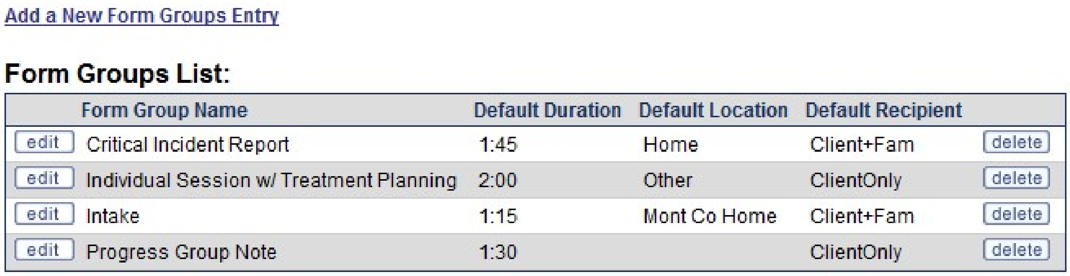
Employees can delete/discard a form within a form group at the time of data entry if it isn't needed. Forms within a form group that will be completed are only available for the originating staff person.

Creating a form group is a two-step process:

1. Use the Form Groups function to add the new form groups entry and set a default duration, location, and recipient.
2. Use the Form Group Visit Types function to select the program that will use the form group and the Visit types that you want to include in the form group.

To add a new form groups entry:

1. Click the **Admin** tab.
2. Click the **Form Groups** link. The Form Groups List screen displays.

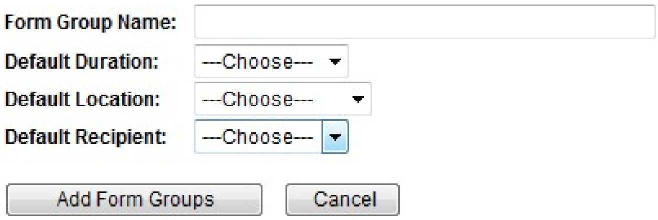


Add a New Form Groups Entry

Form Groups List:

	Form Group Name	Default Duration	Default Location	Default Recipient	
edit	Critical Incident Report	1:45	Home	Client+Fam	delete
edit	Individual Session w/ Treatment Planning	2:00	Other	ClientOnly	delete
edit	Intake	1:15	Mont Co Home	Client+Fam	delete
edit	Progress Group Note	1:30		ClientOnly	delete

3. Click the **Add a New Form Groups Entry** link. The Form Group Entry screen displays.



4. Enter the form group name (required; 50 characters maximum); select a default duration, location, and recipient from the dropdowns provided (optional); and click **Add Add Form Groups.**
5. Use the Form Group Visit Types function to select the program that will use the form group and the Visit types that you want to include in the form group.

To change the name or default duration, location, or recipient of an existing form group:

1. Click the **Admin** tab.
2. Click the **Form Groups** link. The Form Groups List screen displays.
3. Click the **edit** button, make your changes, and then click **save.**

To delete an existing form group:

Note

No completed visits should exist that are linked to the form group you wish to delete.

1. Delete any program associations for the form group:
   a. Admin tab > Form Group Visit Types.
   b. Select the form group from the first dropdown and then select the program linked to it from the second dropdown.
   c. Click the **Delete Form Group Program** button and then click **OK** when the confirmation popup displays.
2. Delete the form group:
   a. Admin tab > Form Groups. The Form Groups List screen displays.
   b. Click the delete button and then click OK when the confirmation popup displays.

See also
[Client Form Groups]
[Form Group Visit Types]

Home > Admin > Lookups and Code Tables > Form Group Visit Types

Form Group Visit Types

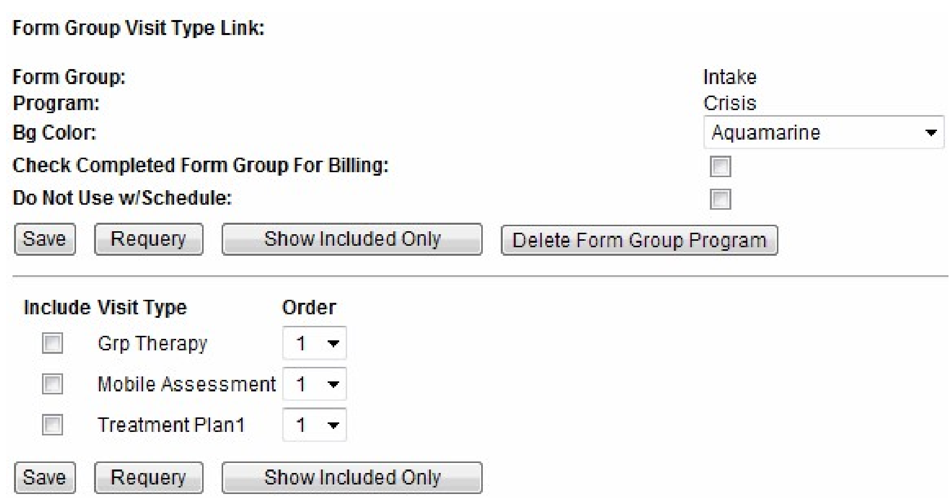
Creating a form group is a two-step process:

1. Use the Form Groups function to add the new form groups entry and set a default duration, location, and recipient.
2. Use the Form Group Visit Types function to select the program that will use the form group and the visit types that you want to include in the form group.

To select the program that will use a form group and the visit types that you want to include in the form group:

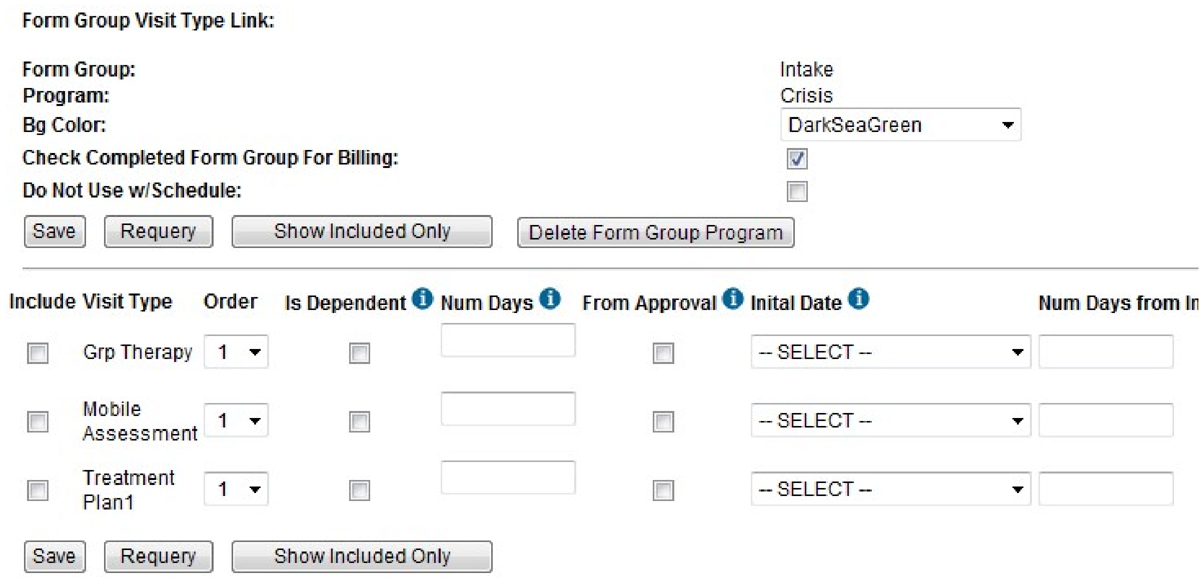
1. Click the **Form Group Visit Types** link. The Form Group Visit Type Link screen displays.
2. Select the form group you want to set up from the dropdown provided.

3. Select the program that will use the form group from the dropdown provided. The screen redisplays with some form group fields in the top section and a list of the visit types associated with the selected program through the Billing Matrix in the bottom section. If you need to change the selected form group/program combination, click **Requery**.



To include a visit type that is linked to a form in a form group, there must be a line in the Billing Matrix that associates the visit type with the program you select. If the visit type is used by different programs, there needs to be a separate line in the Billing Matrix for each visit type/program combination. If the Billing Matrix lines are not configured to include specific programs, the Form Group Visit Type Link screen will not display the visit types and you won't be able to set up a form group. If employees need "form group" functionality for visits types that do not include a specific program in the Billing Matrix, there is an alternative method they can use.

4. If you want to make the form group stand out in the Visit Type dropdown, select a background color from the **BG Color** dropdown.
5. If you want to specify billing rules for one or more of the visit types in the form group, select the **Check Completed Form Group For Billing** checkbox. (In a later step, you will have an opportunity to specify the rules.)
6. If you don't want to make the form group available in the Visit Type dropdown in the Add to Schedule popup, select the **Do Not Use w/Schedule** checkbox. (It will still be available in the Visit Type dropdown in the Enter Visit screen.)
7. Click the **Save** button in the top section. If you selected the **Check Completed Form Group For Billing** checkbox, the screen redisplays with billing criteria fields for each visit type.



8. For each visit type you want to add to the form group, select the Include checkbox and select a number from the Order dropdown to indicate the order of the form within the group.
9. For each visit type in the form group, fill out the billing criteria fields (if applicable; refer to the table below for information on each field).

Note

If any defined criteria is not met, a red X will display at the time of batching; the red X will not show in the Client Visit List.

Is Dependent	If a visit type is dependent on all the forms in the group being completed before it can be billed, select this checkbox. Visits with this visit type will red X if all other visits in the form group are not completed within the designated time frame.
Num Days	If the completion date of the visit type (with a Num Days) is greater than the completion date of the visit types identified as 'Is Dependent' by that Num Days, a red X will occur when batching.
From Approval	If the visit type should compare the Num Days from the Approval Date, select this checkbox; otherwise the visit date will be used (that is, if the visit type should calculate the Num Days from the visit Approval Date, then select the checkbox; otherwise, leave it unchecked and the visit type will calculate from the Visit Date).
Initial Date	This date sets the selected date field from the client's profile to pull an initial required time frame (this only applies to initial time this visit is completed). This setting is associated with the Num Days from Initial field.
Num Days from Initial	Time frame from Initial Date to have this visit completed. Both Initial Date and Num Days from Initial **must** be used for this field to calculate (that is, a number of days due, overdue, and so on).

10. When you are done, click the **Save** button in the bottom section.
11. To ensure you have selected the correct visit types for the form group, click **Show Included Only.**
12. To link visit types to another form group without exiting the screen, click **Requery** and repeat the steps above.

See also
Multiple Visit Types (Forms) in a Single Visit with Add Visit
Form Groups
Client Form Groups

Home > Admin > Lookups and Code Tables > Authorization Levels

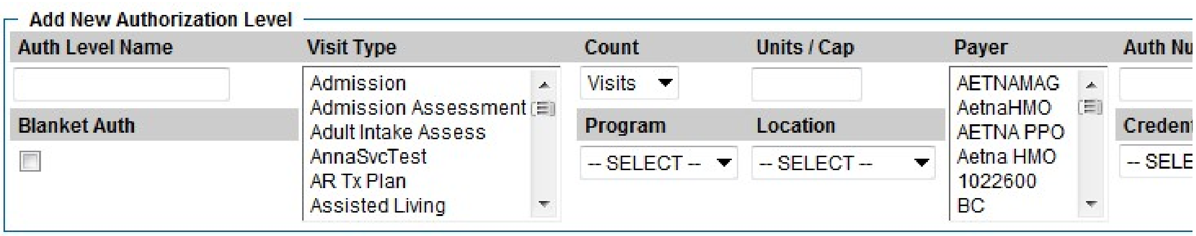
Authorization Levels

With an authorization (auth) level, you can predefine the values for the majority of the fields users need to fill out to add a new authorization to a client record. If your system uses blanket authorizations, setting up an auth level is how you create a blanket authorization.

Settings

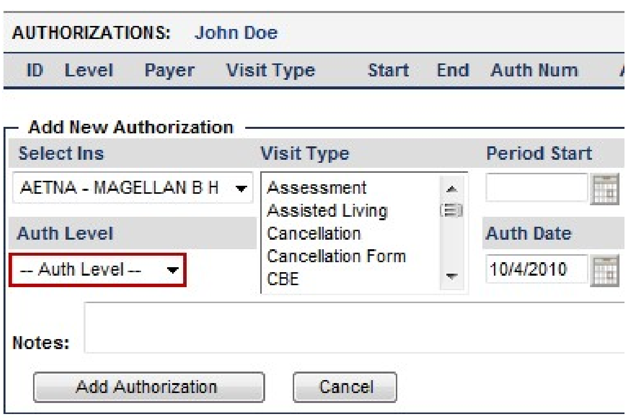
Partner Config: Use Authorization Levels; optional settings are Use Authorization Locations, Use Authorization Programs, Use Blanket Authorizations, Use Auth Primary Flag, and Use Auth Level Billing Matrix

1. Click the **Authorization Levels** link to set up an authorization level.

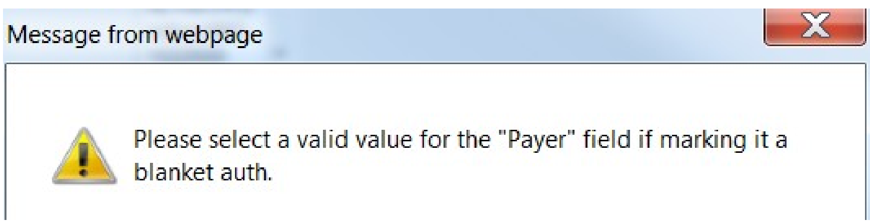


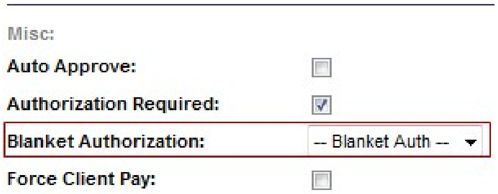
   Authorizations are highly configurable in Credible. The fields that display in the above screen depend on the authorizations settings selected in Partner Config. For example, there are settings to allow auths to be restricted by or specific to locations and programs.

2. In the Add New Authorization Level section, enter the name of the authorization level and fill out the fields as appropriate. Many of the fields are self-explanatory; refer to the table below for notes on a few of the fields.
3. To save the auth level, click the **Add Auth Level** button. The authorization level appears in the list at the top of the screen and in the Authorization Level dropdown on the Authorizations screen for each client.



Visit Type	If the authorization is for certain visit types, select only those that apply (press **Ctrl** and click to select multiple visit types).

Count	You can base insurance authorizations on visits, units, hours, contract rate, or days. Basing an authorization on the contract rate is useful if it differs from the base rate, merged rate, or other billable rates. The system will sum the contract rate for all visits that match the auth. To base an authorization on contract rate, select **Rate** from the Count dropdown and enter the authorized dollar amount (without the dollar sign) in the Units/Cap field. When you select Rate as the Count, it will show in the Visit Details.  When processing an 835, the amount of CO:45 and CO:42 adjustments will automatically be reduced by the amount of the initial contract rate adjustment if you have specified a contract rate in the Billing Matrix and selected the *Auto Contract Rate Adjustments* setting in Partner Config.
Units/Cap	Required field. If the count is visits, units, or hours, this is the maximum number authorized. If the count is contract rate, this is the maximum dollar amount authorized.
Payer	You can assign multiple payers to an auth level. Since the validation for auth levels is different than it is for individual auths you create for a client, it is important that you do not assign the same payer to multiple auth levels with the same name. If you do and the “same name” auth level is selected for a client along with the payer that is in both same name auth levels, two authorizations will be created. Note that a Payer is required for an auth level if you set it up as a blanket authorization. 
Auth Number	Payer-assigned authorization number.
Period Type	• Yearly, monthly, weekly, or biweekly • Specific number of days: 7, 14, 30, 90, or 181 • Specific number of months: 1, 2, 3, 4, 5, 6, 9, or 12 • Monthly by Day Yearly, monthly, weekly, and biweekly -- The system will set up recurring authorizations within the time period entered based on the period type. For example, if the Period Start is 4/1/11 and Period End is 4/30/12 and the period type is Yearly, two auths will be created: one for 1/1/11 - 12/31/11 and one for 1/1/12 - 12/31/12. If you choose weekly and enter a period of a month, you will get 4 auth records. In contrast, a 180-day auth will override the end date of the period that you enter and create a single auth. The biweekly option will create an auth for every 2 weeks between the period start and period end. For example, for the period 8/1/10 - 9/30/10, you will end up with 5 auths, each for a 2-week period. Monthly by Day -- Lets you set up an auth level to start on a specific date and 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. Note that to view future auths, you need to filter the list with the All status.

Blanket Auth	If you configured your system to use blanket authorizations (Partner Config: *Use Blanket Authorizations*), you need to set up one or more authorizations levels for use as blanket auths. You then select the appropriate blanket auth when configuring a Billing Matrix line (the visit types have to match). 
Credential	You can specify the credential group that the provider's credentials must be in for the authorization.
Primary	If you have multiple authorizations that could match a visit, selecting this checkbox will make the system use this authorization first.
Billing Matrix	If your organization provides individual authorizations per tiered rate, you can link an auth level to a specific Billing Matrix line with this dropdown. When a user adds an authorization and selects this auth level, the authorization will be tied to the specific Billing Matrix line. Make sure the matrix line you select has the Authorization Required checkbox selected. Note that you cannot change the matrix line selected for an individual auth when you are in the Authorizations screen for a client – it can only be done at the auth level.

To make changes to an existing authorization level, click the **update** button, make the changes, and click the **update** button again.

To delete an authorization level, click the **delete** button and then click **OK** when the confirmation popup displays.

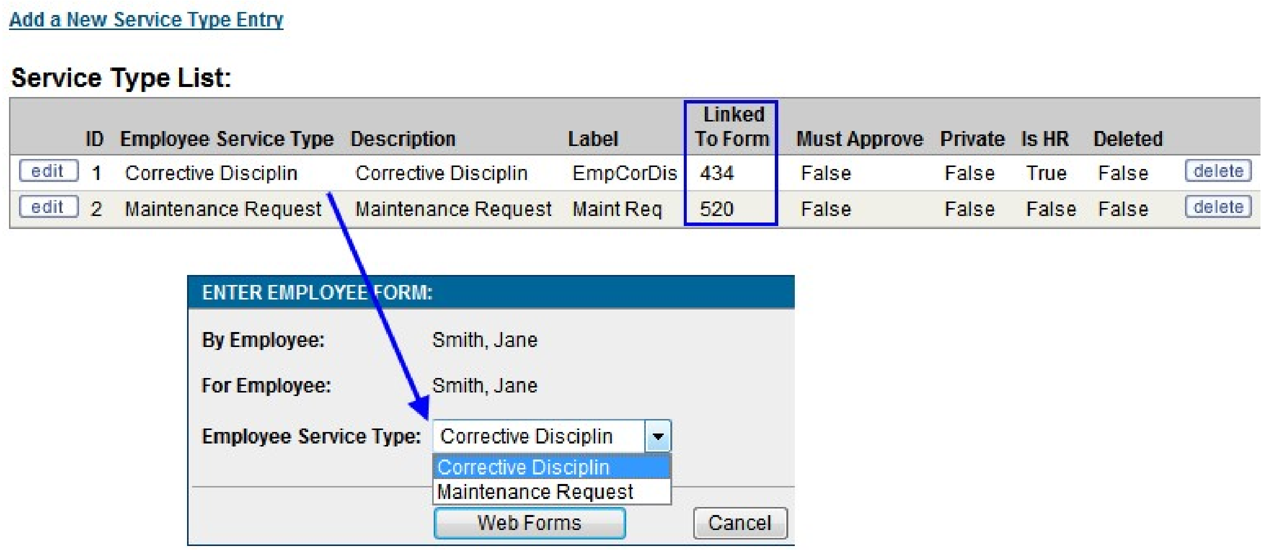
See also
Billing Matrix
Authorizations

Home > Admin > Lookups and Code Tables > Employee Visit Type

Employee Visit Type

If your organization has employee-specific web forms, you need to set up an employee visit type for each form and then link the form to it. Employee forms are useful for things like maintenance requests, employee training, incident/injury reports, and expense reports.

The employee visit types you set up will be available in a dropdown in the Enter Employee Form screen (accessed via Forms on the Employee nav bar > add employee form). When a form is filled out, the system creates an employe visit. Unlike client visits, employee visits are not billable.



Before you add an employee visit type, use Form Builder to create the form you are going to link to it and jot down the form ID.

To create a new employee visit type:

1. Admin tab > Employee Visit Type > Add a New Visit Type Entry.
2. Fill out the required fields: Employee Visit Type, Description, and Linked To Form (enter the Form ID).
3. If desired, enter a label for the employee visit type.
4. If the completed visits for this visit type need to be approved, select True from the Must Approve dropdown. When set to True, Approve checkboxes will be available in the Employee Form List. To approve an employee visit, an employee needs one of the three different EmployeeFormApprove rights.

5. Use the Private and Is HR checkboxes to control the viewing rights to the completed visits/forms.

   If Private = False and Is HR = True, only HR staff (Is HR is set to Yes in Employee Profile) and employees linked to the employee who filled out the form (via a team or supervisor/supervisee assignment) can view the completed visits.
   If Private = True and Is HR = True, only HR staff can view the completed visits.

6. Click Add Visit Type.

To change the details of an employee visit type or make it unavailable in the Enter Employee Form screen:

1. Admin tab > Employee Visit Type > edit.
2. Make the necessary changes. To make an employee visit type unavailable for selection in the Enter Employee Form screen, select True from the Deleted dropdown.
3. Click save.

To delete an employee visit type: Admin tab > Employee Visit Type > delete > OK when confirmation popup displays.

See also
Forms
Employee Forms

Custom Lookup Categories
Custom Lookup Items
Admin Time Types
Geo Areas/Offices
Axis 1/Axis 2/Axis 3
Care Provider Types
External Care Providers
Agencies
Group Activity Types
Credential Types and Groups
Client Status Types
Episode Status Types
Contact Types
Relationship Types
File Folders Admin
Tx Categories
Roles
Program/Role Assoc
Form Groups (Admin)
Form Group Visit Types
Authorization Levels
Attachment Names
Medical Conditions
Bed Board Facilities
Bed Board Rooms
Bed/Foster Interval Reasons
Med Severity Levels
ICD-10 Recode

Home > Admin > Lookups and Code Tables > Attachment Names

Attachment Names

Use this function to manage and create a list of Attachments. You have a choice of selecting the Attachments for Client, Visit, Employee, and Employee Forms.

To add attachment names, click the **Add a New Attchment Name Entry** link. Establish a name for the Attachment and select what the attachment is for, click the **Add Attachment Name** button, to save. To change the name and choice for Attachment, click on the **edit** button. To delete the Attachment name, click on the **delete** button. Click **OK** on the Confirmation Box.

If the Attachment List has been created for Client, click the **Attachments** button on the Client Nav Bar, access the **Attach New** button and you will have the Attachment List available in the Description dropdown.

If the Attachment has been set to Employee, click the **Attachments** button on the Employee Nav Bar, access the **Attach New** button and you will have the Attachment List available in the Description dropdown.

If the Attachment has been set to Employee Form, click on the Employee tab, access the **add employee form** button; from the Employee Form List screen determine the Visit ID (of choice for adding an attachment), click the **view** button, then the **update** button; now access the **Attach New** button and you will have the Attachment List available in the Description dropdown.

If the Attachment has been set to Visit, click on the Visit tab, determine the Visit ID (of choice for adding an attachment), click the **view** button. In the Attachment section, click the **Attach New** button and you will have the Attachment List available in the Description dropdown.

See also

Custom Lookup Categories
Custom Lookup Items
Admin Time Types
Geo Areas/Offices
Axis 1/Axis 2/Axis 3
Care Provider Types
External Care Providers
Agencies
Group Activity Types
Credential Types and Groups
Client Status Types
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Employee Visit Type
Medical Conditions
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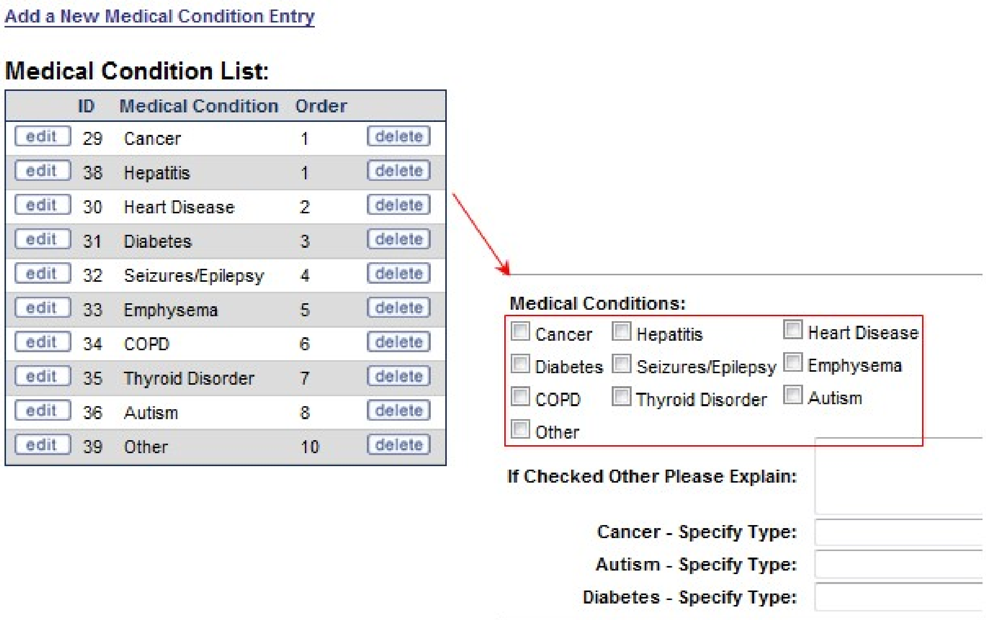
Med Severity Levels
ICD-10 Recode

Home > Admin > Lookups and Code Tables > Medical Conditions

Medical Conditions

You use the Medical Conditions function to control the conditions listed on the Client Medical Profile screen.



Click **Medical Conditions** (under Lookups and Code Tables) to create and manage the list of medical conditions relevant to your client population.

- To add a medical condition to the list: click **Add a New Medical Condition Entry**, enter a medical condition and specify the order you want it to appear in, and click **Add Medical Condition**.
- To edit an existing medical condition: click the **edit** button, make the necessary changes, and click **save.**
- To remove a medical condition from the list: click the **delete** button and then click **OK** when the confirmation popup displays.

See also

Custom Lookup Categories
Custom Lookup Items
Admin Time Types
Geo Areas/Offices
Axis 1/Axis 2/Axis 3
Care Provider Types
External Care Providers
Agencies
Group Activity Types
Credential Types and Groups
Client Status Types
Episode Status Types
Contact Types
Relationship Types
File Folders Admin
Tx Categories
Roles
Program/Role Assoc
Form Groups (Admin)
Form Group Visit Types
Authorization Levels
Employee Visit Type
Attachment Names
Bed Board Facilities
Bed Board Rooms
Bed/Foster Interval Reasons
Med Severity Levels
ICD-10 Recode

Home > Admin > Lookups and Code Tables > Bed Board Facilities

Bed Board Facilities

Click the **Bed Facilities** link to manage and create Bed Board Facilities.

Add a Facility Name and press the **Add Bed Board Facility** button. To change the Facility Name, click on the **edit** button, to save click the **update** button. Once the Facility is created, assigning the Rooms and Beds to the Facility will follow. Then the Client can be added to the Bed Assignment.

See also

Custom Lookup Categories
Custom Lookup Items
Admin Time Types
Geo Areas/Offices
Axis 1/Axis 2/Axis 3
Care Provider Types
External Care Providers
Agencies
Group Activity Types
Credential Types and Groups
Client Status Types
Episode Status Types
Contact Types
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Program/Role Assoc
Form Groups (Admin)
Form Group Visit Types
Authorization Levels
Employee Visit Type
Attachment Names
Medical Conditions
Bed Board Rooms
Bed/Foster Interval Reasons
Med Severity Levels
ICD-10 Recode

Last Updated 11/19/2015 4:11 PM by marchall

Bed Board Rooms

Click on the **Bed Board Room link** to manage and add Rooms/Beds to the Facilities.

At the bottom of the screen is the Facilty dropdown selection; choose a Facilty, add a Room Name in which the bed resides (Room 101 or Rm 24A), then press the **Add Bed Board Room** button. The next step is to add Beds to the Rooms; click on the **view button** next to the bed count for each room. Click the **Add Bed button**, once the Bed Name is added.
The **edit** button allows you to change the Bed Name, then press the **update** button to keep the changes. The **delete** button will delete the Bed from the Room; click **OK** on the Confirmation Box. Click on the **Return to Rooms link** to return to the Bed Board Rooms screen.

Next, assign a Client to a Bed; Client tab, determine the Client, select the **Bed Assign** tab on the **Client Nav Bar**. Assign a Bed by clicking on the **Assign Bed** button. This will bring up a search screen to search beds matching your criteria. Once you find a match, select the **Assign** button. Fill-out an admission date (required field) and an estimated release date (otional), then **Save**. The option to add a **Rate** per bed is available.

The Board Billing Intervals section is to track time a Client is not actually in the bed, but the bed is not released. A Client can be punched out and back in as much as needed. Once **Release Bed** is selected, set it to open and the release date will be set to the out date, this record will then be moved to the History**.** Click on the **History** button to view the Client bed history. Click on the **view** button to view the details

Click the **edit** button to edit the intervals after they have been punched out. The **out** button only appears for a record that has not been punched out and the **in** button only appears if there is not a record to punch out. Click on the **view** button to view the details; to return to the current bed board, click on the **show current assignment** button.

See also

Custom Lookup Categories
Custom Lookup Items
Admin Time Types
Geo Areas/Offices
Axis 1/Axis 2/Axis 3
Care Provider Types
External Care Providers
Agencies
Group Activity Types
Credential Types and Groups
Client Status Types
Episode Status Types
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File Folders Admin
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Form Groups (Admin)
Form Group Visit Types
Authorization Levels
Employee Visit Type
Attachment Names
Medical Conditions
Bed Board Facilities
Bed/Foster Interval Reasons
Med Severity Levels
ICD-10 Recode

Home > Admin > Lookups and Code Tables > Bed/Foster Interval Reasons

Bed/Foster Interval Reasons

If your organization uses the Bed Board and/or Foster Care functionality in Credible, you need to set up interval or "out" reasons. An interval is a period when a bed was on hold or occupied. Occupied intervals are used for billing purposes. When employees close an on hold interval or check a client out of a bed, they need to select an Out Reason.

Bed Board Interval Reasons

Reason	Is Foster Home	Is Bed Board		
Day Pass	True	True	edit	delete
Deceased	False	True	edit	delete
Discharged	True	True	edit	delete
Hold removed	False	True	edit	delete
Hospital	False	True	edit	delete
On hold	False	True	edit	delete
Wknd visit	True	True	edit	delete

Add Bed Board Interval Reason

Reason	Is Foster Home	Is Bed Board
	☐	☐

Add Reason

Settings

Partner Config: Use Foster Care and/or Use Bed Board
Security Matrix: AdminView, AdminLookupUpdate

1. Admin tab > Bed/Foster Interval Reasons.
2. In the Add section, enter a name for the reason.
3. To make the interval available for Foster Care and/or Bed Board, select the appropriate checkboxes.
4. Click Add Reason. Once added, the interval is available to staff to use with Foster Care and/or Bed Board.

To manage existing intervals, use the edit and delete buttons.

Administrator tip: if employees will be putting beds on hold for clients, add a "hold removed" interval reason so they can close the on hold interval before checking the client into the bed.

See also
Bed Board Facilities
Bed Board Rooms
Bed Assign

Home > Admin > Lookups and Code Tables > Med Severity Levels

Med Severity Levels

If you are using the Credible eRx module, you can use the Med Severity Levels function to set up a custom severity level message for the interaction tab for the different type/severity level combinations (for example, Drug/Drug 2 – Severe Interaction). The custom message is not login (security) profile-specific -- all profiles that can see that security level's message will see the same message. Note that the remaining text of the interaction message (mechanism of action, clinical effects, and so on) is not changed.

Med Severity Levels

Type || Severity Level	Profiles to Suppress	Descripti
Drug/Drug || 1 - Contraindicated Drug Combination:	ADMIN JED Present MEDICALCHIEF PHYSICIAN	You must monitor all patients weekly for weekly med checks. Please have client to leaving today.
Drug/Drug || 2 - Severe Interaction:	ADMIN JED Present MEDICALCHIEF PHYSICIAN	You must monitor all patients weekly for weekly med checks. Please have client to leaving today.
Drug/Drug || 3 - Moderate Interaction:	ADMIN JED Present MEDICALCHIEF	

You also have the option of suppressing the interaction warning message and tab for each type/severity level combination for different login profiles. While we don't recommend that you suppress warning messages, the functionality is necessary for meaningful use compliance. By default, all users with prescription creation rights will see all drug-drug and drug-allergy interaction notifications.

Security Matrix: SeverityLevelAdmin

You need to have the Credible eRx module and your Implementation Manager or Partner Services Coordinator needs to turn it on.

1. **Admin** tab > **Med Severity Levels** (under Lookups and Code Tables).
2. Enter a custom message in the Description field for one or more of the type/severity level combinations.
3. If you want to suppress the warning message for a type/severity level combination for certain login profiles, select them from the Profiles to Suppress list.
4. Click **Save.**

See also
Drug/Drug and Drug/Allergy Interactions

Custom Lookup Categories
Custom Lookup Items
Admin Time Types
Geo Areas/Offices
Axis 1/Axis 2/Axis 3
Care Provider Types
External Care Providers
Agencies
Group Activity Types
Credential Types and Groups
Client Status Types
Episode Status Types
Contact Types
Relationship Types
File Folders Admin
Tx Categories
Roles
Program/Role Assoc
Form Groups (Admin)
Form Group Visit Types
Authorization Levels
Employee Visit Type
Attachment Names
Medical Conditions
Bed Board Facilities
Bed Board Rooms
Bed/Foster Interval Reasons
ICD-10 Recode

MU §170.302 (a)(2)

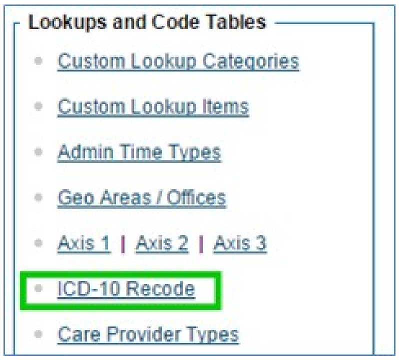
Home > Admin > Lookups and Code Tables > ICD-10 Recode

ICD-10 Recode

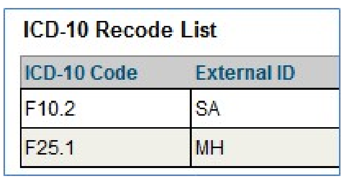
To enhance state reporting options, fields have been added to allow creation of External IDs. These are available on the **Admin** > **Axis 3** page. An **ICD-10 Recode** page has also been added for this purpose.

For example, a user has a report (their own, or a state report), and needs to know how many clients have an SA (substance abuse) diagnosis. The **ICD-10 Recode** table allows this.

1. Go to **Admin** tab > **Lookups and Code Tables** > **ICD-10 Recode**.

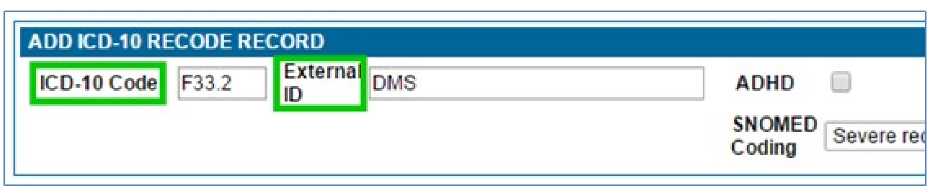


2. The **ICD-10 Recode List** will appear.

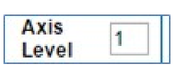

ICD-10 Recode List

ICD-10 Code	External ID
F10.2	SA
F25.1	MH

3. In the **Add ICD-10 Recode Record** form beneath the list, enter the ICD-10 code you want to recode for the report, then the External ID you want to appear.



4. The **Axis Level** field allows you to report a Problem List diagnosis as if it were in a Multi-Axial format.



5. When you have finished, click the **Add ICD-10** button.

See also

Custom Lookup Categories
Custom Lookup Items
Admin Time Types
Geo Areas/Offices
Axis 1/Axis 2/Axis 3
Care Provider Types

External Care Providers
Agencies
Group Activity Types
Credential Types and Groups
Client Status Types
Episode Status Types
Contact Types
Relationship Types
File Folders Admin
Tx Categories
Roles
Program/Role Assoc
Form Groups (Admin)
Form Group Visit Types
Authorization Levels
Employee Visit Type
Attachment Names
Medical Conditions
Bed Board Facilities
Bed Board Rooms
Bed/Foster Interval Reasons
Med Severity Levels

Updated: 11/17/2015 1:06 PM by marchall

Home > Admin > Security Configuration

Security Configuration

This section of the Admin tab contains the following functions:

- User List
- Login Profiles
- Security Matrix
- Report Security
- Login Report
- Client User Security Functions

See also

- Daily Activities
- Lookups and Code Tables
- Billing Configuration
- Site Configuration
- Credible eRx Admin
- Methasoft Import
- Configuring Family Unit As a Client Entity
- Case Manager Notes
- Employee-Specific Time Zones
- Flag Attachments for HR Use Only
- Recipient, Location, & Billing Group Fields Default to Null
- Additional Fields in Visit Details Screen
- Drug Schedule & NDC for Client Medications
- Setting Up the Credible Client Portal
- Outcome Tracking Setup
- Setting Up Your System to Use a Cancellation/No-Show Form
- Setting Up eLabs
- Setting Up eMAR
- Setting Up Bed Board
- Configuration for Generating Clinical Summaries
- Purging Client Records
- User Management Best Practice

Updated 11/30/2016 3:29 PM by public

Home > Admin > Security Configuration > User List

User List

Use this function to view and manage the login details -- user name, email, and security profile -- for all employees. You can also export the list.

If you need to change the login details or delete an employee's user login, click the update button. The User Edit screen displays; click here for more information.

See also

- Employee Login - Create, Edit, & Delete
- Login Profiles
- Security Matrix
- Report Security
- Login Report
- Client User Security Functions

Last updated 6/27/2017 5:17 PM by CredibleEducation

Home > Admin > Security Configuration > Login Profiles

Login Profiles

Use this function to add and manage the security profiles used within the system. Login profiles are used in conjunction with the Security Matrix to control which functions users can access. When an employee is added to the system, the appropriate profile code is selected. Login profiles are also used to give client users access to the Credible Client Portal (Client Portal 1.0 only.)

To add a new profile:

1. Click on the **Add a New Security Profile Entry link** to establish a new Profile.
2. Enter a **Profile Code** and **Description**.
3. (Optional) If you are adding a client user profile for the Credible Client Portal, select **True** from the **Is Client User** dropdown.
4. To add the profile, click the **Add Security Profile** button.

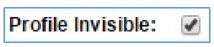
To change an existing Profile Code and/or Description, click the **edit** button then click on the **save** button to keep the changes.

To delete an existing Profile Code and/or Description, click the **delete** button and then click **OK** when the confirmation popup displays.

To view the list of Login Profiles and assign one to an Employee: access the Employee tab, select an Employee, and click the **Login** button on the Employee nav bar. In the User Login Detail section, the Profile Code dropdown will show the list.

Invisible Profile Codes

Profile Codes marked as invisible will only appear to users who have been assigned that Profile Code. When in Login Profiles, the option to make a profile invisible will appear as a check box item.



To create a new Invisible Login Profile:

1. Go to **Admin Tab** > **Security Configuration** > **Login Profiles**.
2. Click **Add a New Security Profile Entry**.
3. Check **Profile Invisible** box.
4. Click **Add Security Profile** button.

To make an existing Login Profile invisible:

1. Go to **Admin Tab** > **Security Configuration** > **Login Profiles**.
2. Click **Edit** button by desired **Profile Code**.
3. Check **Profile Invisible** box.
4. Click **Save** button.

Read-only Profiles

Read-only profiles allow users to access information in Credible, but not edit it.

For instructions on how to set up a read-only profile, click here.

See also

User List
Security Matrix
Report Security
Login Report
Client User Security Functions

Updated 6/27/2017 4:07 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix

Security Matrix

Credible is a profile-based application where different profiles such as employee, supervisor, and administrator determine what information you can view and what functions you can perform. Login Profiles define the roles for your Agency, and the **Security Matrix** is where you select the different views and functions you want to grant each profile.

- To give a profile access to a specific view or function, click the **Security Matrix** link, select the corresponding checkbox in the column for that profile, and then click **Save All.**
- To remove a right, deselect the corresponding checkbox and then click **Save All.**

Note: When changes have been made to the Security Matrix, users assigned the affected profiles need to log out of Credible and log back in for the changes to take effect.

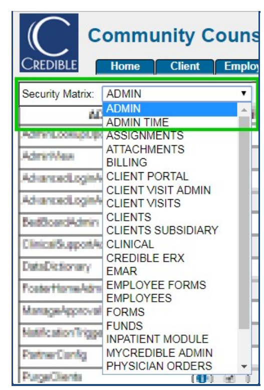
There is an info icon for each setting that describes the security right.

In addition, you can use the **Export** button at the top of the screen to create a spreadsheet that lists the rights assigned to the different login/security profiles in your Agency.The spreadsheet lists the role, the category the right is in, the name of the right, and the tooltip (description). After clicking the **Export** button, open or save the .csv file which is generated.

The Security Matrix Guide has more information about the various settings.

Tip: To quickly find a setting in the Security Matrix, 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. The system displays the number of matches and takes you to the first match. Click **Next** to go to subsequent matches. The settings in the Security Matrix are grouped into the following categories:

Security Matrix Categories



To help you jump quickly to the setting you need, click the dropdown at the top of the page and select the security category needed.

- Admin: This section includes several high-level rights.
- Admin Time: Controls rights to add, approve, delete, view, and update administrative time for employees.
- Assignments: Permissions regarding the assignment of clients, employees, programs, teams, resources, GeoAreas, supervisors, and more.
- Attachments: Rights to attach files to a client record, client visit, employee record, or employee form. There are also rights to delete and view the files, use free text for attachments, create folders, and view private folders.
- Billing
- Client Portal
- Client Visit Admin
- Client Visits
- Clients
- Clients Subsidiary: This includes rights pertaining to Allergies, Authorizations, External Providers, residential/Inpatient, Insurance and Liability, Client Warnings, Treatment Plans, Diagnoses, Medications, and other client-related items.
- Clinical
- Credible eRx
- eMAR
- Employee Forms
- Employees
- Forms
- Funds
- Inpatient Module
- MyCredible Admin
- Physician Orders
- Reports: This is **not** the same as Report Security.
- Scheduler
- Standing Order Sets

Attachments

Rights to attach files to a client record, client visit, employee record, or employee form. There are also rights to delete and view the files, use free text for attachments, create folders, and view private folders.

There is a right to restrict employees from seeing another employee’s attachments. If *EmpFilesViewOwn* is selected (and *EmployeeFileView* is not selected), employees will only have access to their own attachments. If an employee goes to another employee’s Overview screen, the Attachments section will not be visible and the Attachments button will not be available on the nav bar.

Attachment folders have been given three unique Security Matrix lines:

- **View Client Folders by Team** limits the Employee to viewing those Folders that are assigned to their own Teams.
- **Create Client Folders by Team** limits the Employee to creating new Folders assigned to their own Teams.
- **Add Client Files by Team** limits the Employee to attaching files to Folders assigned to their own Teams.

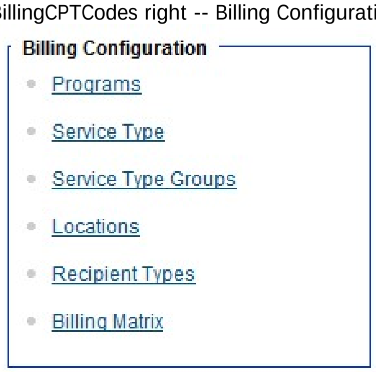
Billing

High-level rights to use the billing configuration functions, edit the Billing Matrix, and:

- Create, run, and delete Revenue/AR exports
- Use the Bed Board Billing and Foster Care Billing functions
- Add a manual billing adjustment to a visit
- Add a client payment or copay and print a receipt
- Access the billing functions
- Refund or return a client payment
- Download HIPAA files from the clearinghouse
- Undo billing ledger actions from the claim details screen
- View and add client payments (for users who don't have access to the Billing functions)
- View and delete client payments, view and edit client payments, or just view client payments
- Bypass initial client enrollment (834)
- Enter and process a credit card payment on the Add Client Payment/Copay screen
- View client balances and financial statistics
- Generate client statements
- Adjust, delete, and update insurance payments
- View edit history for the Billing Matrix
- Add, edit, and delete payment controls
- Close and reopen payment controls

BillingConfig right -- Billing Config section on Billing tab *and* Billing Configuration section on Admin tab with the following functions:

BillingCPTCodes right -- Billing Configuration section on Admin tab with the following functions:



Both BillingConfig and BillingCPTCodes rights -- Billing Config section on Billing tab and Billing Configuration section on Admin tab with all the functions shown above.

Client Visit Admin

Rights to approve, delete, and set a manual red X for a client visit. There are also rights to:

- Delete a signature from a visit or sign any visit regardless of who completed it
- Link a client to an unscheduled/unlinked visit from MobileForm or change the client or employee linked to a visit
- Override a scheduled employee for a web visit
- Reprocess client visits through the Billing Matrix or Advanced Visit Search
- Unapprove a locked visit so it can be updated
- Update locked visits
- View the form ID and version, MobileForm version, and XML data that was transferred from the mobile device to the server (if applicable) in the header section in the Visit Details screen (ClientVisitViewExt)
- Restrict the viewing of client visit information to non-financial information. Other fields such as Diagnosis and Status are also hidden (ClientVisitViewSummary)

When

ClientVisitViewExt	i	☑
ClientVisitViewSummary	i	☐

, all header fields are visible as shown below. Highlighting key: green fields are controlled ClientVisitViewSummary and yellow fields by ClientVisitViewExt.

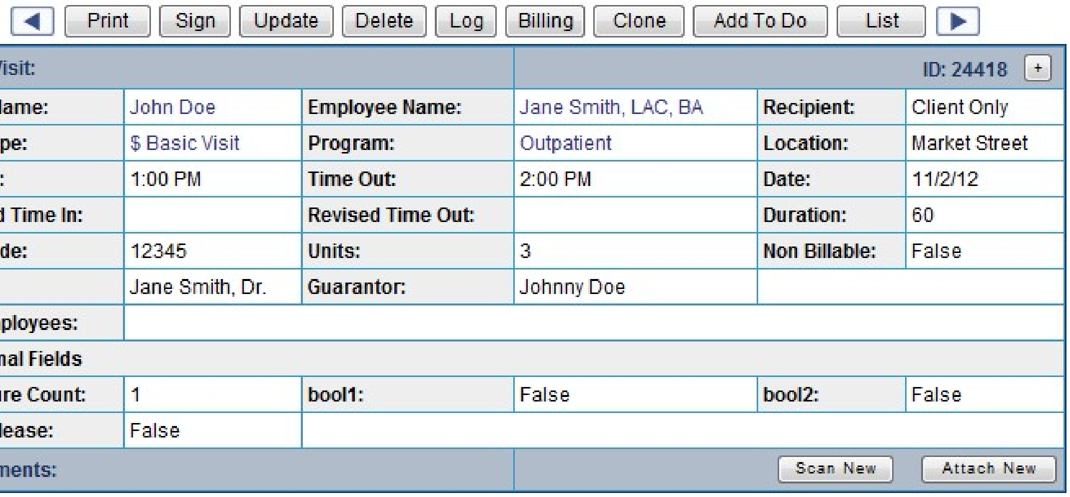
◀ | Print | Sign | Update | Delete | Log | Billing | Clone | Add To Do | List | ▶

Client Visit:					ID: 24418 +
Client Name:	John Doe	**Employee Name:**	Jane Smith, LAC, BA	**Recipient:**	Client Only
Visit Type:	$ Basic Visit	**Program:**	Outpatient	**Location:**	Market Street
Time In:	1:00 PM	**Time Out:**	2:00 PM	**Date:**	11/2/12
Revised Time In:		**Revised Time Out:**		**Duration:**	60
CPT Code:	12345	**Insurance:**	HIGHM : 1234	**Non Billable:**	False
Rate (flex):		**Units:**	3	**Copay:**	$1.00 add
Approved:	True	**Approved By / On:**	jsmith / 11/2/12 1:23 PM	**Diagnosis:**	V62.89
Co-therapy:	False	**Billing Matrix:**	$ Basic Visit (709)	**Transferred:**	11/2/12 1:23 PM
Status:	COMPLETED	**Authorization ID:**	✕	**Signed:**	11/2/12 1:23 PM
Schedule Date:	11/2/2012	**Merged:**	None (TST)	**Billing Group:**	CBH Main B
Form : Version:	672 : 2302	**MobileForm Version:**	Web Entry	**Transfer XML:**	
PCP:	Jane Smith, Dr.	**Guarantor:**	Johnny Doe		
2nd Employees:					
Additional Fields					
Signature Count:	1	**bool1:**	False	**bool2:**	False
non_release:	False				
Attachments:				Scan New	Attach New

Since ClientVisitViewSummary is a "restrict" right, when

ClientVisitViewExt	i	☐
ClientVisitViewSummary	i	☑

, all the highlighted fields above are hidden as shown below.


◀ Print Sign Update Delete Log Billing Clone Add To Do List ▶

Client Visit:				ID: 24418 +	
Client Name:	John Doe	Employee Name:	Jane Smith, LAC, BA	Recipient:	Client Only
Visit Type:	$ Basic Visit	Program:	Outpatient	Location:	Market Street
Time In:	1:00 PM	Time Out:	2:00 PM	Date:	11/2/12
Revised Time In:		Revised Time Out:		Duration:	60
CPT Code:	12345	Units:	3	Non Billable:	False
PCP:	Jane Smith, Dr.	Guarantor:	Johnny Doe		
2nd Employees:					
Additional Fields					
Signature Count:	1	bool1:	False	bool2:	False
non_release:	False				
Attachments:				Scan New	Attach New

Client Visits

Rights to:

- Clone an existing visit to create a new visit
- View or print multiple completed visits on one screen (**View All** and **Print All** buttons)
- Edit or view any incomplete visit (including those that are not your own)
- Flag a visit that is late (according to the *Flag Late When Greater Than* Partner Config setting)
- View a list of:
  - All visits in the system
  - Only your own visits and visits conducted by employees you supervise, employees on teams you supervise, and employees on teams that you are the team leader for (*ClientVisitList* setting)
  - Only visits the *ClientVisitList* setting gives you rights to plus visits of clients assigned to you directly or indirectly through a team (*ClientVisitListTeam* setting)
  - Only visits the *ClientVisitList* setting gives you rights to plus all visits done for the employee's team (*ClientVisitListTeamOnly* setting; this is more restrictive than *ClientVisitListTeam* when a client is on multiple teams but the employee is not - the employee only sees his or her own team)
- Set a visit to non-billable
- Update client visit fields or form data for any visit that you can view
- Update the modifiers for a client visit
- Update the client's name that is saved with a visit
- Update only your own client visits
- View:
  - All visits in the system
  - Only your own visits and visits conducted by employees you supervise, employees on teams you supervise, and employees on teams that you are the team leader for (*ClientVisitView* setting)
  - Only visits the *ClientVisitView* setting gives you rights to plus visits of clients assigned to you directly or indirectly through a team (*ClientVisitViewTeam* setting)
  - Only visits the *ClientVisitView* setting gives you rights to plus all visits done for the employee's team (*ClientVisitViewTeamOnly* setting; this is more restrictive than *ClientVisitViewTeam* when a client is on multiple teams but the employee is not - the employee only sees his or her own team)
- View the form data associated with a visit
- View HIPAA/access logs for client visits
- Sign and submit all visits in a group visit at once (web forms)
- Switch treatment plans that are injected into web forms
- View and update an incident form
- Use data entry or web forms to create visits
- Create a visit for each client in the Advanced Client Search results
- Complete a web form (visit) for another employee as that employee or as yourself

Clients

Rights to:

- Add a client or delete a client you can view
- Edit client episodes through forms or add, update, or delete client episodes
- List:
  - All clients in the system
  - Only clients assigned to you directly or indirectly through a team, on teams that you supervise, and assigned to employees you supervise
- Edit or view only clients fields that are marked "Super Edit" or "Super View" in the Data Dictionary
- Update client facesheet fields and select other records such as episodes and contacts for any client you can view
- View detailed records for:
  - All clients in the system
  - Only clients assigned to you directly or indirectly through a team, on teams that you supervise, and assigned to employees you supervise
- View HIPAA/access logs for clients

Credible eRx

Rights to create and refill a prescription and print a copy of a prescription after it has been created (the *PrescriptionApproveAll* setting is currently not functional). Registered prescribers - employees with a Surescripts Provider Identifier (SPI) number in Credible – automatically have these rights. Click here for more information.

eMAR

Rights to use the electronic Medication Administration Record module in Credible and set up eMAR groups.

Employee Forms

Rights to:

- Add or delete employee forms for employees you can see
- Approve:
  - All employee forms
  - Only employee forms that you have viewing rights to
  - Only your own employee forms
- View a list of:
  - All employee forms in the system
  - Only your own employee forms, forms of employees you supervise, forms of employees on teams you supervise, and forms of employees on teams that you are the team leader for
- Sign any employee form regardless of who completed it
- Unapprove a locked employee form so it can be updated
- Update any employee form you can view or only update your own employee forms
- View:
  - All employee forms in the system
  - Only your own employee forms, forms of employees you supervise, forms of employees on teams you supervise, and forms of employees on teams that you are the team leader for (*EmployeeFormView* setting)
  - Only the forms the *EmployeeFormView* setting gives you rights to plus forms for employees assigned to you directly or indirectly through a team

Employees

Rights to:

- Add new employees to the system
- Update another employee's configuration
- Delete employee records that you can view (we do *not* recommend giving the EmployeeDelete right to any profile; see best practice for Removing an Employee from the System for more information)
- Edit employee fields through forms
- List:
  - All employee records in the system
  - Only your own employee record and the records of employees you supervise, records of employees on teams you supervise, and records of employees on teams that you are the team leader for
- View all employees instant message logs
- Add or delete notes or a profile picture from an employee record
- Edit or view only employee fields that are marked "Super Edit" or "Super View" in the Data Dictionary
- Use the time clock function to punch in any employee and edit the time entered for an employee
- Update employee facesheet fields and credentials for any employee you can view
- Update only your own employee record
- View:
  - All employee records in the system
  - Only your own employee record and the records of employees you supervise, records of employees on teams you supervise, and records of employees on teams that you are the team leader for
  - Only your own employee record and the records of the staff that you supervise (note that EmployeeViewAll trumps EmployeeViewSupervise so a profile should have one or the other selected)
- Add, edit, or view another employee's work schedule
- Change another user's password
- Send a broadcast message to all employees
- Send an instant message to an employee
- Add, edit, or delete a to do list item for another employee
- Create or change logins for existing employees you can view
- View a list of current (active) system logins

Forms

Rights to view forms, copy forms, and build and edit forms.

Funds - NO LONGER IN USE

Rights to:

- Add, edit, or delete client fund allocations
- Budget for funds
- Configure funds
- View the Funds module
- Make payments on fund allocations
- Run fund reports
- View funds for a client

MyCredible Admin

Rights to:

- Use the functions on the Home Page Admin menu (for example, to configure the home pages, dashboard, and Client nav bar) and configure mobile device settings and buttons
- Access the Dashboard link on the Home Page or view a Dashboard for a specific client or employee
- Add and delete links to the Home Page
- View the manager's version of the Home Page; it contains information about you and the employees you manage
- Add, edit, and delete the title and statistics for the Home Page
- Add, edit, and delete Home Page messages

Physician Orders

Rights to:

- View pending physicians' orders on the Home Page
- Sign off on order line
- Add or delete order lines
- Sign all physicians' orders
- View physicians' orders

Registered prescribers automatically have these rights.

Reports

Rights to:

- Use the advanced search function for clients, employees, visits, and the ledger
- Export advanced search results
- Edit or delete an advanced search saved report, even ones saved by another employee and marked as "Global View"
- Build a new export or import or editing an existing one
- Edit exports locked by other users
- Run an export or import
- View a list of the reports you have explicit rights for (see Report Security)

Scheduler

Rights to:

- Delete a notification, alert, to do list item, and so on from the schedule (day view)
- Add scheduled visits to one's own schedule or to another employee's schedule
- Copy another employee's entire daily schedule from one day to another
- Display a front desk view of the schedule upon login
- Reassign a scheduled item to another employee
- Add to a resource schedule, delete a scheduled resource, and view the schedule for a resource
- Add a schedule template to an employee's schedule
- Create schedule templates
- Update schedule entries in one's own schedule or in another employee's schedule
- View the schedules for:
    - All employees
    - Only employees you can view
    - Only employees on your team
- View a list of rescheduled visits
- Schedule resources

See also

User List
Login Profiles
Report Security
Login Report
Client User Security Functions

MU §170.302 (o)

Updated 8/4/2017 2:14 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > High-Level Rights

High-Level Rights

Certain rights in the Security Matrix are considered "high-level." These settings grant their users access to wide-ranging, high-impact abilities which can affect your entire Credible system and site. The granting of these rights should be done sparingly, and only after careful consideration of the alternatives available.

The **High-Level Rights** settings include:

- SecurityUpdate
- PartnerConfig
- DataDictionary
- BillingConfig
- BillingCPTCodes
- ImportRun

See also

Security Matrix: Admin
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Attachments
Security Matrix: Billing
Security Matrix: Clients Subsidiary
Security Matrix: Clinical
Security Matrix: eMAR
Security Matrix: Employees
Security Matrix Guide
Rights for Assigning Credentials
Prevent Staff from Deleting Scheduled Appointments
Medical Profile Rights

Updated: 8/1/2017 12:29 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin

Security Matrix: Admin

The **Admin** section of the Security Matrix provides access to the following settings:

- AdminLookupUpdate
- AdminView
- AdvancedLoginAdminRO
- AdvancedLoginAdminRW
- BedBoardAdmin
- ClinicalSupportAdmin
- DataDictionary (High-Level Right)
- FosterHomeAdmin
- ManageApprovalRoles
- NotificationTriggers
- PartnerConfig (High-Level Right)
- PurgeClients
- SavedVisitMappingManager
- SecurityUpdate (High-Level Right)
- SubmitLibraryTicket (no longer in use)
- SubmitTaskTicket (no longer in use)
- SuperviseAll
- TransferLogList
- TransferLogView

See also

High-Level Rights
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Attachments
Security Matrix: Billing
Security Matrix: Clients Subsidiary
Security Matrix: Clinical
Security Matrix: eMAR
Security Matrix: Employees
Security Matrix Guide
Rights for Assigning Credentials
Prevent Staff from Deleting Scheduled Appointments
Medical Profile Rights

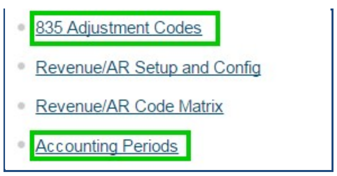
Updated: 12/1/2016 4:40 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > AdminLookupUpdate

AdminLookupUpdate

The **AdminLookupUpdate** setting controls whether the **Lookups and Code Tables** section of the Admin tab will be displayed.

It also controls whether the role will be able to access the **Accounting Periods** and **835 Adjustment Codes** pages from the Billing tab. Please note: If this setting is unchecked, users will still be able to see the *Accounting Periods* link on the Billing tab. However, clicking the link will display an "Insufficient Rights" notification.



See also

- AdminView
- AdvancedLoginAdmin
- BedBoardAdmin
- ClinicalSupportAdmin
- DataDictionary
- FosterHomeAdmin
- ManageApprovalRoles
- NotificationTriggers
- PartnerConfig
- PurgeClients
- SavedVisitMappingManager
- SecurityUpdate
- SubmitLibraryTicket
- SubmitTaskTicket
- SuperviseAll
- TransferLogList/TransferLogView

Updated: 11/30/2016 7:07 PM by public

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > AdminView

AdminView

Checking the **AdminView** setting grants that role permission to view the Admin tab. It does not automatically grant the right to view and use all the functions potentially on that page.

The **AdminView** setting overrides most settings allowing the role to view items on this page, as the page will be inaccessible.

See also

AdminLookupUpdate
AdvancedLoginAdmin
BedBoardAdmin
ClinicalSupportAdmin
DataDictionary
FosterHomeAdmin
ManageApprovalRoles
NotificationTriggers
PartnerConfig
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

Updated: 11/30/2016 7:06 PM by public

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > AdvancedLoginAdmin

AdvancedLoginAdmin

These settings control access to the Advanced Security settings located in **Admin** tab > **Security Configuration**.

- **AdvancedLoginAdminRO**: This provides the role the right to view — but not update — the *Advanced Authentication Config* and *Advanced Authentication Opt Out* settings.
- **AdvancedLoginAdminRW**: This provides the role the right to view **and** update the Advanced Authentication settings.

See also

AdminLookupUpdate
AdminView
BedBoardAdmin
ClinicalSupportAdmin
DataDictionary
FosterHomeAdmin
ManageApprovalRoles
NotificationTriggers
PartnerConfig
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

Updated: 11/29/2016 11:57 AM by CredibleEducation

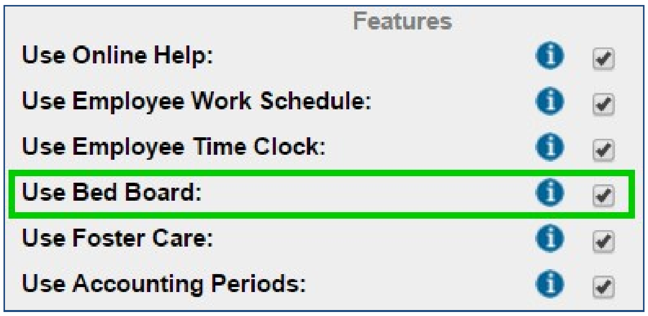
Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > BedBoardAdmin

BedBoardAdmin

The **BedBoardAdmin** setting, when checked, allows the designated role to set up and edit **Bed Board Facilities** and **Bed Board Rooms**.

This setting requires the following prerequisites:

- **Partner Config: Use Bed Board** must be checked.
- **Security Matrix: AdminLookupUpdate** must be checked for this role.



If AdminLookupUpdate is not checked for the role, then the **Lookups and Code Tables** section will not be displayed, overriding this setting.

See also

AdminLookupUpdate
AdminView
AdvancedLoginAdmin
ClinicalSupportAdmin
DataDictionary
FosterHomeAdmin
ManageApprovalRoles
NotificationTriggers
PartnerConfig
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

Updated: 11/30/2016 7:04 PM by public

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > ClinicalSupportAdmin

ClinicalSupportAdmin

This setting grants a role permission to access the Clinical Support tools link on the Admin tab.

- **Admin** tab > **Daily Activities** > **Clinical Support**

- **Please note**: Without this right, a user with AdminView will still be able to see the link, but clicking it will lead to the "insufficient rights" message.

See also

AdminLookupUpdate
AdminView
AdvancedLoginAdmin
BedBoardAdmin
DataDictionary
FosterHomeAdmin
ManageApprovalRoles
NotificationTriggers
PartnerConfig
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

Updated: 11/30/2016 7:02 PM by public

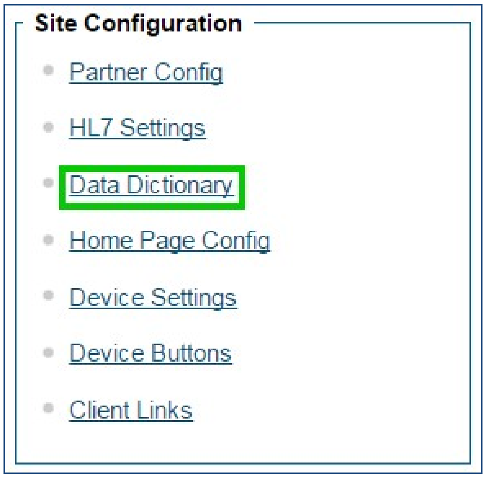
Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > DataDictionary

DataDictionary

The Data Dictionary is an extremely powerful tool for managing your site. This is a High-Level Right, and should be granted to a role only after careful consideration.

When checked, the **DataDictionary** setting grants a role the ability to define, view, and update all fields, labels, and screen layouts used to capture information in client and/or Employee profiles.

- **Admin** tab > **Site Configuration** > **Data Dictionary**



See also

AdminLookupUpdate
AdminView
AdvancedLoginAdmin
BedBoardAdmin
ClinicalSupportAdmin
FosterHomeAdmin
ManageApprovalRoles
NotificationTriggers
PartnerConfig
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

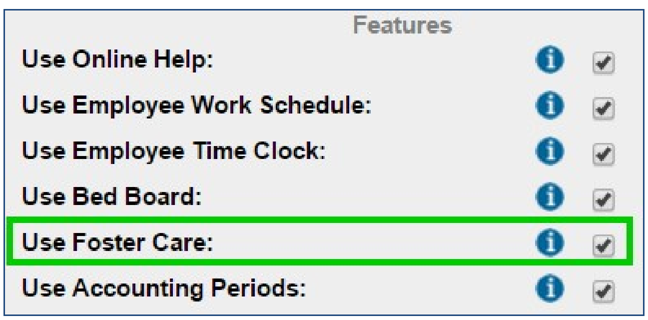
Updated: 11/29/2016 6:45 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > FosterHomeAdmin

FosterHomeAdmin

The **FosterHomeAdmin** setting, when checked, allows the designated role to add, edit, and delete Foster Homes via **Admin** tab > **Daily Activities** > **Manage Foster Homes**.

For the **FosterHomeAdmin** right to be assigned, **Partner Config: Use Foster Care** must also be checked.



See also

AdminLookupUpdate
AdminView
AdvancedLoginAdmin
BedBoardAdmin
ClinicalSupportAdmin
DataDictionary
ManageApprovalRoles
NotificationTriggers
PartnerConfig
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

Updated: 11/29/2016 7:51 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > ManageApprovalRoles

ManageApprovalRoles

The link found at **Admin** tab > **Daily Activities** > **Manage Approval Roles** controls the ability to create new Approval Roles, and assign them to **Visit Types** and **Adjustment Types**. Roles with the **Security Matrix: ManageApprovalRoles** setting checked can use this link.

See also

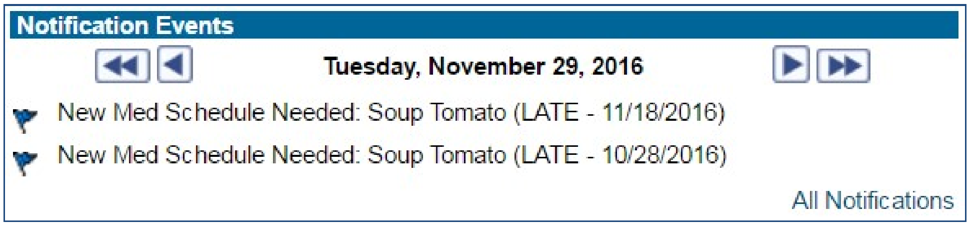
AdminLookupUpdate
AdminView
AdvancedLoginAdmin
BedBoardAdmin
ClinicalSupportAdmin
DataDictionary
FosterHomeAdmin
NotificationTriggers
PartnerConfig
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

Updated: 11/29/2016 8:23 PM by CredibleEducation

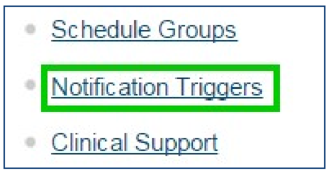
Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > NotificationTriggers

NotificationTriggers

This setting grants the assigned role the right to set up automated notifications to appear on employee schedules and/or the Home Page. For example, a trigger could be set to notify an entire team when an employee enters a visit classed as a suicide risk.



When a role has the **Security Matrix: NotificationTriggers** setting checked, the link will appear at **Admin** tab > **Daily Activities** > **Notification Triggers**, allowing them to create, edit, and delete triggers.



See also

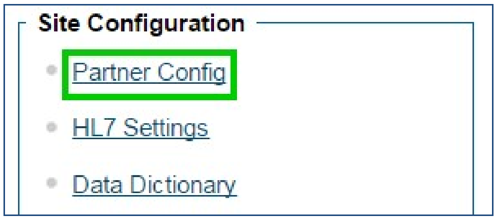
AdminLookupUpdate
AdminView
AdvancedLoginAdmin
BedBoardAdmin
ClinicalSupportAdmin
DataDictionary
FosterHomeAdmin
ManageApprovalRoles
PartnerConfig
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

Updated: 11/29/2016 8:30 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > PartnerConfig

PartnerConfig

Security Matrix: PartnerConfig controls visibility of the link at **Admin** tab > **Site Configuration** > **Partner Config**.



This **high-level right** allows the assigned role to make changes which affect the entire site. This includes:

- setting global configuration options — client and visit settings, list options, permitted file sizes, etc.
- globally turning features on and off — Bed Board, Foster Care, eMAR, accounting periods, etc.
- defining site-wide appearance — logos, colors, fonts, tab labels, etc.

See also

AdminLookupUpdate
AdminView
AdvancedLoginAdmin
BedBoardAdmin
ClinicalSupportAdmin
DataDictionary
FosterHomeAdmin
ManageApprovalRoles
NotificationTriggers
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

Updated: 11/29/2016 8:13 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > PurgeClients

PurgeClients

This setting grants the role the ability to permanently remove client records from the system, via the link at **Admin** tab > **Security Configuration** > **Purge Clients**.

Best Practice: Only grant this right to a high-level administration role. As these deletions cannot be reversed, use extreme caution in permitting this action.

Please Note: To enable this feature, you must submit a Task Ticket. Credible staff will activate the ability for you.

See also

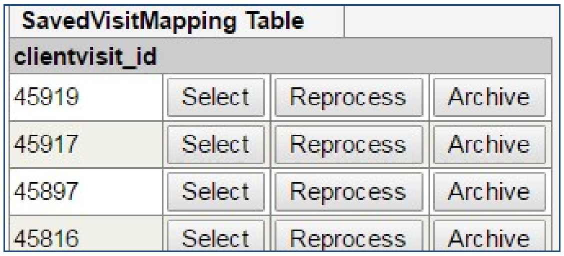
- AdminLookupUpdate
- AdminView
- AdvancedLoginAdmin
- BedBoardAdmin
- ClinicalSupportAdmin
- DataDictionary
- FosterHomeAdmin
- ManageApprovalRoles
- NotificationTriggers
- PartnerConfig
- SavedVisitMappingManager
- SecurityUpdate
- SubmitLibraryTicket
- SubmitTaskTicket
- SuperviseAll
- TransferLogList/TransferLogView

Updated: 11/30/2016 7:09 PM by public

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > SavedVisitMappingManager

SavedVisitMappingManager

The SavedVisitMapping table shows the IDs of failed visit mappings. Roles with this right may manage this table, apply mappings, and archive the *SavedVisitMapping* records.



This link is found at **Admin** tab > **Daily Activities** > **SavedVisitMapping Manager**.

See also

AdminLookupUpdate
AdminView
AdvancedLoginAdmin
BedBoardAdmin
ClinicalSupportAdmin
DataDictionary
FosterHomeAdmin
ManageApprovalRoles
NotificationTriggers
PartnerConfig
PurgeClients
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

Updated: 11/30/2016 7:30 PM by public

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > SecurityUpdate

SecurityUpdate

Note: This is a high-level right. Exercise caution is granting this permission, as the user can grant theirself rights to any part of Credible.

This setting controls the visibility of three links in the **Security Configuration** section of the **Admin** tab: **Login Profiles**, **Security Matrix**, and **Report Security**.

See also

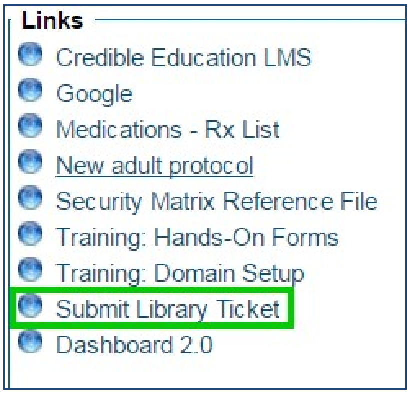
AdminLookupUpdate
AdminView
AdvancedLoginAdmin
BedBoardAdmin
ClinicalSupportAdmin
DataDictionary
FosterHomeAdmin
ManageApprovalRoles
NotificationTriggers
PartnerConfig
PurgeClients
SavedVisitMappingManager
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

Updated: 11/30/2016 7:51 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > SubmitLibraryTicket

SubmitLibraryTicket

This setting grants a user the right to submit a Library Ticket to Credible staff. This function is found at **Home** > **Links** > **Submit Library Ticket**.



Please note: As of 11/30/2016, this feature is being phased out.

See also

AdminLookupUpdate
AdminView
AdvancedLoginAdmin
BedBoardAdmin
ClinicalSupportAdmin
DataDictionary
FosterHomeAdmin
ManageApprovalRoles
NotificationTriggers
PartnerConfig
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitTaskTicket
SuperviseAll
TransferLogList/TransferLogView

Updated: 11/30/2016 8:04 PM by CredibleEducation

SubmitTaskTicket

This granted to a role the right to submit a Task Ticket to Credible via links on **Home Page** > **Links** and **Admin** tab > **Daily Activities** > **Submit Task Ticket**. However, this setting has been discontinued, and is no longer in use.

See also

- AdminLookupUpdate
- AdminView
- AdvancedLoginAdmin
- BedBoardAdmin
- ClinicalSupportAdmin
- DataDictionary
- FosterHomeAdmin
- ManageApprovalRoles
- NotificationTriggers
- PartnerConfig
- PurgeClients
- SavedVisitMappingManager
- SecurityUpdate
- SubmitLibraryTicket
- SuperviseAll
- TransferLogList/TransferLogView

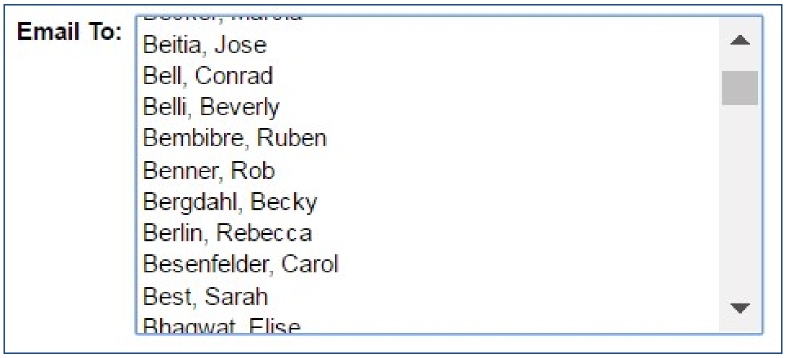
Updated: 11/30/2016 8:02 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > SuperviseAll

SuperviseAll

This right determines which employees will display on the **Email To:** section within the client's Notes page. If checked, employees that are a Supervisor will display in the section, even if they are not assigned to the employee. Additionally, Employee Messaging will display all teams and programs.

This function is found at **Client** tab > **Client Profile** > Client navbar > **Notes** button > **Email To** section.



- The information tooltip for this setting references the Dashboard; however, since the release of Dashboard 2.0, this description is no longer valid.

See also

AdminLookupUpdate
AdminView
AdvancedLoginAdmin
BedBoardAdmin
ClinicalSupportAdmin
DataDictionary
FosterHomeAdmin
ManageApprovalRoles
NotificationTriggers
PartnerConfig
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
TransferLogList/TransferLogView

Updated: 11/30/2016 8:16 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin > TransferLogList/TransferLogView

TransferLogList/TransferLogView

These settings control rights pertaining to the transfer logs kept for the Credible Mobile solutions, MobileForm and NextGen Mobile.

- **TransferLogList** allows the role to view a list (without details) of all transfers completed via MobileForm or NextGen Mobile. This includes saved visits and scheduled downloads.
- **TransferLogView**, in addition to the above, also allows the user to review the contents of the specific log entries.

Both activities are located on **Admin** tab > **Daily Activities** > **View Transfer Log**.

See also

AdminLookupUpdate
AdminView
AdvancedLoginAdmin
BedBoardAdmin
ClinicalSupportAdmin
DataDictionary
FosterHomeAdmin
ManageApprovalRoles
NotificationTriggers
PartnerConfig
PurgeClients
SavedVisitMappingManager
SecurityUpdate
SubmitLibraryTicket
SubmitTaskTicket
SuperviseAll

Updated: 11/30/2016 8:24 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin Time

Security Matrix: Admin Time

The **Admin Time** section of the Security Matrix controls the right to add, approve, delete, view, and update administrative time for employees. It includes the following settings:

This category contains the following settings:

- AdminTimeAdd
- AdminTimeApprove
- AdminTimeDelete
- AdminTimeList
- AdminTimeListAll
- AdminTimeListOwn
- AdminTimeUpdate

Updated: 8/1/2017 1:36 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin Time > AdminTimeAdd

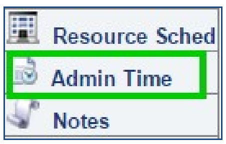
AdminTimeAdd

Having **AdminTimeAdd** checked permits the role to add administrative time for employees by controlling the visibility of the **Add Admin Time** button. This setting requires that the role also have the AdminTimeList setting checked.

Admin Time can be accessed via two paths:

- **Admin** time > **Daily Activities** > **Admin Time Queue**

- **Employee** tab > [click employee name] > **Employee** navbar > **Admin Time** button > **Add Admin Time**



See also

AdminTimeApprove
AdminTimeDelete
AdminTimeList
AdminTimeListAll
AdminTimeListOwn
AdminTimeUpdate

Updated: 12/1/2016 5:49 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin Time > AdminTimeApprove

AdminTimeApprove

This setting grants a role the right to approve administrative time by controlling the visibility of the **Approve** and **Approve All Checked** buttons on the Admin Time list. This setting requires that the role also have the AdminTimeList setting checked.

- **Admin** tab > **Daily Activities** > **Admin Time Queue**

- **Employee** > [click employee name] > **Employee** navbar > **Admin Time** button.

Please note: If auto-approve has been set, this setting has no effect at all.

See also

AdminTimeAdd
AdminTimeDelete
AdminTimeList
AdminTimeListAll
AdminTimeListOwn
AdminTimeUpdate

Updated: 12/1/2016 5:51 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin Time > AdminTimeDelete

AdminTimeDelete

This opening paragraph should describe…

See also

AdminTimeAdd
AdminTimeApprove
AdminTimeList
AdminTimeListAll
AdminTimeListOwn
AdminTimeUpdate

Updated: 12/1/2016 4:51 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin Time > AdminTimeList

AdminTimeList

This opening paragraph should describe...

See also

AdminTimeAdd
AdminTimeApprove
AdminTimeDelete
AdminTimeListAll
AdminTimeListOwn
AdminTimeUpdate

Updated: 12/1/2016 4:51 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin Time > AdminTimeListAll

AdminTimeListAll

This opening paragraph should describe...

See also

AdminTimeAdd
AdminTimeApprove
AdminTimeDelete
AdminTimeList
AdminTimeListOwn
AdminTimeUpdate

Updated: 12/1/2016 4:51 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin Time > AdminTimeListOwn

AdminTimeListOwn

This opening paragraph should describe…

See also

AdminTimeAdd
AdminTimeApprove
AdminTimeDelete
AdminTimeList
AdminTimeListAll
AdminTimeUpdate

Updated: 12/1/2016 4:52 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Admin Time > AdminTimeUpdate

AdminTimeUpdate

This opening paragraph should describe...

See also

AdminTimeAdd
AdminTimeApprove
AdminTimeDelete
AdminTimeList
AdminTimeListAll
AdminTimeListOwn

Updated: 12/1/2016 4:52 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments

Security Matrix: Assignments

This category contains the following settings:

- AssignClientGeoAreas
- AssignClientPrograms
- AssignClients
- AssignClientTeams
- AssignClientTeamsSameOnly
- AssignEmployeeCredentials
- AssignEmployeeCredentialsOwn
- AssignEmployeeGeoAreas
- AssignEmployeePrograms
- AssignEmployees
- AssignEmployeeTeams
- AssignEmployeeTeamsSameOnly
- AssignPlannerGroups
- AssignPrograms
- AssignResources
- AssignSupervisor
- AssignTeams
- BillingGroupsAssign

Updated: 8/1/2017 1:34 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignClientGeoAreas

AssignClientGeoAreas

This setting controls the visibility of the navbar **GeoArea** button for clients. It relies on the setting **Partner Config: GeoAreas**. Please note: the Partner Config settings also impact the content of the **Location** dropdowns.

See also

AssignClientPrograms
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignPrograms
AssignResources
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 1:13 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignClientPrograms

AssignClientPrograms

This setting provides the right to assign clients to a program. Please note that the Programs button and links will still display, but when clicked, the user will be taken to an "insufficient rights" page.

See also

AssignClientGeoAreas
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignPrograms
AssignResources
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 1:18 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignClients

AssignClients

This setting grants permission to directly assign a client to one or more employees via the Assign button, as well as unassign clients from employees. The user can also designate employees as the Primary for selected clients.

Please note: If this permission is not granted to an employee, the **Programs** button is not available on the Employee navbar; likewise, the **Edit** button is not available from the **Assignments** section of the Employee page. However, it does **not** impact Client pages.

See also

- AssignClientGeoAreas
- AssignClientPrograms
- AssignClientTeams
- AssignClientTeamsSameOnly
- AssignEmployeeCredentials
- AssignEmployeeCredentialsOwn
- AssignEmployeeGeoAreas
- AssignEmployeePrograms
- AssignEmployees
- AssignEmployeeTeams
- AssignEmployeeTeamsSameOnly
- AssignPlannerGroups
- AssignPrograms
- AssignResources
- AssignSupervisor
- AssignTeams
- BillingGroupsAssign

Updated: 8/1/2017 1:22 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignClientTeams

AssignClientTeams

This setting provides the right to assign clients to teams. Having this permission adds the **Team** button to the Client navbar.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignPrograms
AssignResources
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 1:30 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignClientTeamsSameOnly

AssignClientTeamsSameOnly

This permissions allows a user to assign clients to teams, but only teams of which they are a member.

Please note: SHould a profile have both settings checked, **AssignClientTeamsSameOnly** supersedes AssignClientTeams.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeams
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignPrograms
AssignResources
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 1:32 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignEmployeeCredentials

AssignEmployeeCredentials

Users with this right may assign credentials to other employees.

See also

- AssignClientGeoAreas
- AssignClientPrograms
- AssignClients
- AssignClientTeams
- AssignClientTeamsSameOnly
- AssignEmployeeCredentialsOwn
- AssignEmployeeGeoAreas
- AssignEmployeePrograms
- AssignEmployees
- AssignEmployeeTeams
- AssignEmployeeTeamsSameOnly
- AssignPlannerGroups
- AssignPrograms
- AssignResources
- AssignSupervisor
- AssignTeams
- BillingGroupsAssign

Updated: 8/1/2017 1:33 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignEmployeeCredentialsOwn

AssignEmployeeCredentialsOwn

This setting controls the visibility of the **Credentials** button on the Employee navbar, allowing the employee to assign their own credentials.

Please note: The existence or absence of certain credentials can impact the visibility of various billing services. As a **Credible Best Practice**, this right should be restricted to human resources staff, due to its potential impact on billing.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignPrograms
AssignResources
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 1:41 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignEmployeeGeoAreas

AssignEmployeeGeoAreas

This setting provides the permission for an employee to assign and unassign employees from GeoAreas. When this is checked, the **GeoAreas** button will appear on the Employee navbar.

See also

- AssignClientGeoAreas
- AssignClientPrograms
- AssignClients
- AssignClientTeams
- AssignClientTeamsSameOnly
- AssignEmployeeCredentials
- AssignEmployeeCredentialsOwn
- AssignEmployeePrograms
- AssignEmployees
- AssignEmployeeTeams
- AssignEmployeeTeamsSameOnly
- AssignPlannerGroups
- AssignPrograms
- AssignResources
- AssignSupervisor
- AssignTeams
- BillingGroupsAssign

Updated: 8/1/2017 1:42 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignEmployeePrograms

AssignEmployeePrograms

This setting enables the visibility of the **Programs** button on the **Employee** navbar, and grants the right to assign programs to employees.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployees
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignPrograms
AssignResources
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 1:44 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignEmployees

AssignEmployees

This provides the user with the right to directly assign employees to one or more clients via the **Assign** button on the **Client** navbar. Profiles with this right will see the **Employee** button on the Client navbar, as well as the **Edit** link on the the Client page.

Please note: The employees available to be assigned are limited by the user's right to see them.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignPrograms
AssignResources
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 1:53 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignEmployeeTeams

AssignEmployeeTeams

The provides the right to assign employees to teams.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignPrograms
AssignResources
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 1:54 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignEmployeeTeamsSameOnly

AssignEmployeeTeamsSameOnly

With this permission, a user can assign employees to any teams of which the user is a member.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeams
AssignPlannerGroups
AssignPrograms
AssignResources
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 1:55 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignPlannerGroups

AssignPlannerGroups

This setting gives the user the right to assign clients to a pre-defined schedule group (e.g., *Anger Management*, *Pain Management*). This allows the user to schedule an entire group at the same time, rather than scheduling each client individually. When this setting is checked, the user will see the **Schedule Grp** button on the Client navbar, and will have access to the **Schedule Groups** link on the **Admin** tab.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPrograms
AssignResources
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 2:02 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignPrograms

AssignPrograms

This setting allows the user to:

- assign programs to clients and employees;
- designate primary programs; and
- designate managers for programs.

When this setting is checked, the user will see the **Programs** button on the **Client navbar** and **Employee navbar**, as well as the **Edit** button on the **Client Overview** and **Employee Overview**. Lastly, users with this permission also have access to the **Program Assignments** link on the **Admin** tab.

Please note: This supersedes the AssignClientPrograms and AssignEmployeePrograms settings.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignResources
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 2:08 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignResources

AssignResources

This setting grants the rights to:

- assign resources to a team;
- edit and delete resources and descriptions on the **Manage Resources** page; and
- add resources via the **New Resource** section of the Manage Resources page.

Please note: When clicking the **Resource Sched** button on the navbar, users without this permission will only see resources assigned to the same team as as the user. Any resources assigned to other teams, or resources not assigned to any teams, will not be displayed.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignPrograms
AssignSupervisor
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 3:28 PM by CredibleEducation

AssignSupervisor

Supervisors have the right to view another employee's records. This setting allows the user to assign supervisors to employees.

- The list of possible supervisors is composed of employees with the **is_supervisor** flag checked in their employee profile.
- Is a user does not have this right, the Supervisor navbar button does not appear; the **Edit** button in the Supervisor section of the profile will not appear, either.

Please note: This setting does **not** create supervisors; it only allows them to be assigned to staff.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignPrograms
AssignResources
AssignTeams
BillingGroupsAssign

Updated: 8/1/2017 3:35 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > AssignTeams

AssignTeams

With this permission, a user can assign employees, clients, programs, and resources to teams. When it is checked, these functions will be available:

- **Teams** button on the Client or Employee navbars
- Under Assignments on a Edit button on the Teams section of a client profile.
- If a user does not have this right, clicking the Teams navbar button will display an "insufficient rights" message.
- AssignClientTeamsSameOnly overrides the lack of **AssignTeams**.

See also

AssignClientGeoAreas
AssignClientPrograms
AssignClients
AssignClientTeams
AssignClientTeamsSameOnly
AssignEmployeeCredentials
AssignEmployeeCredentialsOwn
AssignEmployeeGeoAreas
AssignEmployeePrograms
AssignEmployees
AssignEmployeeTeams
AssignEmployeeTeamsSameOnly
AssignPlannerGroups
AssignPrograms
AssignResources
AssignSupervisor
BillingGroupsAssign

Updated: 8/1/2017 3:51 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Assignments > BillingGroupsAssign

BillingGroupsAssign

This opening paragraph should describe...

See also

- AssignClientGeoAreas
- AssignClientPrograms
- AssignClients
- AssignClientTeams
- AssignClientTeamsSameOnly
- AssignEmployeeCredentials
- AssignEmployeeCredentialsOwn
- AssignEmployeeGeoAreas
- AssignEmployeePrograms
- AssignEmployees
- AssignEmployeeTeams
- AssignEmployeeTeamsSameOnly
- AssignPlannerGroups
- AssignPrograms
- AssignResources
- AssignSupervisor
- AssignTeams

Updated: 8/1/2017 3:56 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Attachments

Security Matrix: Attachments

- AttachmentFreeText
- ClientFileAdd
- ClientFileAddTeamFolderOnly
- ClientFileDelete
- ClientFileEdit
- ClientFileView
- ClientVisitFileAdd
- ClientVisitFileDelete
- ClientVisitFileView
- CreateFolder
- CreateFolderSameTeamOnly
- EmpFilesViewOwn
- EmployeeFileAdd
- EmployeeFileDelete
- EmployeeFileEdit
- EmployeeFileView
- EmployeeFormFileAdd
- EmployeeFormFileDelete
- EmployeeFormFileView
- ViewClientFoldersTeamOnly
- ViewPrivateClientFolders
- ViewPrivateEmployeeFolders

See also

High-Level Rights
Security Matrix: Admin
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Billing
Security Matrix: Clients Subsidiary
Security Matrix: Clinical
Security Matrix: eMAR
Security Matrix: Employees
Security Matrix Guide
Rights for Assigning Credentials
Prevent Staff from Deleting Scheduled Appointments
Medical Profile Rights

Updated: 8/4/2017 2:43 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Attachments > AttachmentFreeText

AttachmentFreeText

This provides the option to use free text for attachments.

See also

- ClientFileAdd
- ClientFileAddTeamFolderOnly
- ClientFileDelete
- ClientFileEdit
- ClientFileView

Updated: 8/4/2017 2:23 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Attachments > ClientFileAdd

ClientFileAdd

This permission allows the user to attach files to a client's record.

See also

- AttachmentFreeText
- ClientFileAddTeamFolderOnly
- ClientFileDelete
- ClientFileEdit
- ClientFileView

Updated: 8/4/2017 2:24 PM by CredibleEducation

ClientFileAddTeamFolderOnly

This setting allows a user to attach files to a client record, but only to folders which are assigned to the same team as the user, or which are not assigned to any team at all.

See also

- AttachmentFreeText
- ClientFileAdd
- ClientFileDelete
- ClientFileEdit
- ClientFileView

Updated: 8/4/2017 2:26 PM by CredibleEducation

ClientFileDelete

Users with this permission can delete attachments from client records.

See also

- AttachmentFreeText
- ClientFileAdd
- ClientFileAddTeamFolderOnly
- ClientFileEdit
- ClientFileView

Updated: 8/4/2017 2:41 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Attachments > ClientFileEdit

ClientFileEdit

Users who should be able to edit the record for a client attachment will need this permission.

See also

- AttachmentFreeText
- ClientFileAdd
- ClientFileAddTeamFolderOnly
- ClientFileDelete
- ClientFileView

Updated: 8/4/2017 2:42 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Attachments > ClientFileView

ClientFileView

When viewing a client record, only users with this right fill be able to see any attachments.

See also

AttachmentFreeText
ClientFileAdd
ClientFileAddTeamFolderOnly
ClientFileDelete
ClientFileEdit

Updated: 8/4/2017 2:43 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Billing

Security Matrix: Billing

This opening paragraph should describe...

See also

High-Level Rights
Security Matrix: Admin
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Attachments
Security Matrix: Clients Subsidiary
Security Matrix: Clinical
Security Matrix: eMAR
Security Matrix: Employees
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Updated: 8/4/2017 2:44 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Billing > BillingAddAdjustment

BillingAddAdjustment

Security right for manual billing adjustments. This controls adding an adjustment to a visit from the Billing Details screen. It also controls the options in the Transfer Balance dropdown when applying a payment that does not cover the full balance.

When this right is turned on, an 'Add Adjustment to Service' section will be available in the Billing Details screen. The Transfer Balance dropdown will have the regular choices available and below them will be the different Write Off types.

See also
Security Matrix
Viewing Billing Details for a Visit

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary

Security Matrix: Clients Subsidiary

The **Clients Subsidiary** section of the Security Matrix controls a large number of rights pertaining to clients. It includes the following settings:

- Allergies
  - AllergyAdd
  - AllergyDelete
  - AllergyUpdate
  - AllergyView
- Authorizations
  - AuthorizationAdd
  - AuthorizationDelete
  - AuthorizationView
- Residential/Inpatient
  - ClientBedBoardAssign
  - ClientBedBoardIntervalDelete
  - ClientBedBoardIntervalEdit
  - FosterHomeIntervalEdit
  - RISarchive
  - RISReactivate
- Client Insurance and Liability
  - ClientInsuranceAdd
  - ClientInsuranceDelete
  - ClientInsuranceView
  - ClientLiabilityUpdate
  - ClientLiabilityView
- Client Notes
  - ClientNoteAdd
  - ClientNoteDelete
- Client Warnings
  - ClientWarningAdd
  - ClientWarningDelete
  - ClientWarningUpdate
  - ClientWarningView
- Diagnoses
  - DxAdd
  - DxAxisDelete
  - DxFormsAdd
  - DxUpdate
  - DxView
- External Providers
  - AddExternalProvider
  - ExternalProviderUpdate
  - ExternalProviderView
- Immunizations
  - ImmunizationAdd
  - ImmunizationDelete
  - ImmunizationEdit
  - ImmunizationView
- Medical Profile
  - MedicalProfileAdd
  - MedicalProfileDelete
  - MedicalProfileUpdate
  - MedicalProfileUpdateInactive
  - MedicalProfileView
- Prescriptions
  - RxDelete
  - RxFormsAdd
  - RxUpdate
  - RxView
- Treatment Plans
  - TxAdd: This controls the visibility of the **Add Tx Plan** button on the Treatment Plan page.

    - TxDelete
    - TxFormsAdd
    - TxPlusActivate
    - TxPlusAdmin: Allows users to create, edit, and delete TxPlus Templates and create, edit, and delete elements in Tx Plus Custom Library. (Requires the AdminView right for access to the Admin tab.)
    - TxPlusBuild
    - TxPlusBuildFromForm
    - TxPlusDelete
    - TxPlusDocument
    - TxPlusInactive
    - TxPlusTemplateCreate: Allows users to create new TxPlus templates from the Client navbar or from a form.
    - TxPlusView
    - TxUpdate
    - TxView
- Other
    - ClientPictureAdd
    - ClientUserView

See also

High-Level Rights
Security Matrix: Admin
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Attachments
Security Matrix: Billing
Security Matrix: Clinical
Security Matrix: eMAR
Security Matrix: Employees
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Medical Profile Rights

Updated: 3/29/2017 11:45 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Allergies

Allergies

This opening paragraph should describe...

See also

Authorizations
Client Notes
Client Warnings
Diagnoses
External Providers
Immunizations
Insurance and Liability
Medical Profile
Prescriptions
Residential Inpatient
Treatment Plans
Client Subsidiary Other

Updated: 3/29/2017 11:24 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Authorizations

Authorizations

This opening paragraph should describe...

See also

Allergies
Client Notes
Client Warnings
Diagnoses
External Providers
Immunizations
Insurance and Liability
Medical Profile
Prescriptions
Residential Inpatient
Treatment Plans
Client Subsidiary Other

Updated: 3/29/2017 11:25 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Client Notes

Client Notes

This opening paragraph should describe...

See also

Allergies
Authorizations
Client Warnings
Diagnoses
External Providers
Immunizations
Insurance and Liability
Medical Profile
Prescriptions
Residential Inpatient
Treatment Plans
Client Subsidiary Other

Updated: 3/29/2017 11:26 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Client Warnings

Client Warnings

This opening paragraph should describe...

See also

Allergies
Authorizations
Client Notes
Diagnoses
External Providers
Immunizations
Insurance and Liability
Medical Profile
Prescriptions
Residential Inpatient
Treatment Plans
Client Subsidiary Other

Updated: 3/29/2017 11:26 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Diagnoses

Diagnoses

This opening paragraph should describe...

See also

Allergies
Authorizations
Client Notes
Client Warnings
External Providers
Immunizations
Insurance and Liability
Medical Profile
Prescriptions
Residential Inpatient
Treatment Plans
Client Subsidiary Other

Updated: 3/29/2017 11:26 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > External Providers

External Providers

This opening paragraph should describe...

See also

Allergies
Authorizations
Client Notes
Client Warnings
Diagnoses
Immunizations
Insurance and Liability
Medical Profile
Prescriptions
Residential Inpatient
Treatment Plans
Client Subsidiary Other

Updated: 3/29/2017 11:27 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Immunizations

Immunizations

This opening paragraph should describe...

See also

Allergies
Authorizations
Client Notes
Client Warnings
Diagnoses
External Providers
Insurance and Liability
Medical Profile
Prescriptions
Residential Inpatient
Treatment Plans
Client Subsidiary Other

Updated: 3/29/2017 11:27 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Insurance and Liability

Insurance and Liability

This opening paragraph should describe...

See also

Allergies
Authorizations
Client Notes
Client Warnings
Diagnoses
External Providers
Immunizations
Medical Profile
Prescriptions
Residential Inpatient
Treatment Plans
Client Subsidiary Other

Updated: 3/29/2017 11:25 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Medical Profile

Medical Profile

This opening paragraph should describe...

See also

Allergies
Authorizations
Client Notes
Client Warnings
Diagnoses
External Providers
Immunizations
Insurance and Liability
Prescriptions
Residential Inpatient
Treatment Plans
Client Subsidiary Other

Updated: 3/29/2017 11:27 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Prescriptions

Prescriptions

This opening paragraph should describe...

See also

Allergies
Authorizations
Client Notes
Client Warnings
Diagnoses
External Providers
Immunizations
Insurance and Liability
Medical Profile
Residential Inpatient
Treatment Plans
Client Subsidiary Other

Updated: 3/29/2017 11:27 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Residential Inpatient

Residential Inpatient

This opening paragraph should describe...

See also

Allergies
Authorizations
Client Notes
Client Warnings
Diagnoses
External Providers
Immunizations
Insurance and Liability
Medical Profile
Prescriptions
Treatment Plans
Client Subsidiary Other

Updated: 3/29/2017 11:25 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Treatment Plans

Treatment Plans

Security Matrix permissions for Tx Plan and Tx Plus include the following.

- **TxAdd**: This controls the visibility of the **Add Tx Plan** button on the Treatment Plan page.
- TxDelete
- TxFormsAdd
- TxPlusActivate
- **TxPlusAdmin**: Allows users to create, edit, and delete TxPlus Templates and create, edit, and delete elements in Tx Plus Custom Library. (Requires the AdminView right for access to the Admin tab.)
- TxPlusBuild
- TxPlusBuildFromForm
- TxPlusDelete
- TxPlusDocument
- TxPlusInactive
- **TxPlusTemplateCreate**: Allows users to create new TxPlus templates from the Client navbar or from a form.
- TxPlusView
- TxUpdate
- TxView

See also

Allergies
Authorizations
Client Notes
Client Warnings
Diagnoses
External Providers
Immunizations
Insurance and Liability
Medical Profile
Prescriptions
Residential Inpatient
Client Subsidiary Other

Updated: 3/29/2017 11:34 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clients Subsidiary > Client Subsidiary Other

Client Subsidiary Other

This opening paragraph should describe...

See also

Allergies
Authorizations
Client Notes
Client Warnings
Diagnoses
External Providers
Immunizations
Insurance and Liability
Medical Profile
Prescriptions
Residential Inpatient
Treatment Plans

Updated: 3/29/2017 11:26 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Clinical

Security Matrix: Clinical

- **ManageDirectMessages**: This right allows the user access to **Admin** tab > **Surescripts Direct Messaging**. This page allows access to the Address Book, permits the user to send messages, and to view received and sent messages.
- **SendDirectMessages**: This setting permits users to send a client-specific message via the Surescripts Direct Message button at the bottom of the Client Profile page.

See also

High-Level Rights
Security Matrix: Admin
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Attachments
Security Matrix: Billing
Security Matrix: Clients Subsidiary
Security Matrix: eMAR
Security Matrix: Employees
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Updated: 4/26/2017 11:12 AM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: eMAR

Security Matrix: eMAR

- eMAR
- eMARGroupClient
- eMARGroupEmployee
- eMARGroupManage
- eMARMedAdmin
- eMARMedAdminMissed
- eMARMedRecordUpdate
- eMARPillboxAdmin
- eMARPillboxReconcile
- eMARScheduleCreate
- eMARScheduleCreateWithChanges
- eMARScheduleUpdate

See also

High-Level Rights
Security Matrix: Admin
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Attachments
Security Matrix: Billing
Security Matrix: Clients Subsidiary
Security Matrix: Clinical
Security Matrix: Employees
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Rights for Assigning Credentials
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Medical Profile Rights

Updated: 6/27/2017 2:01 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: eMAR > eMAR

eMAR

This is the first of two core permissions which enable access to the eMAR module.

Note: Previously called *eMar*.

See also

- eMARGroupClient
- eMARGroupEmployee
- eMARGroupManage
- eMARMedAdmin
- eMARMedAdminMissed
- eMARMedRecordUpdate
- eMARPillboxAdmin
- eMARPillboxReconcile
- eMARScheduleCreate
- eMARScheduleCreateWithChanges
- eMARScheduleUpdate

Updated: 6/27/2017 1:52 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: eMAR > eMARGroupClient

eMARGroupClient

This allows the user to add and remove clients from eMAR Groups.

Previously known as *eMarClientGroup*.

See also

- eMAR
- eMARGroupEmployee
- eMARGroupManage
- eMARMedAdmin
- eMARMedAdminMissed
- eMARMedRecordUpdate
- eMARPillboxAdmin
- eMARPillboxReconcile
- eMARScheduleCreate
- eMARScheduleCreateWithChanges
- eMARScheduleUpdate

Updated: 6/27/2017 2:02 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: eMAR > eMARGroupEmployee

eMARGroupEmployee

This permission confers the ability to add and remove employees from eMAR Groups.

Previously known as *eMarEmployeeGroup*.

See also

- eMAR
- eMARGroupClient
- eMARGroupManage
- eMARMedAdmin
- eMARMedAdminMissed
- eMARMedRecordUpdate
- eMARPillboxAdmin
- eMARPillboxReconcile
- eMARScheduleCreate
- eMARScheduleCreateWithChanges
- eMARScheduleUpdate

Updated: 6/27/2017 2:02 PM by CredibleEducation

eMARGroupManage

This permission allows the user to add, edit, and delete eMAR Groups.

Previously known as eMarManageGroups.

See also

eMAR
eMARGroupClient
eMARGroupEmployee
eMARMedAdmin
eMARMedAdminMissed
eMARMedRecordUpdate
eMARPillboxAdmin
eMARPillboxReconcile
eMARScheduleCreate
eMARScheduleCreateWithChanges
eMARScheduleUpdate

Updated: 6/27/2017 2:02 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: eMAR > eMARMedAdmin

eMARMedAdmin

This the second of two permissions needed to access eMAR. It allows users to administer medications to clients within their assigned eMAR Groups.

Note: This right was previously called *eMarAdministerMeds*.

See also

eMAR
eMARGroupClient
eMARGroupEmployee
eMARGroupManage
eMARMedAdminMissed
eMARMedRecordUpdate
eMARPillboxAdmin
eMARPillboxReconcile
eMARScheduleCreate
eMARScheduleCreateWithChanges
eMARScheduleUpdate

Updated: 6/27/2017 1:51 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: eMAR > eMARMedAdminMissed

eMARMedAdminMissed

Users with this permission have the ability to administer medications after their designated administration window.

This setting was previously known as *eMarAdminMissed*.

See also

eMAR
eMARGroupClient
eMARGroupEmployee
eMARGroupManage
eMARMedAdmin
eMARMedRecordUpdate
eMARPillboxAdmin
eMARPillboxReconcile
eMARScheduleCreate
eMARScheduleCreateWithChanges
eMARScheduleUpdate

Updated: 6/27/2017 2:09 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: eMAR > eMARMedRecordUpdate

eMARMedRecordUpdate

This permission grants the user the right to update eMAR records what have already been marked as completed.

Previously, this setting was named *eMarAdminRecordEdit*.

See also

eMAR
eMARGroupClient
eMARGroupEmployee
eMARGroupManage
eMARMedAdmin
eMARMedAdminMissed
eMARPillboxAdmin
eMARPillboxReconcile
eMARScheduleCreate
eMARScheduleCreateWithChanges
eMARScheduleUpdate

Updated: 6/27/2017 2:10 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: eMAR > eMARPillboxAdmin

eMARPillboxAdmin

This permission grants the ability to add new pillboxes, edit existing pillboxes, and discontinue an existing pillbox.

This was previously named *eMarPillBoxAdmin*.

See also

- eMAR
- eMARGroupClient
- eMARGroupEmployee
- eMARGroupManage
- eMARMedAdmin
- eMARMedAdminMissed
- eMARMedRecordUpdate
- eMARPillboxReconcile
- eMARScheduleCreate
- eMARScheduleCreateWithChanges
- eMARScheduleUpdate

Updated: 6/27/2017 2:11 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: eMAR > eMARPillboxReconcile

eMARPillboxReconcile

This user has the ability to reconcile pillboxes.

It was previously called *eMarPillBoxReconcile*.

See also

eMAR
eMARGroupClient
eMARGroupEmployee
eMARGroupManage
eMARMedAdmin
eMARMedAdminMissed
eMARMedRecordUpdate
eMARPillboxAdmin
eMARScheduleCreate
eMARScheduleCreateWithChanges
eMARScheduleUpdate

Updated: 6/27/2017 2:13 PM by CredibleEducation

eMARScheduleCreate

This permission allows the creation of new eMAR schedules. However, it does not allow existing schedules to be edited or updated.

This was previously known in a slightly different version as *eMarCreateMedSchedule*.

See also

eMAR
eMARGroupClient
eMARGroupEmployee
eMARGroupManage
eMARMedAdmin
eMARMedAdminMissed
eMARMedRecordUpdate
eMARPillboxAdmin
eMARPillboxReconcile
eMARScheduleCreateWithChanges
eMARScheduleUpdate

Updated: 6/27/2017 1:58 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: eMAR > eMARScheduleCreateWithChanges

eMARScheduleCreateWithChanges

Users must have this permission if they will need the ability to alter medication information for appearance in eMAR. However, it does not confer the right to alter the actual medication data in the system.

See also

- eMAR
- eMARGroupClient
- eMARGroupEmployee
- eMARGroupManage
- eMARMedAdmin
- eMARMedAdminMissed
- eMARMedRecordUpdate
- eMARPillboxAdmin
- eMARPillboxReconcile
- eMARScheduleCreate
- eMARScheduleUpdate

Updated: 6/27/2017 2:00 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: eMAR > eMARScheduleUpdate

eMARScheduleUpdate

This security right gives the user the ability to update and discontinue existing schedules.

See also

eMAR
eMARGroupClient
eMARGroupEmployee
eMARGroupManage
eMARMedAdmin
eMARMedAdminMissed
eMARMedRecordUpdate
eMARPillboxAdmin
eMARPillboxReconcile
eMARScheduleCreate
eMARScheduleCreateWithChanges

Updated: 6/27/2017 2:14 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Employees

Security Matrix: Employees

- EmployeeAdd
- EmployeeConfig
- EmployeeDelete
- EmployeeFormsUpdate
- EmployeeList
- EmployeeListAll
- EmployeeMessageLogViewAll
- EmployeeNoteAdd
- EmployeeNoteDelete
- EmployeePictureAdd
- EmployeeSuperEdit
- EmployeeSuperView
- EmployeeTimeClockAll
- EmployeeTimeClockEdit
- EmployeeTimeZone
- EmployeeUpdate
- EmployeeUpdateOwn
- EmployeeView
- EmployeeViewAll
- EmployeeViewSupervise
- EmployeeWorkSchedEdit
- EmployeeWorkSchedView
- MessagingHubAnswerMessages
- PasswordUpdate
- SendBroadcast
- SendEmpMessage
- ToDoListAddOtherEmp
- ToDoListDelete
- ToDoListEditOtherEmp
- UserAdd
- UserList
- UserUpdate

See also

High-Level Rights
Security Matrix: Admin
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Attachments
Security Matrix: Billing
Security Matrix: Clients Subsidiary
Security Matrix: Clinical
Security Matrix: eMAR
Security Matrix Guide
Rights for Assigning Credentials
Prevent Staff from Deleting Scheduled Appointments
Medical Profile Rights

Updated: 6/13/2017 4:45 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Employees > EmployeeAdd

EmployeeAdd

This setting controls the visibility of the **Add Employee** button on the **Employee List** page.

See also

EmployeeConfig
EmployeeDelete
EmployeeFormsUpdate
EmployeeTimeZone

Updated: 6/13/2017 4:03 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Employees > EmployeeConfig

EmployeeConfig

When enabled, allows the profile to edit the configuration of any employee via the **Employee** navbar > **Config** button. Please note: Employees are always able to update their own configuration, although some items may be locked down by other settings.

See also

EmployeeAdd
EmployeeDelete
EmployeeFormsUpdate
EmployeeTimeZone

Updated: 6/13/2017 4:08 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Employees > EmployeeDelete

EmployeeDelete

This opening paragraph should describe...

See also

EmployeeAdd
EmployeeConfig
EmployeeFormsUpdate
EmployeeTimeZone

Updated: 6/13/2017 3:35 PM by CredibleEducation

EmployeeFormsUpdate

This setting controls the ability of a user completing an employee form to map that form data back to the employee profile.

See also

EmployeeAdd
EmployeeConfig
EmployeeDelete
EmployeeTimeZone

Updated: 6/13/2017 4:45 PM by CredibleEducation

Home > Admin > Security Configuration > Security Matrix > Security Matrix: Employees > EmployeeTimeZone

EmployeeTimeZone

This permission is required in order for an employee to set a personal time zone. If this permission is not enabled, then the **Employee Config** settings of **Employee Time Zone** and **Set Employee Time Zone at Login** will not be available.

Please note: Credible must enable **Employee Time Zone** for your Domain before this will take effect. Please submit a task ticket to request the activation.

See also

EmployeeAdd
EmployeeConfig
EmployeeDelete
EmployeeFormsUpdate

Updated: 6/13/2017 4:42 PM by CredibleEducation

Security Matrix Guide

The Security Matrix is a complex and powerful tool for controlling access to information in Credible. The guide below explains the configuration and use of all the Security Matrix settings.

Security Matrix Settings Guide: Draft, July 15, 2016 (341pp/13 MB)

See also

High-Level Rights
Security Matrix: Admin
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Attachments
Security Matrix: Billing
Security Matrix: Clients Subsidiary
Security Matrix: Clinical
Security Matrix: eMAR
Security Matrix: Employees
Rights for Assigning Credentials
Prevent Staff from Deleting Scheduled Appointments
Medical Profile Rights

Updated: 7/18/2016 4:57 PM by marchall

Home > Admin > Security Configuration > Security Matrix > Rights for Assigning Credentials

Rights for Assigning Credentials

To prevent staff from assigning their own credentials *and* the credentials of other employees (Credentials button is not available on Employee nav bar)

AssignEmployeeCredentials	☐
AssignEmployeeCredentialsOwn	☐

To let staff assign their own credentials but not the credentials of other employees (Credentials button is only available on employee's own nav bar)

AssignEmployeeCredentials	☐
AssignEmployeeCredentialsOwn	☑

To let staff assign their own credentials *and* the credentials of other employees (Credentials button is available on Employee nav bar). In second scenario, AssignEmployeeCredentials set to True trumps AssignEmployeeCredentialsOwn set to False.

AssignEmployeeCredentials	☑
AssignEmployeeCredentialsOwn	☑

AssignEmployeeCredentials	☑
AssignEmployeeCredentialsOwn	☐

Tip

If you need a read-only profile, use the first scenario above. And to make it easy for staff to view credentials, include the corresponding field in the Employee Info section on the Employee Overview screen. See Profile Fields On Homepages for more information.

Employee Info

First Name	Jane	**Last Name**	Smith
Title	Psychiatrist	**Status**	ACTIVE
Employee ID	141	**External ID / RU**	
Username	jsmith	**Credentials (Billing)**	LAC, BA
Gender	F	**Job Code**	Psychiatrist
edit			Full Employee Info

See also
Credentials

High-Level Rights
Security Matrix: Admin
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Attachments
Security Matrix: Billing
Security Matrix: Clients Subsidiary
Security Matrix: Clinical
Security Matrix: eMAR
Security Matrix: Employees
Security Matrix Guide
Prevent Staff from Deleting Scheduled Appointments
Medical Profile Rights

Home > Admin > Security Configuration > Security Matrix > Prevent Staff from Deleting Scheduled Appointments

Prevent Staff from Deleting Scheduled Appointments

With the PlannerDelete right, you can control the availability of the Delete button in the Scheduled Visit popup. If you do not want staff to be able to delete schedule entries, make sure the PlannerDelete right is *not* selected for the corresponding profiles.

See also

High-Level Rights
Security Matrix: Admin
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Attachments
Security Matrix: Billing
Security Matrix: Clients Subsidiary
Security Matrix: Clinical
Security Matrix: eMAR
Security Matrix: Employees
Security Matrix Guide
Rights for Assigning Credentials
Medical Profile Rights

Home > Admin > Security Configuration > Security Matrix > Medical Profile Rights

Medical Profile Rights

When:

MedicalProfileAdd = FALSE

MedicalProfileUpdate = FALSE

MedicalProfileView = **TRUE**

Employee can only view the medical profile.

* * *

When:

MedicalProfileAdd = **TRUE**

MedicalProfileUpdate = FALSE

MedicalProfileView = **TRUE**

Employee can only add a new profile and save it as a new record.

* * *

When:

MedicalProfileAdd = FALSE

MedicalProfileUpdate = **TRUE**

MedicalProfileView = **TRUE**

Employee can make changes to the active medical profile and save them; he/she cannot add a new profile (only the Save Medical Profile button is available).

* * *

When:

MedicalProfileAdd = **TRUE**

MedicalProfileUpdate = **TRUE**

MedicalProfileView = **TRUE**

Employee can make changes to the active medical profile and save them; he/she can add a new profile (both the Save Medical Profile and Start New Profile buttons are available).

See also

High-Level Rights
Security Matrix: Admin
Security Matrix: Admin Time
Security Matrix: Assignments
Security Matrix: Attachments
Security Matrix: Billing
Security Matrix: Clients Subsidiary
Security Matrix: Clinical

Security Matrix: eMAR
Security Matrix: Employees
Security Matrix Guide
Rights for Assigning Credentials
Prevent Staff from Deleting Scheduled Appointments

Home > Admin > Security Configuration > Report Security

Report Security

Click on the **Report Security link** to manage, assign and establish the Report viewing capabilities specific to Profile Codes. Administrators use Report Security to grant users the ability to view (specific) detailed reports on the Reports Tab.

To grant the Profile Code access to a particular Report, hover over the informational icon, then check the box under the Profile Code header of choice. To save the checked Reports for particular Profile Codes, click the **Save All** button.

The view/run the selected Reports; access on the Reports Tab click on a specific Report link, then set the filtering criteria to view the Report.

See also

User List
Login Profiles
Security Matrix
Login Report
Client User Security Functions

Home > Admin > Security Configuration > Login Report

Login Report'">Login Report

Click on the **Login Report link** to view a list of Login Log details. The Login Report is a list of users that have logged into Credible showing both successful and unsucessful login attempts with the IP Address of the individual.

Select a Username or ID, Login Type (Erroneous, Successful, All) and/or Date Range, then click the **Filter** button to gather the Login information. Gathered information can be on an individual basis or for a larger population. To save detailed information in Excel format, click on the **Export** button.

See also

User List
Login Profiles
Security Matrix
Report Security
Client User Security Functions

Home > Admin > Security Configuration > Client User Security Functions

Client User Security Functions

Please note: These settings only apply to the original Credible Client Portal, and not to Client Portal 2.0.

- **Client User Security Matrix**
- **Client User List**
- **Client User Login Report**

See also

User List
Login Profiles
Security Matrix
Report Security
Login Report

Modified 8/4/2017 2:49 PM by CredibleEducation

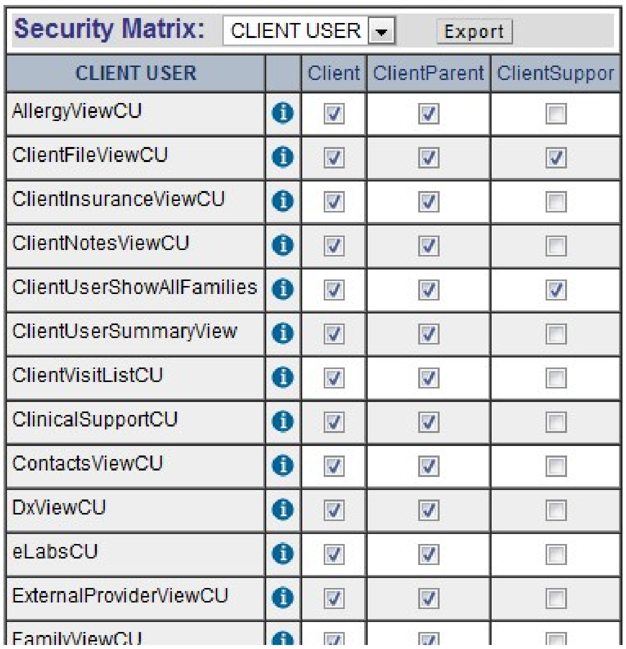
Home > Admin > Security Configuration > Client User Security Functions > Client User Security Matrix

Client User Security Matrix

Use this function to specify which parts of a client's record each client user profile will have access to in the Credible Client Portal.

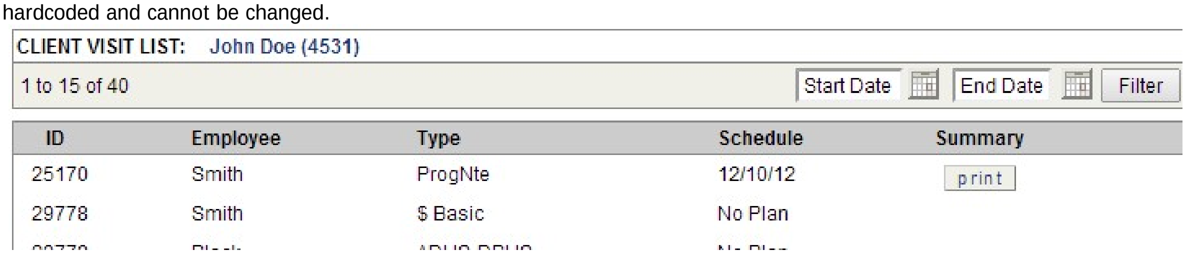
In the example below, there are three different client user profiles. The client user profile "Client" has access to all parts of his/her record. The ClientParent and ClientSuppor only have access to certain parts of the client's record.

Click the Export button at the top of the screen to create a spreadsheet that lists the rights assigned to the Client User profiles. The spreadsheet lists the role, the category the right is in, the right, and the tooltip. After clicking the export button, open or save the .csv file.



Use the Login Profiles function to set up the client user profiles. Use the Users function to add a client user to a client's record and select his/her profile code.

ClientVisitListCU controls the right to view the Client Visit List. In the Client Portal, the columns displayed in the Client Visit List are hardcoded and cannot be changed.



See also

Credible Client Portal

Client User List

Client User Login Report

Home > Admin > Security Configuration > Client User Security Functions > Client User List

Client User List

Use this function to view or export a list of all client users for all clients. The Last Name link and update button take you to the User Accounts screen for the client. You can update client user information from this screen.

Client User List: Showing 1 to 2 of 2. Export

#	For Client ID	Last Name	First Name	User Name	Email	Profile	
1	**1913**	Jack	Jack	Apple	A@J.com	ClientUser	update
2	**2093**	Doe	Jack	jdoe	jdoe@email.com	ClientUser	update

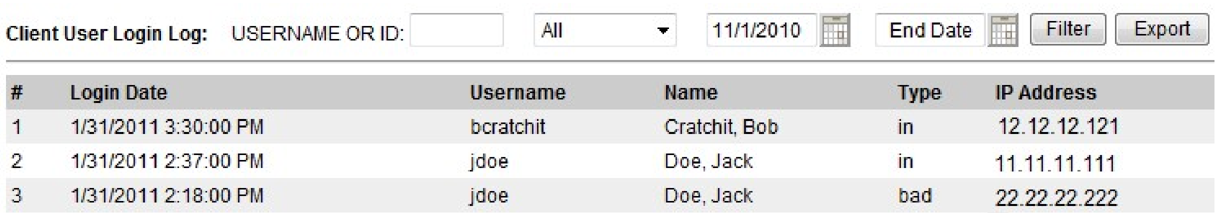
See also

Client User Security Matrix
Client User Login Report

Home > Admin > Security Configuration > Client User Security Functions > Client User Login Report

Client User Login Report

Use this function to view or export a list of all client users that have logged into the Client Portal or attempted to log in. You can filter by the username or ID of the client user, login result -- successful (Type = in) or erroneous (Type = bad), and date range.



Client User Login Log: USERNAME OR ID: All 11/1/2010 End Date Filter Export

#	Login Date	Username	Name	Type	IP Address
1	1/31/2011 3:30:00 PM	bcratchit	Cratchit, Bob	in	12.12.12.121
2	1/31/2011 2:37:00 PM	jdoe	Doe, Jack	in	11.11.11.111
3	1/31/2011 2:18:00 PM	jdoe	Doe, Jack	bad	22.22.22.222

See also

Client User Security Matrix
Client User List

Home > Admin > Billing Configuration

Billing Configuration

This section of the Admin tab encompases the links necessary for completing Billing Setup functions within the site. Each link provides a list of entries for services to be completed with the required program, location, matrix line, payer and group associations.

Programs
Visit Type
Locations
Recipient Types
No CPT Code on 837I
Allowing Negative Balances on Visits
Adding Co-Insurance Days
Client Identifiers for 270 Eligibility Request


Billing Matrix


Billing Payer


Billing Groups

See also

Daily Activities
Lookups and Code Tables
Security Configuration
Site Configuration
Credible eRx Admin
Methasoft Import
Configuring Family Unit As a Client Entity
Case Manager Notes
Employee-Specific Time Zones
Flag Attachments for HR Use Only
Recipient, Location, & Billing Group Fields Default to Null
Additional Fields in Visit Details Screen
Drug Schedule & NDC for Client Medications
Setting Up the Credible Client Portal
Outcome Tracking Setup
Setting Up Your System to Use a Cancellation/No-Show Form
Setting Up eLabs
Setting Up eMAR
Setting Up Bed Board
Configuration for Generating Clinical Summaries
Purging Client Records
User Management Best Practice

Home > Admin > Billing Configuration > Programs

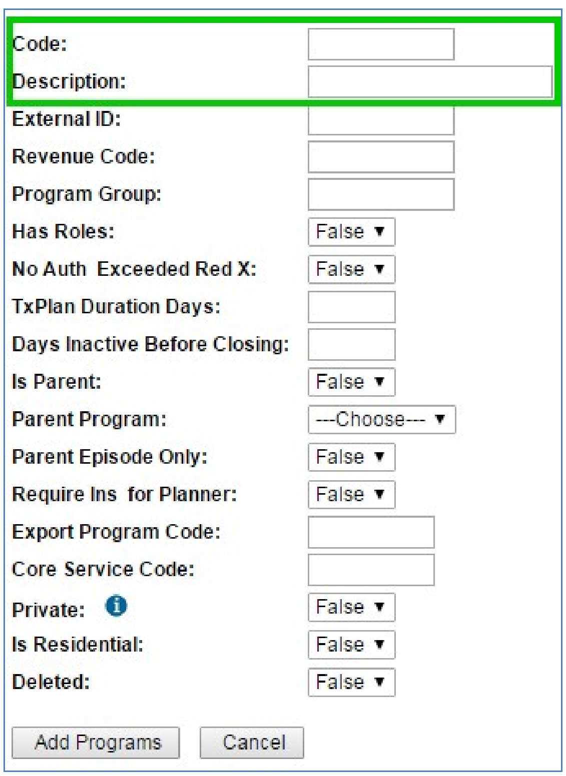
Programs

Establishing programs is part of the Billing setup and Visit Type association.

To access the Programs list, go to the **Admin** tab > **Billing Configuration** > **Programs**.

To add a new program:

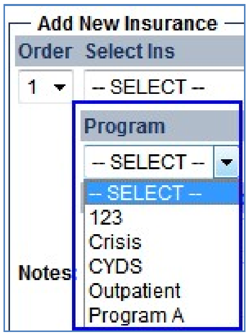
1. Click **Add a New Programs Entry.**
2. Enter a **Code** and **Description**; these are required fields. For a full list of the other fields and their uses, click here.



3. Fill out the other fields as appropriate. This link provides a list of all the Program fields and their purposes.

   The Program Group field is how you associate one or more programs with a client's insurance coverage. If you assign a Program Group code or name to a program, a Program dropdown will be available in the **Add New Insurance** section of the

Client Insurance screen.



If you want staff to be able to associate multiple programs with an insurance coverage, assign the same Program Group code or name to each program. When a user selects the Program Group when adding new insurance for the client, the coverage will be associated with all programs with that Program Group code/name. To associate a single program with an insurance coverage, make sure the Program Group code/name is not assigned to any other program.

4. Click the **Add Programs** button.

To edit a program:

1. Click the **Edit** button (on the far left) for the Program you want to edit.
2. Make any changes, then click the **Save** button.

To delete a program:

1. Click the **Delete** button (on the far right) for the Program you want to delete.
2. Click **OK** when the confirmation prompt displays.

See also

Visit Type
Locations
Recipient Types
No CPT Code on 837I
Allowing Negative Balances on Visits
Adding Co-Insurance Days
Client Identifiers for 270 Eligibility Request
Parent Program Driven Episodes
Use Client Episodes
Episodes per Program Assignment

Updated 7/19/2016 5:23 PM by marchall

Home > Admin > Billing Configuration > Programs > Program Fields

Program Fields

Below are listed the fields making up a Program.

Code	10 character maximum
Description	50 character maximum
External ID	Used with Exports (25 character maximum)
Revenue Code	**Do not define the Revenue Code here**; use the Revenue/AR Code Matrix. However, this field is used sometimes for custom reporting.
Program Group	This is used for custom reporting, or to populate the Program dropdown if using Programs in the Clients' Insurance screen. (12 character maximum.)
Has Roles	Select **True** if this specific Program should be associated with defined program roles.
No Auth Exceeded Red X	Select **True** if visits within a Program should **Red X** if no authorization exists.
TxPlan Duration Days	Identify # of days Tx Plan is typically active. Only Used with FORM treatment plan process and old Treatment Plan process.
Days Inactive Before Closing	Identify # of days client must be inactive before closing the Program; Program Closing Report can be used.
Is Parent	Select **True** if the Program is the parent or over-arching program.
Parent Program	Select the parent Program for all subordinate programs from the list provided. After defining a Program as the parent program, and then assigning other programs as child programs, when a client is assigned to the parent program the client is auto-assigned to the child programs. **Important:** Additional setup under Partner Config is required. **Note**: Advanced searches and Credible reports will not include data directly linked to child programs if only the parent program is selected in the search criteria.
Parent Episode Only	Select **True** if the program is the **only Program** used in Episodes.
Require Ins for Planner	Select **True** if a Program should require **Insurance** when scheduling.
Export Program Code	This is used for custom reporting, e.g. MN CMHRS, VA CCS. (12 character maximum)
Core Service Code	This is used for custom reporting, e.g. VA CCS. (12 character maximum)
Private	This restricts the Program to only employees assigned, regardless of Team/Client assignment. This includes not being able to see whether or not a client is in a particular program, but does not restrict record information. When **Private** is set, relevant Program information is only displayed when in the program for the following Client sections: • **Assignments**: Includes Client Program Assignment; Client Overview Assignment list; Client Profile Assignment list; Assignments in Print View; Assignments in ACS; Program Admin Assignment list (Edit is not available unless the Employee is in the Private Program). • **Episode**: Includes Episode List, View, and Update; Episodes in Print View; Episodes information on ACS. • **Tx Plan**: Includes Tx Plan list, view, update; Print View Tx Plans; Tx Plans appearing on the Homepage. • **Other**: If Employee is on the Team/Program for the client, they can see scheduled items; Visits and Insurance; Authorizations, Diagnoses.
Is Residential	This flags the Program as residential for reporting purposes (information only).
Deleted	Select **True** if the Program is no longer in use.

Updated: 7/19/2016 5:16 PM by marchall

Home > Admin > Billing Configuration > Visit Type

Visit Type

Establishing visit types is part of Billing setup and Program association. Visit types are linked to forms; the forms must be created first.

Access Admin tab > Visit Type

Mouse over an info icon to get more information about the fields in the Visit Type List screen.

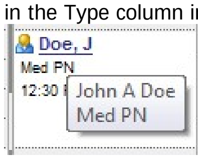
Adding a Visit Type

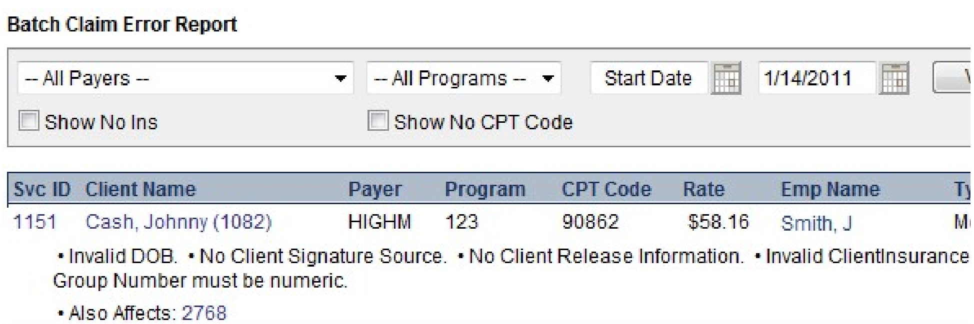
1. Click the Add a New Visit Type Entry link.
2. In the Visit Type field, enter the name of the visit type.
3. From the Linked To Form dropdown, select the web form you want to link to the visit type.
4. Fill out the other fields as appropriate.

Field Descriptions

Label

A short description (up to 10 characters) of the visit type. It displays when you hover over an entry in th
in the Type column in the Batch Claim Error Report.





Visit Sigs

The default is 4: employee signature, client signature, signature box 3, and signature box 4. For signatu
you can set the labels in Partner Config.

Is Tx Plan

When selected, any data injected or entered into the form linked to the visit type will automatically be m
treatment plan for the client. When you access the treatment plan via the Client nav bar, all form data d
single entry without any program, category, or target date assigned. Assignments can be made by editir
Note that using the Is Tx Plan setting for a visit type is not recommended; see *Treatment Planning Setup & Use Best Practices* in the Library (reference 33032) for Credible's recommendations.

If you choose to use the Is Tx Plan setting, you should not set up a question in the form to map back to
TxPlans table -- errors will occur when the treatment plan is updated. In addition, when Is Tx Plan is sel
need to begin the visit from the Schedule -- the visit type will not be available in the the Visit Type drop
using the Add Visit function.

Default Recipient	Lets you specify a default recipient type for visits with this visit type. A default recipient type can also be set for an individual employee via Employee Config or for all employ corresponding setting in Partner Config. The visit type default recipient type trumps the Employee Confic Employee Config and Visit Type settings trump the Partner Config setting. If no default recipient is set in Partner Config, Employee Config, or Visit Type, the Recipient field will def a selection will be required when an employee saves and completes the visit (data entry) or signs and sı (web forms).
Split Visit	If selected, the visit will split for all payers. If you only want the visit to split for certain payers, use the S in the Payer Specific Rates & Codes screen. If you select Split Visit, you need to have two Billing Matrix the primary visit to match and one that has Is Split Secondary selected for the secondary visit to match. If the Split Visit setting for a visit type (or Billing Matrix payer-specific record) is changed to True, you ca completed visit associated with the visit type/Billing Matrix entry and have it split into two visits. Note tha is changed to False, updating a split visit will not remove the split. To reprocess a completed visit: 1. Visit tab > view button to access the Visit Details screen 2. Click Update and then click Update Visit. The Merged field changes to Merged/Split: /Primary. Cli link to access the secondary visit. When Split Visit is enabled and selected for a visit type, a icon will appear in the Type column on the List.
For Cancellation	Sets the visit type up as the cancellation/no-show visit type. Note that you can only set up one visit type cancellations/no-shows. Setting up your system to use a cancellation/no-show form is a Front Desk best practice. Selecting this s second step in the setup process. For the other steps, click here.
Show All Questions	By default, the system only includes questions that have been answered in the documentation for a com you have a visit type where you want to include all questions regardless of whether they have been ans this setting. Note that this setting does not apply to the Tx Plus category in the form (if applicable). To s in that category, you need to select Show All Questions Tx Plus Only.
Show All Questions Tx Plus Only	Applies show all functionality to the Tx Plus category in the form. Since a Tx Plus category cannot have c the show all functionality applies to the items in the Tx Plus category – problems, goals, objectives, and By selecting Show All Questions for Tx Plus Only, the treatment plan can be reviewed and approved befo documentation is entered.
Transcription Weight	To measure transcription productivity by total points, you need to assign a weight to a visit type (total po x quantity). Assigning a weight to a visit type is useful if filling out the associated form involves more tha for example, if the form has multiple sections and lots of checkboxes.
Liability Percent Override	For the Basic Liability form. Overrides the client's per-visit liability amount or per-visit liability percentage affect monthly liabilities. Enter 100 to bypass the client's liability and force the full client due amount to Enter 0 to force a client liability amount of 0.
Liability Minimum Override	For the Basic Liability form. Overrides a client's minimum liability.
Liability Multiplier	For the Basic Liability form. The per-visit liability amount or per-visit liability percentage are multiplied by value and this new amount is used as the per visit liability.
Liability Scale Type	When set to Hourly and there is a Per Service Hourly Liability Amount ($) in a client's basic liability works system calculates liability as service hours * client hourly liability amount. If set to Hourly and the worksl have an hourly liability amount, liability will only be processed if there is a Monthly Liability amount (the Liability Amount/Percentage is ignored).
Liability Model	Use this setting to force liability into either monthly liability or per service liability when both options are basic liability worksheet.
Include Summary	Enables a visit type to support clinical summaries and visit-based clinical summaries.

Form Group Only	If your organization uses form groups and you have visit types that are only used in form groups, you ca "Form Group Only." Once flagged, these visit types will no longer be in the Visit Type dropdown in the A or Scheduled Visit popup. They will only be available in the Form Group Visit Type Link screen and the F screen. Visit types marked as Form Group Only will still appear in the Visit Type dropdown in Advanced Client/Visit/Ledger Search. Select this setting for the Psychotherapy Add-On visit type. This will prevent the visit type from being rep an associated E/M code. You will also need to create a form group that includes both an E/M visit type a Psychotherapy add-on visit type.
Use E/M Level	The Current Procedural Terminology (CPT®) code set requires an Evaluation and Management (E/M) cc the Pharmacologic Management visit type. When this setting is selected, When selected, an E/M Level d available on the Sign & Submit page and when updating a completed visit. If your organization uses E/M report Diagnostic Evaluation with Medical, use this setting to configure E/M New Patient and E/M Establis visit types.
Default to 'Create eRx G-Code'	When selected, the Create eRx G-Code field on the Sign & Submit screen will default to Yes for all visits with the visit type. This eliminates the need for clinicians to determine when they need to create an eRx helps ensure that your organization meets the requirements of the eRx Incentive Program. Note that you to be configured to flag for eRx G-codes.

5. Click Add Visit Type.

Editing a Visit Type

1. Click the edit button on the far left on the line for the Visit Type you want to edit.
2. Make any changes and then click save.

Deleting a Visit Type

Step 1: Expire all Billing Matrix lines associated with visit type you are going to delete

1. Admin/Billing tab > Billing Matrix.
2. From the Visit Type dropdown, select the visit type you are going to delete and click Filter.
3. Edit each line and enter the appropriate Expiration Date. The visit type will no longer be available for scheduling after the Expiration Date. However, if you enter today's date, it will still be available for scheduling today.

Note

If you think you will need a similar line to associate with a new visit type, use Copy New Entry to create a copy of it *before* entering an Expiration Date. Change one of the matching criteria fields and then click Save Settings.

Tip

To search for expired Billing Matrix lines, select Expired from the Current dropdown. To view past, present and future lines, select All.

Step 2: Delete the visit type

1. Admin tab > Visit Type.
2. Note the ID of the form linked to the visit type.
3. Click the delete button for the visit type and then click OK in the confirmation popup.

While the visit type remains in the Visit Type list, True appears in the Deleted column. The visit type will no longer be available in the Billing Matrix Visit Type dropdown so no additional matrix lines will be able to use it.

Note

If the visit type is included in a Form Group, the visit type should be removed from the Form Group before proceeding with the above steps.

Step 3: Delete the form associated with the deleted visit type

You can only delete the form if it is not associated with another active visit/service.

1. **Forms** tab
2. Enter the ID of the form associated with the deleted visit type in the Form ID field and click **Filter.**
3. Click the red x to the right of the new version button.

See also

Programs
Locations
Recipient Types
No CPT Code on 837I
Allowing Negative Balances on Visits
Adding Co-Insurance Days
Client Identifiers for 270 Eligibility Request

Setting Up Your System to Use a Cancellation/No-Show Form
Liability
Transcription Productivity Report
Billing Matrix
Setting Up Clinical Summaries
Generating a Continuity of Care Record (CCR)
Creating eRx G-Codes for Reporting Purposes

Home > Admin > Billing Configuration > Visit Type > Visit Type Groups

Visit Type Groups

If your organization needs to associate multiple visit types with a client's insurance coverage and/or authorizations, you can group the visit types together so employees only have to select one option from the Visit Type dropdown in the Insurance Coverage and Authorizations screens. Visit type groups appear at the top of the Visit Type dropdown in these screens.

You can include the same visit type in multiple groups.

Settings

Partner Config:Use Visit Type in Client Ins
Security Matrix: BillingCPTCodes

1. Admin tab > Visit Type Groups.
2. Enter the name of the visit type group and click Add Visit Type Group. You cannot add a new visit type group (or update an existing one) that has the same name as an existing visit type group.
3. Click the Edit link in the Assigned Types column and assign the visit types you want in the group. Click the visit type group name at the top of the assignment screen to return to the Visit Type Group Admin screen.
4. Click the edit button, select the For Authorizations and/or For Insurance checkboxes, and click update.

See also

Visit Type: Always Display Episode Forcing Modal
Flex Types

Home > Admin > Billing Configuration > Visit Type > Visit Type: Always Display Episode Forcing Modal

Visit Type: Always Display Episode Forcing Modal

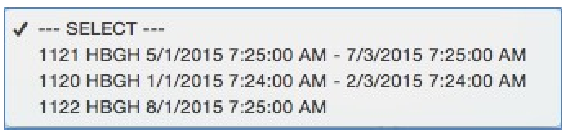
If *Visit Type: Always Display Episode Forcing Modal* is checked, any visit provided of that visit type will always display the **Visit Will Not Attach To Episode** popup on the sign and submit page. This allows the user to always force the visit into the desired episode, regardless of whether or not there is an active episode for the program under which the visit is being signed and submitted.

When the **Sign & Submit** button is clicked on a *Sign & Submit* page, the **Visit Will Not Attach to Episode!** popup will appear.

When the user expands the dropdown, it will show **all** past and current episodes for the program that the visit being signed and submitted under. The active episode will be the last item in the list.

To force the visit to attach to one of the listed episodes:

1. Select the desired episode from the dropdown.



2. Click the **Attach Visit to Selected Episode** button.

Clicking the button will sign and submit the associated with the selected episode.

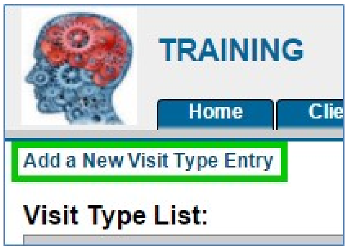
The user may also choose not to attach the visit to an episode by clicking the **Do Not Attach Visit to an Episode** button. The visit will be signed and submitted, but will not be attached to or associated with an episode.

Configuration

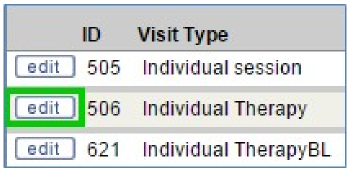
To configure this setting:

1. Go to **Admin** tab > **Billing Configuration** > **Visit Type**.

2. To add a new Visit Type, click **Add a New Visit Type Entry**, or click the **Edit** button beside an existing visit type.

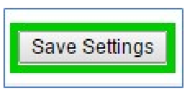


- OR -



3. Locate **Always Display Episode Forcing Modal**, and check it.

4. Click the **Save** button at the bottom of the page.



Updated: 2/5/2016 2:28 PM by marchall

Home > Admin > Billing Configuration > Visit Type > Flex Types

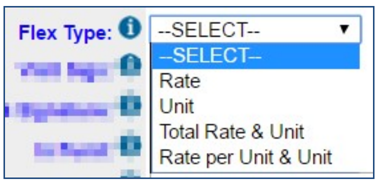
Flex Types

There are two flex type options for Visit Types to handle client- and situation-specific billing. Partners can configure Visit Types to allow manual entry of both the Rate and Units at the same time; previously only rates (Flex Rate) or units (Flex Units) could be manually entered.

- When completing a webform or a data entry visit, a user will need to enter values for the rate and units before saving the visit.
- When the flex type is *Total Rate & Unit*, the user enters the full total rate and the full number of units for the visit. No calculation is performed. For example, if 125 is entered for the rate and 5 for the units, the visit will be for $125 at 5 units.
- When the flex type is *Rate per Unit & Unit*, the user enters a rate for each unit and the full number of units for the visit. The full total rate displays on screen for verification purposes, and is calculated as the rate for each unit multiplied by the number of units. For example, if 125 is entered for the rate and 5 for the units, the visit will be for $625 at 5 units.
- Note that Billing Matrix matching will still occur for determining the CPT code, allowed payers, etc.

Configuration

On the **Admin** tab > **Visit Type** page, select the desired **Flex Type** when configuring the **Visit Type**.



See also

Visit Type Groups
Visit Type: Always Display Episode Forcing Modal

Updated: 4/26/2017 10:38 AM by CredibleEducation

Home > Admin > Billing Configuration > Locations

Locations

Establishing service locations is part of the Billing setup.

Access Admin tab > Locations

Adding a Service Location

1. Click the Add a New Service Location Entry link.
2. Enter an abbreviated description of the location in the Code field (optional).
3. Enter a description of the location in the Description field (required).
4. Select the appropriate Place of Service from the POS(EDI) dropdown (required; EDI stands for Electronic Data Interchange). Each POS is followed by the two-digit code that the system will use in the electronic claim. The POS codes are maintained by the Centers for Medicare & Medicaid Services (CMS).
5. Enter data in the other fields as appropriate.
6. Click the Add Service Location button.

Editing a Service Location

1. Click the edit button for the Service Location you need to edit.
2. Make the necessary changes and click save.

Deleting a Service Location

1. Click the delete button (on far right) for the Service Location you need to delete.
2. Click OK when the Confirmation popup displays. The Service Location will be deleted.

See also
Programs
Visit Type
Recipient Types
No CPT Code on 837I
Allowing Negative Balances on Visits
Adding Co-Insurance Days
Client Identifiers for 270 Eligibility Request

Home > Admin > Billing Configuration > Recipient Types

Recipient Types

Click the **Recipient Types** link to add and manage Recipients used for Billing purposes and how a visit will be conducted. A Code and Description is required for each Recipient Type entered.

On the Admin Tab, click the **Recipient Types** link.

To add a Recipient Type, click the **Add a New Recipient Type Entry** link, fill out the fields, and click Add Recipient Type.

To edit a Recipient Type, click the **edit** button next to the Recipient Type you want to change. Make necessary changes and click the **save** button.

To delete a Recipient Type, click the **delete** button next to the Recipient Type and click **OK** on the Confirmation dialog box.

See also

Programs
Visit Type
Locations
No CPT Code on 837I
Allowing Negative Balances on Visits
Adding Co-Insurance Days
Client Identifiers for 270 Eligibility Request

Home > Admin > Billing Configuration > No CPT Code on 837I

No CPT Code on 837I or CMS 1450

If you have payers who do not want a CPT code sent in the 837I or CMS 1450, select the corresponding setting in Payer Config. The No CPT on 837i or CMS 1450 setting is also available in the Billing Matrix Payer Specific Rates & Codes. The Billing Matrix setting will trump the Payer Config setting.

When No CPT on 837i or CMS 1450 is selected, no CPT code or modifiers are sent in the Service Line (L2400) of the 837I or CMS 1450.

Examples:

- With CPT code: SV2*1234*HC:H0019*132.92*UN*1*33.23~
- Without CPT code: SV2*1234**132.92*UN*1*33.23~

To select the setting for a specific payer:

1. Admin or Billing tab > Billing Payer.
2. Edit an existing payer record.
3. In the Electronic Claim Overrides section, select the No CPT on 837i or CMS 1450 checkbox and click Save Settings.

To select the setting for a specific payer for a specific Billing Matrix line:

1. Admin or Billing tab > Billing Matrix.
2. Edit an existing Billing Matrix line and click Payer Specific Rates & Codes.
3. Select True from the No CPT 837I or CMS 1450 dropdown and click update.

See also

Programs
Visit Type
Locations
Recipient Types
Allowing Negative Balances on Visits
Adding Co-Insurance Days
Client Identifiers for 270 Eligibility Request

Allowing Negative Balances on Visits

Your system can be configured to allow a negative balance on a visit for the following scenarios: rate change, insurance payment, client retraction, and visit retraction. The alternative – the way your system works by default – is to apply an overpayment adjustment instead.

When applying an insurance payment that will result in a negative balance, the system displays a warning message and asks if you want to continue.

If you want to allow negative balances on visits, contact your Implementation Manager or Partner Services Coordinator and he/she will turn on the feature.

See also

Programs
Visit Type
Locations
Recipient Types
No CPT Code on 837I
Adding Co-Insurance Days
Client Identifiers for 270 Eligibility Request

Home > Admin > Billing Configuration > Adding Co-Insurance Days

Adding Co-Insurance Days

Configuration

To send Co-insurance days in Credible, the following must be set:

1. Billing Payer: Send Occurrence Codes, Occurrence Span Codes, Value Codes = True
2. Partner Config: Use Occurrence Codes, Occurrence Span Codes, and Value Codes = True

Co-Insurance Days will only send if a value code of 82 is sent with the Visit/Claim.

SQL Example

```
CLM*4969*1500***53:A:1**A*N*I~
DTP*096*TM*0900~
DTP*434*RD8*20150801-20150815~
DTP*435*DT*201508010001~
REF*D9*4969~
REF*EA*22971~
HI*BK:29189~
HI*BJ:29189~
HI*BE:82:::3~ — Value code of 82 being sent with visit / claim
SBR*S*18*GrpNum******CI~
OI***N***I~
NM1*IL*1*TEST*PSCDEMO****MI*jkBPInsID~
N3*45 Main Street~
N4*Plaistow*NH*03865~
NM1*PR*2*JKBILLINGPAYER*****PI~
LX*1~
SV2*ABCD*HC:1234*1500*DA*15**300~ — SV2*07 is the co-insurance / non-covere
DTP*472*RD8*20150801-20150815~
REF*6R*4969~
NM1*82*1*Kissel*Jay****XX*jmk123NPI~
PRV*PE*PXC*101Y00000X~
```

From looking at the example, you can determine that:

- The Visit lasted 15 days
- Three of those days were co-insurance/ non-covered days

It is important to note that SV2*07 is calculated by taking the product of the visit's billing matrix's rate * the value of value code 82

See also

Programs
Visit Type

Locations
Recipient Types
No CPT Code on 837I
Allowing Negative Balances on Visits
Client Identifiers for 270 Eligibility Request

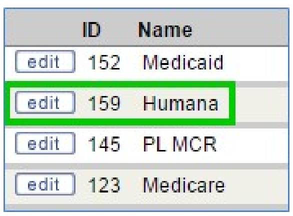
Home > Admin > Billing Configuration > Client Identifiers for 270 Eligibility Request

Client Identifiers for 270 Eligibility Request

In addition to the standard 271 Eligibility Response file, some clearinghouses and payers send an additional file. While this file can be used for importing, matching to the correct client is not possible without a second identifier. Two new Payer Config settings have been added to allow sending a second identifier for a client.

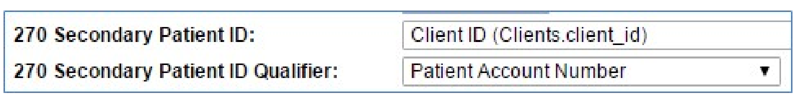
1. Go to **Billing** tab > **Billing Config** > **Billing Payer**.

2. Click the Edit button beside the payer you want to set.



3. Under *Eligibility Override*, select the appropriate values from the dropdowns.

• 270 Secondary Patient ID is the client profile field which is used to store the ID.
• 270 Secondary Patient ID Qualifier is what will be sent.



4. Click the **Save Settings** button at the bottom of the page.

The qualifier and ID will now be sent automatically when generating the 270 file.

Updated: 2/5/2016 2:17 PM by marchall

Home > Admin > Site Configuration

Site Configuration

This section of the Admin tab gives you access to Home Page configuration, mobile device settings, screen layouts, and global sitewide configuration capabilities.

Partner Config	Data Dictionary	Adding Program and Team to Client Profile	Home Page Config	Device Settings	Device Buttons

See also

Daily Activities
Lookups and Code Tables
Security Configuration
Billing Configuration
Credible eRx Admin
Methasoft Import
Configuring Family Unit As a Client Entity
Case Manager Notes
Employee-Specific Time Zones
Flag Attachments for HR Use Only
Recipient, Location, & Billing Group Fields Default to Null
Additional Fields in Visit Details Screen
Drug Schedule & NDC for Client Medications
Setting Up the Credible Client Portal
Outcome Tracking Setup
Setting Up Your System to Use a Cancellation/No-Show Form
Setting Up eLabs
Setting Up eMAR
Setting Up Bed Board
Configuration for Generating Clinical Summaries
Purging Client Records
User Management Best Practice

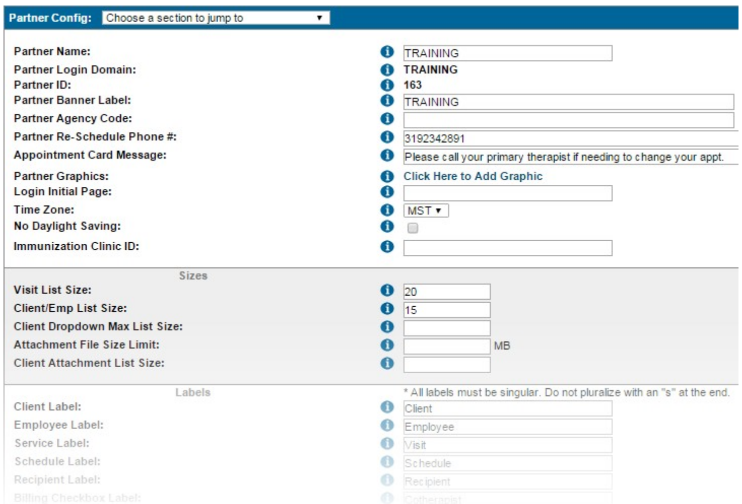
Home > Admin > Site Configuration > Partner Config

Partner Config

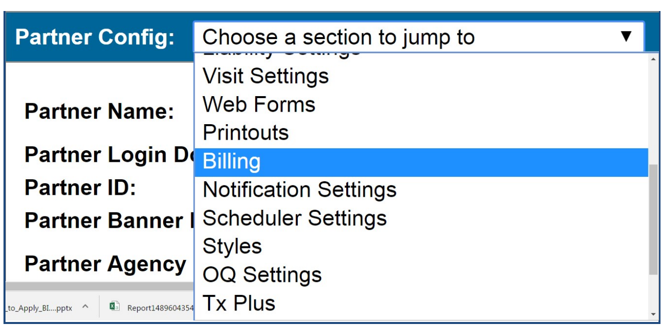
The Partner Config system controls the features and functions available in your Credible system, as well as its labels and appearance. Changes made here affect your entire Credible system, not just that of a single user or department.

The Partner Config link is located on the **Admin** tab > **Site Configuration** > **Partner Config**. Accessing the link requires that the user have the following rights in the Security Matrix:

- AdminView
- PartnerConfig



The settings in Partner Config are divided into sections. A dropdown jump-list has been provided at the top of the page to simplify locating the needed settings.



Many Partner Config settings simply require selecting a checkbox to enable them, while others may require entering information into a text box or selecting an option from a dropdown. You can display a brief description of each setting by mousing over the corresponding information icon.

To save any changes made to Partner Config, click the **Save Partner Config** at the bottom left of the screen. To exit without saving your selections, click **Cancel**.

Details regarding Partner Config settings are grouped into the following sections:

- **Partner Config: Basic Information**
  - Partner Graphics
  - Appointment Cards
- **Partner Config: Sizes**

See also

Data Dictionary
Adding Program and Team to Client Profile

Home Page Config
Device Settings
Device Buttons

Modified 3/22/2017 11:49 AM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Basic Information

Partner Config: Basic Information

The first section in the Partner Config screen is where you enter basic information about your system.

Partner Name

Enter the name of your organization as you would like it to appear on appointment cards and printable versions of prescriptions. Note: This setting does not affect your Agency name as it appears elsewhere in Credible.

Partner Login Domain

This is the name users enter in the Domain field on the login screen. Note: The name of your test Domain (if any) is your Domain name followed by the word "TEST", for example, ABCDTEST. [This value is assigned by Credible staff, and is not editable.]

Partner ID

The Partner ID number is required when installing MobileForm on a laptop or handheld device (you enter it in the Preferences screen). [This value is assigned by Credible staff, and is not editable.]

Partner Banner Label

Enter the name of your Agency as you would like it to appear at the top of the screen throughout your system. The label you enter in this field will also appear on visit print views.

Partner Agency Code

This field is for Virginia Community Service Board (CSB) Agencies, as well as certain other State Reporting purposes. By default it should be left blank.

Partner Re-Schedule Phone
Appointment Card Message

See Appointment Cards for details.

Partner Graphics

For details on this setting, visit the Partner Graphics page.

Login Initial Page

By default, the Home Page is the first screen users see when they log into Credible; this is the Credible Best Practice. However, should you want users to see a different screen when they initially log in, enter the relative URL for the screen in the **Login Initial Page** field. (See examples below.) Please note: This setting affects **all** of your Agency's users. Therefore, Credible strongly recommends that this field be left blank, and the default screen used.

- Client List screen = client/list_clients.asp
- Employee List screen = employee/list_emps.asp
- Employee schedule = planner/planner1.asp
- Visit List screen = visit/list_cvs.asp?appr=0

Time Zone

Select the default time zone for your system from the dropdown provided. The options are Eastern Standard Time (EST), Central Standard Time (CST), Mountain Standard Time (MST), or Pacific Standard Time (PST). This setting affects the clock in the top right of your screen (if used), and select system timestamps.

No Daylight Saving

By default, the system reflects Daylight Saving Time. If you do not want your system to use Daylight Saving Time, check this box.

Immunization Clinic ID

This ID is provided by your state, and is important for Meaningful Use Stage 2.

See also

Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings

Updated 3/17/2017 3:30 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Basic Information > Partner Graphics

Partner Graphics

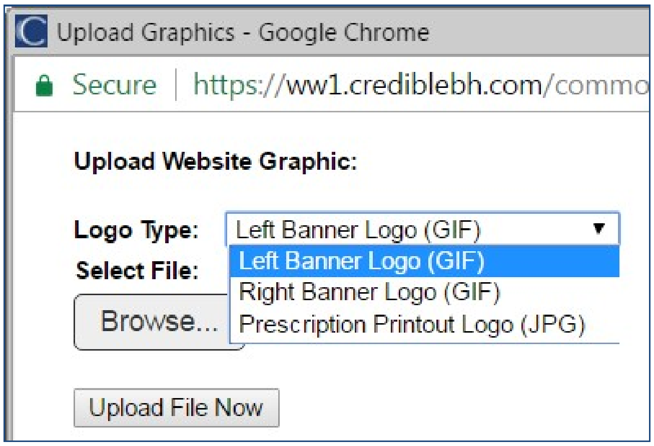
Use this Partner Config setting to upload the logos or graphics you want to display in the banner throughout your system, on printable versions of prescriptions, and on visit print views.

Three logos may be uploaded:

- **Left Banner Logo**: GIF format required; 100px x 65px; appears on top left corner of Credible screen, client statements (optional), and visit print views.
- **Right Banner Logo**: GIF format required; 100px x 65px
- **Prescription Printout Logo**: JPG format required; 100px x 65px; appears on printed prescriptions

To upload a graphic:

1. Click the link in the field. The **Upload Graphics** popup displays.



2. Select the Logo Type from the dropdown.
3. Click **Browse** to locate and select your logo file.
4. Click **Upload File Now**.

Special Notes

- You will not be warned before overwriting an existing image, and past images cannot be retrieved. Please use caution.
- Please adhere to the listed size limitations for the logos. The system will allow you to upload outsized graphics. However, the display of those graphics can render your screens unusable.

See also

Appointment Cards

Updated: 3/16/2017 6:24 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Basic Information > Appointment Cards

Appointment Cards

Partner Config has two settings which configure appointment cards.

TRAINING

Name:	Bill Lee
Appt. Type:	Medication Assessment
Date:	3/17/2017
Time:	09:15 AM
Provider:	Roy Benway

To cancel / reschedule this appointment, call 555-555-1212

Should you need to reschedule your appointment, please contact your primary counselor.

- **Partner Re-Schedule Phone**: Credible can include a rescheduling message on each appointment card. If you want the system to include this message, enter the phone number to call in this field.
- **Appointment Card Message**: If you would like to include an additional message at the bottom of each appointment card, enter the text in this field.

See also

Partner Graphics

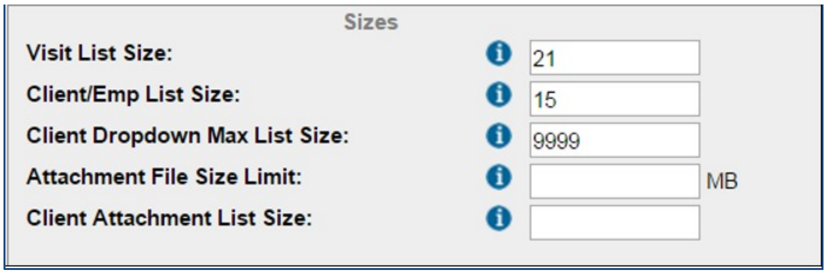
Updated: 3/16/2017 7:08 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Sizes

Partner Config: Sizes

The settings in this section establish the maximum number of items that can be displayed on a single page for the different list screens, the maximum number of names in the Client dropdown in the schedule, and the maximum file size accepted for attachments.

When finished entering desired size limits, click the **Save Partner Config** button at the bottom of the screen. To exit without saving selections, click **Cancel**.



For each setting, you enter the number that reflects the desired maximum. Recommended maximum sizes have been provided for each item as guidance.

Visit List Size

Determines how many visits display on one page of the Client Visit List screen (Visit tab). If left blank, the default is a maximum of 15 list items. The recommended setting is 12, allowing users to easily see all of the buttons at the bottom of the screen. The maximum value is 99.

Client/Emp List Size

Determines how many clients and employees display on one page when you select the Client and Employee tabs. If left blank, the default is a maximum of 18 list items. The recommended setting is 12, allowing users to easily see all of the buttons at the bottom of the screen. The maximum value is 99.

Client Dropdown Max List Size

Determines the maximum number of client names that will be displayed in the Client dropdown of the **Add to Schedule** popup. The default is 500 names; however, exceeding 1,000 will significantly increase page load and refresh times. Note: This dropdown will include schedule groups, team-based assignments (direct or indirect), and directly assigned clients.

Attachment File Size Limit

This sets the maximum size of a file which can be uploaded to your Domain. If left blank, the default is 10MB; the maximum value is 100MB. please note: This feature is intended to help you regulate your storage used, and thereby avoid any charges for usage of excess storage.

Client Attachment List Size

Determines the maximum number of attachments listed on one File Attachments page for a client. The default value is 50 attachments per page.

See also

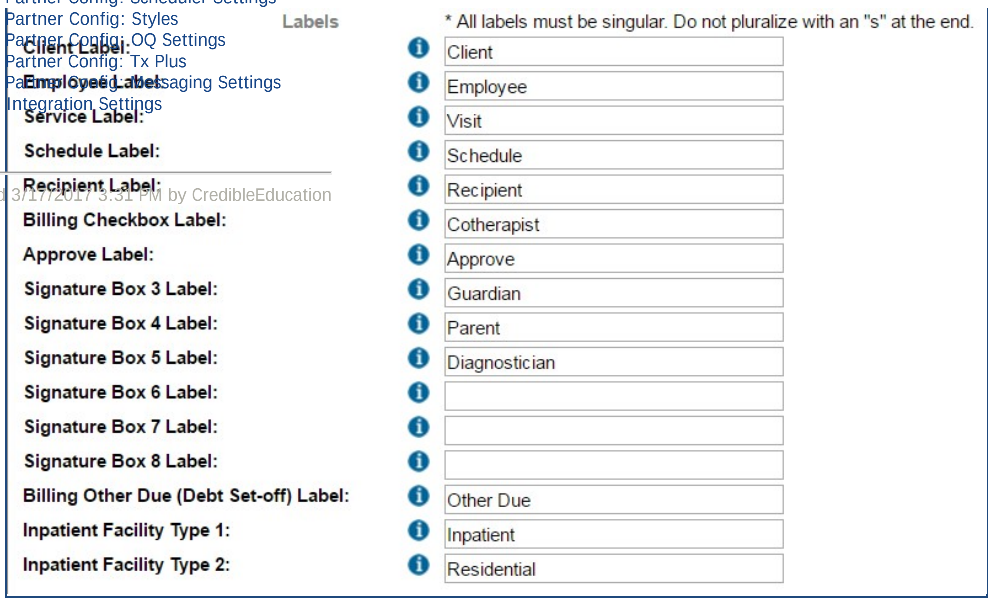
Partner Config: Basic Information
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

Home > Admin > Site Configuration > Partner Config > Partner Config: Labels

Partner Config: Labels

With the settings in this section, you can set the terminology used throughout your site when referring to clients, employees, visits, schedules, signatures, and so on, allowing your Agency to use the terminology that is familiar to the staff.

Enter the desired text into each label field. Note that all labels must be singular – do not add an "s" to the end of label text. Once complete, click the **Save Partner Config** button to save your entries, or **Cancel** to exit without saving.



Updated 3/17/2017 3:31 PM by CredibleEducation

- **Client, Employee, Schedule, and Service Labels**: These labels determine the terms used on the tabs and most places where they appear. Please note: Links on Admin pages will not change (e.g., Purge Clients, Manage Client Duplicates, etc.).
- **Recipient Label**: This label affects the name of the Recipient Types function (accessed via the Admin tab) as well as all of the places where Recipient is used.
- **Billing Checkbox Label**: For details, click here.
- **Approve Label**: This label is the header for the **Approve** column in the Client Visit List, and the label for the **Approve** buttons. A corresponding **Approved** field is in the Visit Details screen.
- **Signature Box Labels**: The default number of signature boxes on the Sign & Submit page is four. The first two are Employee and Client; the next two correspond to Signature Boxes 3 and 4. If a visit type is configured to five or more signatures boxes, the boxes correspond to Signature Boxes 5 through 8. You can use the Signature Box Label fields to identify who should sign in each box. If a label isn't entered for a signature box, the default "Signature #" is used. Note: The Signature Box labels only affect Client forms. In an Employee form, the labels for signature boxes 3 and 4 will always be "Signature 3" and "Signature 4."
- **Billing Other Due (Debt Set-off) Label**: For details, click here.
- **Inpatient Facility Type 1**: This setting defines the label for the first facility tab in the Inpatient module. If left blank the label will default to "Inpatient Clients".
- **Inpatient Facility Type 2**: This setting defines the label for the second facility tab in the Inpatient module. If left blank the label will default to "Residential Clients".

See also

Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

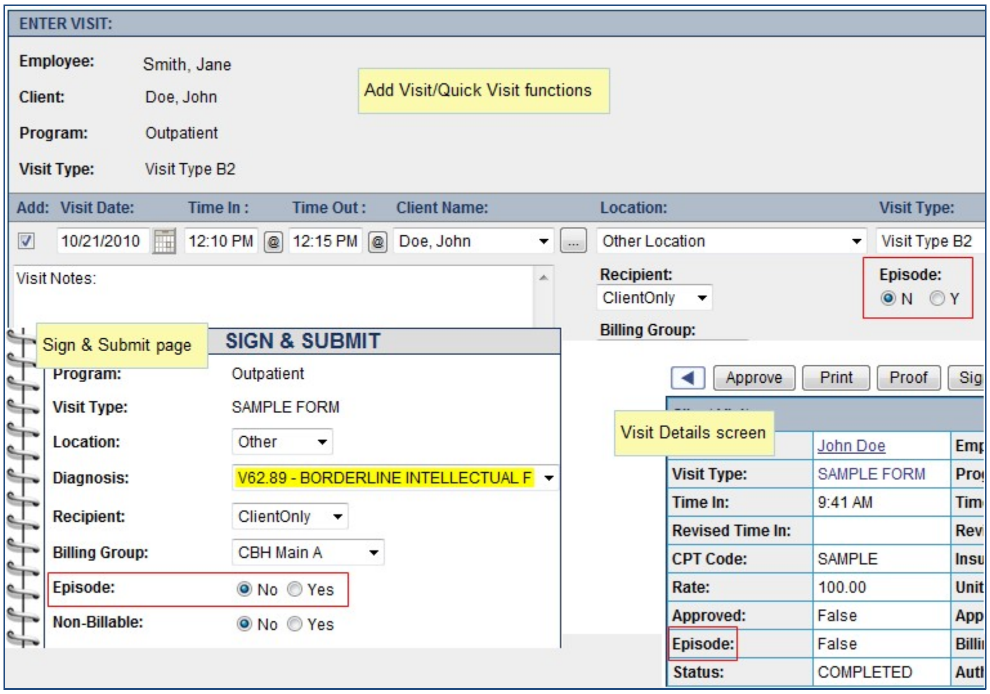
Updated 3/16/2017 5:58 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Labels > Billing Checkbox Label

Billing Checkbox Label

When a value is assigned to this label, a Yes/No field appears when signing & submitting a web form via Add Visit or Quick Visit. If no label is assigned, then checkbox will not appear.

In the example below, **Episode** is the Billing Checkbox label.



If you enter a label and use the field, you can then use a custom filter in Advanced Visit Search to search for visits where the value is true:

Note: If **Visit.Cotherapist** is not in the Column dropdown, use Data Dictionary to add the **Cotherapist** field to the Visit table.

See also

Billing Other Due Label

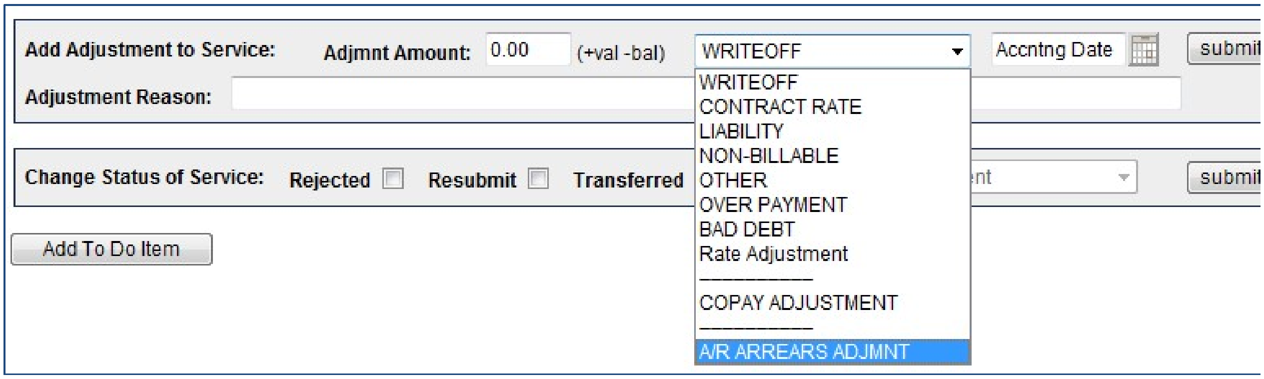
Updated: 3/16/2017 4:22 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Labels > Billing Other Due Label

Billing Other Due Label

Billing Other Due is a third due amount (with insurance due and client due) against which you can make adjustments. You can use it for debt set-off or other impaired or contingent receivables.

To enable this third due amount, you need to enter a label in Partner Config (maximum length is 12 characters). A suggestion would be to label it **A/R Arrears** or **Unrec A/R**. The label will appear in the Adjustment Type dropdown in the Claim Billing Details screen (accessed via the Billing button on the Visit Details screen).



Summary:

- This is required if you want to have revenue move to the third other due "bucket".
- It is typically used when a collection agency becomes involved.
- Selecting the setting activates the Other Due Adjustment option that moves amounts to/from Other Due.

If a client has an "other due" balance on one or more billable visits, the sum of all the other due amounts will be displayed in the Billing Info section on the Client Overview and Client Profile screens. The name of the field will correspond to the Other Due Label.

See also

Billing Checkbox Label

Updated: 3/16/2017 4:58 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Features

Partner Config: Features

The settings in this section set the activation of functions within Credible such as Online Help, Accounting Periods, eMAR, and more.

- Use Online Help
- Use Employee Work Schedule
- Use Employee Time Clock
- Use Bed Board
- Use Foster Care
- Use Accounting Periods
- Use Outlook Export
- Turn Off HTML Formatting
- Allow Emergency Access
- Use eMAR Functionality
- Window to Administer eMAR Medications
- Use System Clock
- Display Info Buttons

See also

Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

Updated 3/22/2017 11:52 AM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Use Online Help

Use Online Help

This setting activates Credible Help (including this very page!) for your users. When selected (as recommended), a question mark "help" icon appears in the banner section for all users. Clicking the icon will take you to the Credible Help home page.

See also

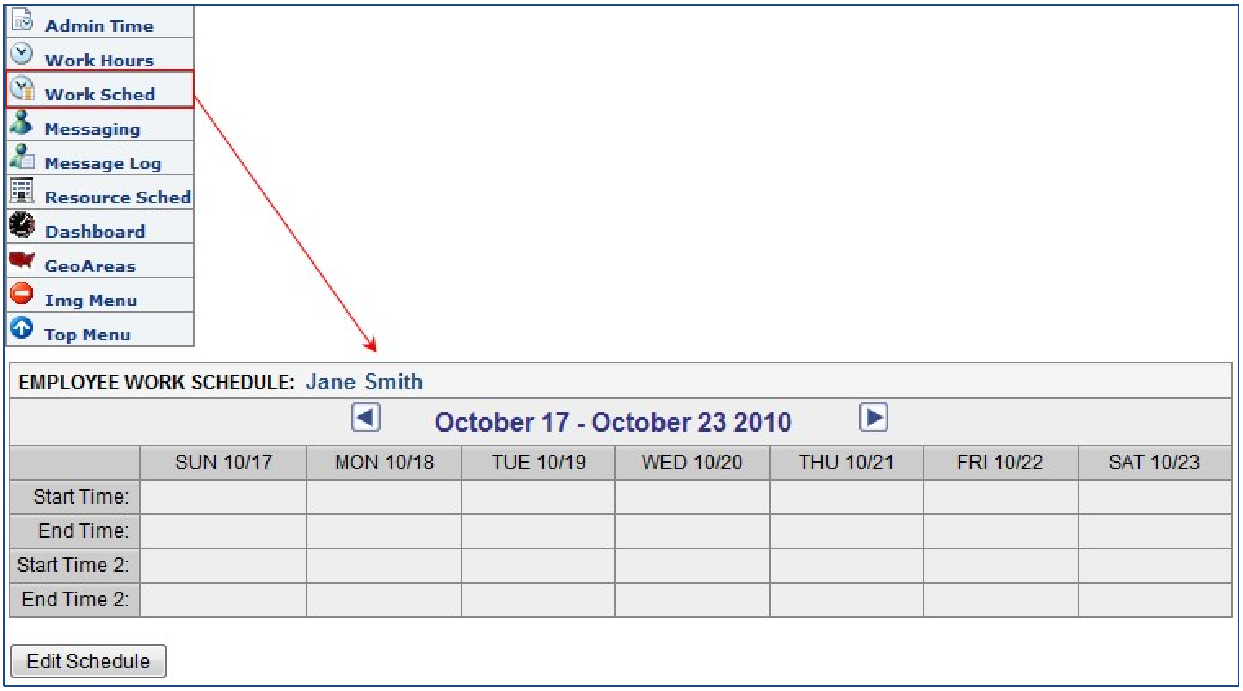
- Use Employee Work Schedule
- Use Employee Time Clock
- Use Bed Board
- Use Foster Care
- Use Accounting Periods
- Use Outlook Export
- Turn Off HTML Formatting
- Allow Emergency Access
- Use eMAR Functionality
- Window to Administer eMAR Medications
- Use System Clock
- Display Info Buttons

Updated 3/22/2017 11:57 AM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Use Employee Work Schedule

Use Employee Work Schedule

This setting makes the Work Schedule function available on the Employee navbar.



With this function, employees can set a fixed work schedule for the week. Shading appears in the employee schedule to reflect the hours worked. If an employee does not routinely work a set schedule, you may want to use the Work Hours function instead.

If you want the Work Schedule to include a time clock function, select the Use Employee Time Clock setting.

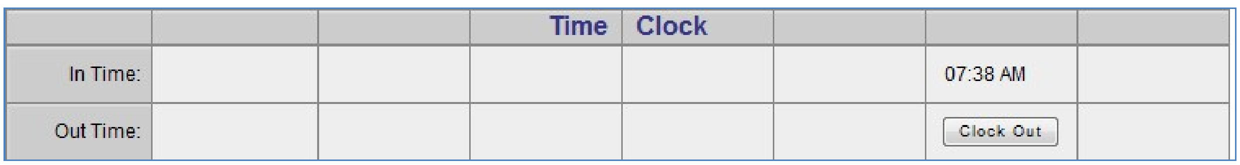
See also

Use Online Help
Use Employee Time Clock
Use Bed Board
Use Foster Care
Use Accounting Periods
Use Outlook Export
Turn Off HTML Formatting
Allow Emergency Access
Use eMAR Functionality
Window to Administer eMAR Medications
Use System Clock
Display Info Buttons

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Use Employee Time Clock

Use Employee Time Clock

This setting turns on the time clock feature in the Employee Work Schedule screen. Users can use the **Clock In**/**Clock Out** button to record when they start and stop work.



See also

- Use Online Help
- Use Employee Work Schedule
- Use Bed Board
- Use Foster Care
- Use Accounting Periods
- Use Outlook Export
- Turn Off HTML Formatting
- Allow Emergency Access
- Use eMAR Functionality
- Window to Administer eMAR Medications
- Use System Clock
- Display Info Buttons

Updated 8/10/2016 7:25 PM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Use Bed Board

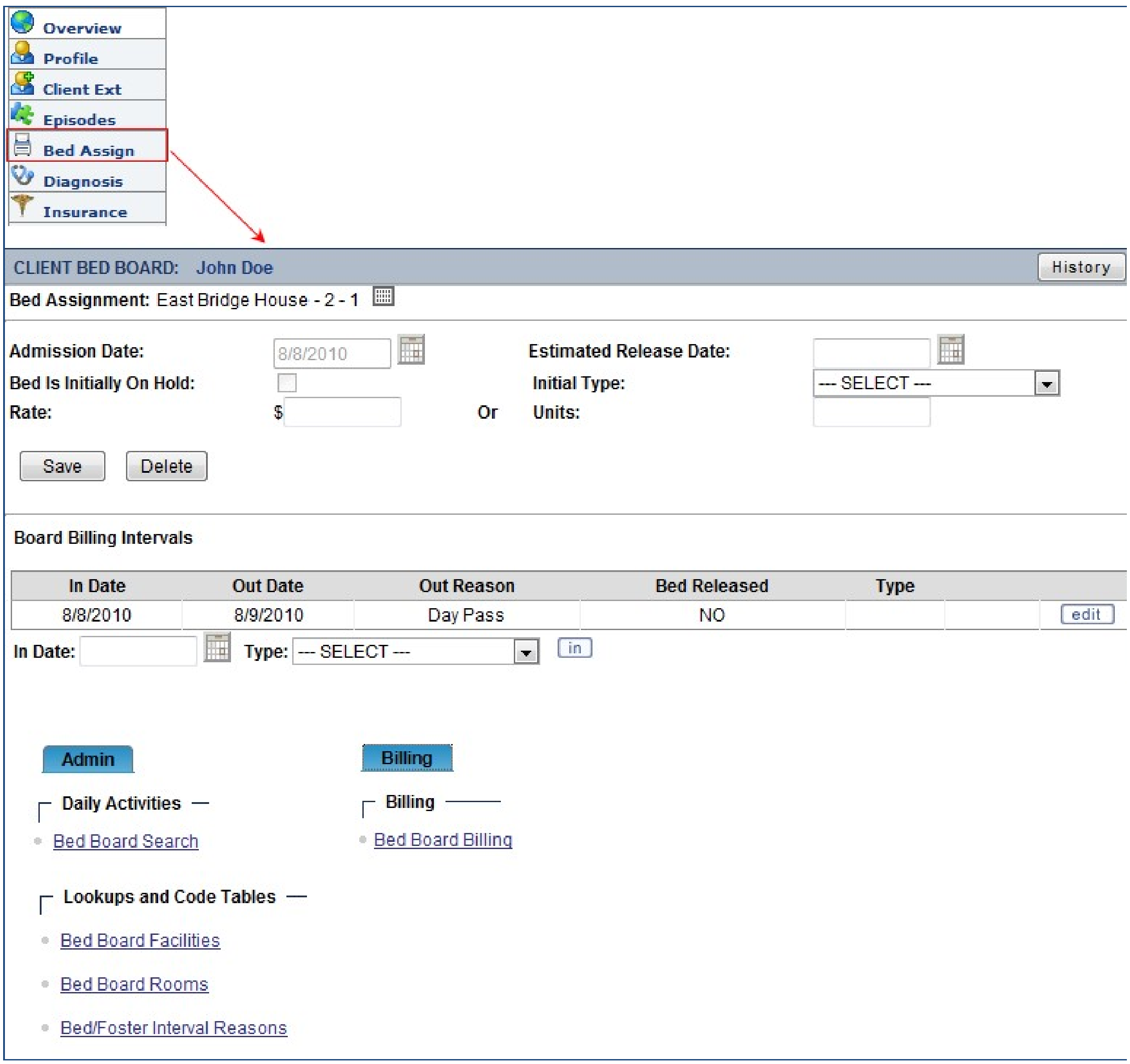
Use Bed Board

This setting turns on the Bed Board functionality in your system. If your Agency provides residential/inpatient services, employees can use the Bed Assign function (available on the Client navbar) to check clients in and out of specific beds. The system keeps track of bed board availability and creates bed board intervals for billing purposes. As the administrator, you have functions to set up the bed board facilities and rooms, define bed board interval reasons, and run searches on bed board assignments. Additionally, the Billing tab includes a function to bill for the beds and/or rooms.

With this setting checked:

- the Bed Assign button will be visible on the Client navbar;
- the Bed Board links will appear on the Admin tab; and
- the Bed Board Billing link will appear on the Billing tab.

Please note: To use the Inpatient features and tab, this setting must be checked.



See also
Bed Board Search

Bed Board Facilities
Bed Board Rooms
Bed/Foster Interval Reasons
Bed Board Billing
Use Online Help
Use Employee Work Schedule
Use Employee Time Clock
Use Foster Care
Use Accounting Periods
Use Outlook Export
Turn Off HTML Formatting
Allow Emergency Access
Use eMAR Functionality
Window to Administer eMAR Medications
Use System Clock
Display Info Buttons

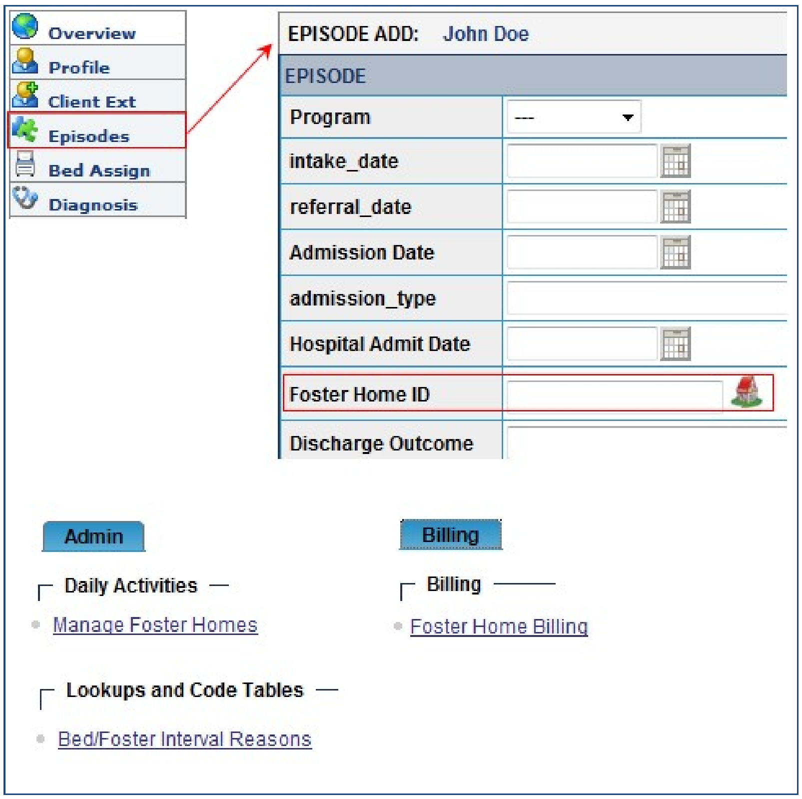
Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Use Foster Care

Use Foster Care

This setting turns on the Foster Care functionality in your system. If your Agency has a foster care program, users can assign a client to a foster home when adding a new episode. The system keeps track of foster home availability and creates foster home intervals for billing purposes. As the administrator, you set up the foster homes in your system and add the necessary foster home fields to the Episode Add screen.

When checked, this setting:

- enables the Foster Care links on the Admin and Billing tabs; and
- adds the Foster Home ID field on the Add Episode page.



See also

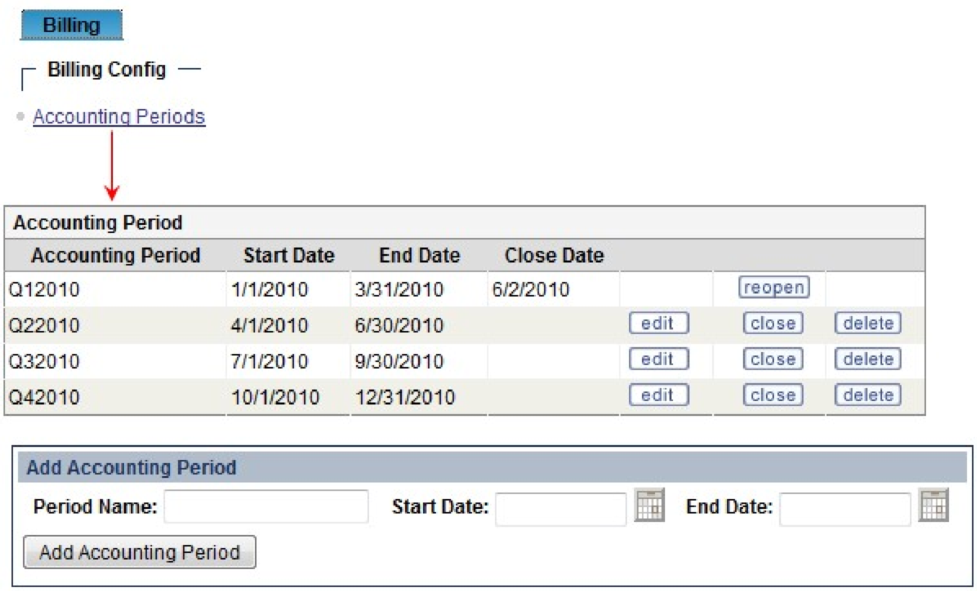
Manage Foster Homes
Bed/Foster Interval Reasons
Foster Home Billing

Use Online Help
Use Employee Work Schedule
Use Employee Time Clock
Use Bed Board
Use Accounting Periods
Use Outlook Export
Turn Off HTML Formatting
Allow Emergency Access
Use eMAR Functionality
Window to Administer eMAR Medications
Use System Clock
Display Info Buttons

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Use Accounting Periods

Use Accounting Periods

Allows for the creation and closing of accounting periods. Accounting periods are used for general ledger exports. When this setting is selected, you can set up named accounting periods (for example, Q1 2009) to categorize all ledger entries. You can also close accounting periods, which affects ledger dates.


Billing
Billing Config
Accounting Periods

Accounting Period

Accounting Period	Start Date	End Date	Close Date			
Q12010	1/1/2010	3/31/2010	6/2/2010		reopen	
Q22010	4/1/2010	6/30/2010		edit	close	delete
Q32010	7/1/2010	9/30/2010		edit	close	delete
Q42010	10/1/2010	12/31/2010		edit	close	delete

Add Accounting Period
Period Name: Start Date: End Date:
Add Accounting Period

Recommendation: select this setting if you will be doing any reporting (including the AR-GL export) based on Accounting Date. If you use Accounting Date for reporting and do not select *Use Accounting Periods,* it will be practically impossible to consistently determine the financial activity for a given date range.

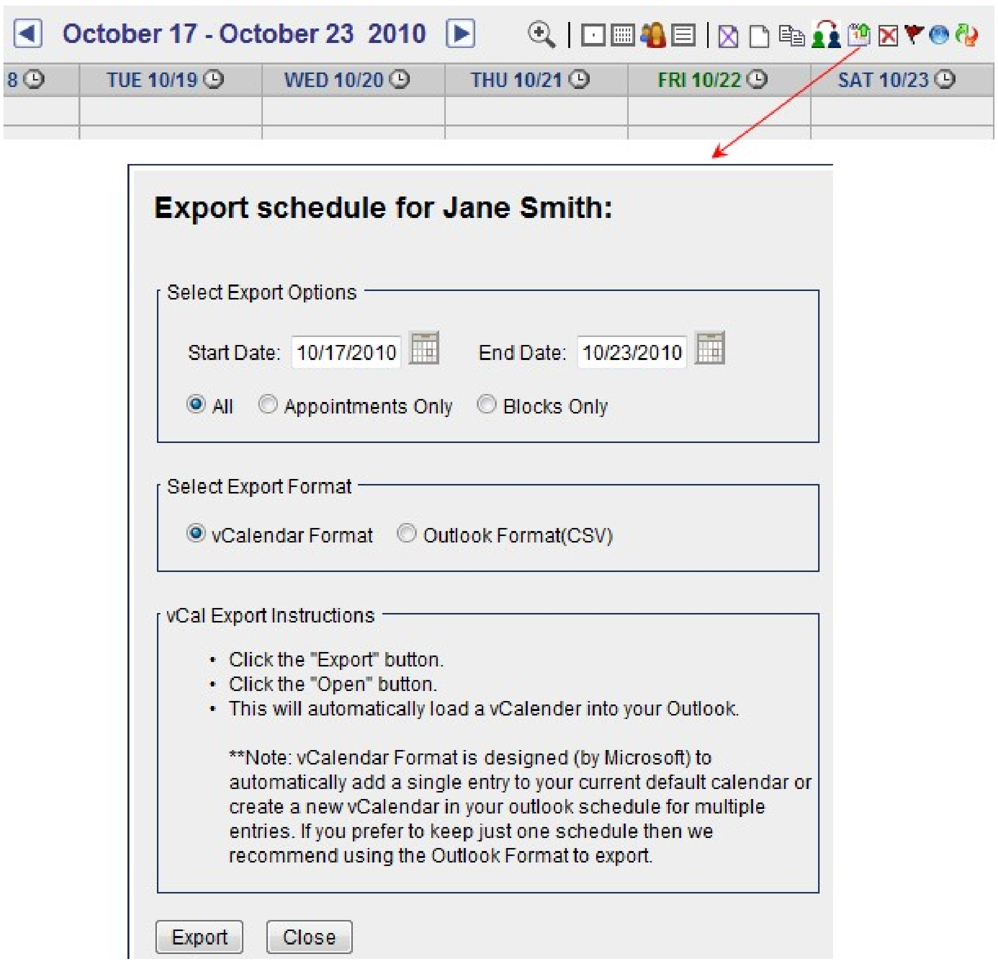
See also

Accounting Periods
Use Online Help
Use Employee Work Schedule
Use Employee Time Clock
Use Bed Board
Use Foster Care
Use Outlook Export
Turn Off HTML Formatting
Allow Emergency Access
Use eMAR Functionality
Window to Administer eMAR Medications
Use System Clock
Display Info Buttons

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Use Outlook Export

Use Outlook Export

This setting turns on the Export to Outlook function in the employee schedule.



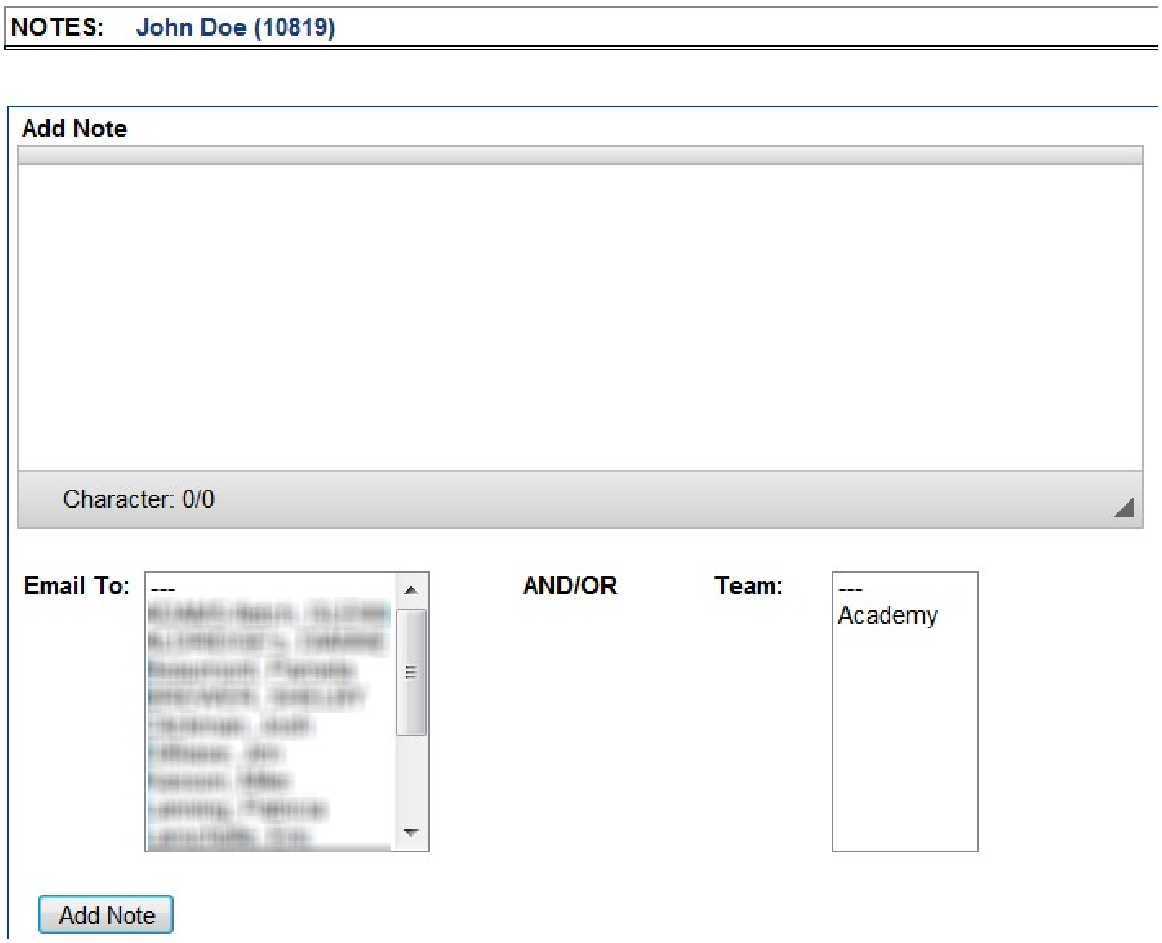
See also

Use Online Help
Use Employee Work Schedule
Use Employee Time Clock
Use Bed Board
Use Foster Care
Use Accounting Periods
Turn Off HTML Formatting
Allow Emergency Access
Use eMAR Functionality
Window to Administer eMAR Medications
Use System Clock
Display Info Buttons

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Turn Off HTML Formatting

Turn Off HTML Formatting

When this setting is selected, the toolbar will not be available in the Notes text box. Note that the editor does still respond to keyboard shortcuts for formatting such as Ctrl+U for underline, Ctrl+I for italic, and Ctrl+B for bold.



See also

Use Online Help
Use Employee Work Schedule
Use Employee Time Clock
Use Bed Board
Use Foster Care
Use Accounting Periods
Use Outlook Export
Allow Emergency Access
Use eMAR Functionality
Window to Administer eMAR Medications
Use System Clock
Display Info Buttons

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Allow Emergency Access

Allow Emergency Access

If an emergency situation arises with a client and the assigned employee is not available, another employee can “take” emergency access to that client’s record if he or she has the new security right ClientEmergencyAccess. Note that employees can only take emergency access for themselves – they cannot assign emergency access to another employee. Emergency access only grants assignment to the client – what you can do once assigned will be determined by the Security Matrix rights assigned to your login profile. Assignment given through emergency access must be manually unassigned if needed.

With two notification triggers, the appropriate staff can be notified when emergency access has been taken. While the notifications are not required, they are highly recommended and should be set up before you enable the Emergency function.

Emergency client assignments are recorded in the client and employee HIPAA logs.

Settings

Security Matrix: ClientEmergencyAccess, ClientView, ClientViewLog, NotificationTriggers
Partner Config: Allow Emergency Access

To set up the notification triggers: **Admin** tab > **Notification Triggers** > **Add a New Trigger Entry.**

- Employee Granted Emergency Access – Occur = 0, Send To = Team Leaders & Supervisors
- Client Record Granted Emergency Access – Occur = 0, Send To = Specified Employee; select employee who is currently assigned to client

See also

Notification Triggers
Emergency
Use Online Help
Use Employee Work Schedule
Use Employee Time Clock
Use Bed Board
Use Foster Care
Use Accounting Periods
Use Outlook Export
Turn Off HTML Formatting
Use eMAR Functionality
Window to Administer eMAR Medications
Use System Clock
Display Info Buttons

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Use eMAR Functionality

Use eMAR Functionality

This setting turns on the electronic Medication Administration Record module in Credible. For information on the other steps necessary to set up eMAR, click here.

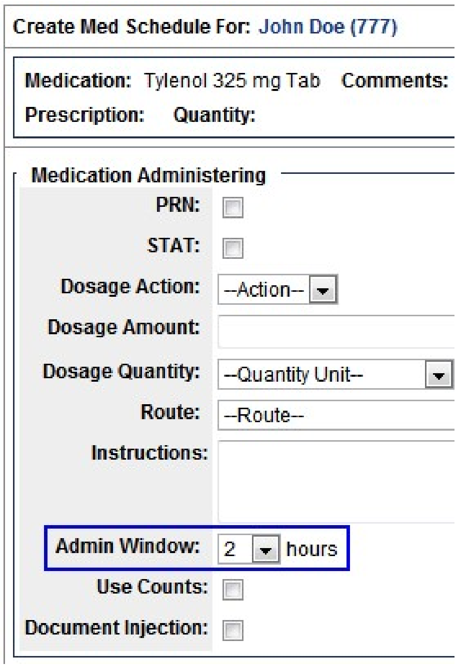
See also

Use Online Help
Use Employee Work Schedule
Use Employee Time Clock
Use Bed Board
Use Foster Care
Use Accounting Periods
Use Outlook Export
Turn Off HTML Formatting
Allow Emergency Access
Window to Administer eMAR Medications
Use System Clock
Display Info Buttons

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Window to Administer eMAR Medications

Window to Administer eMAR Medications

Sets the default for the Admin Window dropdown in the Create Med Schedule screen (default is 2 hours and maximum window is 24 hours).



The admin window can be changed for each specific medication.

The admin window determines number of hours before and after actual administration time for medications. If administration results are not entered within the defined window, the administration status automatically changes to Missed. Only employees with eMarAdminMissed right can edit missed administrations.

Note that this Partner Config setting only becomes available if you select the Use eMAR Functionality setting.

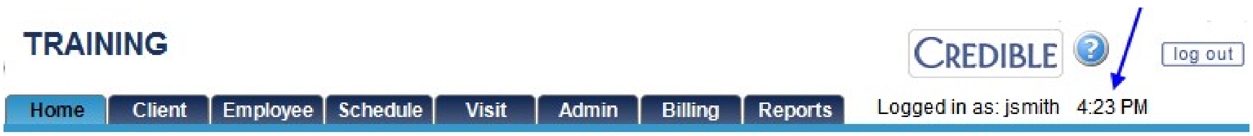
See also

Use Online Help
Use Employee Work Schedule
Use Employee Time Clock
Use Bed Board
Use Foster Care
Use Accounting Periods
Use Outlook Export
Turn Off HTML Formatting
Allow Emergency Access
Use eMAR Functionality
Use System Clock
Display Info Buttons

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Use System Clock

Use System Clock

Enables a digital clock in the format HH:MM AM/PM next to the “Logged in as” field.



The clock will always be present with the tabs on the Credible screen. It uses the time zone that is set in Partner Config.

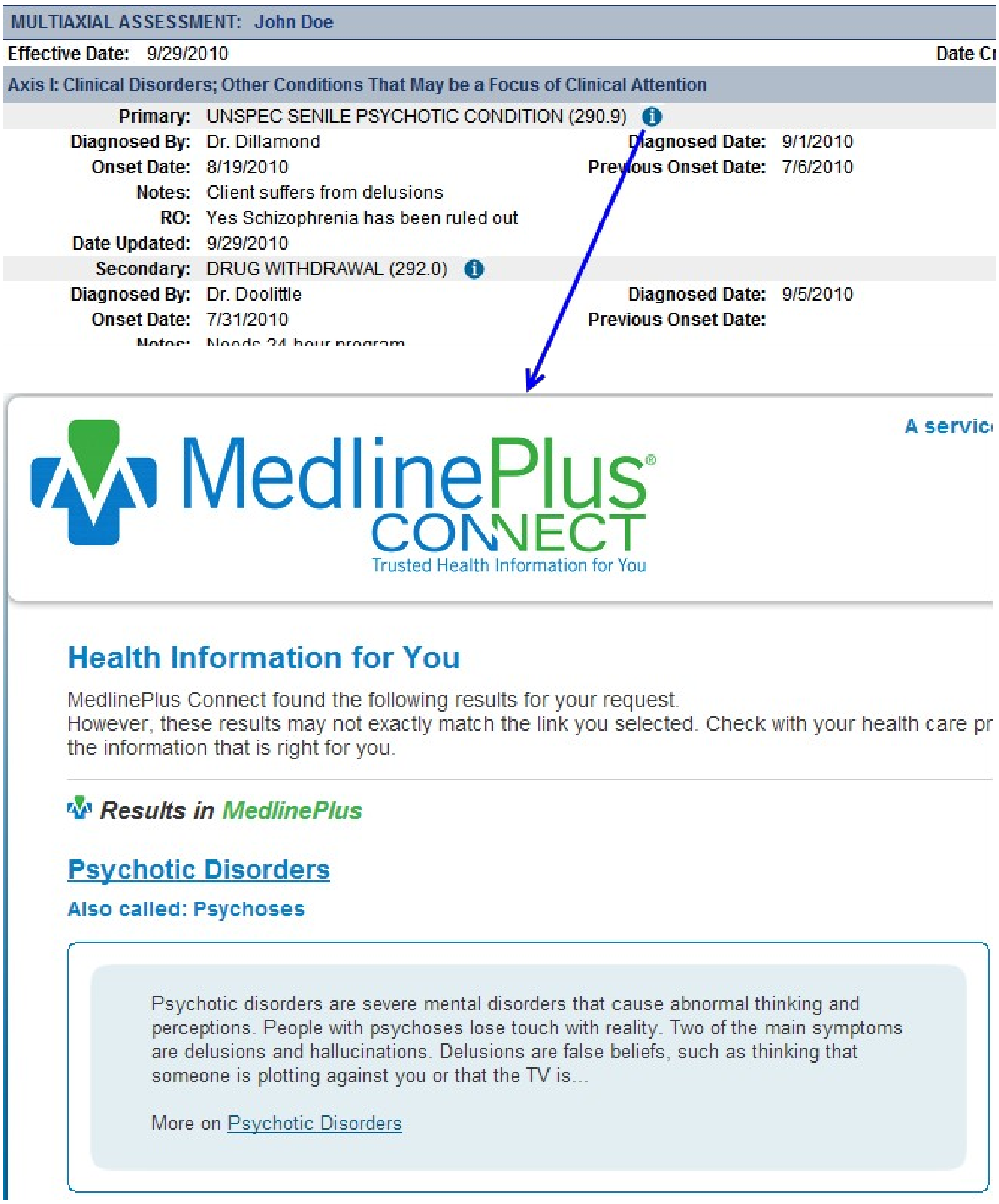
See also

Use Online Help
Use Employee Work Schedule
Use Employee Time Clock
Use Bed Board
Use Foster Care
Use Accounting Periods
Use Outlook Export
Turn Off HTML Formatting
Allow Emergency Access
Use eMAR Functionality
Window to Administer eMAR Medications
Display Info Buttons

Home > Admin > Site Configuration > Partner Config > Partner Config: Features > Display Info Buttons

Display Info Buttons

When selected, "info buttons" will be available in the Multiaxial Assessment (Diagnosis) screen. The buttons let you access context-sensitive information from the MedlinePlus database about a client's diagnoses.



If there is not an exact match, a search box for the MedlinePlus database will be available. Note that no personal health information is transmitted when you use an info button.

Credible accepts no responsibility for the content/accuracy of the information provided by MedlinePlus. For more information about MedlinePlus, click here.

See also

Use Axis IV Stressors
Use MRO & HAP Eligible for Axis I & II
Show RO Field in Diagnosis
Hide Previous GAF in Diagnosis
Shows Highest GAF in Diagnosis
Diagnosis

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings

Partner Config: General Settings

The General Settings enable a variety of features such as saved reports, employee work hours/1st available, and idle logout. There are several general settings that control how passwords work in your system.

After checking or unchecking one or more settings in Partner Config, click **Save Partner Config** at the bottom of the screen. To exit without saving your selections, click **Cancel**.

Password Configuration	Save Reports	Maintain Employee Hours	Use Program Roles	Use Case Managers	Use Form Groups	Use Residential Teams
Default Recipient	Display Military Time	Idle Logout and Idle Logout Redirect	Disable PRN for Refills	Show Hashing	Use Clinical Summary Features	Profile Fields On Homepages
Physician Orders Hide Discontinue Button	Remove Zip Code Validation	Electronic Fax Cover Sheet Text				

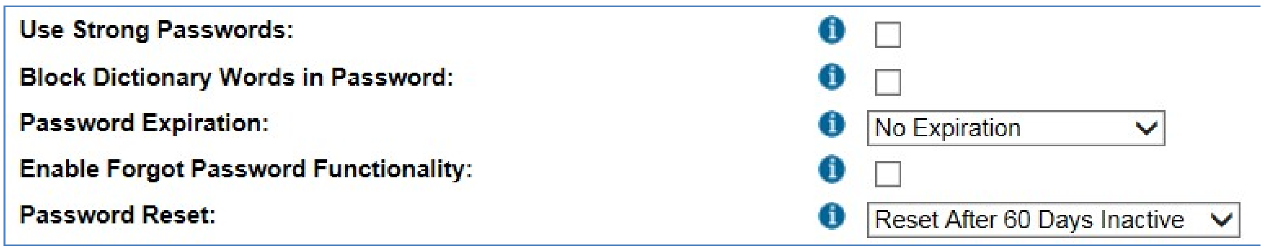
See also

Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Password Configuration

Password Configuration

Passwords are essential to protecting the information stored in Credible. These Partner Config setting control the use of passwords in your Domain.



- **Use Strong Passwords**
- **Block Dictionary Words in Passwords**
- **Password Expiration**
- **Enable Forgot Password Functionality**
- **Password Reset**

Updated: 6/2/2016 2:59 PM by marchall

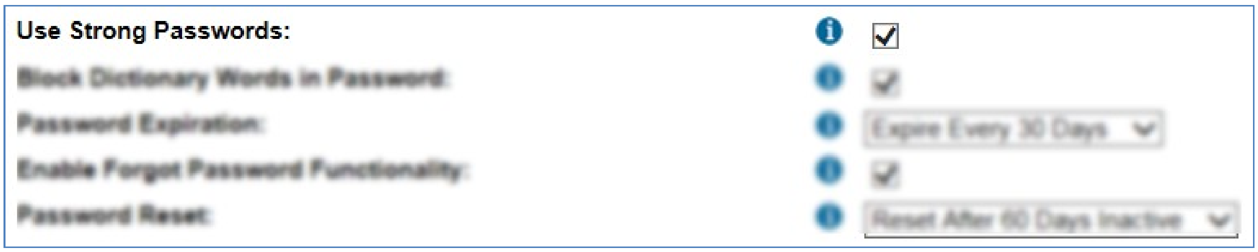
Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Password Configuration > Use Strong Passwords

Use Strong Passwords

When **Use Strong Passwords** is checked, a password must follow these requirements:

- At least 8 characters long
- Contain at least one letter (a-z, A-Z)
- Contain at least one number (0-9)
- Contain at least one special character from this set:

` ! @ $ % ^ & * ( ) - _ = + [ ] ; : ' , < . > / ? \ ~ # { } |



See also

Updating Your Password

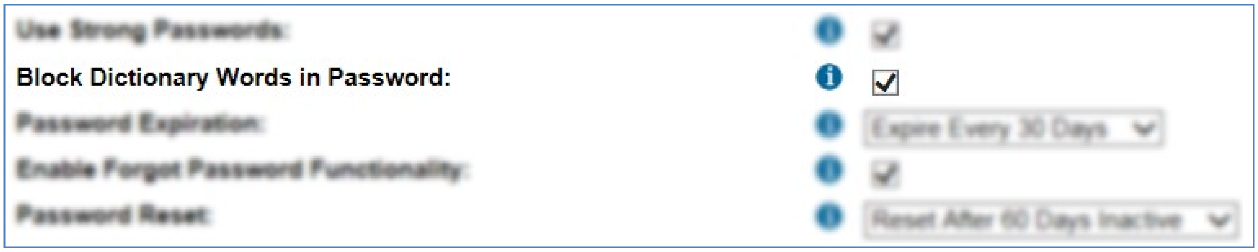
Block Dictionary Words in Passwords
Password Expiration
Enable Forgot Password Functionality
Password Reset

Updated 6/2/2016 3:08 PM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Password Configuration > Block Dictionary Words in Passwords

Block Dictionary Words in Passwords

When **Block Dictionary Words in Passwords** is selected, the system will prevent any standard dictionary words that are 4 or more letters long from being included as any part of the user's password.



See Also

Use Strong Passwords
Password Expiration
Enable Forgot Password Functionality
Password Reset

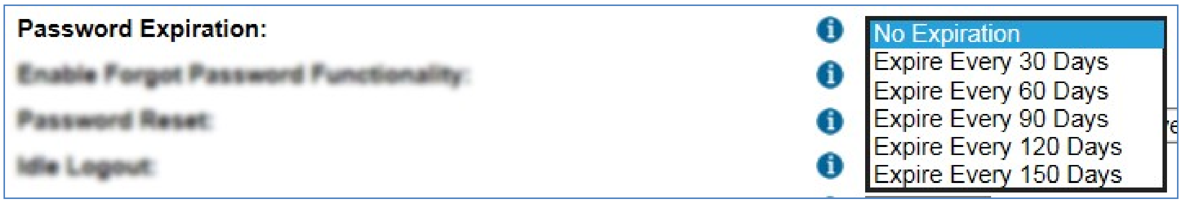
Updated 6/2/2016 3:09 PM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Password Configuration > Password Expiration

Password Expiration

The **Password Expiration** setting allows you to set the default duration at which passwords for all users will expire. Passwords can be set to never expire (NOT recommended), or to expire in 30-day increments ranging from 30 to 150 days.

Best Practice: Credible recommends that passwords expire every 30 days.



Use Strong Passwords
Block Dictionary Words in Passwords
Enable Forgot Password Functionality
Password Reset

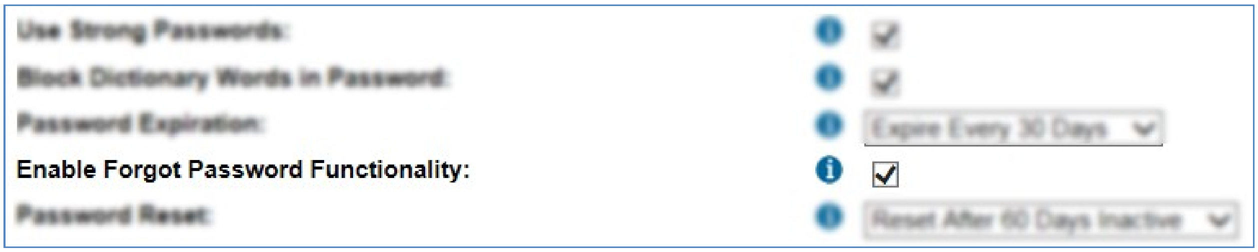
Updated 6/2/2016 3:14 PM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Password Configuration > Enable Forgot Password Functionality

Enable Forgot Password Functionality

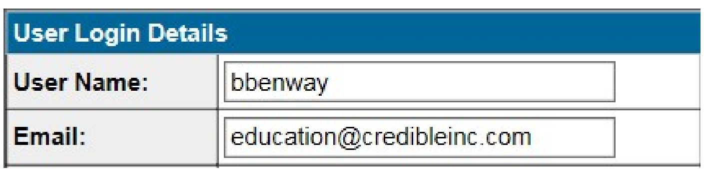
With this Partner Config setting checked, a Forgot Password link appears on the Credible login screen. Employees may use this link to reset their passwords without assistance from an administrator. Actions related to the forgotten password process are recorded in the HIPAA logs.

To enable this functionality, the **Enable Forgot Password Functionality** setting much be checked in **Partner Config**.



Additionally, the user needing their password reset must a valid email address stored with their login. To configure:

1. Go to the **Employee** tab > **Overview** > **Login** button on navbar.
2. Enter an email address in the *Email* field and click **Update User.**



See also
Resetting Your Password

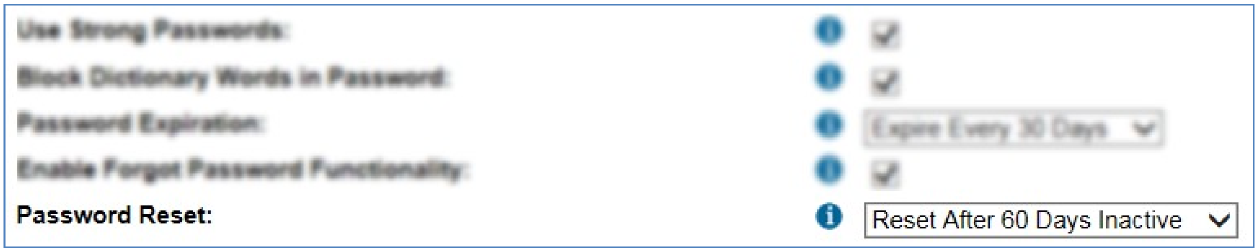
Use Strong Passwords
Block Dictionary Words in Passwords
Password Expiration
Password Reset

Updated: 6/2/2016 3:29 PM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Password Configuration > Password Reset

Password Reset

To help eliminate unused user accounts, an automatic password reset function is provided which is triggered by inactivity. If a user does not log into Credible for the specified number of days (60, 90, 120, 150, or 180), his or her password will be automatically reset. (The default period is 120 days). The inactive user will then need to contact their Administrator to get a new password.



To ensure that only the user knows his or her password, Credible forces a password update whenever someone else sets or changes that employee's password. This security feature helps to 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.

See also

Use Strong Passwords
Block Dictionary Words in Passwords
Password Expiration
Enable Forgot Password Functionality

Updated 6/2/2016 3:22 PM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Save Reports

Save Reports

When **Save Reports** is selected, the system will provide you with the option to save default report parameters under the "Reports" tab (NOTE: this applies **ONLY** to reports run under the "Reports" tab, and not to reports that may be run from other parts of the site). This is especially useful if you are likely run the same types of reports routinely.

See also

Password Configuration
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Maintain Employee Hours

Maintain Employee Hours

When checked, the Work Hours function will be available to assign work hours for each employee. 

The system uses the work hours to determine next available appointments for clients (1st Available feature).

See also

Password Configuration
Save Reports
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Use Program Roles

Use Program Roles

Use Program Roles allows you to assign/specify the role of the primary employee assigned to a client.

Note: this is an Arizona requirement.

See also

Password Configuration
Save Reports
Maintain Employee Hours
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Use Case Managers

Use Case Managers

Selecting **Use Case Managers** will give you the "Case Manager" button on the Client-Employee assignment screen. This allows you to assign/specify a single employee as the Case Manager for a client.

NOTE: Only **ONE** (1) Case Manager can be assigned to a client.

TECHNICAL NOTES: The **case_manager_emp_id** field in the Client database is automatically updated when a Case Manager assignment is made, and is automatically set back to NULL when the Case Manager assignment is removed. This field can be added to the **VIEW** in Data Dictionary, but not to Update. The Case Manager assignment will also show on the Client Homepage, Employee Homepage, Client View and Employee View in the Assignments view in bold and italic type.

See also

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Employee-Client Assignment

Use Form Groups

When selected, the Form Groups button will be available on the Client nav bar.

If you have a collection of forms that need to be filled out for a specific visit type, for example an Intake visit, you can set up a form group that has all those forms in it. Staff can access form groups for a client via the Client nav bar and keep track of which ones have been filled out.

Use the Form Groups and Form Group Visit Types functions on the Admin tab to set up form groups.

If you have visit types that are only used in form groups, you can flag them as "Form Group Only." Once flagged, these visit types will no longer be in the Visit Type dropdown in the Add to Schedule or Scheduled Visit popup. They will only be available in the Form Group Visit Type Link screen and the Form Groups screen. Visit types marked as Form Group Only will still appear in the Visit Type dropdown in Advanced Client/Visit/Ledger Search.

See also
Form Groups (Admin)
Form Group Visit Types
Visit Type
Form Groups

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Use Residential Teams

Use Residential Teams

The **Use Residential Teams** feature is used for residential services. When selected, the feature allows you to designate a team as "residential" and enter team configuration information (phone, fax, address, director, etc. – extra fields that are NOT included if the team is NOT a residential team).

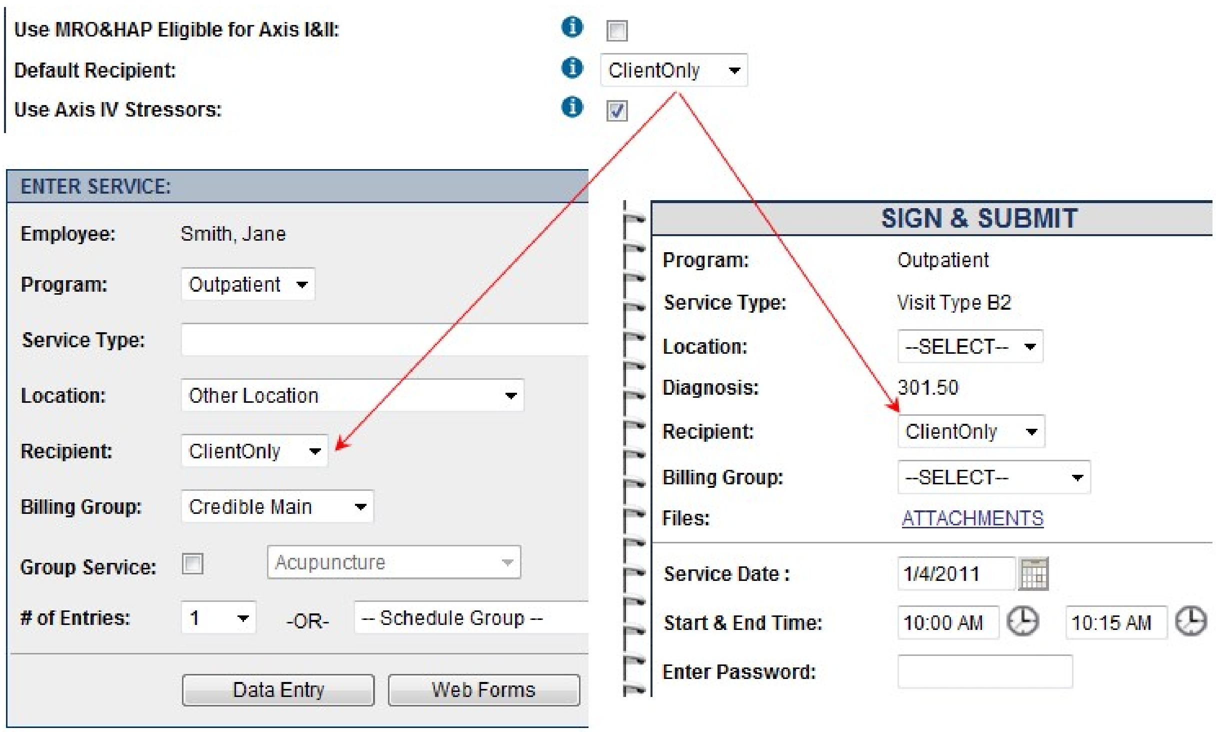
See also

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Default Recipient

Default Recipient

Sets the default recipient for visits for all employees.



The Partner Config default will be overridden if a default recipient is set for an employee (via Empoyee Config) or for the visit type selected for the visit.

If left to the default value of --SELECT-- (null) and no default recipient type is set in Employee Config or for the visit type selected, the Recipient field will default to null and a selection will be required when an employee saves and completes the visit (data entry) or signs and submits the visit (web forms).

See also

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Display Military Time

Display Military Time

When **Display Military Time** is selected, the pop-up time window that appears when you are entering a visit will show military time *(<u>Note</u>: the pop-up time window is the ONLY place military time will be displayed).*

See also

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Idle Logout and Idle Logout Redirect

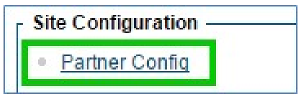
Idle Logout and Idle Logout Redirect

The Idle Logout feature provides enhanced security and protection of PHI by logging the user out after a configurable amount of inactive (idle) time. Inactivity is defined as a period with no clicks, key presses, or scrolls. By default, **Idle Logout** is set to 60 minutes, but can be set to smaller amounts, if desired. To configure this, simply select a duration option from the **Idle Logout** dropdown and save the Partner Config settings..

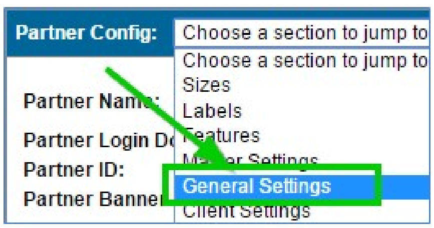
If a user is inactive for the amount of time specified, a timeout warning popup displays: "Your session is about to expire. You will be redirected in X seconds. Do you want to Continue your session?"

Configuration

1. Go to **Admin** tab > **Site Configuration** > **Partner Config**.

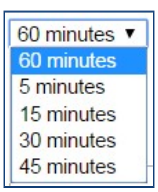


2. Go to **General Settings**.

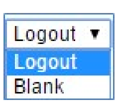


3. Locate the settings for **Idle Logout** and **Idle Logout Redirect**.

4. Select the period of inactivity desired on the **Idle Logout** dropdown. Credible Best Practice recommends that the default of 60 minutes be used.



5. **Idle Logout Redirect** previously determined the action which followed the expiration of the Idle Logout setting (above): logging out, or blanking the screen. To support security Best Practices and Meaningful Use guidelines, the Blank option no longer functions; all users will be logged out after the Idle Logout duration has passed. The **Blank** option functions identically to the **Logout** option, and will be removed in a future release.



For additional security, the Idle Logout feature now extends its functionality to the entire Credible site, including Admin areas that do not contain PHI.

See also

Timeout Warning: Your Session Is About to Expire

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Last Updated 3/28/2017 1:09 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Disable PRN for Refills

Disable PRN for Refills

If you do not want staff to use the PRN field when prescribing, select the new Partner Config setting Disable PRN for Refills. When selected, the PRN field is removed from the Create Prescription and "finalize" screens.

You need to have the Credible eRx module and your Implementation Manager or Partner Services Coordinator needs to turn it on.

See also

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Show Hashing
Use Clinical Summary Features
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Show Hashing

Show Hashing

For Meaningful Use attestation, you may need to generate a Continuity of Care Record (CCR) and then import it to demonstrate that the hash values match. Hash values are used to verify the integrity of files exchanged between different agencies. Credible generates a unique “File Hash” value for each CCR you generate and includes it in a text file when you use the zip file output option. Similarly, when you import a CCR or CCD, Credible generates a “Received Hash” value.

To have the system show the hash values, select this Partner Config setting. For more information on comparing file hash and received has values, click here.

See also

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Use Clinical Summary Features
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Use Clinical Summary Features

Use Clinical Summary Features

Check **Partner Config: Use Clinical Summary Features** to make the following available:

1. **Generate Clinical Summary** button in the Client Profile and **Create Clinical Summary** link in the Visit Details screen. Both require that the user have the **PatientSummaryGenerator** right in the Security Matrix.
2. **Import Clinical Summary** button on the **Client File Attachments** screen. This requires **Security Matrix: ClientFileAdd**.

Enter the address and phone number you want to include with clinical summaries in the **CCD Author Address** fields.

See also

Generating a Continuity of Care Record (CCR)

Importing a Continuity of Care Record or Document (CCR and CCD)

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Updated 6/23/2016 3:41 PM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Profile Fields On Homepages

Profile Fields On Homepages

Controls the number of Profile fields that appear in the Client/Employee Info sections on the Client/Employee home pages; default is 12.

In the example below, Profile Fields On Homepages = 10

Client Info

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

edit print Full Client Info

View order of client and employee profile fields is set up in Data Dictionary.

Data Dictionary Update: Table Source: Clients

Column Name	View Label	View Ord
last_name	Last Name	1
first_name	First Name	2
mi	Middle Initial	3
client_status	Status	4
client_id	Client ID	5
sex	Gender	6
ssn	SSN	7
is_familyunit	Is family unit?	8
dob	DOB	9
marital_status	Marital Status	10

See also
Client Overview
Employee Overview

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features
Physician Orders Hide Discontinue Button
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Physician Orders Hide Discontinue Button

Physician Orders Hide Discontinue Button

Hides the discont (discontinue) button that is available in the Current Orders section on the Physicians Orders screen when Create Prescription is used to create an order. Note that the discont button will still be available in the Order History section when the order is signed/completed.

See also
Physician Order/Assigned Physician
Current, Pending, and Completed Orders

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features
Profile Fields On Homepages
Remove Zip Code Validation
Electronic Fax Cover Sheet Text

Remove Zip Code Validation

By default, the system requires a numeric value in the zip code field in the Billing Payer screen. If your organization needs to accommodate alphanumeric zip codes for payers, for example, for Canadian addresses, you should select Remove Zip Code Validation. Note that this setting does not override any zip code settings configured in Data Dictionary.

See also
Billing Payer

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features
Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Electronic Fax Cover Sheet Text

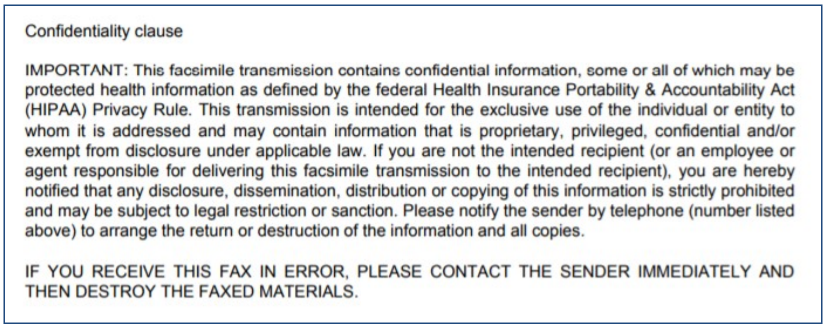
Home > Admin > Site Configuration > Partner Config > Partner Config: General Settings > Electronic Fax Cover Sheet Text

Electronic Fax Cover Sheet Text

This setting provides a text field for entering custom information for fax cover sheets, addressing Partner requirements while also enhancing adherence to specific State requirements. The default value for this field is a legal confidentiality clause. However, it is fully customizable, allowing for up to 3000 characters formatted as bold or normal text.

Configuration

1. Go to **Admin** tab > **Site Configuration** > **Partner Config** > **General Settings**.
2. The **Electronic Fax Cover Sheet Text** field is pre-populated with the text shown below.

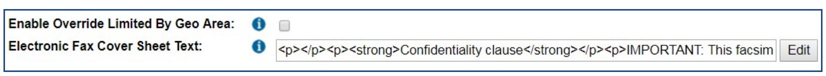


Confidentiality clause

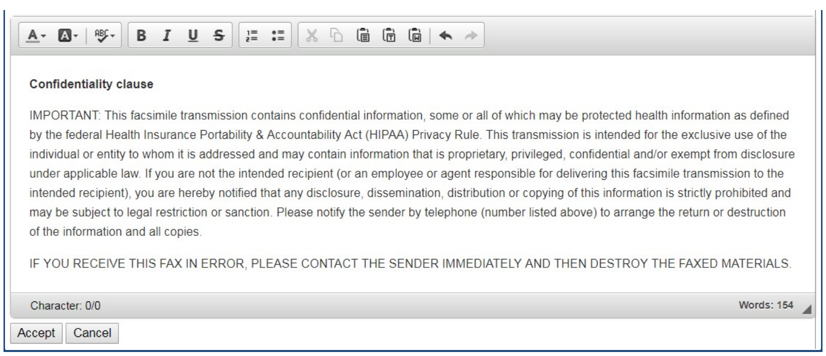
IMPORTANT: This facsimile transmission contains confidential information, some or all of which may be protected health information as defined by the federal Health Insurance Portability & Accountability Act (HIPAA) Privacy Rule. This transmission is intended for the exclusive use of the individual or entity to whom it is addressed and may contain information that is proprietary, privileged, confidential and/or exempt from disclosure under applicable law. If you are not the intended recipient (or an employee or agent responsible for delivering this facsimile transmission to the intended recipient), you are hereby notified that any disclosure, dissemination, distribution or copying of this information is strictly prohibited and may be subject to legal restriction or sanction. Please notify the sender by telephone (number listed above) to arrange the return or destruction of the information and all copies.

IF YOU RECEIVE THIS FAX IN ERROR, PLEASE CONTACT THE SENDER IMMEDIATELY AND THEN DESTROY THE FAXED MATERIALS.

3. To view or edit the text for the cover sheet, click the **Edit** button to the right of the text box.



4. The full text will appear, along with a standard rich-text editing toolbar (see note below).



   - While the entire toolbar is provided, only the **bold** and underline functions will be transferred to your cover sheet. **Do not use any of the other formatting types**, as the results are unpredictable.

5. When editing is complete, click the **Accept** button, then the **Save Partner Config** button at the bottom of the page.

See also

Password Configuration
Save Reports
Maintain Employee Hours
Use Program Roles
Use Case Managers
Use Form Groups
Use Residential Teams
Default Recipient
Display Military Time
Idle Logout and Idle Logout Redirect
Disable PRN for Refills
Show Hashing
Use Clinical Summary Features

Profile Fields On Homepages
Physician Orders Hide Discontinue Button
Remove Zip Code Validation

Updated: 6/12/2017 5:32 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings

Client Settings

This section includes a number of different settings that affect clients and how they are handled, and includes family, team selection, insurance, authorizations, diagnoses, and medications.

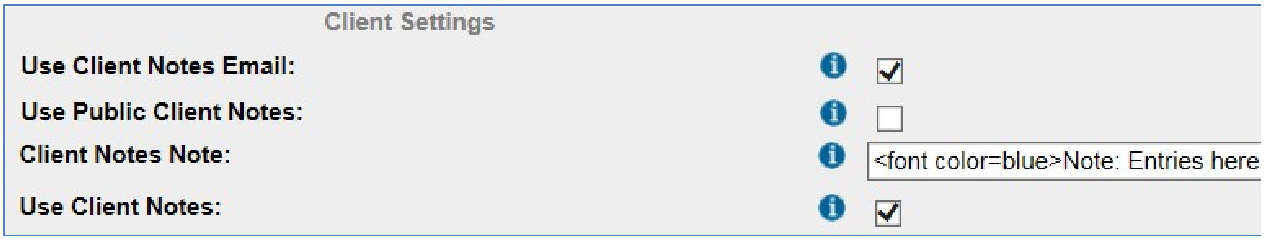
- Client Notes Settings
- Automatically Update Diagnosis: Problem List
- Exclude V and Z codes from Auto Update
- V and Z Diagnosis Codes in Claims
- Use Client Family
- ROI Dates Required
- Use Med History Notes
- Force Client Teams
- Allow Insurance ID Edit
- Use Visit Type in Client Ins
- Use Accident Info on Client Ins
- Use MRO & HAP Eligible for Axis I & II
- Use Axis IV Stressors
- Show RO Field in Diagnosis
- Hide Previous GAF in Diagnosis
- Shows Highest GAF in Diagnosis
- Default Client Attachment Folders Closed
- Reason for Client Team Unassign
- Show Recent Clients in List
- Show Target Date in Tx Plans
- Use Tx Plan Methods
- Show Date & Time in Medical Profile
- Hide Medication Notes
- Client Email Signature
- Client Email From Address
- Hide Additional Family Fields
- Physician Order/Assigned Physician
- Immunization HL7 Exports
- Show Client Extended Fields
- Use Client Episodes
- Parent Program Driven Episodes
- Episodes per Program Assignment
- Redirect to Update on Last Episode
- Check Future Schedule for Episode before Closing
- Printing a Diagnosis Code on a Prescription

See also
Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Client Notes Settings

Client Notes Settings

These settings control the user of the Client Notes feature. They are located in the **Client Settings** section.



See also

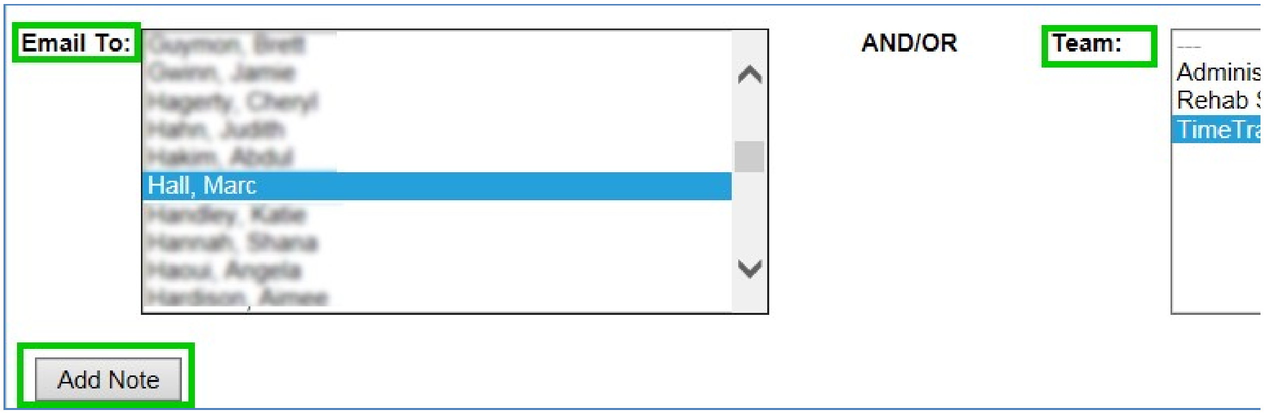
Use Client Notes Email
Use Public Client Notes
Client Notes Note
Use Client Notes

Updated: 6/2/2016 11:59 AM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Client Notes Settings > Use Client Notes Email

Use Client Notes Email

When checked, there will be an **Email To** section in the Notes screen for each client. When adding a note, you can send it to individual employees, or to all employees on one or more selected Teams.



See also

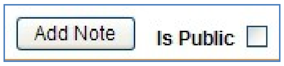
Use Public Client Notes
Client Notes Note
Use Client Notes

Updated 6/2/2016 12:03 PM by marchall

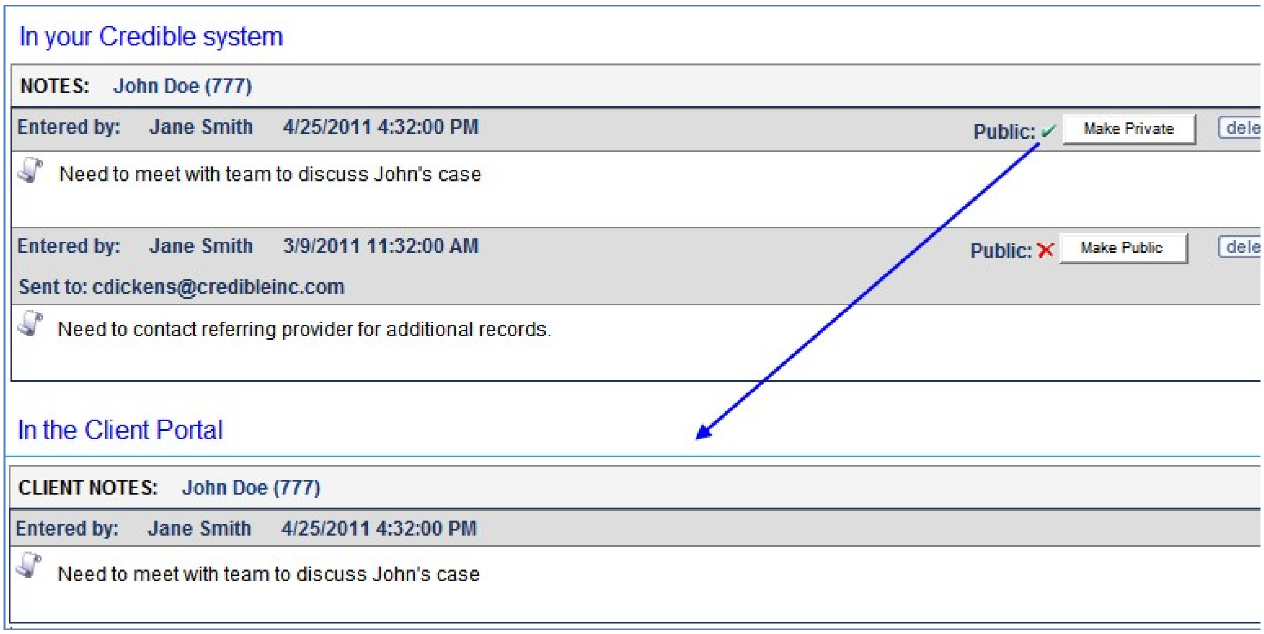
Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Client Notes Settings > Use Public Client Notes

Use Public Client Notes

When selected, an **Is Public** checkbox is available when adding a client note.



If **Is Public** is checked and a client user has the **ClientNotesViewCU** permission, they can view the note in the Credible Client Portal. A **Make Private / Make Public** button is also available for an existing client note so you can change the public/private status after the note has been added.



See also
Client User Security Functions
Credible Client Portal

Updated 6/2/2016 12:06 PM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Client Notes Settings > Client Notes Note

Client Notes Note

This setting is an optional field allowing administrators to add a note that will appear above the **Add Note** box in the Notes function (accessed via Client navbar). The **Client Notes Note** can be used to provide brief instructions or reminders to users entering client notes.

See also

Use Client Notes Email
Use Public Client Notes
Use Client Notes

Client Notes

Updated 6/2/2016 12:33 PM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Client Notes Settings > Use Client Notes

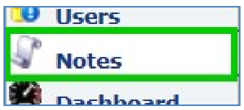
Use Client Notes

This setting enables the Notes function, adding the button to the Client navbar. The Notes function allows users to add notes to a client record, and to then send the note via email to employees or teams.

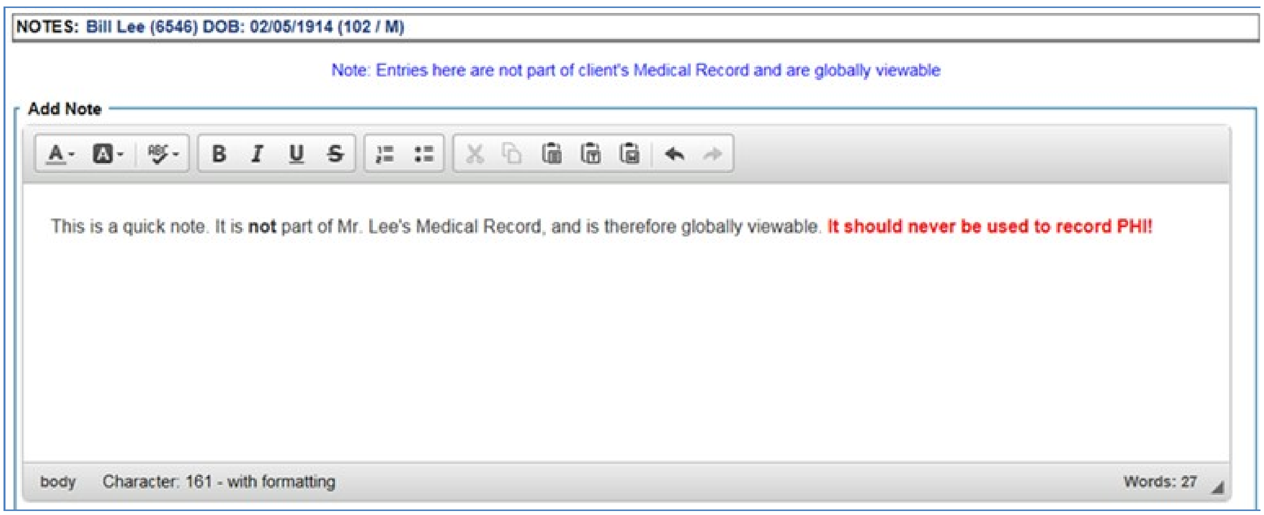
Important: Notes entries are **not** part of the client's medical record, and are therefore globally viewable. However, they are still **discoverable**, and subject to HIPAA.

Best Practice: Credible strongly recommends that Partners work with their Corporate Compliance Officer to develop policies and procedures around the appropriate use of this feature.

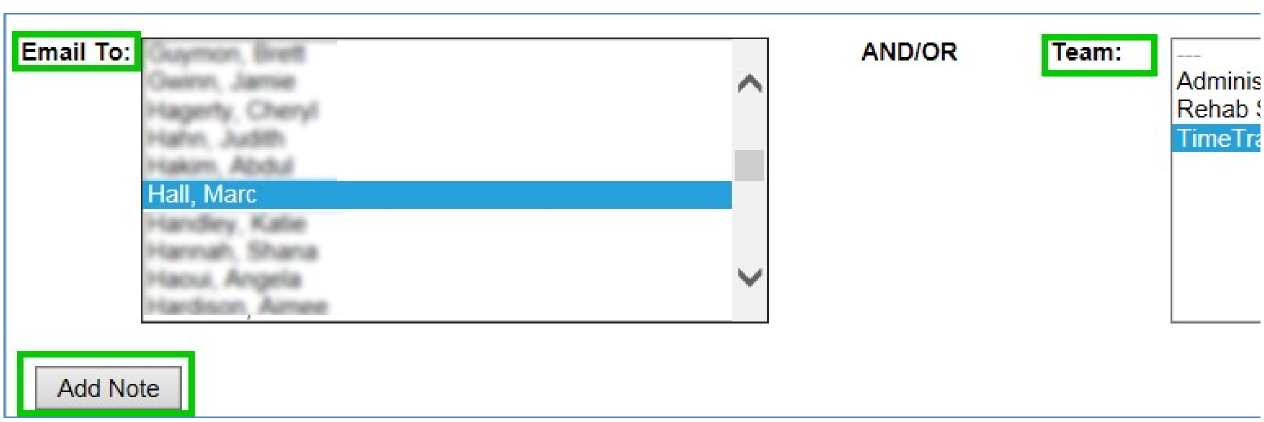
Once Notes have been enabled, they are accessible through the Client navbar.



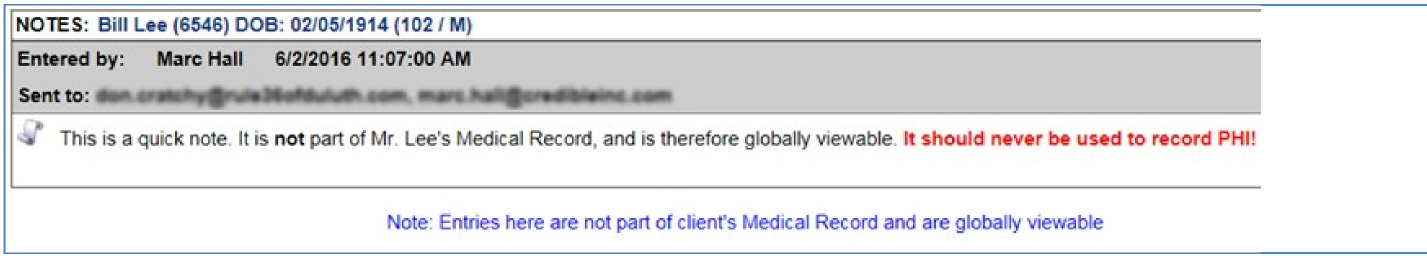
Enter the note using the text editor provided.



If desired, it may be sent via email to individual employees or Teams. Select them from the lists, and then click the **Add Note** button.



Once it has been added, it will appear as below.



Updated 6/2/2016 11:54 AM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Automatically Update Diagnosis: Problem List

Automatically Update Diagnosis: Problem List

This setting will allow the first five diagnoses to be added to the Visit when the Client's active assessment is in Problem List format. The first five is regardless of specific order number.

See also

Client Notes Settings
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
Use Visit Type in Client Ins
Use Accident Info on Client Ins
Use MRO & HAP Eligible for Axis I & II
Use Axis IV Stressors
Show RO Field in Diagnosis
Hide Previous GAF in Diagnosis
Shows Highest GAF in Diagnosis
Default Client Attachment Folders Closed
Reason for Client Team Unassign
Show Recent Clients in List
Show Target Date in Tx Plans
Use Tx Plan Methods
Show Date & Time in Medical Profile
Hide Medication Notes
Client Email Signature
Client Email From Address
Hide Additional Family Fields
Physician Order/Assigned Physician
Immunization HL7 Exports
Show Client Extended Fields
Use Client Episodes
Parent Program Driven Episodes
Episodes per Program Assignment
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Exclude V and Z codes from Auto Update

Exclude V and Z codes from Auto Update

This setting will prevent V and Z codes from being automatically added to Visits. V codes are related to ICD-9 and Z codes to ICD-10.

This setting must be used with the **Automatically Update Visit Diagnosis** setting.

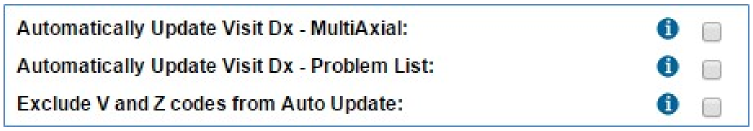
See also

Client Notes Settings
Automatically Update Diagnosis: Problem List
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
Use Visit Type in Client Ins
Use Accident Info on Client Ins
Use MRO & HAP Eligible for Axis I & II
Use Axis IV Stressors
Show RO Field in Diagnosis
Hide Previous GAF in Diagnosis
Shows Highest GAF in Diagnosis
Default Client Attachment Folders Closed
Reason for Client Team Unassign
Show Recent Clients in List
Show Target Date in Tx Plans
Use Tx Plan Methods
Show Date & Time in Medical Profile
Hide Medication Notes
Client Email Signature
Client Email From Address
Hide Additional Family Fields
Physician Order/Assigned Physician
Immunization HL7 Exports
Show Client Extended Fields
Use Client Episodes
Parent Program Driven Episodes
Episodes per Program Assignment
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > V and Z Diagnosis Codes in Claims

V and Z Diagnosis Codes in Claims

The setting *Automatically Update Visit Dx* has been relabeled to *Automatically Update Visit Dx - MultiAxial*. The first five Axis I diagnoses will be added to visits when the client's active assessment is in the Multi-Axial format.



In addition, two new settings have been added to *Partner Config*:

- *Automatically Update Visit Dx - Problem List*: The first five Problem List diagnoses will be added to visits when the client's active assessment is in the Problem List format. Please note: the 'first five' returned does not reflect the specific order numbers.
- *Exclude V and Z codes from Auto Update*: This must be used with one of the *Automatically Update* settings. This prevents V and Z codes from being automatically added to visits.

See also

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
Use Visit Type in Client Ins
Use Accident Info on Client Ins
Use MRO & HAP Eligible for Axis I & II
Use Axis IV Stressors
Show RO Field in Diagnosis
Hide Previous GAF in Diagnosis
Shows Highest GAF in Diagnosis
Default Client Attachment Folders Closed
Reason for Client Team Unassign
Show Recent Clients in List
Show Target Date in Tx Plans
Use Tx Plan Methods
Show Date & Time in Medical Profile
Hide Medication Notes
Client Email Signature
Client Email From Address
Hide Additional Family Fields
Physician Order/Assigned Physician
Immunization HL7 Exports
Show Client Extended Fields
Use Client Episodes
Parent Program Driven Episodes
Episodes per Program Assignment
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Updated: 11/16/2015 5:08 PM by public

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Use Client Family

Use Client Family

When selected, the Family button 

will be available on the Client nav bar. The button lets you access the Family Members screen where you can view a list of family members that have been added to the client's record. If you have the ClientUpdateContactsFamily right, you can add family members and manage existing family members.

See also
Hide Additional Family Fields
Family

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > ROI Dates Required

ROI Dates Required

This setting controls whether the ROI Start Date and ROI Expires Date are required when ROI Obtained is selected for a client's contact or family member. When selected, the fields are required.

The ROI Status feature on the Contacts list gives additional information about ROI Obtained. When you delete a contact, the system retains it as a deleted record so you can view a client's contact history.

ROI Obtained	ROI Start Date	ROI Expires Date	ROI Status
True	7/27/2012	7/31/2013	ROI OBTAINED BUT EXPIRED
False			ROI NOT OBTAINED
True	7/1/2013	7/1/2014	ROI OBTAINED & ACTIVE
True	8/31/2013	8/31/2014	ROI OBTAINED & NOT YET ACTIVE

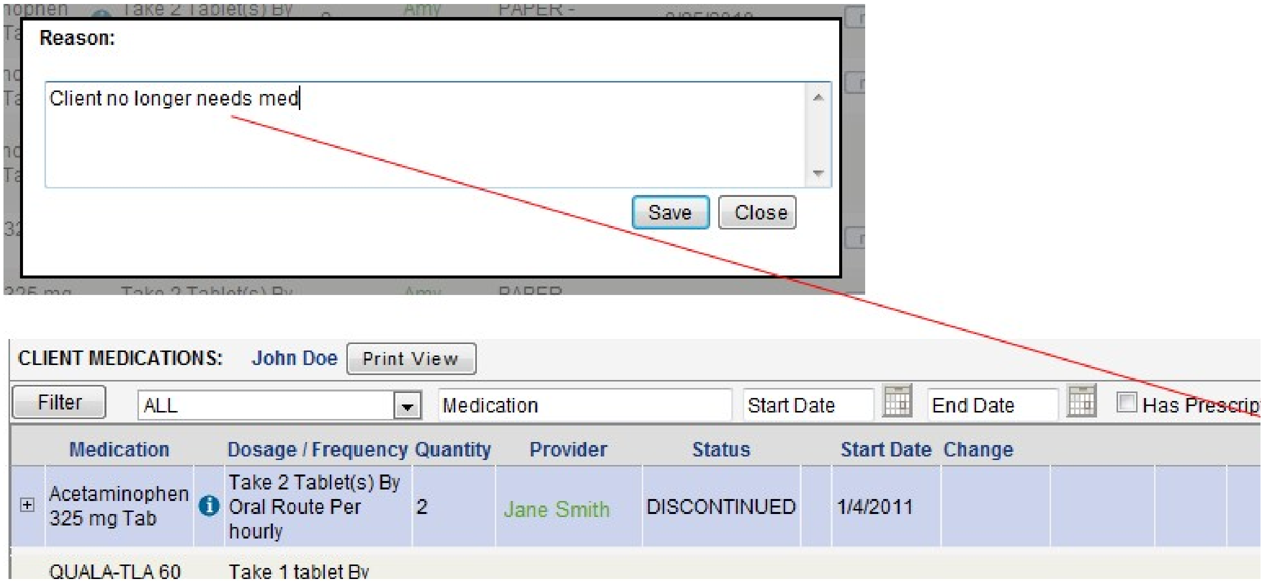
See also

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
Use Visit Type in Client Ins
Use Accident Info on Client Ins
Use MRO & HAP Eligible for Axis I & II
Use Axis IV Stressors
Show RO Field in Diagnosis
Hide Previous GAF in Diagnosis
Shows Highest GAF in Diagnosis
Default Client Attachment Folders Closed
Reason for Client Team Unassign
Show Recent Clients in List
Show Target Date in Tx Plans
Use Tx Plan Methods
Show Date & Time in Medical Profile
Hide Medication Notes
Client Email Signature
Client Email From Address
Hide Additional Family Fields
Physician Order/Assigned Physician
Immunization HL7 Exports
Show Client Extended Fields
Use Client Episodes
Parent Program Driven Episodes
Episodes per Program Assignment
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Use Med History Notes

Use Med History Notes

You can configure the system to display a Reason popup when an employee rejects or discontinues a prescription. Employees can view med history notes in the Client Medications screen and the Medication History screen.

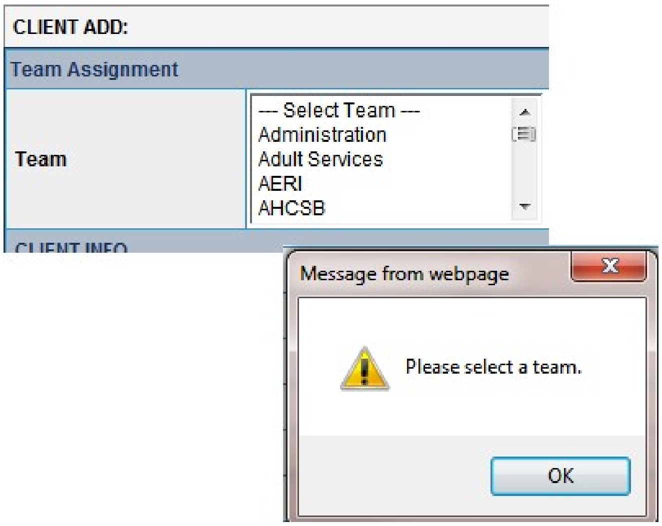


See also
Medications

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Force Client Teams

Force Client Teams

When selected, a team selection (assignment) is required when adding a new client.



See also

Add Client

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Allow Insurance ID Edit

Allow Insurance ID Edit

When selected, you can edit the insurance ID on a client record.

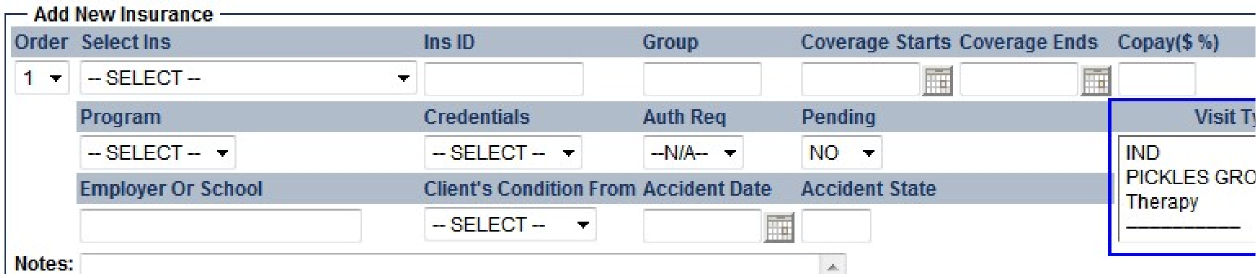
Important: you should only use this function to *correct an insurance ID that was entered incorrectly.* If a client's insurance has *changed* -- that is, he/she has new/different insurance, you should delete the old insurance and add the new insurance. You should not edit the old insurance.

See also
Use Visit Type in Client Ins
Use Accident Info on Client Ins
Insurance

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Use Visit Type in Client Ins

Use Visit Type in Client Ins

When selected, a Visit Type dropdown will be available on the Insurance Coverage screen. If an insurance coverage only covers specific visit types, you can select the corresponding visit type group (they are listed first in the dropdown) or individual visit types. Only visit type groups that are flagged "For Insurance" in the Visit Type Group Admin screen are included in the dropdown.

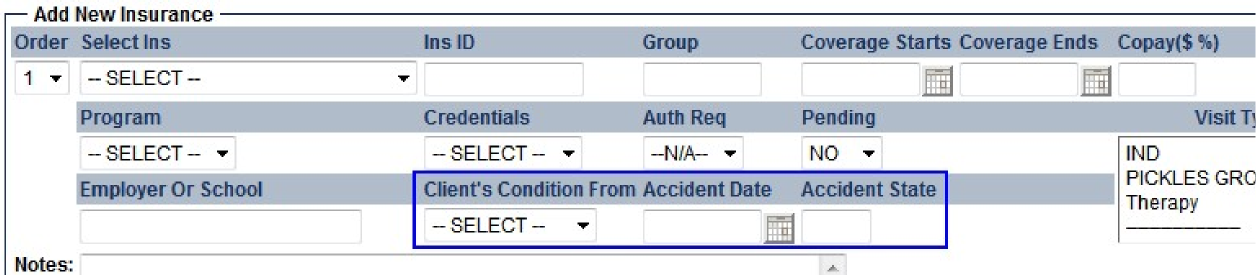


See also
Allow Insurance ID Edit
Use Accident Info on Client Ins
Insurance
Visit Type
Visit Type Groups

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Use Accident Info on Client Ins

Use Accident Info on Client Ins

Select to add the following accident info fields to the Client Insurance screen: Client's Condition From, Accident Date, and Accident State. If the client's payer record does *not* have Default Box 10 to No selected and the accident info fields are filled in, Client's Condition From and Accident Date will be included in the CMS 1500. Accident State is not currently being used.



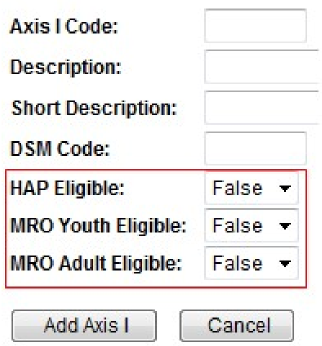
Make sure the Default Box 10 to No setting in Payer Config is *not selected* for the client's payer (Billing tab > Billing Payer).

See also
Allow Insurance ID Edit
Use Visit Type in Client Ins
Insurance

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Use MRO & HAP Eligible for Axis I & II

Use MRO & HAP Eligible for Axis I & II

When selected, True/False fields to indicate eligibility for the Hoosier Assurance Plan (HAP) and Medicaid Rehabilitation Option (MRO) are added to the fields for an Axis I or II diagnosis.



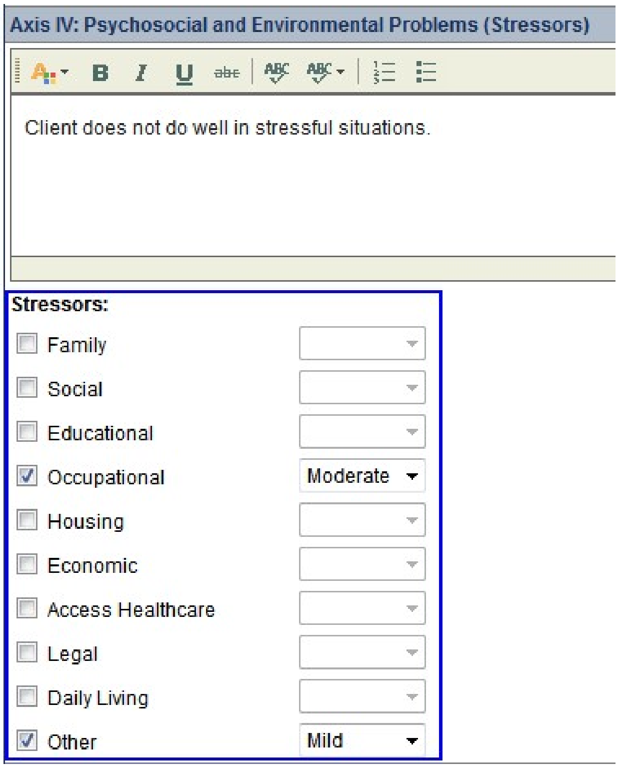
Admin tab > Axis 1 or Axis 2 (under Lookups and Code Tables)

See also
Axis 1/Axis 2/Axis 3
Diagnosis
Use Axis IV Stressors
Show RO Field in Diagnosis
Hide Previous GAF in Diagnosis
Shows Highest GAF in Diagnosis

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Use Axis IV Stressors

Use Axis IV Stressors

When selected, a Stressors list will be available in the Axis IV section on the Diagnosis screen.



If Use Axis IV Stressors is NOT selected, you will see the Axis IV text box only and NOT the Stressors selection list.

See also
Use MRO & HAP Eligible for Axis I & II
Show RO Field in Diagnosis
Hide Previous GAF in Diagnosis
Shows Highest GAF in Diagnosis
Display Info Buttons
Diagnosis

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Show RO Field in Diagnosis

Show RO Field in Diagnosis

When **Show RO Field in Diagnosis** is selected, the RO (“ruled out”) checkbox and textbox will show on the Diagnosis screen (Axis I – tertiary), which is accessed by clicking on the "Diagnosis" Nav Bar button under the Client tab.

See also

Use MRO & HAP Eligible for Axis I & II
Use Axis IV Stressors
Hide Previous GAF in Diagnosis
Shows Highest GAF in Diagnosis
Diagnosis

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Hide Previous GAF in Diagnosis

Hide Previous GAF in Diagnosis

When **Hide Previous GAF in Diagnosis** is selected, the previous GAF score in the client diagnosis and injected diagnosis fields will be hidden.

See also

Use MRO & HAP Eligible for Axis I & II
Use Axis IV Stressors
Show RO Field in Diagnosis
Shows Highest GAF in Diagnosis
Diagnosis

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Shows Highest GAF in Diagnosis

Shows Highest GAF in Diagnosis

When **Show Highest GAF in Diagnosis** is selected, the *highest GAF score within the past 12 months* will be shown on the client Diagnosis screen.

See also

Use MRO & HAP Eligible for Axis I & II
Use Axis IV Stressors
Show RO Field in Diagnosis
Hide Previous GAF in Diagnosis
Diagnosis

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Default Client Attachment Folders Closed

Default Client Attachment Folders Closed

If your client records have numerous attachments, it may be easier to locate a specific attachment if the folders are closed when you access the File Attachments screen. Select this Partner Config setting to have the folders default to a closed state.

Note that if you enable closed folders, the paging navigation bar at the bottom of the screen won’t be available.

See also

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
Use Visit Type in Client Ins
Use Accident Info on Client Ins
Use MRO & HAP Eligible for Axis I & II
Use Axis IV Stressors
Show RO Field in Diagnosis
Hide Previous GAF in Diagnosis
Shows Highest GAF in Diagnosis
Reason for Client Team Unassign
Show Recent Clients in List
Show Target Date in Tx Plans
Use Tx Plan Methods
Show Date & Time in Medical Profile
Hide Medication Notes
Client Email Signature
Client Email From Address
Hide Additional Family Fields
Physician Order/Assigned Physician
Immunization HL7 Exports
Show Client Extended Fields
Use Client Episodes
Parent Program Driven Episodes
Episodes per Program Assignment
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Reason for Client Team Unassign

Reason for Client Team Unassign

When **Reason for Client Team Unassign** is selected, when a client is unassigned from a team, a pop-up window will appear in which the reason for the un-assignment may be entered.

See also

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
Use Visit Type in Client Ins
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Hide Additional Family Fields
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Immunization HL7 Exports
Show Client Extended Fields
Use Client Episodes
Parent Program Driven Episodes
Episodes per Program Assignment
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Show Recent Clients in List

Show Recent Clients in List

When **Show Recent Clients in List** is selected (**highly** recommended), the default view for the Client List will show the clients who have most recently been viewed. This makes it faster and easier for most users to locate the client(s) they're working with.

If this setting is NOT selected (i.e. - the checkbox is left BLANK), the Client List will always display clients whose last names begin with an "A" first, and the user will have to use the sort/filter tools at the top of the screen the locate and select the desired clients every time he/she is on the Client List screen.

See also

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
Use Visit Type in Client Ins
Use Accident Info on Client Ins
Use MRO & HAP Eligible for Axis I & II
Use Axis IV Stressors
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Immunization HL7 Exports
Show Client Extended Fields
Use Client Episodes
Parent Program Driven Episodes
Episodes per Program Assignment
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Show Target Date in Tx Plans

Show Target Date in Tx Plans

When **Show Target Date in Tx Plans** is selected ("Tx" = Treatment), the "Target Date" field will appear on clients' Treatment Plan(s) (Tx Plan) in addition to "Start" and "End" dates.

> Target Date may be used to set progress markers or assessment and adjustment intervals. For example: If a client is started on a new course of medication, a behavioral modification program, etc., and the course of treatment is expected to run from January 1, 2009 (Start Date) through March 31, 2009 (End Date), you may wish to set a Target Date at some point between the Start and End Dates to assess whether or not the expected progress has been made and to make adjustments accordingly.

If the **Show Target Date in Tx Plans** setting is **NOT** selected (i.e. - the checkbox is left BLANK), the "Target Date" field will NOT appear on the client's Treatment Plan. Only the "Start" and "End" dates will appear.

See also

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
Use Visit Type in Client Ins
Use Accident Info on Client Ins
Use MRO & HAP Eligible for Axis I & II
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Show RO Field in Diagnosis
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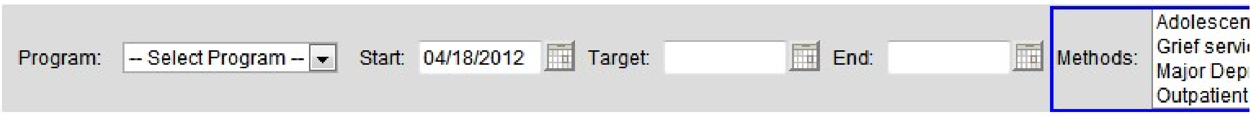
Show Recent Clients in List
Use Tx Plan Methods
Show Date & Time in Medical Profile
Hide Medication Notes
Client Email Signature
Client Email From Address
Hide Additional Family Fields
Physician Order/Assigned Physician
Immunization HL7 Exports
Show Client Extended Fields
Use Client Episodes
Parent Program Driven Episodes
Episodes per Program Assignment
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Use Tx Plan Methods

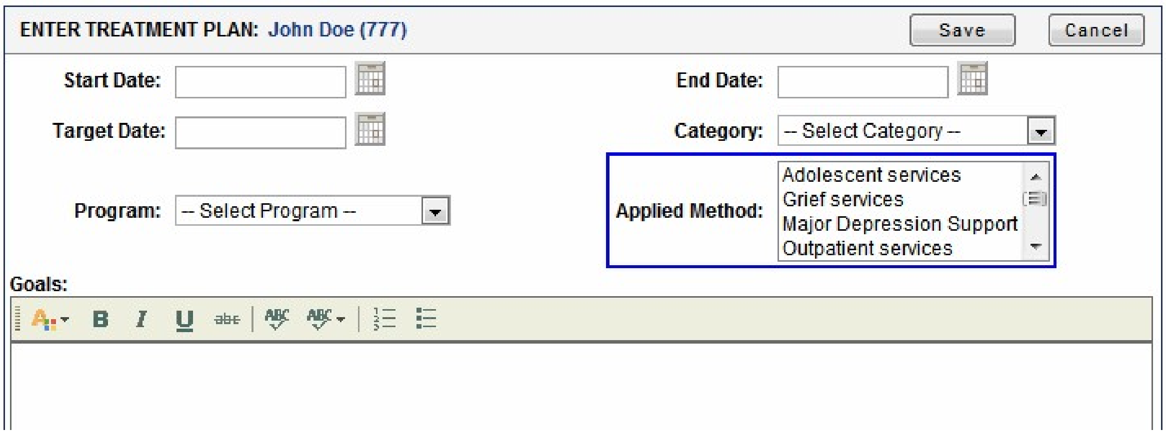
Use Tx Plan Methods

Methods (also referred to as applied methods) are groups of related visit types that you as the administrator set up. If you select this Partner Config setting, staff can select one or more methods for a treatment plan to convey the types of services that will be provided to meet the goals and objectives.

Tx Plus:



Tx Plan:



There is another feature of associating methods with a treatment plan: the system will prevent staff from selecting a visit type for the client if it is not in one of the methods selected for the treatment plan. You have to configure the visit types in the methods to be 'blocked without group' for this to work. The blocking is applicable for visits documented via data entry and web forms.

You can also flag visit type groups for use with insurance and authorizations.

Setting Up a Visit Type Group

1. Admin tab > Visit Type Groups (under Billing Configuration). The Visit Type Group Admin screen displays. You can sort the list by clicking the Group Name column header.
2. Enter a name for the visit type group and click Add Visit Type Group. The new visit type group will be listed.
3. Click the Edit link in the Assigned Types column. A list of all the visit types displays.
4. Click assign for each visit type you want to include in the visit type group. Click Show Assigned Only to review the assigned visit types.
5. When done, click the visit type group name at the top of the screen to return to the Visit Type Group Admin screen.

Configuring a Visit Type to Be Blocked Without Group

1. Admin tab > Visit Type (under Billing Configuration).
2. Edit a visit type.
3. Select the Blocked w/o Group setting and save.

See also
Visit Type
Tx Plus

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Show Date & Time in Medical Profile

Show Date & Time in Medical Profile

When selected, the date and time will display in the Profile Date field in the Client Medical Profile screen.

If a medical profile record was created before this setting was selected, the time will be 12:00 AM (for example, 01/11/2011 12:00 AM).

The timestamp displays military time if the Partner Config setting Display Military Time is selected.

See also
Medical Profile

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
Use Visit Type in Client Ins
Use Accident Info on Client Ins
Use MRO & HAP Eligible for Axis I & II
Use Axis IV Stressors
Show RO Field in Diagnosis
Hide Previous GAF in Diagnosis
Shows Highest GAF in Diagnosis
Default Client Attachment Folders Closed
Reason for Client Team Unassign
Show Recent Clients in List
Show Target Date in Tx Plans
Use Tx Plan Methods
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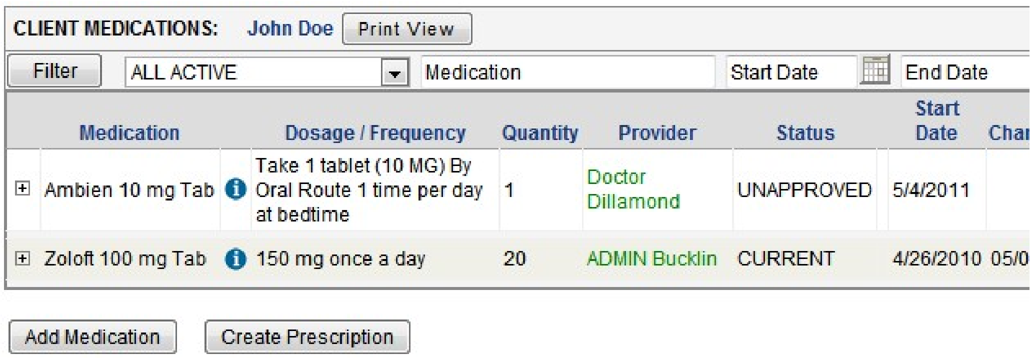
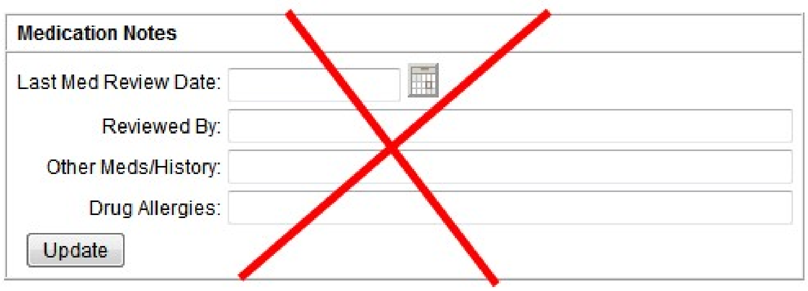
Client Email Signature
Client Email From Address
Hide Additional Family Fields
Physician Order/Assigned Physician
Immunization HL7 Exports
Show Client Extended Fields
Use Client Episodes
Parent Program Driven Episodes
Episodes per Program Assignment
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Hide Medication Notes

Hide Medication Notes

With the introduction of the Allergy function, the Medication Notes box -- displayed below a client's medication list -- is no longer needed so *we recommend that you select this Partner Config setting to hide it.*





Caution: if you choose to use the Medication Notes box, any meds or allergies entered into it will *not* be part of the client's record -- that is, they will not be added to the corresponding lists and will not be considered in drug/drug and drug/allergy checks when creating prescriptions.

See also

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
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Show Client Extended Fields

Use Client Episodes
Parent Program Driven Episodes
Episodes per Program Assignment
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Client Email Signature

Client Email Signature

Client Email Signature is set by Credible staff (no action is needed for this setting).

When an e-mail message is sent through the Client Notes feature in "Tasks," the following will appear as the signature on the e-mail:

> **Credible Behavioral Health**
> Secure.Proven.Easy to Use.

See also

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
Use Visit Type in Client Ins
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Hide Additional Family Fields
Physician Order/Assigned Physician
Immunization HL7 Exports
Show Client Extended Fields
Use Client Episodes
Parent Program Driven Episodes
Episodes per Program Assignment
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Client Email From Address

Client Email From Address

The **Client Email From Address** is set by Credible staff (no action is needed for this setting).

When an e-mail message is sent through the Client Notes feature in "Tasks," the "from" address on the e-mail will show as "**support@credibleinc.com**."

See also

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit
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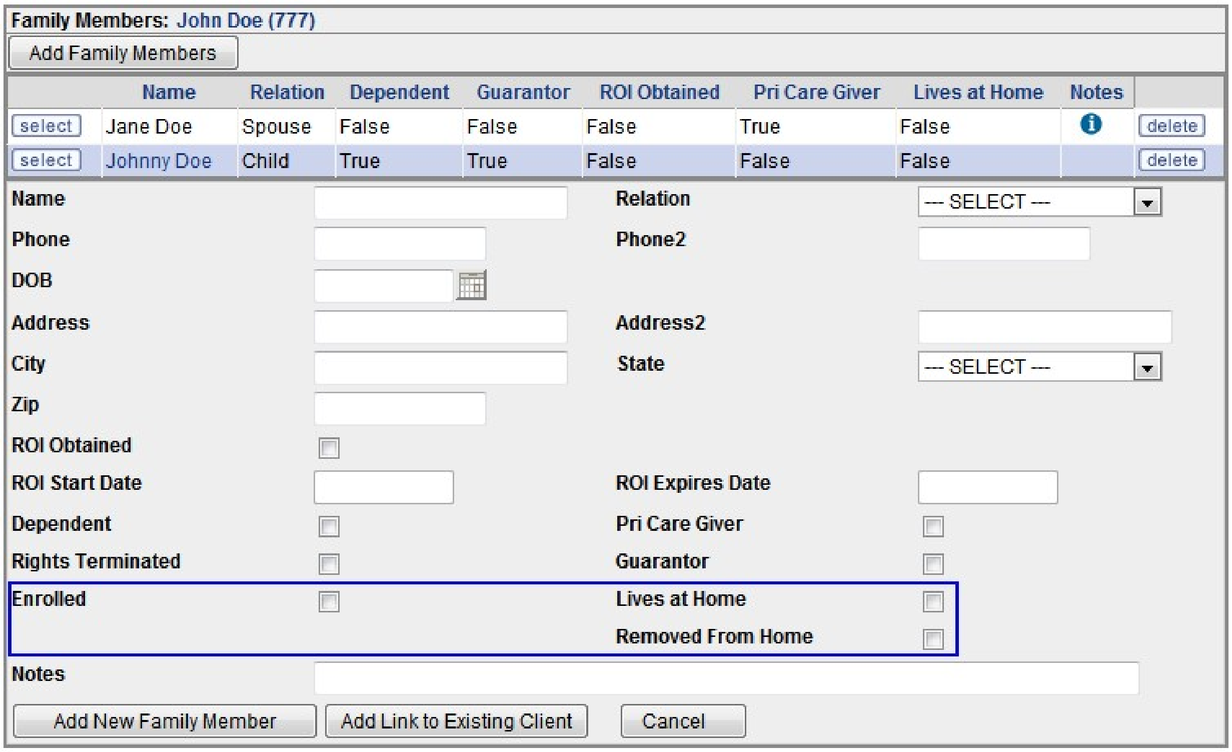
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing
Printing a Diagnosis Code on a Prescription

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Hide Additional Family Fields

Hide Additional Family Fields

When selected, the following fields will be hidden on the Family Members screen: Enrolled, Lives at Home, and Removed from Home.



See also
Use Client Family
Family

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Physician Order/Assigned Physician

Physician Order/Assigned Physician

When checked, Signed By and Physician columns in the Pending Orders section = the selected physician.
When unchecked, the Signed By column = the user that actually signed the order and the Physician column = the selected physician.

You can select (assign) a physician when creating an order and if necessary, change the selection before signing and sending to Pending Orders.

See also
Physician Orders Hide Discontinue Button
Current, Pending, and Completed Orders

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Immunization HL7 Exports

Immunization HL7 Exports

For Meaningful Use. Makes an Export Immunization HL7 button available on the Immunizations screen.

See also
Immunizations
Meaningful Use Guide for Credible Software

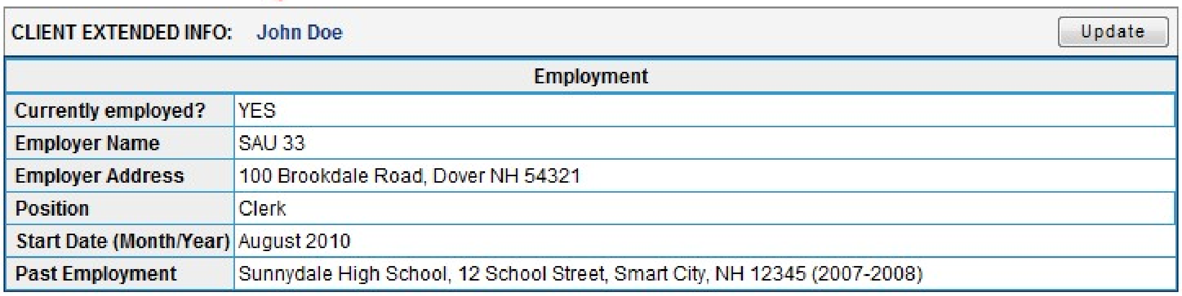
MU §170.302 (k)

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Show Client Extended Fields

Show Client Extended Fields

With Client Extended fields, you can track and report on additional profile information about your clients. These fields are only necessary if you use up all the fields available in the Client Profile.

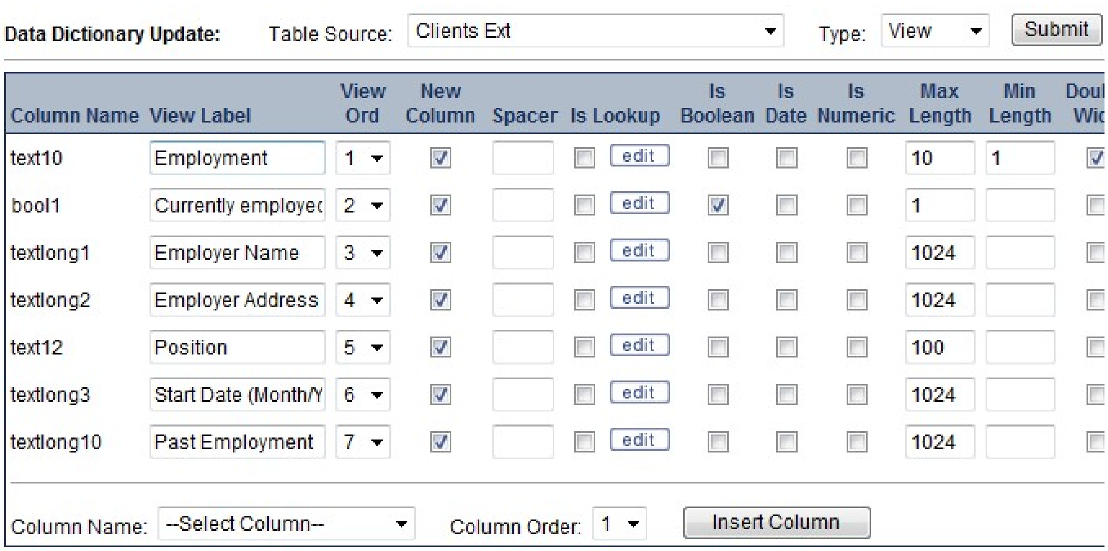
This setting makes the Client Ext function available on the Client nav bar and adds a corresponding Client Extended Info section to the Client Profile.



CLIENT EXTENDED INFO: John Doe — Update

Employment	
Currently employed?	YES
Employer Name	SAU 33
Employer Address	100 Brookdale Road, Dover NH 54321
Position	Clerk
Start Date (Month/Year)	August 2010
Past Employment	Sunnydale High School, 12 School Street, Smart City, NH 12345 (2007-2008)

If you want to use Client Extended fields, you need to use Data Dictionary to add them to the Clients Ext table.



Data Dictionary Update: Table Source: Clients Ext — Type: View — Submit

Column Name	View Label	View Ord	New Column	Spacer	Is Lookup	Is Boolean	Is Date	Is Numeric	Max Length	Min Length	Doul Wic
text10	Employment	1	☑		☐ edit	☐	☐	☐	10	1	☑
bool1	Currently employec	2	☑		☐ edit	☑	☐	☐	1		☐
textlong1	Employer Name	3	☑		☐ edit	☐	☐	☐	1024		☐
textlong2	Employer Address	4	☑		☐ edit	☐	☐	☐	1024		☐
text12	Position	5	☑		☐ edit	☐	☐	☐	100		☐
textlong3	Start Date (Month/Y	6	☑		☐ edit	☐	☐	☐	1024		☐
textlong10	Past Employment	7	☑		☐ edit	☐	☐	☐	1024		☐

Column Name: --Select Column-- Column Order: 1 Insert Column

See also
Data Dictionary

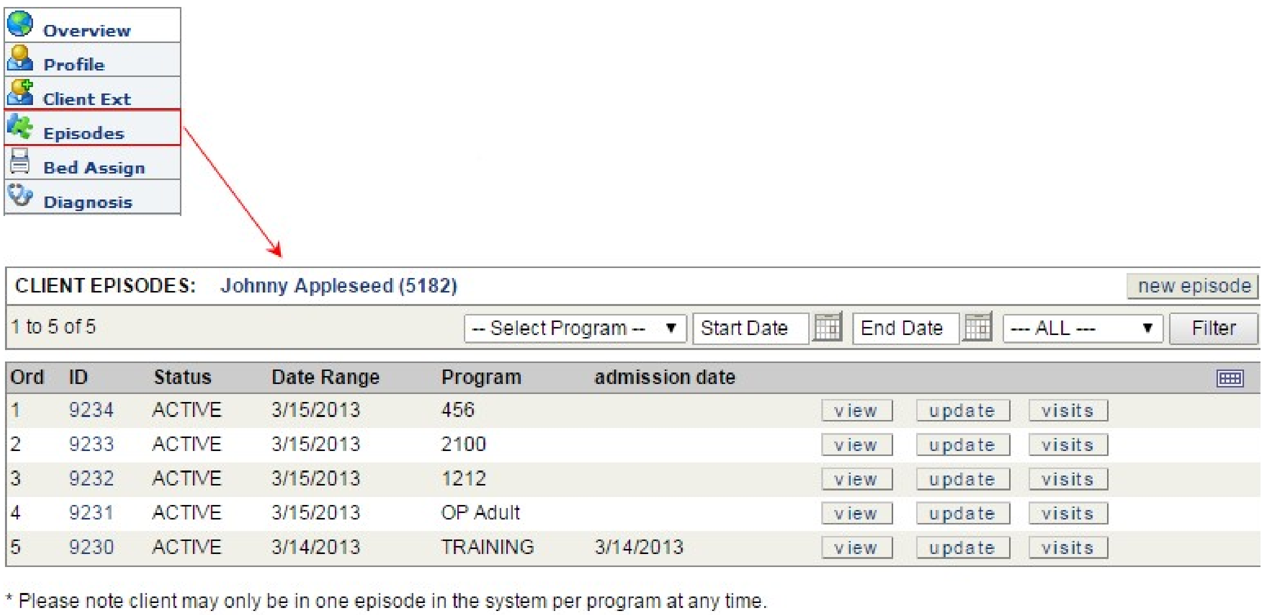
Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required
Use Med History Notes
Force Client Teams
Allow Insurance ID Edit

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Use Client Episodes

Use Client Episodes

Client episodes refer to "episodes of care" and allow you to track multiple admissions and discharges related to a single episode of care. If your organization has a foster care program, users can assign a client to a foster home when adding a new episode. With Advanced Client Search, you can search only for clients that have had an episode and include active and discharged (closed) episodes

The *Use Client Episodes* setting makes the Episodes function available on the Client nav bar.



See also

Programs
Parent Program Driven Episodes
Redirect to Update on Last Episode
Check Future Schedule for Episode before Closing

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Parent Program Driven Episodes

Parent Program Driven Episodes

A program can be defined as a Parent program but clients cannot be assigned to it directly. When the *Parent Program Driven Episodes* setting is selected, the Parent program drives episode creation and closing. However, the closing of the episode can only occur if the episode details are finalized.

If a client is assigned to a "child" program, he or she will be auto assigned to the related Parent program and a client episode will be automatically be created in the Parent program. This allows you to track entry to and exit from Parent programs, which is a requirement in some states (for example, Virginia).

Note: if Parent Program Driven Episodes and Episodes per Program Assignment are both enabled, the former trumps the latter if a parent program episode does not already exist when you assign a child program. In this scenario, the system will only add a parent program episode.

See also
Programs
Episodes per Program Assignment
Redirect to Update on Last Episode
Use Client Episodes
Check Future Schedule for Episode before Closing

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Episodes per Program Assignment

Episodes per Program Assignment

When this feature is selected, the system will automatically create an episode when a client is assigned to a program. The episode will be automatically closed when the client is unassigned from the program.

Note: if Parent Program Driven Episodes and Episodes per Program Assignment are both enabled, the former trumps the latter if a parent program episode does not already exist when you assign a child program. In this scenario, the system will only add a parent program episode.

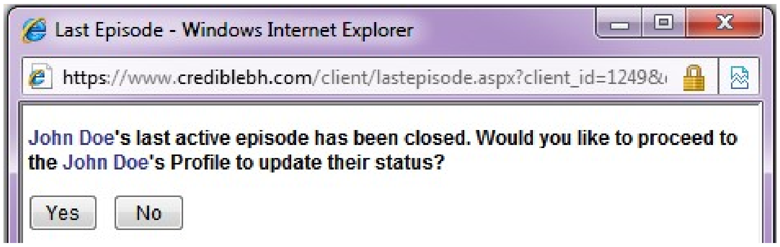
See also

Client Program Assignment
Programs
Parent Program Driven Episodes
Redirect to Update on Last Episode
Use Client Episodes
Check Future Schedule for Episode before Closing

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Redirect to Update on Last Episode

Redirect to Update on Last Episode

When selected, a Last Episode popup will display when you close the last active episode for a client.



The popup gives you the option of going to the client's Profile screen to change his or her status.

Best practice: select this setting as part of your Admission & Discharge best practices.

See also

Programs
Parent Program Driven Episodes
Redirect to Update on Last Episode
Use Client Episodes
Check Future Schedule for Episode before Closing

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Check Future Schedule for Episode before Closing

Check Future Schedule for Episode before Closing

Your system can be set up to display a warning message if an employee tries to close an episode for a client and one of the following conditions is met:

- One or more future appointments exist and have the same program as the episode being closed
- The episode is for the parent program of the service being closed

See also
Episodes

Home > Admin > Site Configuration > Partner Config > Partner Config: Client Settings > Printing a Diagnosis Code on a Prescription

Printing a Diagnosis Code on a Prescription

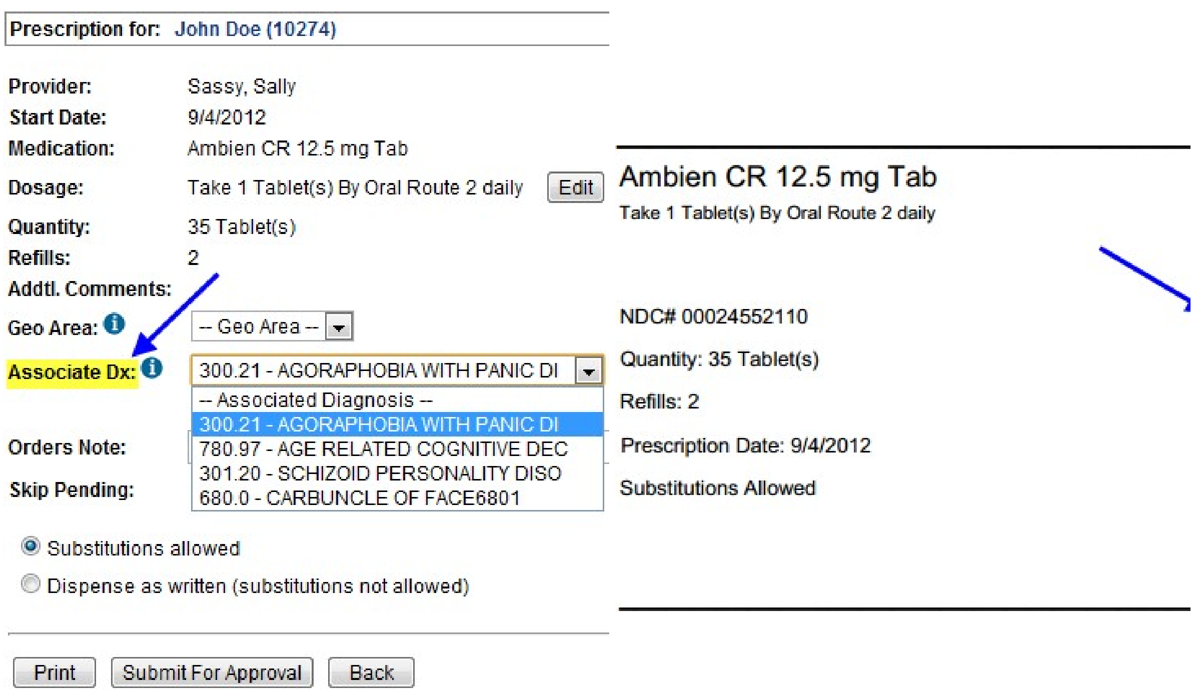
If your state has certain drugs that require a diagnosis on the prescription, you can make that association when creating a prescription with Credible eRx.

For information on adding one or more diagnoses to a client's record, see Diagnosis in the help.

Settings
Partner Config: Associate Diagnosis to Med
Security Matrix: RxUpdate, DxAdd or DxFormsAdd

To print a diagnosis code on a prescription:

1. Create a prescription. For more information, see Creating a Prescription in the help.
2. On the Finalize screen, select the appropriate diagnosis from the Associate Dx dropdown and complete the script or submit it for approval.



- Only active diagnoses are listed in the Dx dropdown.
- If you are using a custom Credible eRx print template, you will need to manually add the Diagnosis field.

See also

Client Notes Settings
Automatically Update Diagnosis: Problem List
Exclude V and Z codes from Auto Update
V and Z Diagnosis Codes in Claims
Use Client Family
ROI Dates Required

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings

Partner Config: Authorization Settings

Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date

See also

Authorizations
Authorization Levels
Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Use Authorization Levels

Use Authorization Levels

When **Use Authorization Levels** is selected, the system will allow you to enter and use predefined levels of authorizations. This can make data entry easier by providing a "shortcut" for entering complex authorizations, or when predefined authorizations from payers exist.

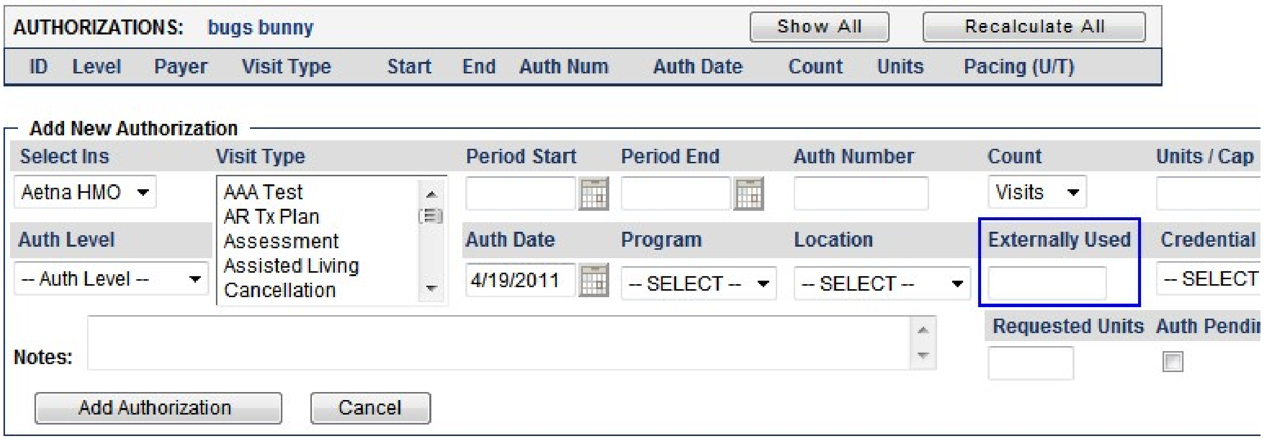
See also

Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Use Authorization External Field

Use Authorization External Field

When this Partner Config setting is selected, an Externally Used field is added to the Authorizations screen.



This field is useful when adding a client authorization that existed in another system and some of the units have already been used (this information can be brought into Credible via an import). When a value is entered in the Externally Used field, the system adjusts the remaining units and pacing accordingly.

See also
Authorizations

Use Authorization Levels
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Allow Provider Specific Auths

Allow Provider Specific Auths

When **Allow Provider Specific Auths** is selected, the system will allow authorizations ("auths") to be entered that are specific to one provider. This will also allow you to tie an authorization to a specific employee (provider).

See also

Use Authorization Levels
Use Authorization External Field
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Use Authorization Locations

Use Authorization Locations

When **Use Authorization Locations** is selected, the system will allow authorizations to be restricted by or to a specific location.

See also

Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Use Authorization Programs

Use Authorization Programs

Selecting **Use Authorization Programs** will allow authorizations to be restricted by or to a specific program.

See also

Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Allow Auth Required in Client Ins

Allow Auth Required in Client Ins

When selected, **Allow Auth Required in Client Ins** will allow an "authorization required" override in the client insurance record. If you do NOT want to allow authorization overrides in client insurance records, simply leave this checkbox BLANK.

For a payer that requires authorizations, turning this setting ON provides the ability to override the authorization requirement at the client level, and allows you to override "yes" or "no" (overrides payer setting).

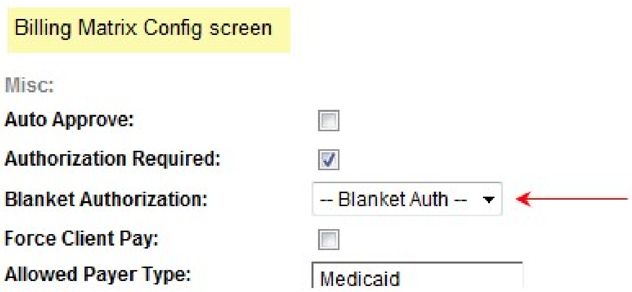
See also

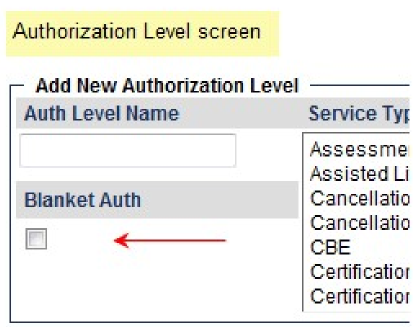
Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Use Blanket Authorizations

Use Blanket Authorizations

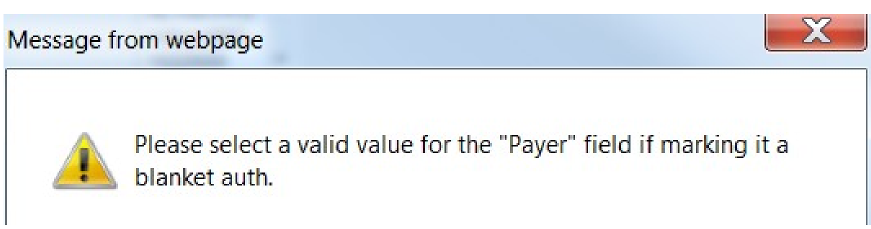
This setting lets you associate a blanket authorization with a specific line (program/visit type) in the Billing Matrix. When selected, a Blanket Authorization dropdown is added to the Billing Matrix Config screen and a Blanket Authorization checkbox is added to the Authorization Level screen.





If you select a blanket authorization for a Billing Matrix entry and set up a blanket authorization auth level that matches the visit type of the matrix line, an authorization will automatically be created for a client when the specified type of visit is completed. In other words, this creates an authorization that can be applied to multiple Clients because the authorization is by program/visit type.

Note that a Payer is required for an auth level if you set it up as a blanket authorization.



See also

Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Use Auth Spanning

Use Auth Spanning

When selected, a single visit can use the visits, units, hours, or rate available on two authorizations. If a visit causes an authorization to max out, the visit will pull visits (or other count type) from the second authorization so that all available authorized units are used.

Both authorizations must match the visit and the second authorization must have enough visits (or other count type) to accomodate the excess.

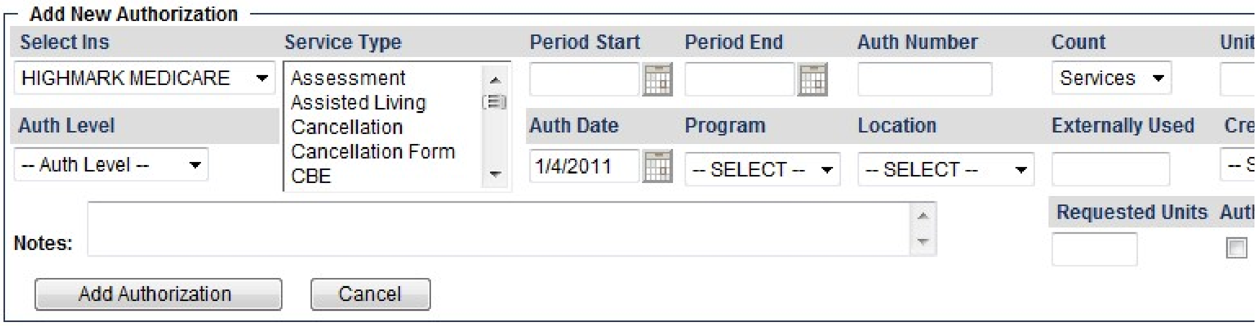
See also

Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date
Authorizations

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Use Auth Primary Flag

Use Auth Primary Flag

When selected, a Primary checkbox is added to the Authorizations screen and Authorization Levels screen. If there are multiple authorizations that could match a visit, selecting the checkbox will make the system use that authorization first.



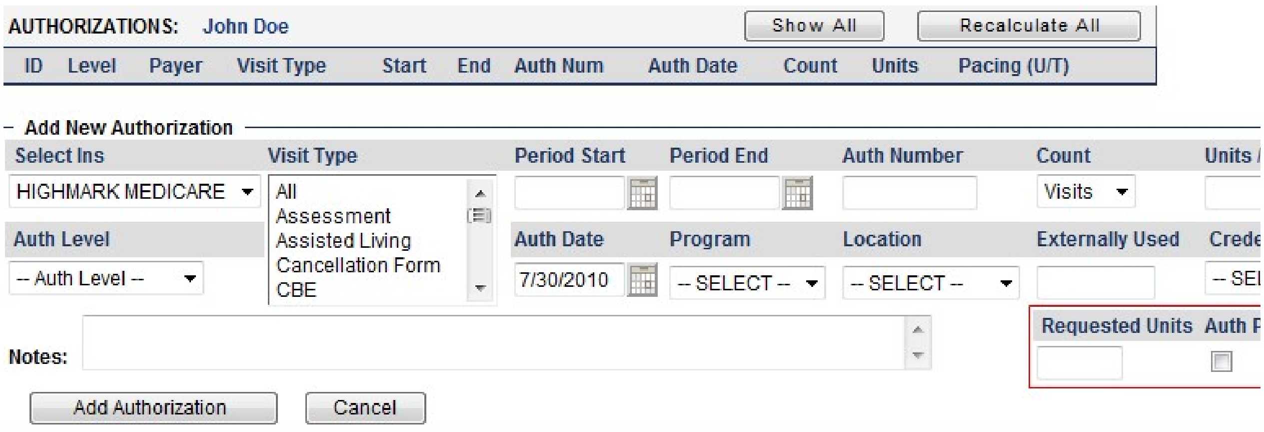
See also

Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date
Authorizations

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Use Auth Pending

Use Auth Pending

When selected, the Authorizations screen will have two additional fields: Requested Units and Auth Pending.



If an employee is waiting for approval from an insurance company to provide services to the client, he or she can use these two fields to create a pending authorization. When an authorization is marked as Pending, it will *not* decrement or match against any visits.

See also

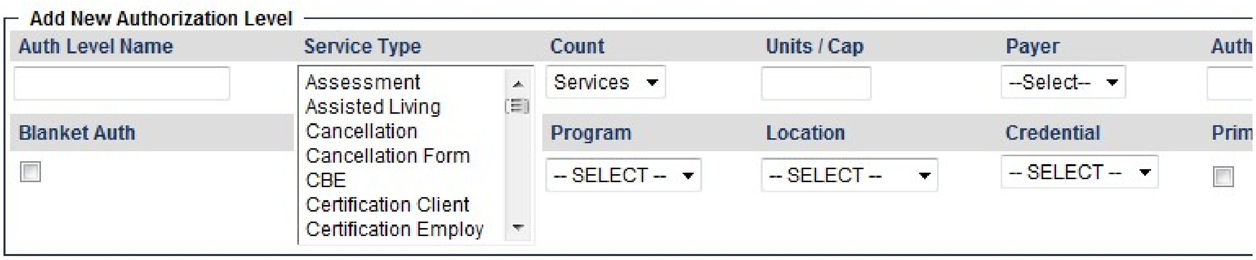
Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date
Authorizations

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Use Auth Level Billing Matrix

Use Auth Level Billing Matrix

If your organization is providing individual authorizations per tiered rate, you can configure your system so users can tie client authorizations to specific Billing Matrix lines.

When this Partner Config setting is selected, a Billing Matrix dropdown is added to the Authorization Level screen. With it, you can link an auth level to a specific Billing Matrix line. When a user adds an authorization and selects that auth level, the authorization will be tied to the specific Billing Matrix line.



To configure:

1. **Admin** tab > **Partner Config,** select *Use Auth Level Billing Marix,* and click **Save Partner Config.**
2. **Admin** tab > **Authorization Levels.**
3. Add a new auth level or update an existing one.
4. From the Billing Matrix dropdown, select the matrix line you want to tie the auth level to. Make sure the matrix line you select has the Authorization Required checkbox selected.

   Note that you cannot change the matrix line selected for an individual auth when you are in the Authorizations screen for a client – it can only be done at the auth level.
5. Add/update other fields as necessary and save.

See also

Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Red X Exceed Auths
Show Pending on Authorization Report
Use Auth TPL Date

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Red X Exceed Auths

Red X Exceed Auths

If selected, any service that has exceeded an authorization will red X when you generate a batch claim file.

See also

Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Show Pending on Authorization Report
Use Auth TPL Date

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Show Pending on Authorization Report

Show Pending on Authorization Report

When selected, a Pending column will be added to the Authorizations report. If an authorization is pending, the word True appears in the column.

Authorizations: Showing 11 to 20 of 117.

ID	Pending	Client	Payer	Visit Type	Auth Number	Period Start	Period End	Units
172		bunny, bugs	Blue Cross	Ind Ther InSight	678	5/4/2010	7/30/2010	0 / 12
173		Credible, Client 1	Medicare	All	100	5/10/2010	11/10/2010	16 / 2
80	**True**	Credible, Client 2	Comm Behav Health	CBE	888999	5/31/2010	8/11/2010	0 / 1
108		Credible, Client 3	Medicare	Progress Note	654	4/5/2010	10/5/2010	3 / 24
106		ClientA, Test	Medicare	Grp Therapy	999999	1/1/2010	12/31/2010	12 / 8
21		Claus, Santa	Magellan	Grp Therapy	12345	4/7/2009	8/9/2010	0 / 34

Key:
- Within anticipated pace (+/- 5%)
- Exceeding anticipated pace
- Over authorized amount
- Under anticipated pace
- Inactive Period

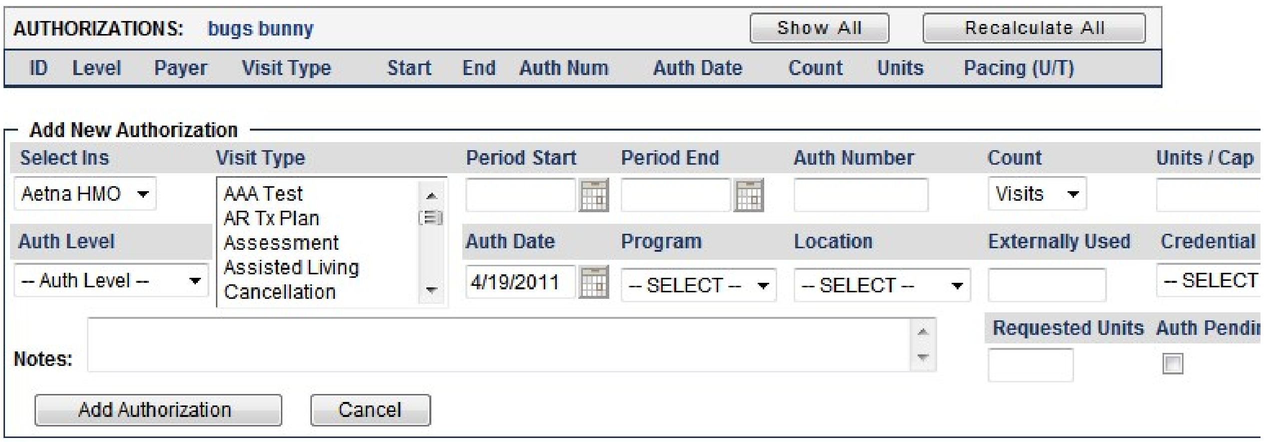
See also

Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Use Auth TPL Date
Authorizations Report

Home > Admin > Site Configuration > Partner Config > Partner Config: Authorization Settings > Use Auth TPL Date

Use Auth TPL Date

When this Partner Config setting is selected, a TPL Date field is added to the Authorizations screen.



If you know in advance that some services will not be covered by specific payers and the payer you are reporting to requires this information, you can use this field to send a third-party liability (TPL) denial date along with the claim.

If a TPL date is entered, the denial date is included in the batch (for example, DTP*573*D8*20110122 - LINE ADJUDICATION DATE). If a TPL date is not entered, the service date will be sent.

See also
Authorizations

Use Authorization Levels
Use Authorization External Field
Allow Provider Specific Auths
Use Authorization Locations
Use Authorization Programs
Allow Auth Required in Client Ins
Use Blanket Authorizations
Use Auth Spanning
Use Auth Primary Flag
Use Auth Pending
Use Auth Level Billing Matrix
Red X Exceed Auths
Show Pending on Authorization Report

Home > Admin > Site Configuration > Partner Config > Partner Config: Liability Settings

Partner Config: Liability Settings

Liability Settings	
Use PA Client Liability:	☐
Use VA Scale Client Liability:	☐
Use VA Sliding Fee Liability:	☐
Use Basic Liability Worksheet:	☑
Auto Process Self Pay And Liability:	☑
Auto Adj Copays Exceeding Liability:	☐
Process Liability for Uninsured:	☐

Use PA Client Liability

Use VA Scale Client Liability

Use VA Sliding Fee Liability

Use Basic Liability Worksheet

Auto Process Self Pay and Liability

Auto Adj Copays Exceeding Liability

Process Liability for Uninsured

See also

Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Visit Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

Home > Admin > Site Configuration > Partner Config > Partner Config: Liability Settings > Use PA Client Liability

Use PA Client Liability

When ***Use PA Client Liability*** is selected, the system will use the Pennsylvania spreadsheet for determining monthly client liability.

Please note: If you use *PA Client Liability*, you cannot use the *VA Scale Client Liability*, *VA Sliding Fee Liability*, or *Basic Liability* worksheets.

See also

Use VA Scale Client Liability
Use VA Sliding Fee Liability
Use Basic Liability Worksheet
Auto Process Self Pay and Liability
Auto Adj Copays Exceeding Liability
Process Liability for Uninsured

Updated 6/27/2017 1:06 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Liability Settings > Use VA Scale Client Liability

Use VA Scale Client Liability

When *Use VA Scale Client Liability* is selected, the sysem will use the Virginia spreadsheet for determining per-unit client liability.

Note If you use VA Scale Client Liability, you cannot use the PA Scale Client Liability, VA Sliding Fee Liability, or Basic Liability worksheet.

See also

Use PA Client Liability
Use VA Sliding Fee Liability
Use Basic Liability Worksheet
Auto Process Self Pay and Liability
Auto Adj Copays Exceeding Liability
Process Liability for Uninsured

Home > Admin > Site Configuration > Partner Config > Partner Config: Liability Settings > Use VA Sliding Fee Liability

Use VA Sliding Fee Liability

When *Use VA Sliding Fee Liability* is selected, the sysem will use the Virginia spreadsheet for determining client liability.

Note If you use VA Sliding Fee Liability, you cannot use the PA Client Liability, VA Scale Client Liability, or Basic Liability worksheet.

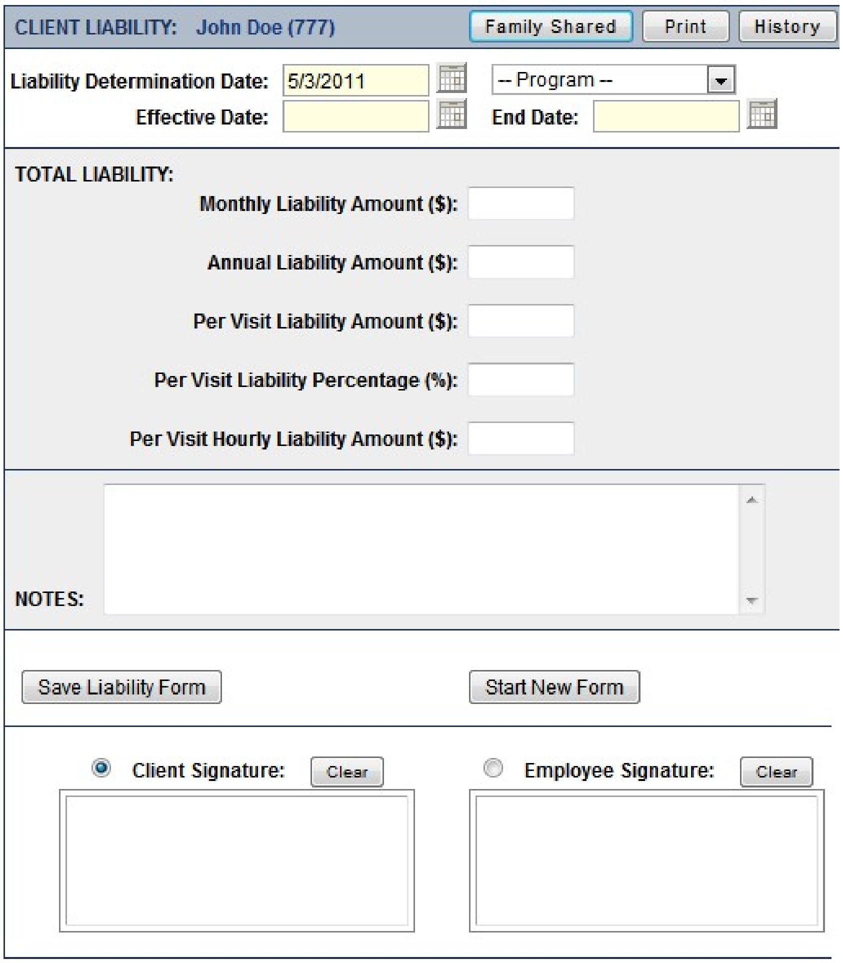
See also

Use PA Client Liability
Use VA Scale Client Liability
Use Basic Liability Worksheet
Auto Process Self Pay and Liability
Auto Adj Copays Exceeding Liability
Process Liability for Uninsured

Home > Admin > Site Configuration > Partner Config > Partner Config: Liability Settings > Use Basic Liability Worksheet

Use Basic Liability Worksheet

When this Partner Config setting is selected, the sysem will use a basic client liability screen with just date ranges and liability amounts.



If your organization uses the Basic Liability form, you can set up a liability percent override, liability minimum override, and liability multiplier when configuring visit types.

See also

Use PA Client Liability
Use VA Scale Client Liability
Use VA Sliding Fee Liability
Auto Process Self Pay and Liability
Auto Adj Copays Exceeding Liability
Process Liability for Uninsured
Visit Type

Home > Admin > Site Configuration > Partner Config > Partner Config: Liability Settings > Auto Process Self Pay and Liability

Auto Process Self Pay and Liability

Use this Partner Config setting to push the balance of a service from the Self Pay payer through Liability (if one exists) to the client. This will save you from having to batch and reject the service or batch and transfer the balance to the client. The push happens each night through a script that runs automatically.

Prerequisites: the service must be approved and the balance needs to be sitting at the Self Pay payer. The client must have an active Liability form prior to when the nightly script is run.

The active Liability form is only required if it is going to run through Liability. To auto process Self Pay, the following is required:

- Payer, set with Self Pay = TRUE
- Client linked to Self Pay payer
- Visit balance sitting at Self Pay
- Partner Config *Auto Process Self Pay and Liability* = TRUE

The balance will transfer to client.

See also
Use PA Client Liability
Use VA Scale Client Liability
Use VA Sliding Fee Liability
Use Basic Liability Worksheet
Auto Adj Copays Exceeding Liability
Process Liability for Uninsured

Home > Admin > Site Configuration > Partner Config > Partner Config: Liability Settings > Auto Adj Copays Exceeding Liability

Auto Adj Copays Exceeding Liability

When selected, the system automatically writes off any copay amounts exceeding the liability. The writeoff occurs when an employee signs and submits the visit. When not selected, the system waits until the visit reaches client due and then writes off any copay amount to liability.

Recommendation: do not select

See also

Use PA Client Liability
Use VA Scale Client Liability
Use VA Sliding Fee Liability
Use Basic Liability Worksheet
Auto Process Self Pay and Liability
Process Liability for Uninsured

Home > Admin > Site Configuration > Partner Config > Partner Config: Liability Settings > Process Liability for Uninsured

Process Liability for Uninsured

Process liability for uncovered/force-client-pay services when a client insurance record exists.

The client must have an active insurance record which is in effect at the date of the service. This could be self-pay or other options. The process makes the assumption that a record in the insurance list indicates that someone has verified the insurance status of the client.

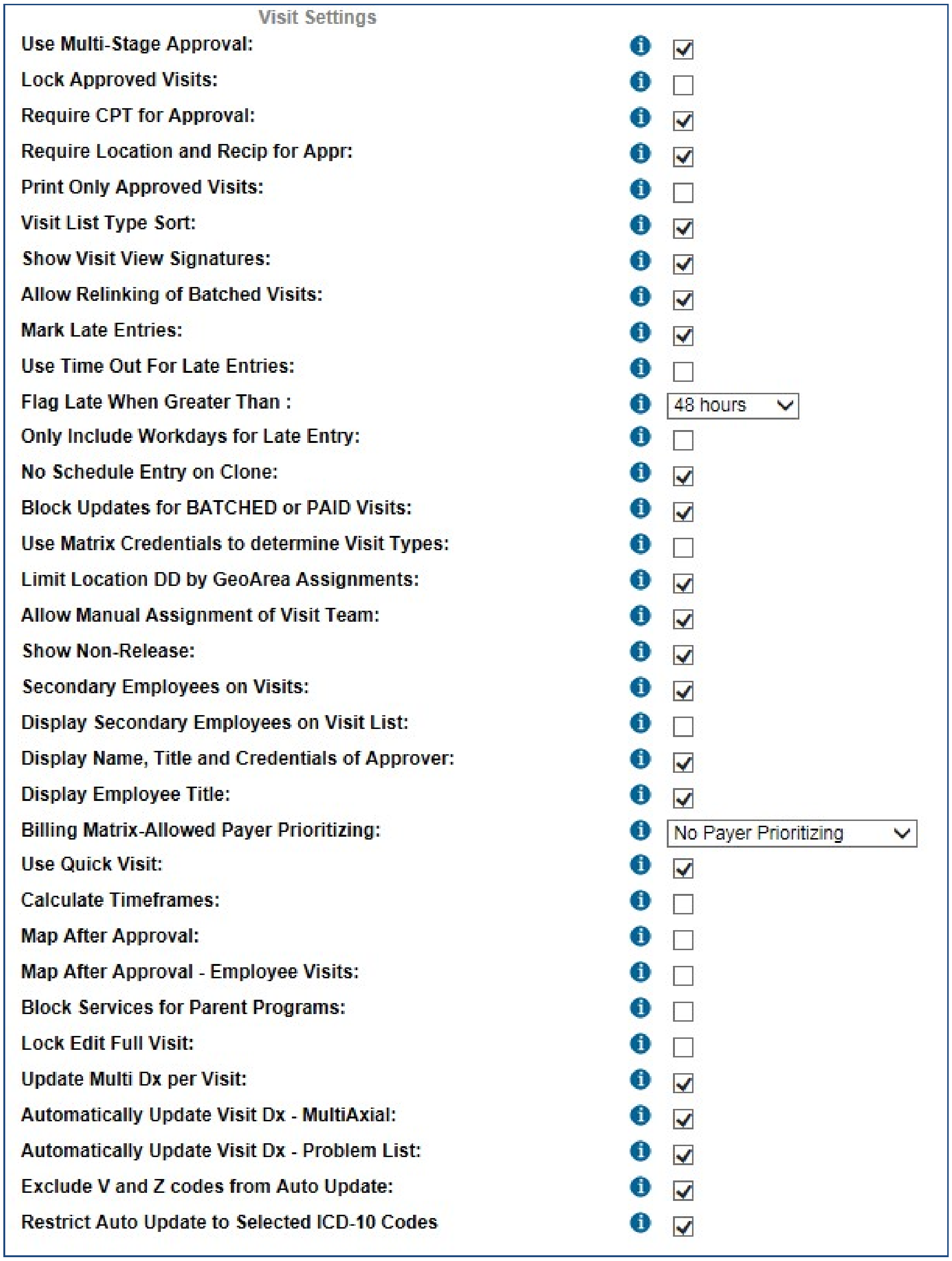
See also

Use PA Client Liability
Use VA Scale Client Liability
Use VA Sliding Fee Liability
Use Basic Liability Worksheet
Auto Process Self Pay and Liability
Auto Adj Copays Exceeding Liability

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings

Partner Config: Visit Settings

This section includes a number of different settings that affect visits and how they are handled, including approvals, code requirements, signatures, batching, and more.



If you need more information about any of the settings in this section, mouse over the information symbol to see a brief tool tip.

When finished selecting your desired settings, click the **Save Partner Config** button at the bottom of the screen. To exit without saving your selections, click **Cancel**.

Use Multi-Stage Approval

Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

See also

Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Use Multi-Stage Approval

Use Multi-Stage Approval

Selecting **Use Multi-Stage Approval** will allow you to establish a chain of approval (multi-stage approval), or multiple approval roles, instead of having a single approval point (as with a supervisor).

If you prefer to have a single point of approval for visits, simply leave the checkbox for this setting BLANK.

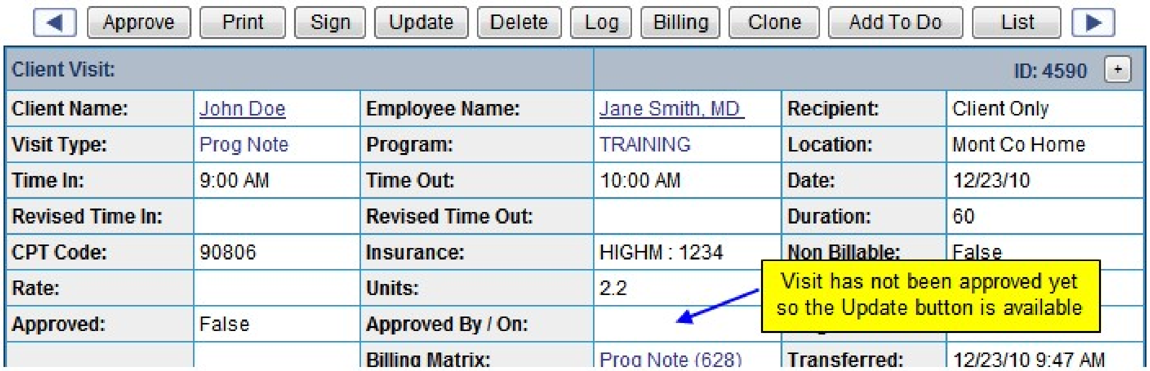
See also

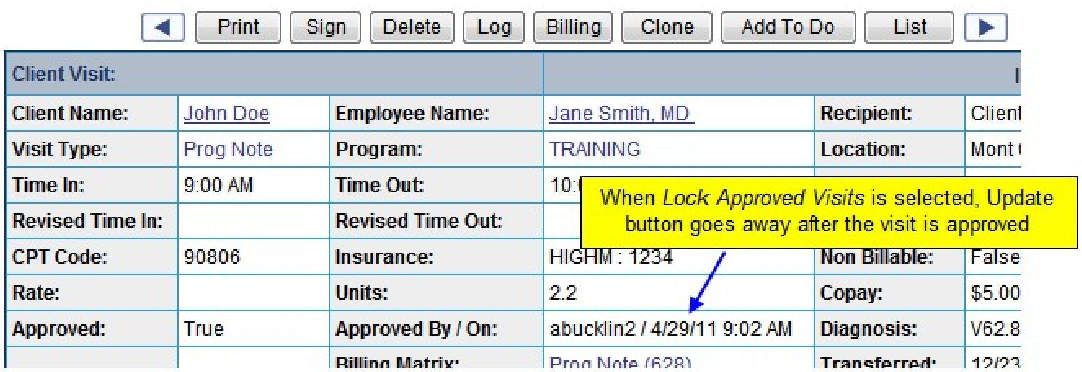
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

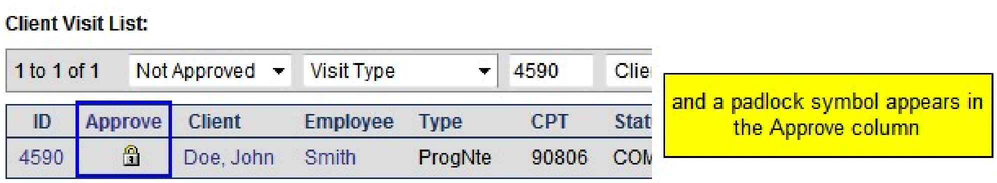
Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Lock Approved Visits

Lock Approved Visits

When selected, the system prevents visits from being updated after they've been approved by removing the Update button from the Visit Details screen. The system also displays a padlock symbol in the Approve column after a visit is approved.







If a user has the *ClientVisitUnApprove* right, an Unapprove button will be added to the Visit Details screen. Once a locked visit is unapproved, it can be updated so make sure this right is only given to the necessary staff.

Another admin-level right you need to be careful with is *ClientVisitUpdateLocked.* If a user has this right, he or she will still have access to the Update button in the Visit Details screen after the visit has been locked.

Recommendation: select *Lock Approved Visits* to prevent changes to approved visits. If you don't select this Partner Config setting, the visit header information and clinical documentation can be changed after approval.

See also

Use Multi-Stage Approval
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Require CPT for Approval

Require CPT for Approval

When selected, the system will require a visit to have a valid CPT code before it can be approved. CPT codes are only assigned when a visit matches a matrix line; rates are only assigned upon a match. Requiring a CPT code for approval can help you identify gaps in the Billing Matrix.

Recommendation: it is highly recommended that you select this setting. If you don't select *Require CPT for Approval,* visits can be approved without matching a matrix line and expected revenue will not be generated.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Require Location and Recip for Appr

Require Location and Recip for Appr

When Require Location and Recipient for Approval is selected, the system will require a visit to have a valid location and recipient before it can be approved. If the visit does *not* have a valid location or recipient attached to it, a red X will be generated for the visit. Proper insurance billing requires a POS (place of service) code.

Recommendation: it is highly recommended that you select this setting. If you don't select *Require Location and Recip for Appr,* visits that do not have a location specified can be approved. These visits will not be batchable and will show up on the Batch Claim Error report as missing location code.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Print Only Approved Visits

Print Only Approved Visits

When **Print Only Approved Visits** is selected, only visits that have been approved will be printed (this will lock out printing until a visit is approved).

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Visit List Sort Type

Visit List Sort Type

When **Visit List Sort Type** is selected, the "Visit Type" filter will appear at the top of the screen on the Visit List page (what appears when you click on the "Visit" tab), which allows users to sort/filter by Visit Type. If Visit List Sort Type is NOT selected, this sort/filter option will NOT appear.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Show Visit View Signatures

Show Visit View Signatures

When the **Show Visit View Signatures** setting is selected, visit signatures will show on Visit View page.

NOTE: Signatures ALWAYS show on the Print View, but the **Show Visit View Signatures** setting determines whether or not they ALSO show on the Visit View page.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Allow Relinking of Batched Visits

Allow Relinking of Batched Visits

When selected, the system will allow visits that are in BATCHED status to be relinked to a different client. This means that after a visit has been billed to a payer but before payment has been received, the visit can moved to a different client or performed by a different employee. Since this basically changes the underlying claim that the insurance is paying, allowing relinking of batched visits is not recommended.

Recommendation: it is highly recommended that you do not select this setting. Visits and documentation should not be changed after being sent to a payer.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Mark Late Entries & Use Time Out For Late Entries

Mark Late Entries & Use Time Out For Late Entries

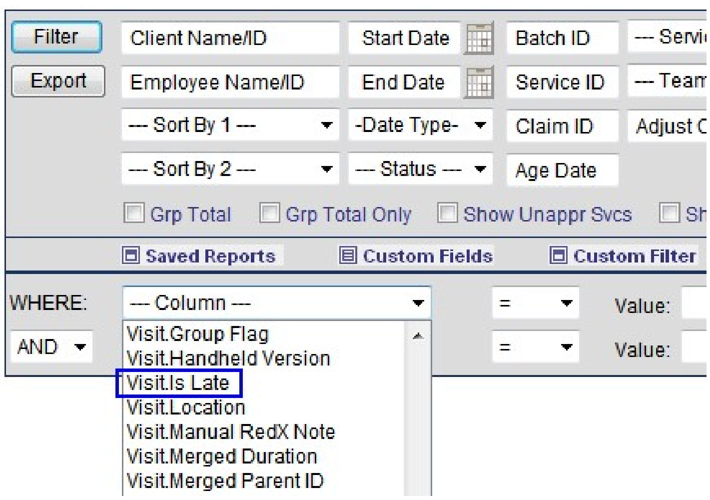
When selected and *Flag Late When Greater Than* is set to nothing, the system will note "LATE ENTRY" on the Visit Details screen and print view if the visit is signed on the second day after the Visit Date/Time In or any day after that. The visit will be flagged as late regardless of the time the visit was signed on the second day. The employee must have the ClientVisitFlagLate right.

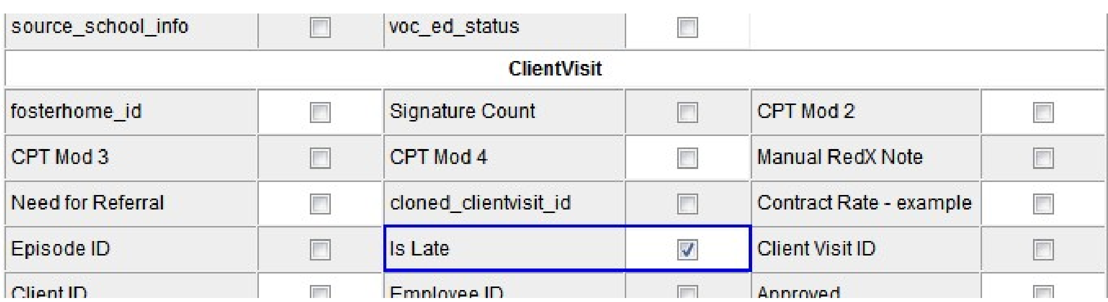
To change the default late timeframe, select an option from the Flag Late When Greater Than. Late visits are calculated based on minutes. For example, If Flag Late When Greater Than is set to 16 hours, a service signed at 15 hours 59 minutes is not late. Note that the 1 day option refers to anything on the previous day – it is not the same as 24 hours. For example, a visit starting at 5/18/11 11:59 pm and transferred at 5/19/11 12:01 am will be late as the days are different – even though the time difference is just 2 minutes.

To have the system use the visit time out instead of the default visit time in as the basis for the Mark Late Entries calculation, select *Use Time Out For Late Entries*.

With the Partner Config setting *Only Include Workdays for Late Entry*, 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.

The system uses the Is Late flag for late notifications. You can also use it in a custom filter and select it as a custom field in Advanced Visit Search and Advanced Ledger Search.





See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Flag Late When Greater Than
No Schedule Entry on Clone

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Flag Late When Greater Than

Flag Late When Greater Than

Lets you override the default timeframe the system uses when marking late entries. The default is the second day after the Visit Date/Time In or any day after that; the visit will be flagged as late regardless of the time the visit was signed on the second day.

To override the default timeframe, select the desired number of hours from the dropdown -- the minimum is 24 and the maximum is 168 (7 days). If the number of hours between the Visit Date/Time In and Signed Date/Time exceeds the number of hours specified, the system marks the visit as late. With the Partner Config setting *Use Time Out For Late Entries*, you can have the system use the visit time out instead of the default visit time in as the basis for the Mark Late Entries calculation.

Note that the 1 day option is anything on the previous day – it is not the same as 24 hours. For example, a visit starting at 5/18/11 11:59 pm and transferred at 5/19/11 12:01 am will be late as the days are different –even though the time difference is just 2 minutes.

The *Mark Late Entries* setting must be selected and the employee must have the *ClientVisitFlagLate* right.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > No Schedule Entry on Clone

No Schedule Entry on Clone

When No Schedule Entry on Clone is selected, the system will *not* create a schedule entry when a user clones a completed visit (via the Clone button in the Visit Details screen). While this setting is recommended, it is important to note that selecting it disables the Clone Group functionality.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Block Updates for BATCHED or PAID Visits

Block Updates for BATCHED or PAID Visits

When selected, the system will disallow updates on any visit that is in BATCHED or PAID status. If this setting is not selected, a visit can be changed (header information and clinical documentation) while a payer is processing the claim. This basically changes the underlying claim that the insurance is paying (or has already paid).

Recommendation: it is highly recommended that you select this setting. Visits and documentation should not be changed after being sent to a payer.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Use Matrix Credentials to Determine Visit Types

Use Matrix Credentials to Determine Visit Types

When **Use Matrix Credentials to Determine Visit Types** is selected, an employee's credentials can be associated with specific Program/Visit Types through the Billing Matrix to determine which visit types appear on the employee's Visit Type drop-down menu when he/she is scheduling visits. When this is used, if an employee does NOT have a credential necessary to access a certain visit type, that visit type will NOT appear in Visit Type drop-down menu.

This is a useful tool if you would like to limit access to certain visit types based on an employee's credentials.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
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Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Limit Location DD by GeoArea Assignments

Limit Location DD by GeoArea Assignments

With the GeoAreas assignment function and the Partner Config setting *Limit the Location DD by GeoArea Assignments*, you can limit the locations available when scheduling or adding a visit to the ones an employee and/or client are configured to work with. Configuring the geo area/location connection involves setting up geo areas and then selecting one for each location. You then use the GeoAreas function on the Employee and Client nav bars to make the geo area assignments.

When an employee schedules or adds a visit, the Location dropdown will only contains locations that are not associated with geo areas and locations associated with geo areas that are assigned to the employee and client. Geo areas are now included in the Assignments section of client and employee records.

Settings

Security Matrix: AssignClientGeoAreas, AssignEmployeeGeoAreas
Partner Config: Limit the Location DD by GeoArea Assignments

1. Create geo areas (Admin tab > Geo Areas/Offices).
2. Create visit locations and select a geo area for each one (Admin tab > Locations).
3. Assign geo areas to employee and client records (GeoAreas button on the Employee and Client nav bars).

See also
Geo Areas/Offices
Locations

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
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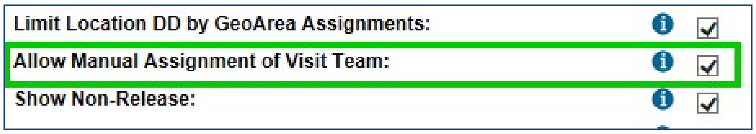
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

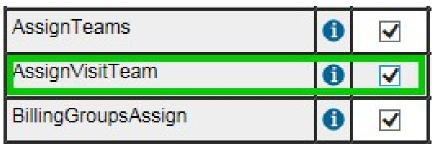
Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Allow Manual Assignment of Visit Team

Allow Manual Assignment of Visit Team

Teams are automatically assigned to visits using a best-match approach. For example, a team that is shared by the client, employee, and the visit's program would be automatically assigned before a team that is only shared by the client and employee.

The setting **Partner Config: Allow Manual Assignment of Visit Team**, and a new security right, **AssignVisitTeam**, provide an override to the automatic team functionality.





When **Allow Manual Assignment of Visit Team** is checked, users with the **AssignVisitTeam** Security Matrix right have a Team dropdown visible when Sign & Submitting and updating a visit. The dropdown contains an alphabetical list of all the teams the client, employee, and visit program are assigned to. A team must be selected from this dropdown before the visit can be saved. Note: Users with the *ClientVisitViewSummary* security right have a more limited view when updating a visit, and will not see the Team dropdown.

If there is exactly one team that the employee and client share, that team will display as the default. Otherwise the dropdown requires manual selection. If there are no teams at all assigned to the client, employee, or the visit's program, "No teams available" will display in place of the dropdown. In this scenario, the visit can be saved without the team.

Users lacking the **AssignVisitTeam** security right do not have the Team dropdown, and are not blocked from saving visits. For these users, teams will continue to be automatically assigned using the "best-match" approach above.

See also

- Use Multi-Stage Approval
- Lock Approved Visits
- Require CPT for Approval
- Require Location and Recip for Appr
- Print Only Approved Visits
- Visit List Sort Type
- Show Visit View Signatures
- Allow Relinking of Batched Visits
- Mark Late Entries & Use Time Out For Late Entries
- Flag Late When Greater Than
- No Schedule Entry on Clone
- Block Updates for BATCHED or PAID Visits
- Use Matrix Credentials to Determine Visit Types
- Limit Location DD by GeoArea Assignments
- Show Non-Release
- Secondary Employees on Visits
- Display Secondary Employees on Visit List
- Display Name, Title, and Credentials of Approver
- Display Employee Title in Visit Details Screen
- Billing Matrix-Allowed Payer Prioritizing
- Use Quick Visit
- Calculate Timeframes
- Map After Approval
- Block Services for Parent Programs
- Lock Edit Full Visit

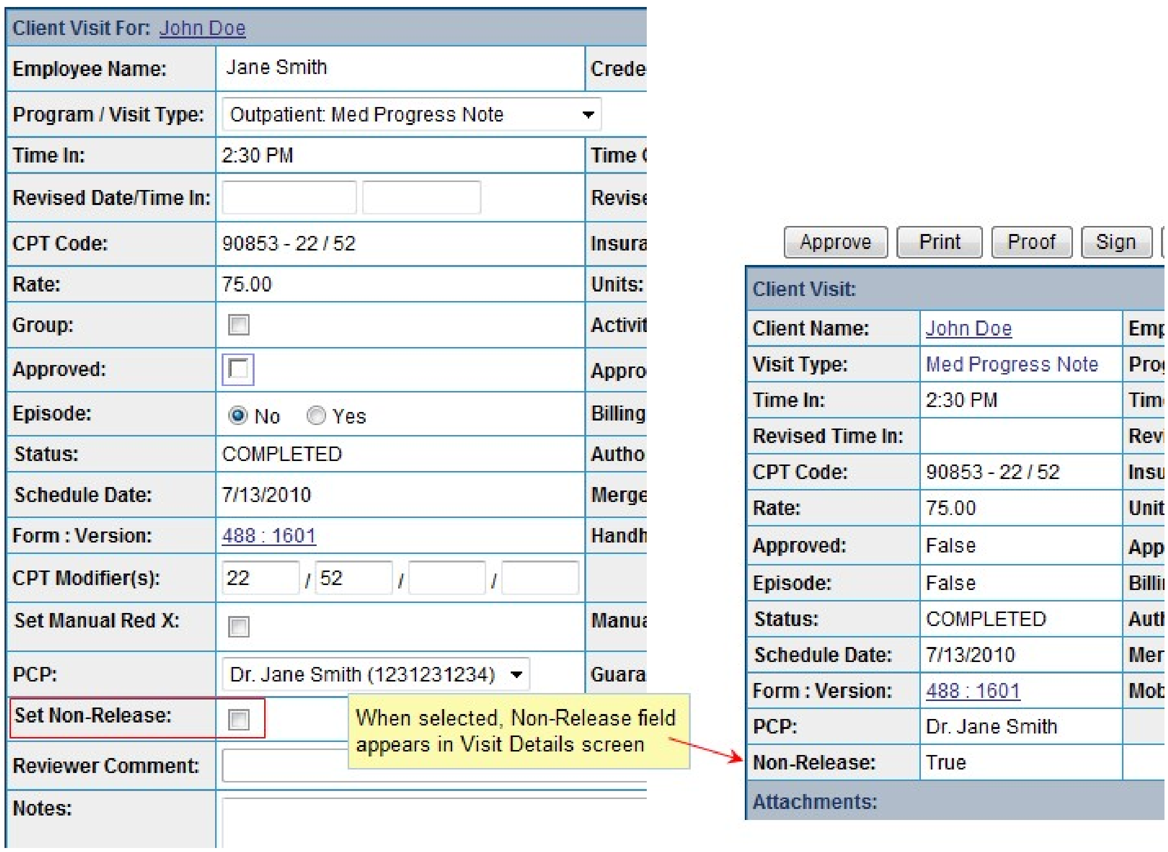
Updated: 3/13/2017 12:17 PM by CredibleEducation

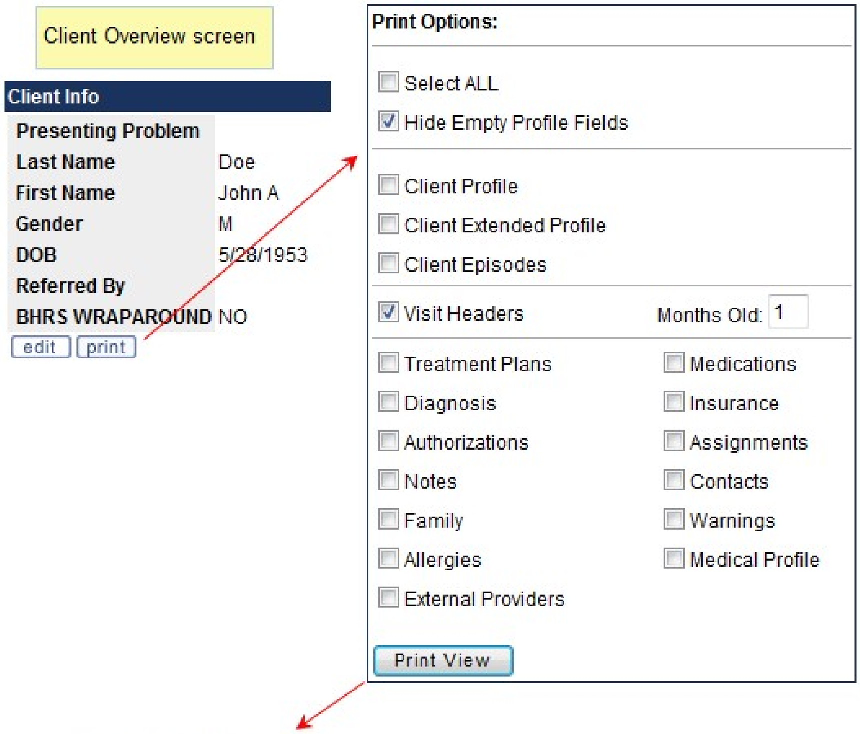
Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Show Non-Release

Show Non-Release

When selected, a Set Non-Release checkbox will be available for completed visits in the Client Visit Update screen. If a user doesn't want to include a visit in the **Print All** results (Client Visit List screen), he or she can select the checkbox. The visit will also be excluded from the Client Visit "header list" that you can generate with the **print** button in the Client Info section on the Client Overview screen (see below).

Client Visit Update:





John Doe (666) [DOB: 5/28/1953]

CLIENT VISIT					
Visit Date	10/24/2010	**Visit Type**	Med PN	**Location**	Mont Co Home
Program	Outpatient	**Employee**	Smith	**Duration**	15
Visit Date	10/21/2010	**Visit Type**	SAMPLE FRM	**Location**	Other
Program	Outpatient	**Employee**	Dickens	**Duration**	180
Visit Date	10/21/2010	**Visit Type**	TPUPD	**Location**	Other
Program	Outpatient	**Employee**	Jones	**Duration**	120
Visit Date	10/21/2010	**Visit Type**	IndTherIS	**Location**	Other
Program	Outpatient	**Employee**	Smith	**Duration**	120

Note that if Non-Release = True for a visit and then the Partner Config setting *Show Non-Release* is deselected, the visit will remain in non-release mode and not show in the Print All results or Client Visit header list. And since the Set Non-Release checkbox won't be available, the user will not have any way to change the non-release setting.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
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Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit

Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Updated 4/25/2017 9:35 AM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Secondary Employees on Visits

Secondary Employees on Visits

When selected, a Schedule & Add 2nd Emps button will be available when adding a visit to the schedule. For completed visits, you can view secondary employees assigned to the visit (in the Visit Details screen) and edit the assignments if necessary. For more information, refer to Adding Secondary Employees to a Visit.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Display Secondary Employees on Visit List

Display Secondary Employees on Visit List

If Secondary Employees on Visits is selected, the setting Display Secondary Employees on Visit List becomes available. Select it if you want to include a Secondary Employees column in the Client Visit List screen.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Display Name, Title, and Credentials of Approver

Display Name, Title, and Credentials of Approver

When selected, a supervisor's name, title, and credentials will be displayed underneath his or her signature line in the visit print view when the visit is approved by a supervisor.
In addition, the name, title, and credentials will be displayed under signatures 3 and 4 in the Visit Details screen as well as in the visit print view. Note that the enhancement to signatures 3 and 4 is only available if you use the standard print view or have requested that it be incorporated into your custom print view.

Settings

Security Matrix: ClientVisitView
Partner Config: Display Name, Title and Credentials of Approver; Show Visit View Signatures; Printout Approval Signature

To configure:

The system pulls the name and title from an employee’s profile. The credential type needs to have **Do Not Print On Visit** set to **False** (**Admin** tab > **Credential Types**).

For an employee to be a supervisor, the **is_supervisor_flag** field in the profile must be set to **Yes**.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
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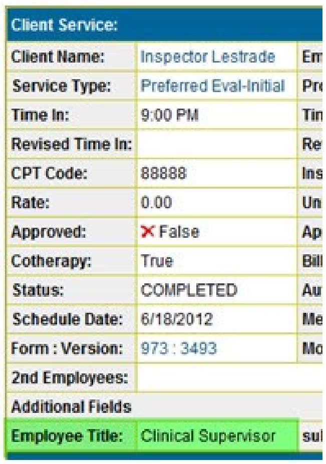
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Updated 4/25/2017 9:46 AM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Display Employee Title in Visit Details Screen

Display Employee Title in Visit Details Screen

With the Partner Config setting Display Employee Title, you can set up your system to display an employee's title in the Visit Details screen. The system pulls the title from the corresponding field in the employee's profile.



Client Service:		
Client Name:	Inspector Lestrade	Em
Service Type:	Preferred Eval-Initial	Pre
Time In:	9:00 PM	Tin
Revised Time In:		Re
CPT Code:	88888	Ins
Rate:	0.00	Un
Approved:	✕ False	Ap
Cotherapy:	True	Bill
Status:	COMPLETED	Au
Schedule Date:	6/18/2012	Me
Form : Version:	973 : 3493	Mo
2nd Employees:		
Additional Fields		
Employee Title:	Clinical Supervisor	sul

Tip You can also add the employee's title to the visit print view (see Configuring Header Fields in Visit Print View in the help).

Settings

Partner Config: Display Employee Title
Security Matrix: ClientVisitView, ClientVisitViewAll, ClientVisitViewTeam, or ClientVisitViewTeamOnly

Configuration

Make sure the title field is available in the Employee Profile (Data Dictionary; Table Source = Employee) and that the field is filled out for all employees.

Use

Visit tab > view button for visit. The Employee Title field is in the Additional Fields section in the header.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
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Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit

Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Billing Matrix-Allowed Payer Prioritizing

Billing Matrix-Allowed Payer Prioritizing

This setting lets you control the prioritizing the system uses when a visit matches multiple Billing Matrix lines.

Please note: Exercise caution when using this setting alongside Credential Group Prioritizing, as the interactions can be complex.

No Payer Prioritizing	Default setting. When selected, the system uses a "more-specific-before-general" prioritizing rule when a visit matches multiple Billing Matrix lines. For example, you have a visit that was done at Location A. Except for location, there are two identical matrix lines that match this visit -- one is set to Location A (specific) and the other is set to no location (general). While technically they both match the visit, the line with a specific location (Location A) will have a higher priority for the match over the one that has no location (general).
Primary Payer Prioritizing	If selected, a match between an allowed payer associated with a Billing Matrix line and a client's primary payer takes priority over the more-specific-before-general rule when a visit matches multiple Billing Matrix lines. The system first checks to see if one of the lines has an allowed payer that matches the client's primary payer. If there is an allowed payer/primary payer match, the system pulls that Billing Matrix line even if one of the other matching lines is a more specific match. As an example, assume a visit matches the following two lines: Line 1 has the client's secondary payer, a Credential Group that matches employee's credential, and a rate of $100. Line 2 has the client's primary payer, no Credential Group specified, and a rate of $75. The system will pull Line 2 for the visit because priority is given to the primary payer match over the credential match. If there isn't an allowed payer match, the system uses the more-specific-before-general rule to decide which line should be used. And if a visit only matches one Billing Matrix line, the system will pull it even if the allowed payer and primary payer don't match.
Any Payer Prioritizing	If selected, a match between an allowed payer associated with a Billing Matrix line and any of the client's payers takes priority over the more-specific-before-general rule when a visit matches multiple Billing Matrix lines. See above for more information.

See also
Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs

Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Use Quick Visit

Use Quick Visit

If your organization would prefer not to use the Quick Visit function, you can disable it (remove it from the Client nav bar) by deselecting the Partner Config setting *Use Quick Visit.*

See also
Quick Visit
Config

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Calculate Timeframes
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Calculate Timeframes

Calculate Timeframes

If a Billing Matrix line is set up as a "Subtract Overlap" and you have the Calculate Timeframes setting selected, the system will calculate and display the timeframes in the Visit Details screen. The timeframes have also been added to a custom print view.

You can add the timeframes field to the Visit table and then report on it through Advanced Visit Search (Custom Fields > More Fields) and exports.

Partner Config: Calculate Timeframes, Visit Printout Popup Page = clientvisit_printout_timeframes.asp

To configure:

1. Make sure Subtract Overlapping Duration or Subtract Overlapping Units must be selected in a Billing Matrix line (Admin or Billing tab > Billing Matrix.
2. Add timeframes to the Visit table (so it can be added as a custom field in Advanced Visit Search):
    a. Admin tab > **Data Dictionary** > Table source = Visit and Type = View.
    b. Insert Timeframes as a field (column) and then click **Match Update to View.**

To view in Visit Details screen: Visit tab > Visit ID or view button. Timeframes field is in header section.

To view in the custom print view: Visit tab > print button.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Map After Approval
Block Services for Parent Programs
Lock Edit Full Visit

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Map After Approval

Map After Approval

With this 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.

See also

Mapping a Response in a Field to a Client or Employee Record

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Block Services for Parent Programs
Lock Edit Full Visit

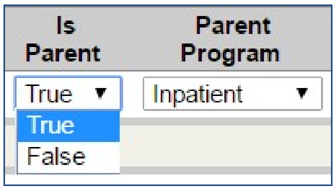
Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Block Services for Parent Programs

Block Services for Parent Programs

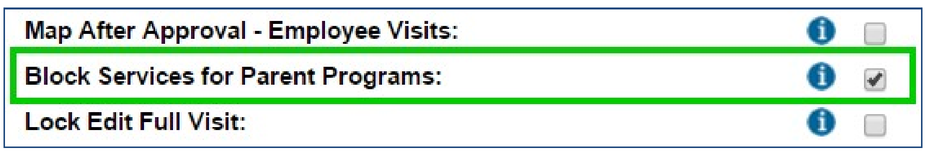
When selected, the system will prevent services from being created for or updated to parent programs. Any program that is set up as a parent program will not be available as an option in the **Add to Schedule** or **Scheduled Visit** popups, or on the **Add Visit** screen. Note that parent programs will still be available via **Advanced Client Search** and **Mobile**.

To set up a program as a parent program:

1. Go to **Admin** tab > **Billing Configuration** section > **Programs**.
2. Click the **Edit** button beside the program you wish to make a Parent Program.
3. Change the **Is Parent** dropdown to **True** for the Program.



4. Click the **Save** button for the Program.
5. Go to **Admin** tab > **Site Configuration** section > **Partner Config**.
6. Under the **Visit** section, check **Block Services for Parent Programs**.



7. Click the **Save Settings** button at the bottom of the screen.

The program is now designated as a Parent Program.

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
Mark Late Entries & Use Time Out For Late Entries
Flag Late When Greater Than
No Schedule Entry on Clone
Block Updates for BATCHED or PAID Visits
Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
Secondary Employees on Visits
Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Lock Edit Full Visit

Updated 4/10/2017 12:24 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Visit Settings > Lock Edit Full Visit

Lock Edit Full Visit

With the **Partner Config: Lock Edit Full Visit** setting, you can set up your system to hide the **Edit Full Visit** button when the status of a visit changes to **RECONCILED**, **REJECTED**, or **TRANSFERRED**. **Lock Edit Full Visit** is a companion setting to **Block Updates for BATCHED or PAID Services**. These settings prevent changes to form data even if the user has the *ClientVisitUpdateForm* right.

Settings

Partner Config: Lock Edit Full Visit
Security Matrix: ClientVisitUpdateForm

See also

Use Multi-Stage Approval
Lock Approved Visits
Require CPT for Approval
Require Location and Recip for Appr
Print Only Approved Visits
Visit List Sort Type
Show Visit View Signatures
Allow Relinking of Batched Visits
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Use Matrix Credentials to Determine Visit Types
Limit Location DD by GeoArea Assignments
Allow Manual Assignment of Visit Team
Show Non-Release
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Display Secondary Employees on Visit List
Display Name, Title, and Credentials of Approver
Display Employee Title in Visit Details Screen
Billing Matrix-Allowed Payer Prioritizing
Use Quick Visit
Calculate Timeframes
Map After Approval
Block Services for Parent Programs

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms

Partner Config: Web Forms

This section includes settings that affect the use and functionality of web forms (online forms), including billing-related items, diagnosis, whether or not overlapping schedule entries are permitted, signatures, and how cancellations are handled.

Web Forms: Block Overlapping	Location Billing Flag	Recipient Billing Flag	Non-Billable Checkbox	Billing Group Dropdown	Diagnosis Dropdown	Allow Supervising Physician Selection
Use Treatment Plan Categories	Allow Single Form in Group Webforms	Inject Sig 3 for Secondary Emp	Footnote for Sign & Submit	Actual Times on Webforms	Force Visit Time Entry on Sign and Submit Screen	Block Future Visits Greater Than
No Cloning on Diagnosis Mapping	Block Saving Visits that Occurred Before Specific Month/Day					

See also

Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Web Forms: Block Overlapping

Web Forms: Block Overlapping

There are several settings in Partner Config for controlling the ability to prevent visits from overlapping. Please review these settings carefully, ensuring which will best support your workflow. Some settings may interact with others in unexpected ways.

Updated: 5/9/2017 10:36 AM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Web Forms: Block Overlapping > Block All Overlapping Client Visits

Block All Overlapping Client Visits

When **Block All Overlapping Client Visits** is selected, the system will prevent a user from saving any visit submitted through webforms or via data entry when the time of the visit overlaps the time of another completed visit for that client.

For example: If a completed visit already exists from 12:00pm - 2:00pm on a given day, the system will NOT allow a user to enter a new visit from 1:00pm - 3:00pm because the visits overlap from 1:00pm - 2:00pm. If a time overlap exists, when the user attempts to "Sign & Submit" the visit or presses "Save" when data entering a visit, he/she will get a system-generated error message and must eliminate the time overlap before the new visit will be accepted.

See also

Block All Overlapping Employee Visits
Block Billable Overlapping Client Visits
Block Billable Overlapping Employee Visits
Block Overlapping Visits for the Same Payer
Block Overlapping Client Visits by Recipients
Block Overlapping Client Visits by Type
Exclude Bed Board Visits for Overlapping Visits

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Web Forms: Block Overlapping > Block All Overlapping Employee Visits

Block All Overlapping Employee Visits

When **Block All Overlapping Employee Visits** is selected, the system will prevent a user from saving any visit submitted through webforms or via data entry when the time of the visit overlaps the time of another completed visit for that employee.

For example: If a completed visit already exists from 12:00pm - 2:00pm on a given day, the system will NOT allow a user to enter a new visit from 1:00pm - 3:00pm because the visits overlap from 1:00pm - 2:00pm. If a time overlap exists, when the user attempts to "Sign & Submit" the visit or presses "Save" when data entering a visit, he/she will get a system-generated error message and must eliminate the time overlap before the new visit will be accepted.

See also

Block All Overlapping Client Visits
Block Billable Overlapping Client Visits
Block Billable Overlapping Employee Visits
Block Overlapping Visits for the Same Payer
Block Overlapping Client Visits by Recipients
Block Overlapping Client Visits by Type
Exclude Bed Board Visits for Overlapping Visits

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Web Forms: Block Overlapping > Block Billable Overlapping Client Visits

Block Billable Overlapping Client Visits

When **Block Billable Overlapping Client Visits** is selected, the system will prevent a user from saving any **billable** visit submitted through webforms or via data entry when the time of the visit overlaps the time of another completed visit for that client.

For example: If a completed BILLABLE visit already exists from 12:00pm - 2:00pm on a given day, the system will NOT allow a user to enter a new BILLABLE visit from 1:00pm - 3:00pm because the visits overlap from 1:00pm - 2:00pm (however - the system WOULD allow a NON-billable visit from 1:00pm - 3:00pm to be entered). If a BILLABLE time overlap exists, when the user attempts to "Sign & Submit" the visit or presses "Save" when data entering a visit, he/she will get a system-generated error message and must eliminate the time overlap before the new visit will be accepted.

See also

Block All Overlapping Client Visits
Block All Overlapping Employee Visits
Block Billable Overlapping Employee Visits
Block Overlapping Visits for the Same Payer
Block Overlapping Client Visits by Recipients
Block Overlapping Client Visits by Type
Exclude Bed Board Visits for Overlapping Visits

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Web Forms: Block Overlapping > Block Billable Overlapping Employee Visits

Block Billable Overlapping Employee Visits

When **Block Billable Overlapping Employee Visits** is selected, the system will prevent a user from saving any **billable** visit submitted through webforms or via data entry when the time of the visit overlaps the time of another completed visit for that employee.

For example: If a completed BILLABLE visit already exists from 12:00pm - 2:00pm on a given day, the system will NOT allow a user to enter a new BILLABLE visit from 1:00pm - 3:00pm because the visits overlap from 1:00pm - 2:00pm (however - the system WOULD allow a NON-billable visit from 1:00pm - 3:00pm to be entered). If a BILLABLE time overlap exists, when the user attempts to "Sign & Submit" the visit or presses "Save" when data entering a visit, he/she will get a system-generated error message and must eliminate the time overlap before the new visit will be accepted.

See also

Block All Overlapping Client Visits
Block All Overlapping Employee Visits
Block Billable Overlapping Client Visits
Block Overlapping Visits for the Same Payer
Block Overlapping Client Visits by Recipients
Block Overlapping Client Visits by Type
Exclude Bed Board Visits for Overlapping Visits

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Web Forms: Block Overlapping > Block Overlapping Visits for the Same Payer

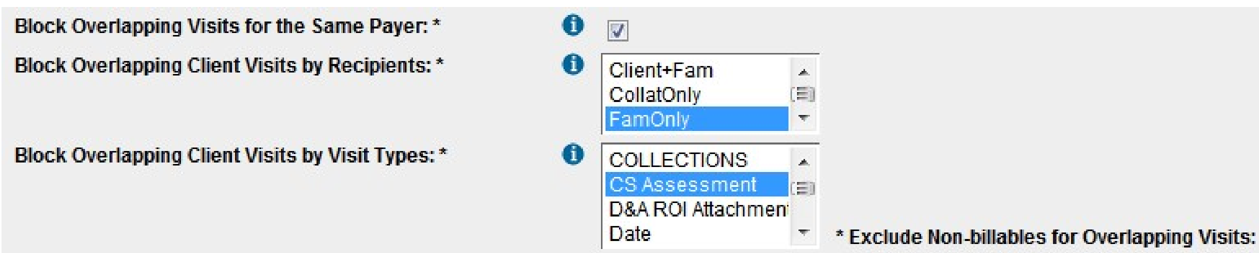
Block Overlapping Visits for the Same Payer

When selected, the system will prevent a user from saving any visit submitted through web forms or data entry when the time of the visit overlaps the time of another completed visit for that client for the same payer.

For example: if a completed Medicare visit already exists from 12:00pm - 2:00pm on a given day, the system will *not* allow a user to enter a new Medicare visit from 1:00pm - 3:00pm because the visits for the same payer (Medicare) overlap from 1:00pm - 2:00pm. However, the system *would* allow a Medicaid visit from 1:00pm - 3:00pm to be entered, because Medicaid is not the same payer as Medicare. If a time overlap for the *same payer* exists for the client, when the user attempts to sign and submit the visit (or click Save when using data entry), he/she will get an error message and must eliminate the time overlap (or use a different payer) before the new visit will be accepted.

Exclude Non-Billables from the Overlapping Block

To exclude non-billables from the overlapping block, select the Exclude Non-billables for Overlapping Visits checkbox. When selected, you can successfully complete non-billable visits even if they meet the block overlapping criteria. Note that the exclusion also applies to the two other block overlapping settings.



See also

Block All Overlapping Client Visits
Block All Overlapping Employee Visits
Block Billable Overlapping Client Visits
Block Billable Overlapping Employee Visits
Block Overlapping Client Visits by Recipients
Block Overlapping Client Visits by Type
Exclude Bed Board Visits for Overlapping Visits

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Web Forms: Block Overlapping > Block Overlapping Client Visits by Recipients

Block Overlapping Client Visits by Recipients

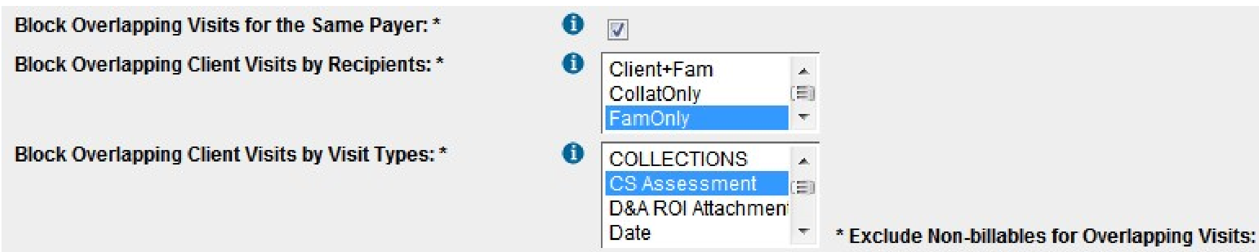
When selected, the system will prevent a user from saving any visit submitted through a web form or data entry when 1) the time of the visit overlaps the time of another completed visit for that client, 2) the two visits have the same recipient, and 3) that recipient is in the selected Recipient list.

For example: if a completed visit already exists from 12:00pm - 2:00pm on a given day, the system will *not* allow a user to enter a new visit from 1:00pm - 3:00pm if the visit recipient for the new visit is the same as the previous completed visit that overlaps the time of the new visit. If a time overlap for the *same recipient* exists for the client, when the user attempts to sign and submit the visit (or clicks Save when using data entry), he/she will get an error message and must eliminate the time overlap (or use a different recipient) before the new visit will be accepted.

You can select multiple recipients from the dropdpown.

Exclude Non-Billables from the Overlapping Block

To exclude non-billables from the overlapping block, select the Exclude Non-billables for Overlapping Visits checkbox. When selected, you can successfully complete non-billable visits even if they meet the block overlapping criteria. Note that the exclusion also applies to the two other block overlapping settings.



See also

Block All Overlapping Client Visits
Block All Overlapping Employee Visits
Block Billable Overlapping Client Visits
Block Billable Overlapping Employee Visits
Block Overlapping Visits for the Same Payer
Block Overlapping Client Visits by Type
Exclude Bed Board Visits for Overlapping Visits

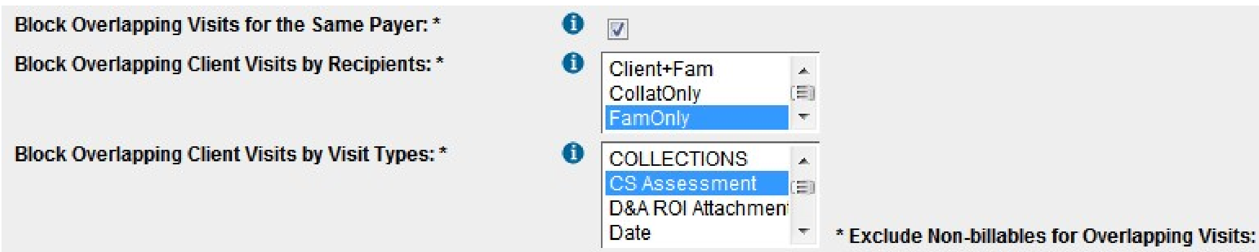
Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Web Forms: Block Overlapping > Block Overlapping Client Visits by Type

Block Overlapping Client Visits by Type

The blocking of overlapping visits for submission can be based on visit type. When this setting is selected, the system automatically blocks users from being able to be submit a visit when another completed visit in one of the selected visit types overlaps the visit for the same client.

Exclude Non-Billables from Block Overlapping

To exclude non-billables from the overlapping block, select the corresponding checkbox. When selected, you can successfully complete non-billable visits even if they meet the block overlapping criteria. Note that the exclusion also applies to the two other block overlapping settings.



See also

Block All Overlapping Client Visits
Block All Overlapping Employee Visits
Block Billable Overlapping Client Visits
Block Billable Overlapping Employee Visits
Block Overlapping Visits for the Same Payer
Block Overlapping Client Visits by Recipients
Exclude Bed Board Visits for Overlapping Visits

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Web Forms: Block Overlapping > Exclude Bed Board Visits for Overlapping Visits

Exclude Bed Board Visits for Overlapping Visits

If Bed Board functionality is in use, checking this setting tells the system to ignore any Bed Board visits for purposes of checking overlapping visits.

See also

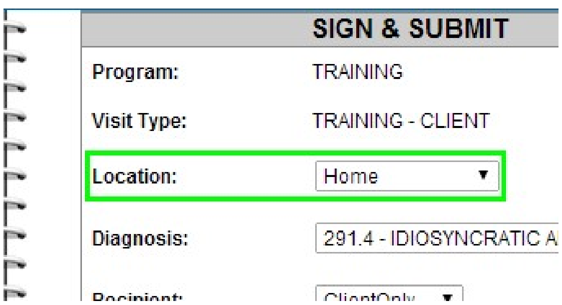
Block All Overlapping Client Visits
Block All Overlapping Employee Visits
Block Billable Overlapping Client Visits
Block Billable Overlapping Employee Visits
Block Overlapping Visits for the Same Payer
Block Overlapping Client Visits by Recipients
Block Overlapping Client Visits by Type

Updated: 5/9/2017 10:21 AM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Location Billing Flag

Location Billing Flag

Selecting Location Billing Flag makes the Location dropdown available on the Enter Visit screens (Add Visit/Quick Visit) and Sign & Submit screen when completing a web form visit. **This feature should always be on** -- be sure to select it when configuring your Credible system.



Note that Location Billing Flag does not control the availability of the Location dropdown on the Add to Schedule popup.

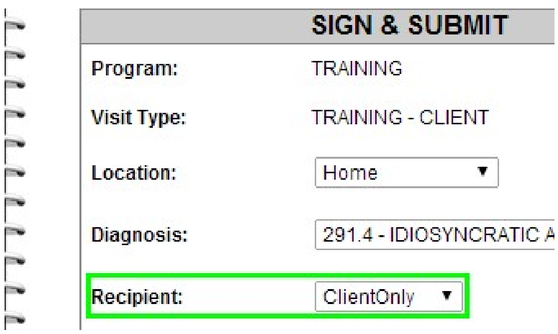
See also

Add Client Visit
Quick Visit
Documenting a Visit with a Web Form
Web Forms: Block Overlapping
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
Allow Supervising Physician Selection
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
Footnote for Sign & Submit
Actual Times on Webforms
Force Visit Time Entry on Sign and Submit Screen
Block Future Visits Greater Than
No Cloning on Diagnosis Mapping
Block Saving Visits that Occurred Before Specific Month/Day

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Recipient Billing Flag

Recipient Billing Flag

Selecting Recipient Billing Flag makes the Recipient dropdown available on the Enter Visit screens (Add Visit/Quick Visit) and Sign & Submit screen when completing a web form visit. **This feature should always be on** -- be sure to select it when configuring your Credible system.



See also

Add Client Visit
Quick Visit
Documenting a Visit with a Web Form
Web Forms: Block Overlapping
Location Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
Allow Supervising Physician Selection
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
Footnote for Sign & Submit
Actual Times on Webforms
Force Visit Time Entry on Sign and Submit Screen
Block Future Visits Greater Than
No Cloning on Diagnosis Mapping
Block Saving Visits that Occurred Before Specific Month/Day

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Non-Billable Checkbox

Non-Billable Checkbox

When the **Non-Billable Checkbox** is selected, "non-billable" will be shown on the Web Forms billing screen (the "Web Forms billing screen" is the "Sign & Submit" screen that appears when a visit is completed).

Note: This feature is **optional**, but in order to select it, ***you must have the right*** *to turn it on or off* (the right to do this must be set in the Security Matrix).

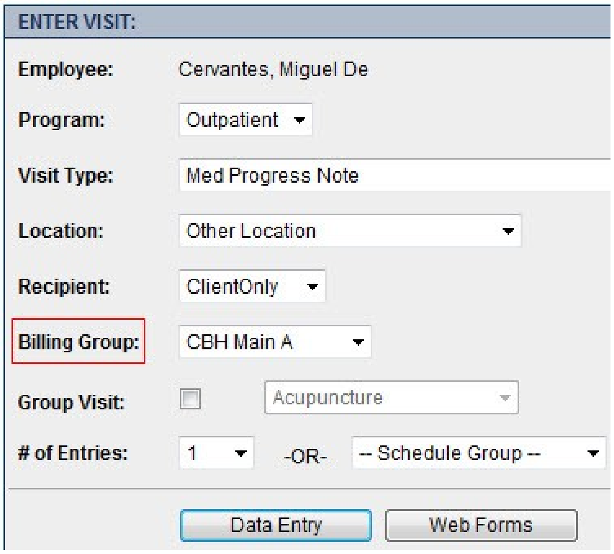
See also

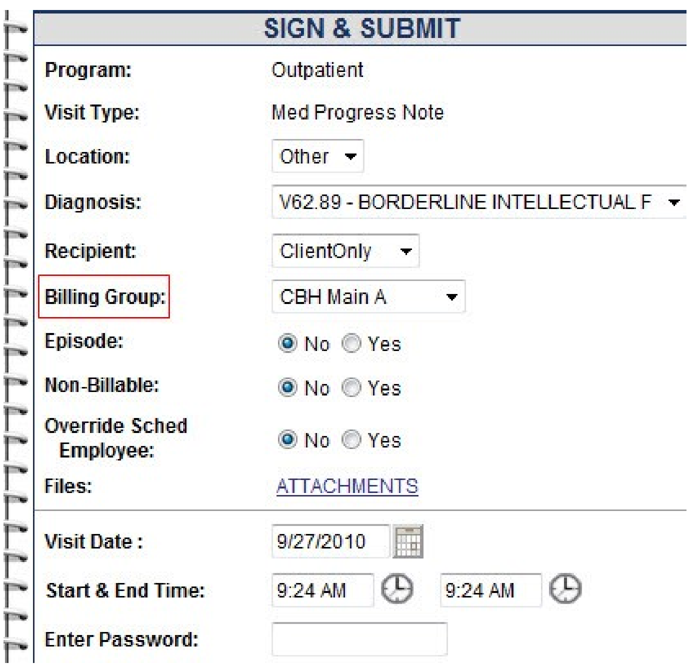
Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Billing Group Dropdown
Diagnosis Dropdown
Allow Supervising Physician Selection
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
Footnote for Sign & Submit
Actual Times on Webforms
Force Visit Time Entry on Sign and Submit Screen
Block Future Visits Greater Than
No Cloning on Diagnosis Mapping
Block Saving Visits that Occurred Before Specific Month/Day

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Billing Group Dropdown

Billing Group Dropdown

Billing groups determine the agency level NPI/provider information sent for claims. When *Billing Group Dropdown* is selected, a Billing Group dropdown will be available when you save and complete a visit (data entry) or sign and submit it (web forms).





Recommendation: select this setting.

Note If you only have one billing group, it can be set as the default and you don't need to select this setting.

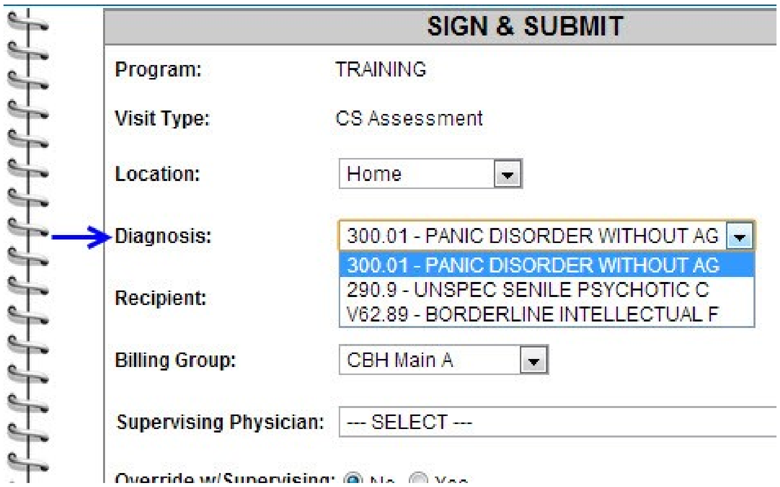
See also

Web Forms: Block Overlapping
Location Billing Flag

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Diagnosis Dropdown

Diagnosis Dropdown

Proper billing requires a diagnosis; by default, all claims go out with the client's Axis I Primary diagnosis code. If you want staff to be able to associate a different diagnosis with a visit, select the Partner Config setting Diagnosis Dropdown. This will make a Diagnosis dropdown available on the Sign & Submit screen -- in the web-based version of Credible and in Credible Mobile.



The dropdown lists all of the client's diagnoses that are active when you access the Sign & Submit screen. Selecting a diagnosis from the dropdown does *not* change the client's Axis I Primary diagnosis. (You use the Diagnosis function on the Client nav bar to set or change the Axis I Primary and other diagnoses for a client.)

Remember that Diagnosis Dropdown is a Partner-level setting – if selected, all users will be able to see and use the dropdown.

Important: when a diagnosis is selected from the Diagnosis dropdown, it becomes the diagnosis the visit will be billed as.

Recommendation: if anything other than Axis I Primary is ever billed, you must set program-defaulted diagnoses on the client and/or select this eable this Partner Config setting so users can select the appropriate diagnosis code.

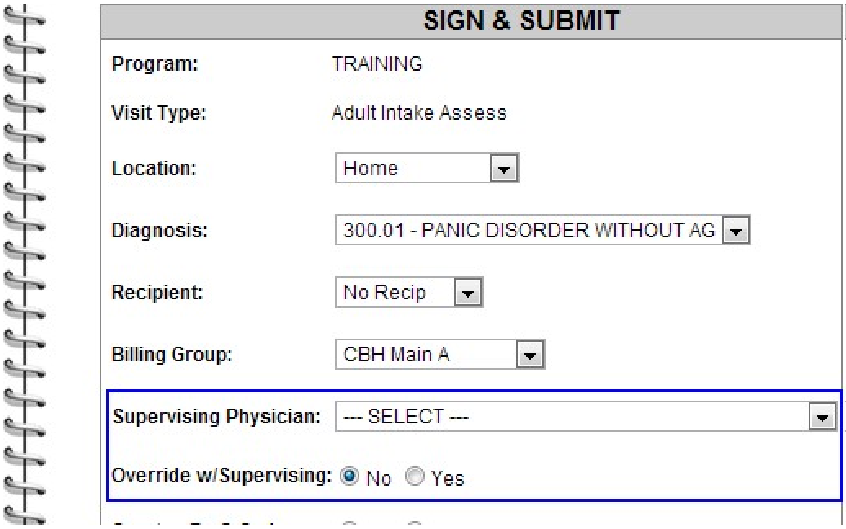
See also

Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Allow Supervising Physician Selection
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
Footnote for Sign & Submit
Actual Times on Webforms
Force Visit Time Entry on Sign and Submit Screen
Block Future Visits Greater Than
No Cloning on Diagnosis Mapping
Block Saving Visits that Occurred Before Specific Month/Day

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Allow Supervising Physician Selection

Allow Supervising Physician Selection

When Allow Supervising Physician Selection is checked, there will be a Supervising Physician dropdown and Override w/ Supervising flag on the Sign & Submit screen when completing a web form visit.



The Supervising Physician dropdown includes employees that have the is_doctor or is_incident_to field in the Employee Profile set to Yes. (If the fields are not currently in the Employee Profile, use Data Dictionary to add them to the Employee table.) Using the is_incident_to field makes it possible to report non-physician employees as rendering providers on a service-by-service basis.

A supervising physician should *only* be selected if the doctor or non-physician employee responsible for overseeing the visit is *different* than the employee who is completing the visit. This selection is simply for documentation purposes. If you have to actually *bill* as the Supervising Physician, select Yes for the Override w/Supervising flag.

See also

Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
Footnote for Sign & Submit
Actual Times on Webforms
Force Visit Time Entry on Sign and Submit Screen
Block Future Visits Greater Than
No Cloning on Diagnosis Mapping
Block Saving Visits that Occurred Before Specific Month/Day

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Use Treatment Plan Categories

Use Treatment Plan Categories

When selected, **Use Treatment Plan Categories** allows a treatment plan ("Tx Plan") to be associated with a category and displayed on the form for the selected Tx Category. If this is NOT selected, you will NOT be able to associate a treatment plan with a custom category.

*Note: If you need to **map** treatment plans or plan to use **injection**, this MUST be ON.*

More about Treatment Plan Categories*:*

- **ALL Treatment Plan Categories are custom**. Before a Treatment Plan category can be selected, the category must be set up through Admin Lookups (to do this, the right to establish Tx Plan categories must be assigned through the Security Matrix).
- **There are two (2) treatment plans in the system**: one is based on a form *without* a Tx Plan category (the form is built from scratch through FormBuilder), and one is a "free text" box. If your group has *not* created a custom form through FormBuilder, you'll choose a Treatment Plan Category by clicking on the **Client** tab, then on the **Tx Plan** button on the Nav Bar. A large blank box will then appear (the "free text" box) in which you can select a pre-defined Treatment (Tx) Plan category.
- **The third way to enter a Tx Plan is through a question in a webform**. Tx Plan categories MUST be set up for this to happen (this is called "mapping," which is when the data entered into a form goes into the Tx Plan portion of the client record).
- **Tx Plan categories are also required for *injection***, which is the opposite of mapping. With injection, select data from the client record is injected into a form (i.e. – prepopulated into the form). This allows you to document directly against the Tx Plan (the treatment plan will be displayed inside the form while you're documenting).

  For example: You're using a form, and the current/existing Tx plan is injected on top (view only). You can then enter a new treatment plan on the bottom, which then maps back to the Tx Plan (i.e. - the system adds the *new* Tx Plan as the most current one) - this functions like an ongoing history where you can see prior treatment plans as well as the current treatment plan.

See also

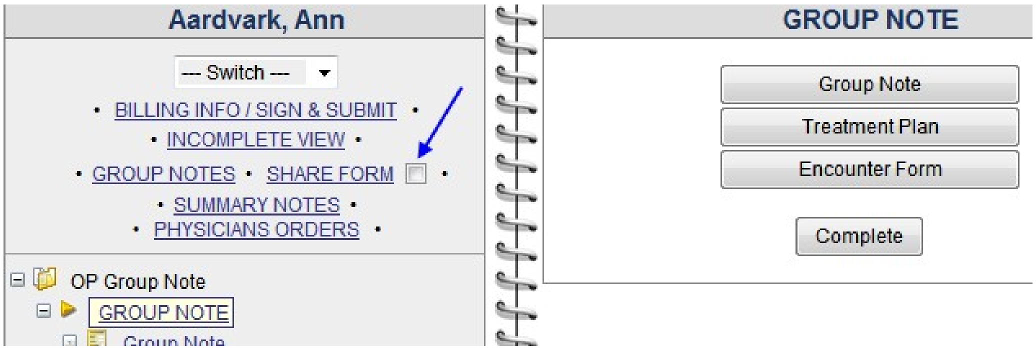
Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
Allow Supervising Physician Selection
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
Footnote for Sign & Submit
Actual Times on Webforms
Force Visit Time Entry on Sign and Submit Screen
Block Future Visits Greater Than
No Cloning on Diagnosis Mapping
Block Saving Visits that Occurred Before Specific Month/Day

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Allow Single Form in Group Webforms

Allow Single Form in Group Webforms

When selected, users have the option of filling out a single web form for a group visit. Once the form is complete, the system uses it for each client in the group. In other words, this allows you to complete one single form for an entire group instead of having to fill a form out individually for each client (applies to group visits with multiple clients).

When this Partner Config setting is selected, a Share Form checkbox will be available in a web form for a group visit.



See also

Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
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Scheduling a Group Visit
Begin a Group Visit from Schedule

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Inject Sig 3 for Secondary Emp

Inject Sig 3 for Secondary Emp

When **Inject Sig 3 for Secondary Emp** (Inject Signature 3 for Secondary Employee) is checked, the system will inject a presigned signature into the **Sig 3** (Signature 3) field for the secondary employee who is completing the visit. For example, if one person starts a visit and a different person completes it, the system will automatically inject the signature of the person who **started** the visit in the **Sig 3** field.

As a general rule, the person who *Signs & Submits* a visit is reflected in **Sig 1** (Signature 1) and the client is reflected in **Sig 2** (Signature 2).

NOTE: In order for this feature to work, you must have the right to complete another person's visit.

See also

Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
Allow Supervising Physician Selection
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Footnote for Sign & Submit
Actual Times on Webforms
Force Visit Time Entry on Sign and Submit Screen
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No Cloning on Diagnosis Mapping
Block Saving Visits that Occurred Before Specific Month/Day

Updated 5/9/2017 9:43 AM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Footnote for Sign & Submit

Footnote for Sign & Submit

When **Footnote for Sign & Submit** is selected, the system will add a footnote to the bottom of the webforms "Sign & Submit" page. This is purely optional, and can be used for reminder notes or other messages.

See also

Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
Allow Supervising Physician Selection
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
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Block Saving Visits that Occurred Before Specific Month/Day

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Actual Times on Webforms

Actual Times on Webforms

When **Actual Times on Webforms** is selected, the system will use the ACTUAL start and end times of a visit on webforms instead of the SCHEDULED visit time. The "Start" time will begin when you click "Start" on the Schedule ("scheduler"), and the visit "End" time will be the time at which you "Sign & Submit" (complete) the visit.

If this feature is NOT selected, the default start time will be the *scheduled* (NOT actual) start time. The end time will still be the time you "Sign & Submit" (complete) the visit.

See also

Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
Allow Supervising Physician Selection
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
Footnote for Sign & Submit
Force Visit Time Entry on Sign and Submit Screen
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Block Saving Visits that Occurred Before Specific Month/Day

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Force Visit Time Entry on Sign and Submit Screen

Force Visit Time Entry on Sign and Submit Screen

By default, the Start & End Time fields on the Sign & Submit screen are populated – with current times or scheduled times if it was a scheduled visit. If you want to ensure that your staff enters the actual start and end time, select this Partner Config setting to force visit time entry during sign and submit. The Start & End Time fields will be blank and the system will require that valid times are entered before allowing sign and submit.

There are two exceptions:

- Add Visit function and Web Forms method: if a time in and/or time out is entered on the Enter Visit screen, the times entered will be retained on the Sign & Submit screen.
- If Actual Times on Webforms is enabled in Partner Config, current times will be retained on the Sign & Submit screen for scheduled visits.

See also

Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
Allow Supervising Physician Selection
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
Footnote for Sign & Submit
Actual Times on Webforms
Block Future Visits Greater Than
No Cloning on Diagnosis Mapping
Block Saving Visits that Occurred Before Specific Month/Day

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > Block Future Visits Greater Than

Block Future Visits Greater Than

With the *Block Future Visits Greater Than* setting, you can prevent users from saving (signing and submitting) visits that have visit dates that are "too far out" in the future. You specify the maximum number of days out in the future that a visit date cannot exceed for signing and submitting purposes. Note that this setting does not prevent users from scheduling visits far out in the future. A user will get an error message if he or she tries to sign and submit the visit and the visit date is farther out in the future than the number of days specified.

For example, assume you enter 14 in the "__ Days" field. A user begins and completes a visit that is scheduled 15 days out in the future. When the user tries to sign and submit the completed visit, the following message displays: "This visit cannot be saved because the visit date is greater than 14 days in the future."

Recommendation: enter zero in the field. This prevents staff from preemptively signing and submitting services (the signature date is before the actual service). If left blank (or anything greater than zero), visits will be able to be entered for future dates. Visits will still not be approvable until the visit date is "today."

See also

Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
Allow Supervising Physician Selection
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
Footnote for Sign & Submit
Actual Times on Webforms
Force Visit Time Entry on Sign and Submit Screen
No Cloning on Diagnosis Mapping
Block Saving Visits that Occurred Before Specific Month/Day

Home > Admin > Site Configuration > Partner Config > Partner Config: Web Forms > No Cloning on Diagnosis Mapping

No Cloning on Diagnosis Mapping

When a form maps a new diagnosis back to a client record, the active assessment is cloned first. Once the form is completed, any selections made are added to the cloned copy. With this Partner Config setting, you can prevent the system from cloning the active assessment when mapping a new diagnosis.

When *No Cloning on Diagnosis Mapping* is selected, a diagnosis added via form mapping will not clone a copy of the active assessment first. Once the form is completed, the new client assessment will only include the values selected in the form.

Security Matrix: DxAdd or DxFormsAdd

See also

Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
Allow Supervising Physician Selection
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
Footnote for Sign & Submit
Actual Times on Webforms
Force Visit Time Entry on Sign and Submit Screen
Block Future Visits Greater Than
Block Saving Visits that Occurred Before Specific Month/Day

Diagnosis Mapping

Block Saving Visits that Occurred Before Specific Month/Day

With the Partner Config setting *Block Past Visits Before This Date (M/d),* you can 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."

See also

Web Forms: Block Overlapping
Location Billing Flag
Recipient Billing Flag
Non-Billable Checkbox
Billing Group Dropdown
Diagnosis Dropdown
Allow Supervising Physician Selection
Use Treatment Plan Categories
Allow Single Form in Group Webforms
Inject Sig 3 for Secondary Emp
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Force Visit Time Entry on Sign and Submit Screen
Block Future Visits Greater Than
No Cloning on Diagnosis Mapping

Home > Admin > Site Configuration > Partner Config > Partner Config: Printouts

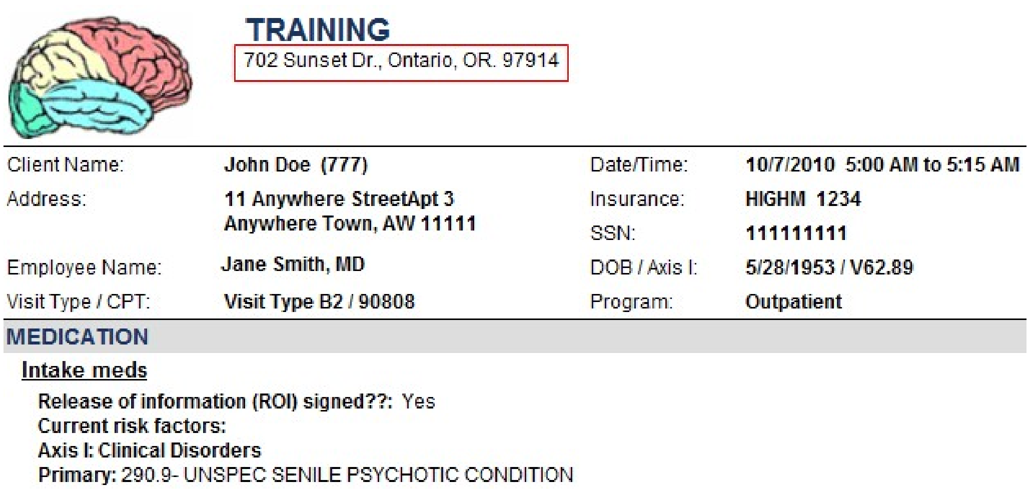
Partner Config: Printouts

The settings in this section are *visit* printout options that apply when users are printing a single visit or all visits. The printing is done through the **print** and **Print All** buttons on the Client Visit List and the **Print** button on the Visit Details screen.

Printouts	
Printout Address:	702 Sunset Dr., Ontario OR 97914
Visit Printout Popup Page:	
Printout Approval Signature:	☑
GeoArea for Address:	☑
Print in PDF Format:	☑
PDF Header font size:	6
PDF Body font size:	6

Printout Address

Enter the address that you want to appear in the header when a user generates a print view of a visit.



TRAINING
702 Sunset Dr., Ontario, OR. 97914

Client Name:	**John Doe (777)**	Date/Time:	**10/7/2010 5:00 AM to 5:15 AM**
Address:	**11 Anywhere StreetApt 3 Anywhere Town, AW 11111**	Insurance:	**HIGHM 1234**
		SSN:	**111111111**
Employee Name:	**Jane Smith, MD**	DOB / Axis I:	**5/28/1953 / V62.89**
Visit Type / CPT:	**Visit Type B2 / 90808**	Program:	**Outpatient**

MEDICATION

Intake meds

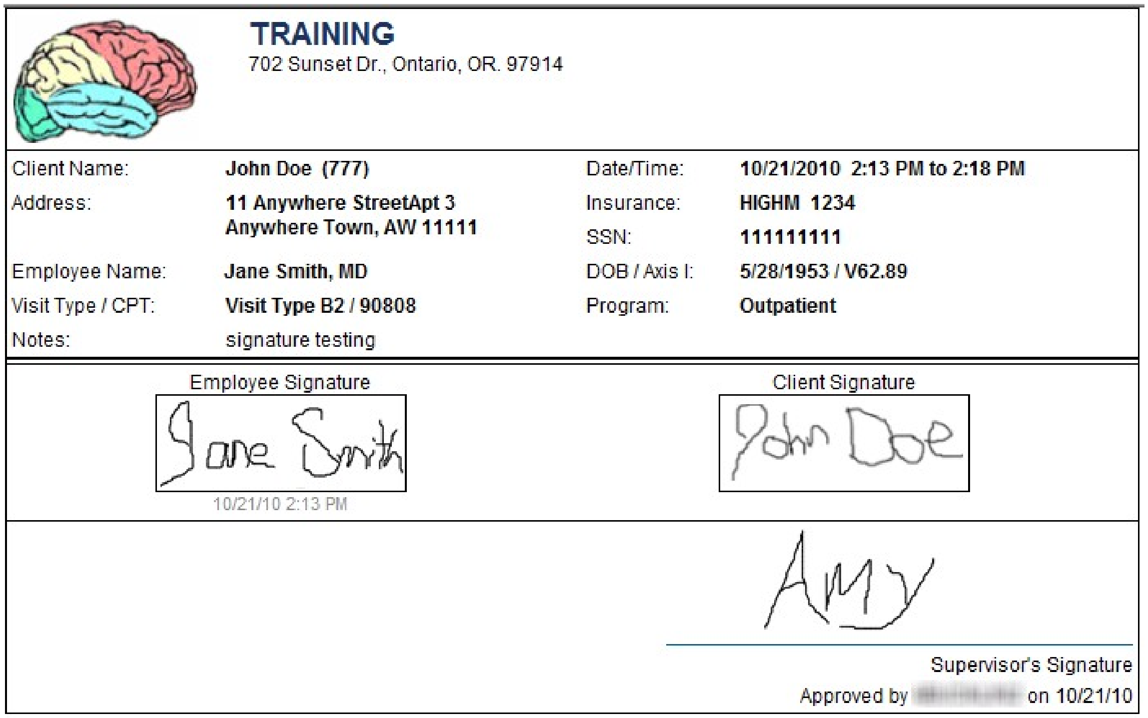
Release of information (ROI) signed??: Yes
Current risk factors:
Axis I: Clinical Disorders
Primary: 290.9- UNSPEC SENILE PSYCHOTIC CONDITION

Visit Printout Popup Page

If Credible's Tech Team has developed a custom printout for your organization, you enter the name of the custom ASP page in this field.

Printout Approval Signature

When selected, the signature of the supervisor (the person who approved the visit) will show on the visit printout when a visit is approved.



TRAINING
702 Sunset Dr., Ontario, OR. 97914

Client Name:	**John Doe (777)**	Date/Time:	**10/21/2010 2:13 PM to 2:18 PM**
Address:	**11 Anywhere StreetApt 3 Anywhere Town, AW 11111**	Insurance: SSN:	**HIGHM 1234** **111111111**
Employee Name:	**Jane Smith, MD**	DOB / Axis I:	**5/28/1953 / V62.89**
Visit Type / CPT:	**Visit Type B2 / 90808**	Program:	**Outpatient**
Notes:	signature testing		

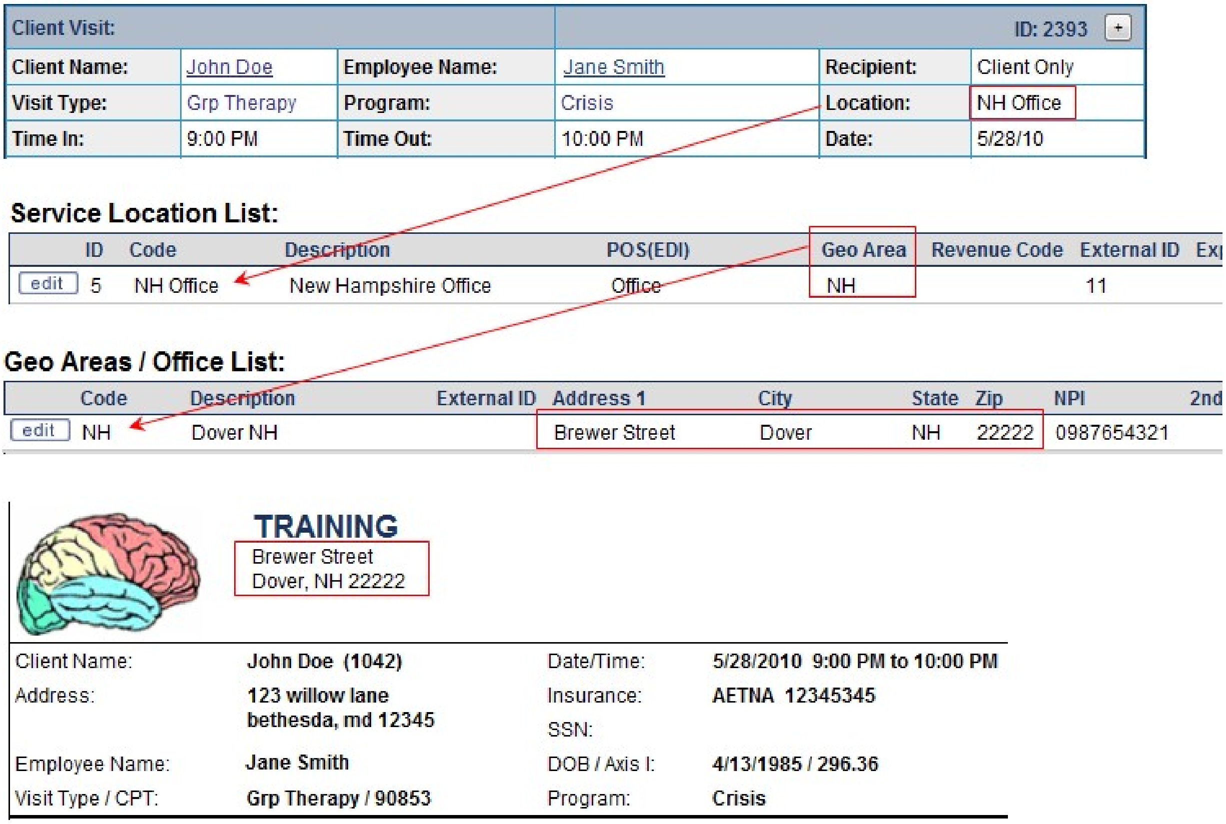
Employee Signature
Jane Smith
10/21/10 2:13 PM

Client Signature
John Doe

Amy
Supervisor's Signature
Approved by [illegible] on 10/21/10

GeoArea for Address

When selected, the system will use the address of the geo area that is assigned to the location of the visit in the print view header. GeoArea for Address setting.



1. Add geo areas with addresses (Admin tab > **Geo Areas / Offices**).
2. Add locations and select a geo area for each one (Admin tab > **Locations**).
3. Select *GeoArea for Address* in Partner Config.

Print in PDF Format & PDF Header/Body font size

With a new Partner Config setting, you can set up your system to generate a print view for an individual visit in PDF. If a visit print view spans multiple pages, the visit header will repeat on each page.

Note that print view in PDF is not available when printing multiple visits at one time with the Print All button. The default HTML format is used.

If your system is set up to print visit details to PDF, you can control the font size for the two main sections of the form. For the information in the header, you can choose between 6 and 8 point. For the form data, the range is 6 to 12 point. The default font size for both the header and body is 8.

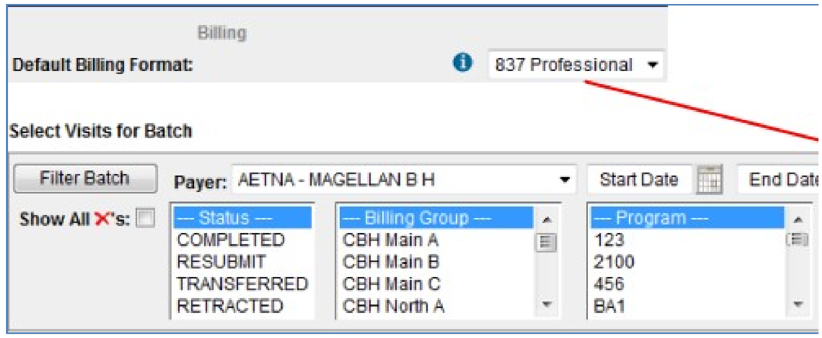
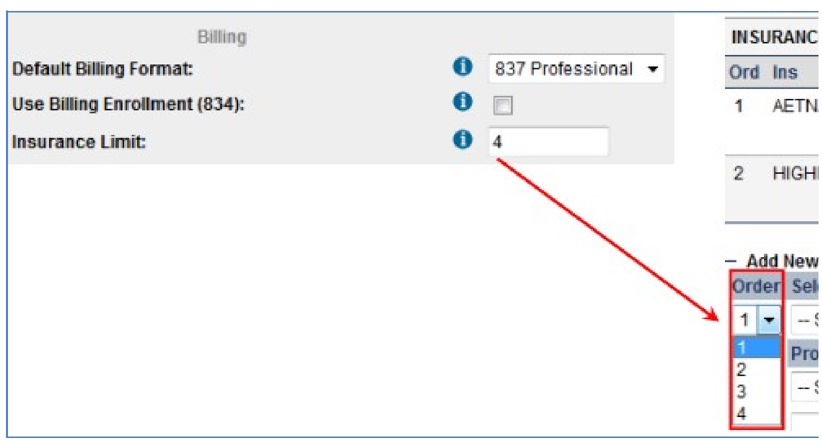
See also
Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Web Forms

Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

Home > Admin > Site Configuration > Partner Config > Partner Config: Billing

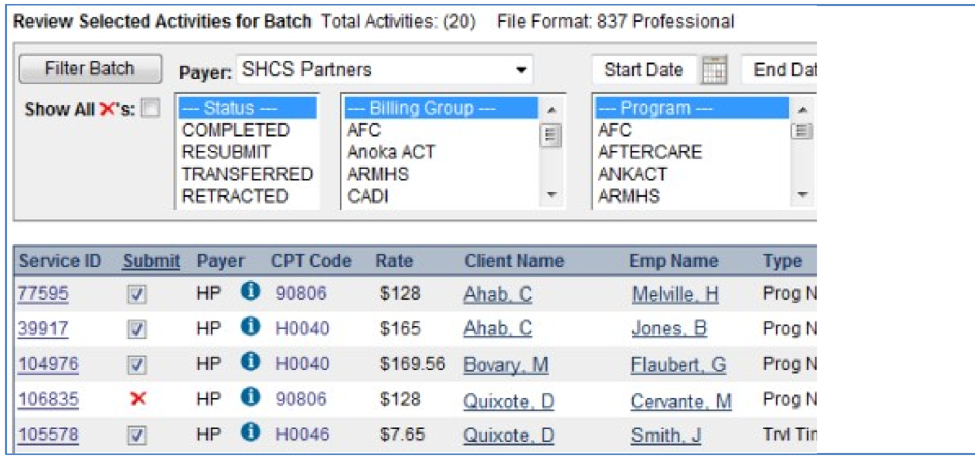
Partner Config: Billing

The settings in this section let you configure the Billing functionality in your Credible system to meet the needs of your organization.

Default Billing Format	Sets the default for the Claim Format dropdown in the Generate Batch Claim File screen  • 837 Professional and 837 Institutional are the typical settings and are for electro • CMS 1500 and CMS 1450 are for purely paper-based billing • Custom, Custom XML, and Custom CSV are for custom billing The Override Claim Format field in Payer Config (**Billing** tab > **Billing Payer**) overrides highly recommended.
Use Billing Enrollment (834)	Only for Arizona Partners; enables the option to generate billing enrollments (834 = sta **Note:** To use this, you *must* have the Data Dictionary profile set to specifically capture
Insurance Limit	Sets the maximum number of insurance providers allowed per client (the maximum the increase the number by one to accommodate a Self-pay payer (client responsibility bes for each client). 
HIPAA Send Pay To Provider	When checked, always sends the Pay to Provider loop, even if *Billing Provider = Pay to* **Note:** You do not need to select this setting to include the Pay to Provider defined in th
HIPAA Require Employee SSN	When checked: sends the employee SSN for billing if required (doesn't replace NPI).
Alternate 835 Processing	Only for Tennessee Partners; instructs the system to use the claim status code to proce

Billing Red X Override

When checked: lets users override any red X (problem) visit in the Generate Batch Clai
overridden. This procedure is only allowed when the fields causing the red X condition
overridden red X visits in the batch.



Recommendation: **Select** to allow (but not require) claims that Red X for batching to
not be available and claims that Red X for a batching rule will not become batchable ur

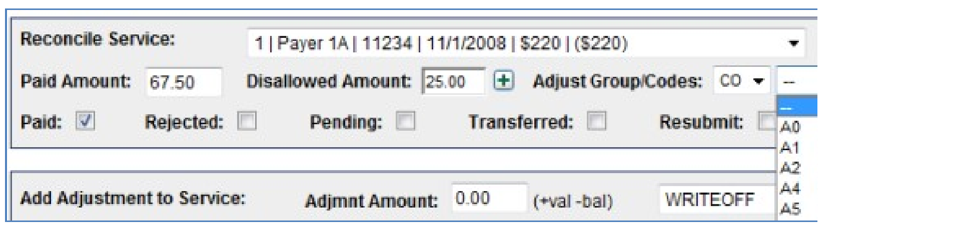
Allow Overpayment of Checks

- When checked: allows a claim to be reconciled against a payment entered even
- When unchecked: does not allow the overpayment to be reconciled against a claim.

Note: The system will automatically apply an Adjustment for the Overpaid amount.

Use Dropdown for Disallowed Codes

When checked, limits users to a list of valid HIPAA adjustment codes when reconciling a
Details screen.



When left unchecked, users can enter an adjustment code manually (up to 7 characters
Please Note: This setting does not affect the *Reconciled Batched Claims Screen*.

Show Last Paid on Statements 1.0

When checked, the system includes the posting date (date entered into Credible) of the
client payment will show under the client's name.

Please note: This only applies to Client Statements 1.0, not Client Statements 2.0.

Visit ID on CMS 1500

When checked, this prints the Visit ID in Box 26 of the CMS 1500, where the Client ID b

CMS 1500 Report Alignment

Sets the alignment for printing a CMS 1500. To compensate for variations in printers, tl
version, and 10pt font versions with an 1/8 inch adjustment in different directions.

Batch Claim Printer Alignment Settings for Epson WF 4630

Client Payment Auto Apply

When checked, client payments will automatically be applied to visits that have a client
For example, assume a client has had some visits and then an insurance provider or th
automatically apply the payment to the first service that was entered, since it is the old

When left unchecked, you must manually reconcile all client payments.

Regardless of setting, you need a business practice/workflow to address unapplied clier

Use Custom Revenue/AR Export	When checked: allows the use of a custom Revenue/AR to G/L export; discuss with you Credible develops the custom export for you, the system will generate errors. Recommendation: do not select if you are going to use the Revenue/AR Setup and Con procedure 'spc_load_ledgerbatch'."
Use Custom Revenue/AR Report	When checked: allows the use of a custom Revenue/AR to G/L export detail report; dis develops the custom report for you, the system will generate errors. Recommendation: do not select if you are going to use the Revenue/AR Setup and Con procedure 'spc_load_ledgerbatch'."
Single Custom Revenue/AR Export File	When checked: allows the use of custom Revenue/AR to G/L export that is a single file Implementation Manager. If you select this setting before Credible develops the custom Recommendation: do not select if you are going to use the Revenue/AR Setup and Con procedure 'spc_load_ledgerbatch'."
Auto Contract Rate Adjustments	When checked: a contract rate adjustment will reduce the value of the visit as soon as i that payer. If the visit is merged with another visit, the contract rate adjustment for the When left unchecked: any contract rate specified in the Billing Matrix will just be inform Recommendation: do not select if the payer's contract rates vary based on client (or so
Undo Auto Contract Rate Adjustments for 835	Automatically undo contracat rate adjustments off of services when loading in an 835 batch. This will al directly from the 835.
Auto Non-Billable Adjustments	When checked: the system automatically reduces any visit that is marked as non-billabl There are two ways to designate a visit as non-billable: • Select the **Yes** radio button for Non-Billable on the Sign & Submit screen (Non-E Web Forms section of the Partner Config) • Select the Non Billable checkbox on the Client Visit Update screen Visits that a marked as non-billable do *not* show up when generating a batch, even if th When left unchecked: you will need to manually find and adjust off each non-billable vi with no off-setting adjustment. Recommendation: it is highly recommended that you select this setting. **Caution:** the non-billable feature does not work well for billable services when Non-Bil
Set Zero Rate for Merged Secondaries	When checked: reduces any visit that merges into another to be worth $0. Each visit th "value" but only the primary visit is billed out. For example, some payers require that multiple visits that occur on the same day for gi the two visits are merged, one becomes the "primary" visit and the other becomes the selected and the two visits are merged, the following rate adjustments would occur: in (the primary) becomes $200 and the rate for Visit 2 (the secondary) becomes $0.00. When left unchecked: merged secondary visits will have revenue lines with no off-settir Recommendation: it is highly recommended that you select this setting.
Use Payment Controls	Payment controls are useful if your organization uses a centralized payment entry meth the money is received). For example, the BH Agency collects 27 payments during the d agency calculates the total amount collected. The payments and tally sheet are then giv The Payment Processor (or another employee with the PaymentControlAlter right) crea the 27 payments. With the unique ID assigned to the payment control, the Payment Pro payment control should equal the balance after the 27 payments entered. As the payme balance goes down -- once it gets to zero, you have reconciled all the payments in that and reconciliations for each payment control.

Include All Diagnoses for Billing	Include all diagnoses in dropdown to be selected for billing of services.
Block Apply Payments With No Insurance	When checked: only insurance payments from payers that are in the client's insurance into three payers in Credible (M1, M2, and M3) but only recieve payment from the main list, the money cannot be applied. If a user tries to apply an insurance payment to a vis message "Error processing claim [number]: Invalid payment payer ID. No client insurar When left unchecked: any insurance payment to be applied to any visit. Recommendation: do not select.
Allow Duplicate Ins Payment Entries	Removes the default constraint of blocking duplicate insurance payments – payments n
Require Deposit Date on All Payment Entries	Requires users to fill in a deposit date when they enter any insurance or client check pa deposit date is the Accounting Date.
Require Location on Client Payment Entries	Forces users to select a location when adding a client payment. Note that the Locatior up a payment location: 1. Billing tab > Billing Custom Lookups (under Billing Config). 2. Select payment_location from the Category dropdown and click **Display**. 3. Click **Add a New payment location entry**, fill out the fields for the payment lc used in the Location dropdown on the Payment Add screen. 4. Repeat step 3 for each location.
Use Contract Rate for Copay Percentage	When checked: system calculates percentage copay amounts (set up in the client's insu When left unchecked: system calculates percentage copay amounts (set up in the clien
HTTP Post URL, HTTP Post Username, HTTP Post Password, and 837P Message Type	Only for Partners who post 837 files to Change Healthcare (formerly Emdeon Inc.) Chai key.
Payment Display Date	Client Statement 1.0 only: Determines what date will print when generating Client State accounting dates are associated with payments. • Ledger (default) = Computer date -- the actual date funds were applied to the v • Check = Check date -- the manually entered check date of the payment the appl • Deposit = Accounting date -- the manually entered deposit date of the payment
Show CMS Formats When Generating Batches	When checked: gives your Billing staff the ability to use the CMS 1450 for an 837P or tł 1450 as options is available when generating a batch claim file. When left unchecked: Force CMS Format checkbox available when generating a batch (CMS 1450 for an 837I.
Use Simple Client Statement 1.0	When checked, system generates simple client statements. The simplified version does and past due time frames for amounts due. Note that the Adjusted column will reflect a
Show logo on Client Statement 1.0	When checked, your Agency logo will display in the upper left hand corner of each clien the upper left corner of your Credible system (left banner logo).
Use Client Statements 2.0	Enables Client Statements 2.0 for the Domain.
Use Alt Employee IDs by GeoArea	When checked: you can enter multiple alternate IDs for an employee via geo area assiç
Use Paperwork Segment for Visit Attachments	Displays the fields required to send paperwork reference information for visit attachments in the 837.
Save Updates to 835 Status Flags	Saves edits to the 835 status values on the reconcile screen when navigating away from the screen.
Use COB Indicator	Use the **COB Indicator** dropdown when reconciling an insurance payment. (This setting is for Ohio Par here.
Use Occurrence Codes, Occurrence Span Codes, and Value Codes	Allow **Occurrence Codes**, **Occurrence Span Codes**, and **Value Codes** to be recorded for clients. T **Note:** This is only relevant for Inpatient Billing.
Use Condition Codes	Allows **Condition Codes** to be recorded for clients. This adds additional fields to the Episode screen. **N**
Number of Days to mark Non-billable as PAID	This sets the number of days since the visit date (*rev_timein*) to set non-billable visits to paid. The visit
Allow selection of non-billable ICD-10 codes	When using the Problem List, this allows users to select non-billable ICD-10 diagnostic/category codes (l selecting non-billable codes and trying to bill them.

See also

Partner Config: Basic Information
Partner Config: Sizes

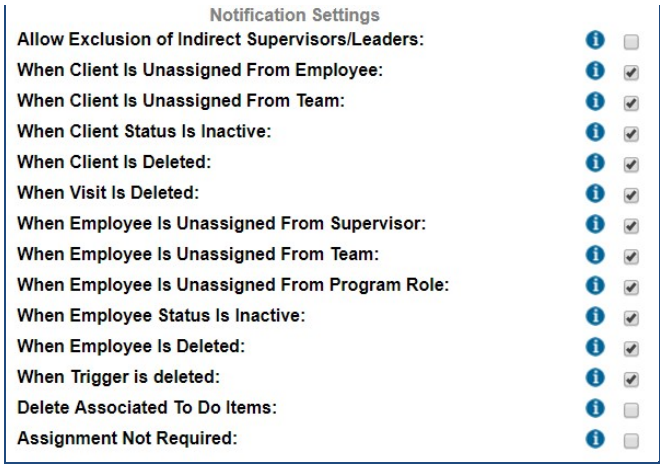
- Partner Config: Labels
- Partner Config: Features
- Partner Config: General Settings
- Partner Config: Client Settings
- Partner Config: Authorization Settings
- Partner Config: Liability Settings
- Partner Config: Visit Settings
- Partner Config: Web Forms
- Partner Config: Printouts
- Partner Config: Notification Settings
- Partner Config: Scheduler Settings
- Partner Config: Styles
- Partner Config: OQ Settings
- Partner Config: Tx Plus
- Partner Config: Messaging Settings
- Integration Settings

Updated 8/7/2017 2:27 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings

Partner Config: Notification Settings

These settings control the behavior of Notifications in Credible. See the pages listed below for more details on the settings. More information on creation and use of notifications can be found here.



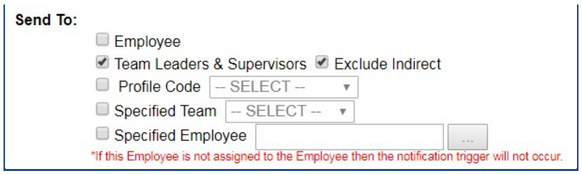
- **Allow Exclusion of Indirect Supervisors/Leaders**
- **Delete Associated To Do Items**
- **Assignment Not Required**
- **Notification Deletion Settings**
  - When Client is Unassigned from Employee
  - When Client is Unassigned From Team
  - When Client Status is Inactive
  - When Client Is Deleted
  - When Visit Is Deleted
  - When Employee Is Unassigned From Supervisor
  - When Employee Is Unassigned From Team
  - When Employee is Unassigned From Program Role
  - When Employee Status Is Inactive
  - When Employee Is Deleted
  - When Trigger Is Deleted

Modified 6/16/2017 6:28 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Allow Exclusion of Indirect Supervisors/Leaders

Allow Exclusion of Indirect Supervisors/Leaders

When is selected, an **Exclude Indirect** checkbox will be available for employee-based notifications. This gives staff the option of excluding indirect supervisors or leaders for employee-based notifications when **Send To: Team Leaders & Supervisors** is selected.



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.

See also

Delete Associated To Do Items
Assignment Not Required
Notification Deletion Settings

Updated: 6/16/2017 6:23 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Delete Associated To Do Items

Delete Associated To Do Items

When selected, this setting allows you to 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 Partner Config Notification Deletion Settings, for example, **When Client Is Unassigned From Employee**.

See also

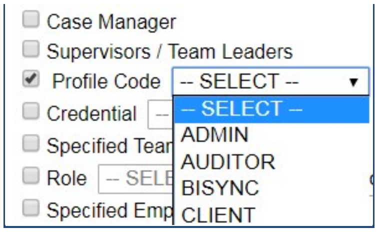
Allow Exclusion of Indirect Supervisors/Leaders
Assignment Not Required
Notification Deletion Settings

Updated: 6/16/2017 6:23 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Assignment Not Required

Assignment Not Required

When selected, an **Assignment Not Required** checkbox is added for the **Send To Profile Code**. When the checkbox is selected, notification is sent to employees with specified profile regardless of client assignment (for example, Billing Staff).



See also

Allow Exclusion of Indirect Supervisors/Leaders
Delete Associated To Do Items
Notification Deletion Settings

Updated: 6/16/2017 6:22 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings

Notification Deletion Settings

Most Partner Config notifications settings are for the automatic removal of existing notifications from employee schedules when varying conditions are met. **Please note**: Notifications that have not triggered yet are not affected by the automatic removal.

Updated: 6/16/2017 6:21 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings > When Client is Unassigned from Employee

When Client is Unassigned from Employee

Deleted the notifications for the employee when the client is no longer assigned to that employee.

See also

When Client is Unassigned From Team
When Client Status is Inactive
When Client Is Deleted
When Visit Is Deleted
When Employee Is Unassigned From Supervisor
When Employee Is Unassigned From Team
When Employee is Unassigned From Program Role
When Employee Status Is Inactive
When Employee Is Deleted
When Trigger Is Deleted

Updated: 6/16/2017 6:20 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings > When Client is Unassigned From Team

When Client is Unassigned From Team

Deletes notifications for team members when the client is no longer assigned to that team.

See also

When Client is Unassigned from Employee
When Client Status is Inactive
When Client Is Deleted
When Visit Is Deleted
When Employee Is Unassigned From Supervisor
When Employee Is Unassigned From Team
When Employee is Unassigned From Program Role
When Employee Status Is Inactive
When Employee Is Deleted
When Trigger Is Deleted

Updated: 6/16/2017 6:20 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings > When Client Status is Inactive

When Client Status is Inactive

Deletes notifications when the client's status is changed to **Inactive**.

See also

When Client is Unassigned from Employee
When Client is Unassigned From Team
When Client Is Deleted
When Visit Is Deleted
When Employee Is Unassigned From Supervisor
When Employee Is Unassigned From Team
When Employee is Unassigned From Program Role
When Employee Status Is Inactive
When Employee Is Deleted
When Trigger Is Deleted

Updated: 6/16/2017 6:20 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings > When Client Is Deleted

When Client Is Deleted

Deleted notifications when the client is deleted from the system.

See also

When Client is Unassigned from Employee
When Client is Unassigned From Team
When Client Status is Inactive
When Visit Is Deleted
When Employee Is Unassigned From Supervisor
When Employee Is Unassigned From Team
When Employee is Unassigned From Program Role
When Employee Status Is Inactive
When Employee Is Deleted
When Trigger Is Deleted

Updated: 6/16/2017 6:19 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings > When Visit Is Deleted

When Visit Is Deleted

Deletes notifications resulting from a visit, when that visit is deleted from the system.

See also

When Client is Unassigned from Employee
When Client is Unassigned From Team
When Client Status is Inactive
When Client Is Deleted
When Employee Is Unassigned From Supervisor
When Employee Is Unassigned From Team
When Employee is Unassigned From Program Role
When Employee Status Is Inactive
When Employee Is Deleted
When Trigger Is Deleted

Updated: 6/16/2017 6:19 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings > When Employee Is Unassigned From Supervisor

When Employee Is Unassigned From Supervisor

Deleted notifications for the supervisor when an employee is no longer under their supervision.

See also

When Client is Unassigned from Employee
When Client is Unassigned From Team
When Client Status is Inactive
When Client Is Deleted
When Visit Is Deleted
When Employee Is Unassigned From Team
When Employee is Unassigned From Program Role
When Employee Status Is Inactive
When Employee Is Deleted
When Trigger Is Deleted

Updated: 6/16/2017 6:19 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings > When Employee Is Unassigned From Team

When Employee Is Unassigned From Team

Deletes notifications for team members when the employee is no longer assigned to that team.

See also

When Client is Unassigned from Employee
When Client is Unassigned From Team
When Client Status is Inactive
When Client Is Deleted
When Visit Is Deleted
When Employee Is Unassigned From Supervisor
When Employee is Unassigned From Program Role
When Employee Status Is Inactive
When Employee Is Deleted
When Trigger Is Deleted

Updated: 6/16/2017 6:19 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings > When Employee is Unassigned From Program Role

When Employee is Unassigned From Program Role

Deletes notifications for the employee when that employee is unassigned from the program role that was part of the notification.

See also

When Client is Unassigned from Employee
When Client is Unassigned From Team
When Client Status is Inactive
When Client Is Deleted
When Visit Is Deleted
When Employee Is Unassigned From Supervisor
When Employee Is Unassigned From Team
When Employee Status Is Inactive
When Employee Is Deleted
When Trigger Is Deleted

Updated: 6/16/2017 6:19 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings > When Employee Status Is Inactive

When Employee Status Is Inactive

Deletes notifications when the employee's status is changed to **Inactive**.

See also

When Client is Unassigned from Employee
When Client is Unassigned From Team
When Client Status is Inactive
When Client Is Deleted
When Visit Is Deleted
When Employee Is Unassigned From Supervisor
When Employee Is Unassigned From Team
When Employee is Unassigned From Program Role
When Employee Is Deleted
When Trigger Is Deleted

Updated: 6/16/2017 6:18 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings > When Employee Is Deleted

When Employee Is Deleted

Deletes notifications when the employee is deleted from the system.

See also

When Client is Unassigned from Employee
When Client is Unassigned From Team
When Client Status is Inactive
When Client Is Deleted
When Visit Is Deleted
When Employee Is Unassigned From Supervisor
When Employee Is Unassigned From Team
When Employee is Unassigned From Program Role
When Employee Status Is Inactive
When Trigger Is Deleted

Updated: 6/16/2017 6:18 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Notification Settings > Notification Deletion Settings > When Trigger Is Deleted

When Trigger Is Deleted

This setting deletes notifications when the trigger creating the notification is deleted from the system.

Notification Triggers are deleted via **Admin** tab > **Daily Activities** section> **Notification Triggers**, then clicking the **Delete** button.

See also

When Client is Unassigned from Employee
When Client is Unassigned From Team
When Client Status is Inactive
When Client Is Deleted
When Visit Is Deleted
When Employee Is Unassigned From Supervisor
When Employee Is Unassigned From Team
When Employee is Unassigned From Program Role
When Employee Status Is Inactive
When Employee Is Deleted

Updated: 6/16/2017 6:18 PM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Scheduler Settings

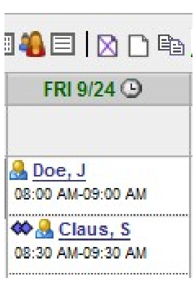
Partner Config: Scheduler Settings

The settings in this section let you allow or block various schedule entries and enable two functions: Company Holidays and Appointment Reminders.

Allow Conflicting Schedules - Employees

Allow overlapping schedule items (blocks or appointments) to be entered on the schedule for the same employee. The default setting is to *disallow* the overlap. If you do *not* want to allow scheduling overlap, do *not* select the setting.

If a scheduled entry conflicts with another entry, two overlapping blue diamonds appear in the upper left corner of the entry.

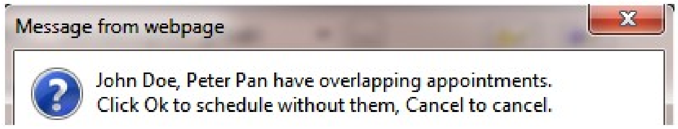


Allow Conflicting Schedules - Clients

Allow a schedule entry that overlaps another entry for the same client. See above for more information.

Schedule Group Without Overlapping Clients

Notify an employee when clients in the group visit he/she is scheduling have overlapping visits.



Employee can schedule the group visit without the clients (the system automatically removes them from the visit) or cancel the scheduled group visit.

Block Not Assoc Employee Scheduling

Block the scheduling of a visit for an employee who is *not* associated with what would be the primary payer for that visit. In other words, the system will *not* permit visits to be scheduled for employees who are not payer-credentialed.

The default setting is for this type of scheduling to be permitted. If you do *not* want to allow it, check the box to activate this blocking feature.

Block Conflicting Schedule for same Payer

Prevent a user from scheduling a visit for a client who has another visit scheduled for an overlapping time for the same payer.

Block Scheduling of Visits Where Client Owes More Than

Block the scheduling of visits where clients owe more than the amount you specify. Note that the blocking does not apply if an employee conducts a visit through the Add Visit or Quick Visit functions.

If need to override the block for individual clients, add the **do_not_block_for_debt** field to the Client Profile. When set to Yes, visits can be scheduled for the client even if he or she has a client due balance that exceeds the amount set in Partner Config.

Show Schedule Primary Assigned

This is a print option. When selected, the primary assigned clinician will appear on the schedule printout.

Use Cancellation Form

When selected, a Begin Cancellation/No-Show Form button is added to the Scheduled Visit popup when an employee changes the status to CANCELLED, CNCLD>24hr, or NOSHOW.

Setting up your system to use a cancellation/no-show form is a Front Desk best practice. Selecting this Partner Config setting is the first step in the setup process. For the other steps, click here.

Default Duration on Planner

Sets the global standard default duration that appears each time you click on the "Schedule" page to schedule a new visit, event, appointment, and so on.

Note: The default duration can be overridden by the Visit Type setting and the Employee Configuration setting.

The default duration can be set for as short as 15 minutes or as long as 12 hours. To set your default duration, select the desired time period from the dropdown.

Hide Insurance ID on Schedule Print

When selected, the Insurance ID will *not* appear on the Schedule Print.

Use Company Holidays	Makes the Company Holidays function available on the Admin tab (under Daily Activities). The function lets staff specify which dates are holidays for your organization. For Meaningful Use, a business day is defined as a date that is both a weekday (Monday to Friday) and is not marked as a holiday. Business days are used to measure the objective of providing patients with an electronic copy of their health information.
Enable Appointment Reminders	Enables the system to automatically email and/or text appointment reminders to clients. Click here for more info.
No Cancel on Discard	Do not set client scheduled records to CANCELLED when using the discard visit on sign and submit page. This only works for group scheduled visits.

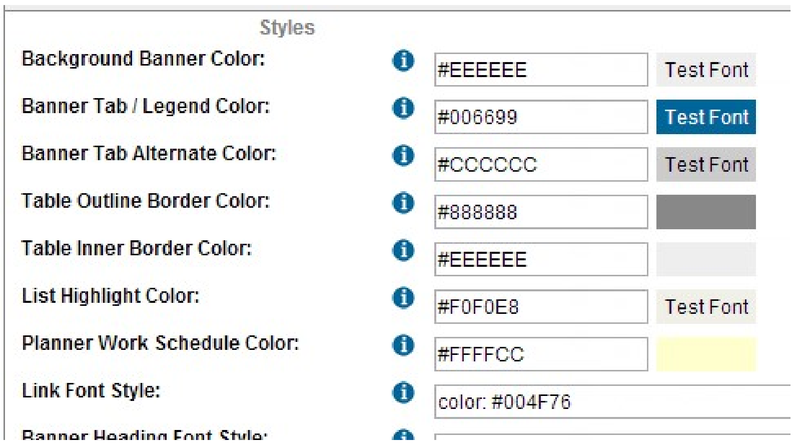
See also

Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles

Partner Config: Styles

The Styles section allows you to customize the overall look and feel of your site by changing the colors and font styles of banners, tables, and more.



All fields in this section are preset with standard selections (generally set up for you by a Credible staff member to coordinate with your company logo and colors), but a link to a "Color Picker Site" allows you to view and select other options if desired.

Background Banner Color	Banner Tab / Legend Color	Banner Tab Alternate Color	Table Outline Border Color	Table Inner Border Color	List Highlight Color	Planner Work Schedule Color
Body Font Style	Link Font Style	Banner Heading Font Style	Email Signature Font Style	Page Heading Font Style	Table Header Font Style	Table List Header Font Style
Table Field Label Font Style	Table Row Highlight Font Style					

See also

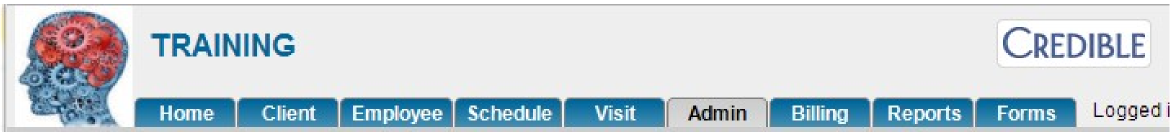
Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: OQ Settings
Partner Config: Tx Plus

Partner Config: Messaging Settings
Integration Settings

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Background Banner Color

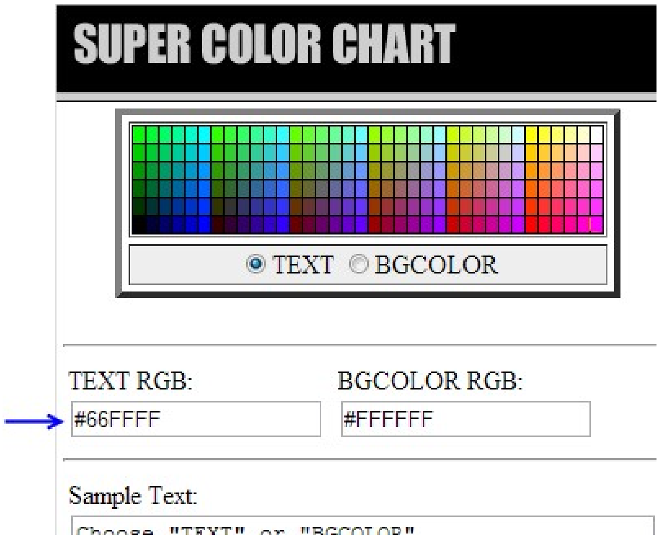
Background Banner Color

This setting determines the background color for the banner at the top of the screen. In the example below, the hexidecimal (hex) code for background banner color is #EEEEEE.



To change the background banner color:

1. Admin tab > Partner Config.
2. Scroll down to the Styles section.
3. If you know the hex code for the color you want to use, enter it into the Background Banner Color field.
   If you don't know the hex code: click the Color Picker Site link at the bottom of the Styles section, click the desired color in the super color chart, copy the Text RGB code, and paste it into the Background Banner Color field.



4. Click Save Partner Config.

See also

Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Banner Tab / Legend Color

Banner Tab / Legend Color

Banner Tab / Legend Color sets the color for *unselected* banner tabs, legend box borders (on the Admin page, Client Insurance page, etc.), and section headers on MyCW pages.

See also

Background Banner Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Banner Tab Alternate Color

Banner Tab Alternate Color

Banner Tab Alternate Color sets the tab color for *selected* banner tabs.

See also

Background Banner Color
Banner Tab / Legend Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Table Outline Border Color

Table Outline Border Color

Table Outline Border Color sets the outline color for outer table borders (appears on most list, view, and update pages).

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Table Inner Border Color

Table Inner Border Color

Table Inner Border Color sets the color for inner table borders (appears on the Client View, Client Update screen, Visit View, etc.).

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > List Highlight Color

List Highlight Color

List Highlight Color sets the background color for alternate lines in a list page (ex: Client List, Visit List, etc.)

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Planner Work Schedule Color

Planner Work Schedule Color

Planner Work Schedule Color sets the background color on the planner (schedule) that shows a person's work schedule.

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Body Font Style

Body Font Style

Body Font Style sets the font style for the main body text on all pages within the site.

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

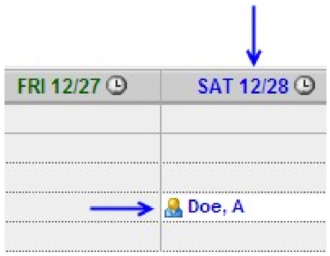
Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Link Font Style

Link Font Style

Link Font Style controls the color for hyperlinks throughout your Credible system. This setting also controls the color of client names for scheduled visits when *employees are viewing their own schedules*.

The default setting is **Color: #343843**.

If this setting is null, the bright blue color shown below will be used.



See also
Schedule Basics II

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Banner Heading Font Style

Banner Heading Font Style

Banner Heading Font Style sets the font style for the partner name on the site banner and on printouts.

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Email Signature Font Style

Email Signature Font Style

The **Email Signature Font Style** setting in Partner Config sets the font style for the Client's email signature that appears on email sent through the site.

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Page Heading Font Style

Page Heading Font Style

Page Heading Font Style sets the font style for miscellaneous page headings (i.e. - on Schedules (planners), the Security Matrix, etc.).

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Table Header Font Style

Table Header Font Style

Table Header Font Style sets the font and background style for the headers that appear on "View" and "Update" pages within the site (i.e. - Client View, Employee View, Client Update, etc.).

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table List Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Table List Header Font Style

Table List Header Font Style

Table List Header Font Style sets the font and background style of the column headers that appear on "List" pages (i.e. - Client List, Employee List, Visit List, etc.).

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table Field Label Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Table Field Label Font Style

Table Field Label Font Style

Table Field Label Font Style sets the font and background style for the labels and/or field names that appear on tables (i.e. - the labels/field names that appear on the Client View screen, the Client Axis, Employee Update screen, etc.).

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Row Highlight Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: Styles > Table Row Highlight Font Style

Table Row Highlight Font Style

Table Row Highlight Font Style sets the font style for highlighted rows on assignment pages (i.e. - Client Team assignment, Employee Program assignment, etc.).

See also

Background Banner Color
Banner Tab / Legend Color
Banner Tab Alternate Color
Table Outline Border Color
Table Inner Border Color
List Highlight Color
Planner Work Schedule Color
Body Font Style
Link Font Style
Banner Heading Font Style
Email Signature Font Style
Page Heading Font Style
Table Header Font Style
Table List Header Font Style
Table Field Label Font Style

Home > Admin > Site Configuration > Partner Config > Partner Config: OQ Settings

Partner Config: OQ Settings

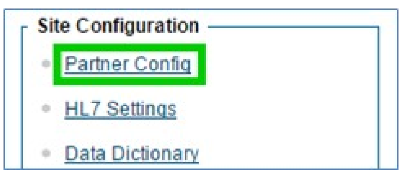
Please note: Credible Premium features require a contract order form, addendum, or modification. For more information, please contact your Partner Relationship Manager, or email contracts@credibleinc.com.

The following OQ Settings are available on the Partner Config page. For more information about this service, please contact your Partner Relationship Manager.

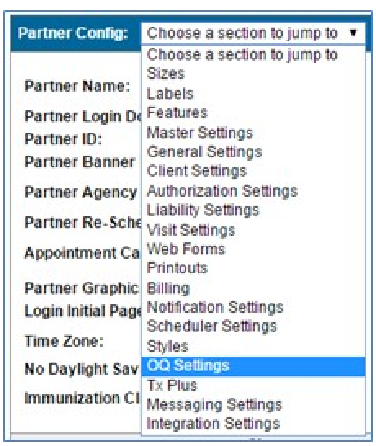
- OQ Sync Web Service
- OQ Username
- OQ Password
- OQ Profile Codes to Sync
- OQ Adult Default Instrument
- OQ Child Default Instrument
- OQ Clinic/MRN Prefix
- Employee Username Suffix
- Use External Team ID
- Use Team Prefix
- Use Geo Area
- OQ Medical Record Number

To access these settings:

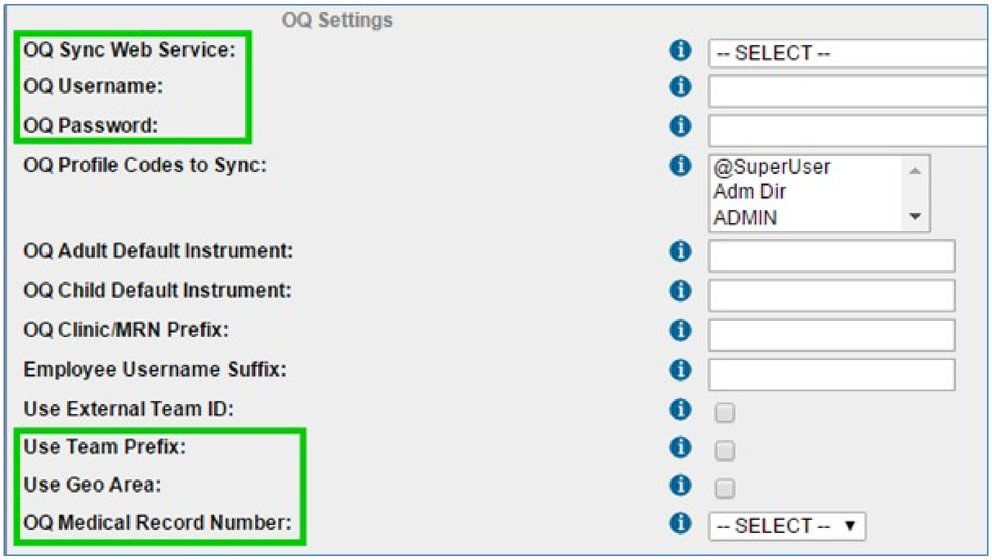
1. Go to **Admin** > **Site Configuration** > **Partner Config**.



2. From the **Section** dropdown, select **OQ Settings**.



3. Check the settings you wish to enable.



4. Click the **Save Partner Config** button at the bottom of the page.

See also

Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: Tx Plus
Partner Config: Messaging Settings
Integration Settings

Updated: 5/23/2017 10:39 AM by CredibleEducation

Home > Admin > Site Configuration > Partner Config > Partner Config: Tx Plus

Partner Config: Tx Plus

Use Tx Plus	Turns on the feature and makes it appear on the navbar, Security Matrix permitting. Note: Do not turn off the feature after it has been enabled.
Use Custom Tx Plus Library	Enables the custom treatment plan library functionality in Credible. Use the Manage Tx Plus Library function on the Admin tab to create the library with clinical areas specific to your organization. For each clinical area, predefine problems and the related goals, objectives, and interventions to standardize treatment plan building. When an employee selects a clinical area, he or she will only be able to choose from the problems you defined for it. Similarly, when the employee selects a problem, only the goals/objectives/interventions you associated with it will be available.
Use Tx Plus Extended Fields/ Manage Tx Plus Extended Fields	Click here
Activate Tx Plus On Approval/ Use Approval Date As Tx Plus Plan Start Date	Click here
On Template Change Children Dates	If your organization uses Tx Plus templates, you can configure your system to use the Tx Plan start date you enter for all items in the plan after you select a template. If you change the plan start date after having saved the plan, it will no longer cascade down to the items in the plan.
No Program Selector on Builder Screen	Select this setting if you do not want your treatment plan builders to associate a client's program with his/her treatment plan. When checked, the Program dropdown will not be available on the Client Tx Plus Builder screen.
Inactive Individual Tx Plus Elements	If your organization has the need to defer individual elements (levels) in a Tx Plus plan, you can configure your system so an Element Status dropdown is available for each level. When you change the Element Status from Active (default) to Inactive, a reason field appears. An inactive Tx Plus level, greys out the level and any child levels so you cannot edit or document against them. The system also prevents you from adding additional child levels to an inactive level. A user needs the TxPlusInactive right to be able to change the Element Status dropdown. When a user reactivates an inactive element by selecting active status, a reactivate confirmation prompt displays. To rename an existing status: 1. Go to Admin Tab > Partner Config > Manage Tx Plus Element Status Types and find the status you would like to change. 2. Click Edit. 3. Change Tx Plus Status name. 4. Click Save. To add a new status: 1. Go to Admin Tab > Partner Config > Manage Tx Plus Element Status Types 2. Click Add a New Tx Plus Element Status Types Entry. 3. Enter the name of the status in the Tx Plus Status field. You can also enter a code in the Code field. 4. If you are adding an acxtive status, select True from Is Active dropdown. Otherwise, use default False to add an inactive status. 5. Click Add Tx Plus Element Status Types button.
Restrict Tx Plus Creation to Certain Forms	Click here
Alert Users On Blank Program Save	When checked, the message “Program is blank, are you sure you want to save?” displays when saving a Tx Plus plan with a blank program. This is useful if you use templates and an employee selects a program before selecting a template -- in this scenario, the system will clear the program selection (the recommended order is to select a template first).

Problem/Goal/Objective/Intervention Label	If necessary, change the names of the hierarchical levels to the terminology your organization uses (max 25 characters). If you want to use fewer than four levels, remove the appropriate number of labels starting with the lowest level (Intervention Label). If you remove the Problem Label, no Tx Plus items will be available when building a treatment plan.
Custom Tx Plus Program Labels	Click here
Problem/Goal/Objective/Intervention Background Color	When the background color fields are blank, the default colors are as follows: • Problem: pale turquoise (#BBFFFF) • Goal: Navajo white (#FFDEAD) • Objective: purple (#9999FF) • Intervention: salmon (#FF9999) To change a background color, enter the appropriate hex code in the corresponding Partner Config field. Do not use yellow as that is the "active level" color used by the system.
Show Active Tx Plus Plans In Forms	Click here
Force Custom/Wiley Library	Click here
Hide Templates	Disables the template functionality for Tx Plus; hides the TxPlus Templates function on the Admin tab

See also

Tx Plus

Managing Tx Plus Extended Fields
Activate Tx Plus on Approval/Use Approval Date As Tx Plus Plan Start Date
Restricting Tx Plus Plan Creation to Web Forms and Specific Visit Types
Custom Tx Plus Program Labels
Show Active Tx Plus Plans In Forms
Force Custom/Wiley Library

Home > Admin > Site Configuration > Partner Config > Partner Config: Tx Plus > Managing Tx Plus Extended Fields

Managing Tx Plus Extended Fields

If your organization needs further organization and detail for a Tx Plus level/item (problem, goal, objective, or intervention), you can configure your system to use extended fields. You specify the field label and type – checkbox, dropdown, or text box. For a dropdown, you can use an existing custom lookup or enter the options for the dropdown on the fly.

By default, users can only document against extended fields when the treatment plan is accessed via the Client nav bar. By selecting the Form Documentation Only checkbox, you can switch the "documentation venue" so users can only document against them when the plan is accessed via a web form.

When adding or changing extended elements, you can preview how they will appear to users when documenting against a Tx Plus plan. The preview assumes the plan is accessed via the Client nav bar so if Form Documentation Only is checked, you will not be able to preview dropdown options.

Settings

Partner Config: Use Tx Plus Extended Fields, Manage Tx Plus Extended Fields
Security Matrix: TxPlusBuild

Configuration

To add extended fields:

1. Admin tab > Partner Config.
2. Enable Tx Plus extended fields in Partner Config and then click Manage Tx Plus Extended Fields.
3. Click the New Extended Field button and select the Tx Plus item you want to add it to.
4. Enter the label for the field (max 100 characters) and select the field type.
5. If you selected dropdown, click the Manage Dropdown Items button. Do one of the following and then click Save.

   • To use a custom lookup, select it from the dropdown.
   • To create your dropdown on the fly, select the checkbox and enter the options in the text box, separating each one with a semicolon.

6. To switch the documentation venue for the field to a web form (vs the Client nav bar), select the Form Only Documentation checkbox.
7. Click Save to return to the list of extended fields.
8. Repeat steps 2 – 7 to add additional extended fields.
9. To preview the extended fields for a Tx Plus item, click Show Model, select the element from the dropdown, and click Preview. To clear a preview, click the Hide Model button.
10. When done configuring extended fields, close the popup and click Save Partner Config.

To edit or delete an extended field:

1. Admin tab > Partner Config > Manage Tx Plus Extended Fields.
2. Use the corresponding button. Note that you cannot delete an extended field once it has been documented against.

For use, see the Tx Plus help topic. Note that answers to Tx Plus extended fields are not displayed as part of Previous Documentation.

See also

Activate Tx Plus on Approval/Use Approval Date As Tx Plus Plan Start Date
Restricting Tx Plus Plan Creation to Web Forms and Specific Visit Types
Custom Tx Plus Program Labels
Show Active Tx Plus Plans In Forms
Force Custom/Wiley Library

Activate Tx Plus on Approval/Use Approval Date As Tx Plus Plan Start Date

With the Activate Tx Plus On Approval setting, you can set up your system to automatically activate a Tx Plus plan when the visit in which it was built is approved. Because the feature is tied to visit approval, you must build the Tx Plus plan from within a web form. Once built, the plan will only be available to view in the visit in which it was built until it is activated. If your system is set up to use multi-stage approval and the Tx Plus plan visit type is set up for multi-stage approval, the plan will not become active until after the last approval.

If you have enabled Activate Tx Plus On Approval, you can also configure your system to automatically use the visit approval date as the Tx Plus plan start date. When Use Approval Date As Tx Plus Plan Start Date is checked, the Tx Plus plan start entered when the plan was created will be overwritten with the approval date.

The other related Partner Config setting you need to select is Show Active Tx Plus Plans In Forms.

See also

Managing Tx Plus Extended Fields
Restricting Tx Plus Plan Creation to Web Forms and Specific Visit Types
Custom Tx Plus Program Labels
Show Active Tx Plus Plans In Forms
Force Custom/Wiley Library

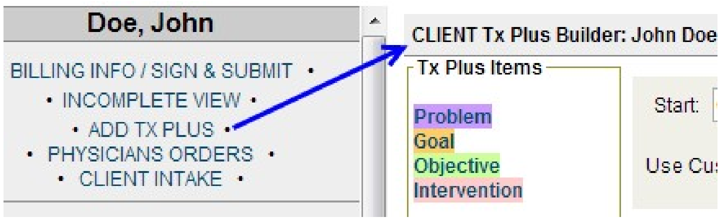
Home > Admin > Site Configuration > Partner Config > Partner Config: Tx Plus > Restricting Tx Plus Plan Creation to Web Forms and Specific Visit Types

Restricting Tx Plus Plan Creation to Web Forms and Specific Visit Types

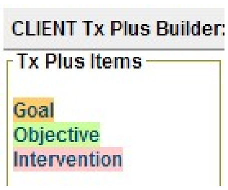
You can configure your system to restrict Tx Plus plan creation so it can only be done from within a web form and only for certain visit types. Once a Tx Plus plan exists, the restriction prevents users from adding/editing top levels but allows them to add/edit child levels.

This restriction is useful if the top levels in a treatment plan – for example, Problems – need to stem directly from information in a specific form such as an original assessment. In this scenario, users would be prevented from adding/editing Problems in non-assessment forms but could add/edit child levels – for example, Goals, Objectives, and Interventions – as normal.

When Restrict Tx Plus Creation to Certain Forms is selected, there is only one way to create a Tx Plus plan: from within a form that is linked to a visit type flagged as "Tx Plus Creation Visit" – a new visit type config setting. And you have to use the ADD TX PLUS link to access the "creator" version of the Tx Plus Builder screen.



If you access the Tx Plus Builder screen via the Intake navbar (or the Client navbar), the "non-creator" version without the top level in the Tx Plus Items box displays.



Once top levels (and optionally child levels) have been added to a Tx Plus plan and it has been saved, users should then access it via "non-creator" visit types – Tx Plus Creation Visit is unchecked. While they cannot add/edit top levels, they can add/edit child levels.

Settings

Partner Config: Use Tx Plus, Restrict Tx Plus Creation to Certain Forms

Visit Type Config: Tx Plus Creation Visit

Security Matrix: TxPlusBuild, TxPlusView, TxPlusBuildFromForm (optional)

Note that Restrict Tx Plus Creation to Certain Forms is different than the TxPlusBuildFromForm right, which removes the Tx Plus button from the Client navbar and has no impact on the top level.

Configuration

1. Admin tab > Partner Config.
2. Select Restrict Tx Plus Creation to Certain Forms and click Save Partner Config.
3. Admin tab > Visit Type.
4. Edit the visit type(s) you want to allow top-level editing and adding.
5. Select Tx Plus Creation Visit and click Save.

See Tx Plus in the help for information on setting up a Tx Plus form.

Use

See Building a Tx Plus Plan in the help; look for the section on building the plan from within a web form.

When creating the plan, access the form via a “creator” visit type and make sure you use the ADD TX PLUS link to access the Tx Plus Builder screen.

Once the plan is created, have users use a “non-creator” visit type to add/update child levels in the plan.

See also

Managing Tx Plus Extended Fields
Activate Tx Plus on Approval/Use Approval Date As Tx Plus Plan Start Date
Custom Tx Plus Program Labels
Show Active Tx Plus Plans In Forms
Force Custom/Wiley Library

Custom Tx Plus Program Labels

If the terminology you use for the items/levels in a treatment plan changes based on the program the plan is associated with, take advantage of the program-specific Tx Plus labels. You can have program-specific labels for the four items in a Tx Plus plan: Problem, Goal, Objective, and Intervention.

The main labels in Partner Config are used for programs that do not have labels assigned. When using program-specific labels, it is important that you set them up for the same levels that are set for the main labels. For example, if only Problem and Goal are filled out for the main labels, you should only set up program-specific labels for the same two levels. As a reminder, when you leave a level blank, it does not appear when building a treatment plan.

Settings

Partner Config: Custom Tx Plus Program Labels

Security Matrix: TxPlusView, TxPlusBuild

Configuration

1. Admin tab > Partner Config > Custom Tx Plus Program Labels.
2. Click the Click Here to Add Labels link. The Program-Specific Tx Plus Labels screen displays.
3. Click the Add Tx Plus Program-Specific Label button.
4. Select a program from the dropdown.
5. Enter custom labels for the same levels that are set up with “main labels” in Partner Config and save.
6. Repeat steps 3 - 5 for each program that needs labels. Since each program can only have one set of labels, an error message displays if you select a program that already has labels.
7. When you are done setting up program-specific labels, close the popup.

See also

Managing Tx Plus Extended Fields
Activate Tx Plus on Approval/Use Approval Date As Tx Plus Plan Start Date
Restricting Tx Plus Plan Creation to Web Forms and Specific Visit Types
Show Active Tx Plus Plans In Forms
Force Custom/Wiley Library

Home > Admin > Site Configuration > Partner Config > Partner Config: Tx Plus > Show Active Tx Plus Plans In Forms

Show Active Tx Plus Plans In Forms

If your agency needs to approve a Tx Plus plan before making it available in a Tx Plus form, you can set up your system to show only active Tx Plus plans in forms. Once a Tx Plus plan has been approved, you can flag it as Active and then it will be available to document against. You can control which employees can flag a Tx Plus plan as active with the Security Matrix right TxPlusActivate.

Note

If a Tx Plus plan is used for a visit and then set to "inactive," it will still show up for that visit.

Settings

Partner Config: Use Tx Plus, Show Active Tx Plus Plans In Forms

Note

If Show Active Tx Plus Plans In Forms is not selected, all Tx Plus plans added default to active status.

Security Matrix: TxPlusActivate

Configuration

See Tx Plus

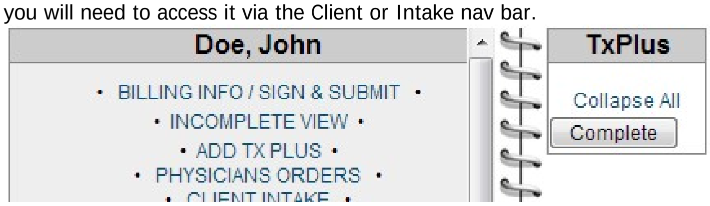
Use

After a Tx Plus plan has been approved:

1. Tx Plus on Client nav bar > edit button for the plan.
2. Select the Active checkbox and click Save.

Notes

- If you don't have the TxPlusActivate right and you edit an active TxPlus plan, the plan will automatically become inactive.
- If you do have the TxPlusActivate right and you edit an active TxPlus plan, it will remain active unless you specifically uncheck the Active checkbox.
- If you build a Tx Plus plan from within a form, the plan will not display after saving if the Active checkbox was not selected while building. Instead, you will get an empty TxPlus box as shown below. When you are ready to set the plan to Active, you will need to access it via the Client or Intake nav bar.



See also

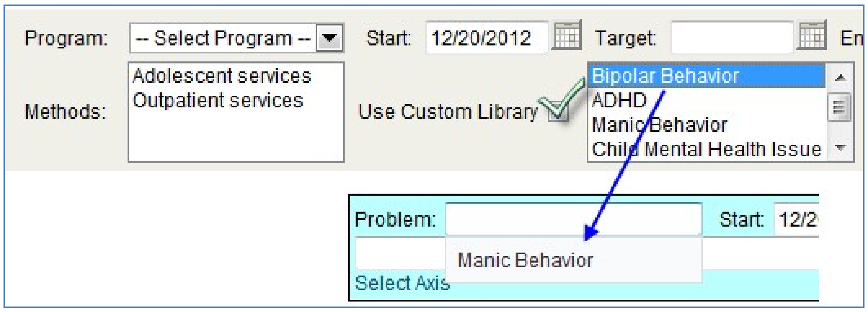
Managing Tx Plus Extended Fields
Activate Tx Plus on Approval/Use Approval Date As Tx Plus Plan Start Date
Restricting Tx Plus Plan Creation to Web Forms and Specific Visit Types
Custom Tx Plus Program Labels
Force Custom/Wiley Library

Home > Admin > Site Configuration > Partner Config > Partner Config: Tx Plus > Force Custom/Wiley Library

Force Custom/Wiley Library

To achieve consistency in the problems/goals/objectives/interventions in Tx Plus plans – which ones are used and how they are described – you can create a custom library and/or contract to use the Wiley treatment planning library as part of Tx Plus. With this Partner Config setting, you can force users to select the predefined problems/goals/objectives/interventions when building a treatment plan vs being able to enter them freehand.

If you select *Use Custom Library*, *Use Wiley Library*, or *Use Custom/Wiley Library* when building a Tx Plus plan, the predefined problems/goals/objectives/interventions for the treatment plan you select are available via dropdowns.



If *Force Custom/Wiley Library* is not selected, staff can edit the actual problem (goal, and so on) text. When the Partner Config setting is selected, staff can only use the text as is.

Settings

Using the Wiley treatment planning library requires an addendum to your contract. For more information, contact contracts@credibleinc.com. Once you have contracted to use Wiley, your Implementation Manager (IM) or Partner Services Coordinator (PSC) needs to turn on the functionality in your system.

Partner Config: Use Tx Plus, Force Custom/Wiley Library (optional)
Security Matrix: TxPlusBuild, TxPlusBuildfromForm

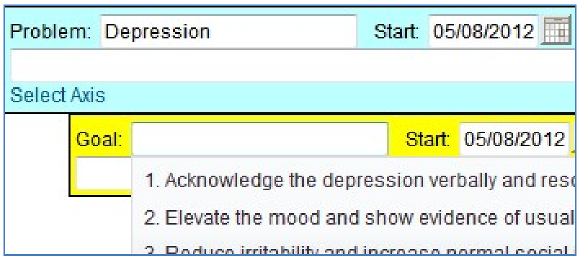
Note: Wiley charges on a per-employee basis for using Wiley data to build a treatment plan. If your IM/PSC has turned on Wiley in your system, Wiley will count each employee that has the **TxPlusBuild** security right for billing purposes.

Configuration

See Tx Plus

Use

1. Go to Client navbar > Tx Plus button.
2. Click the **New TxPlus** button.
3. Select the **Use Custom Library**, **Use Wiley Library**, or **Use Custom/Wiley Library** checkbox and select a treatment plan from the list.
4. Click **Problem** in the **TxPlus Items** box to add it to the plan.
5. Click the **Problem** name field to display a list of problems associated with the treatment plan you selected.
6. Select the appropriate problem.
7. Change the start date if necessary and enter a target date.
8. If applicable, use the **Select Axis** link to associate the problem with one of the client's diagnoses.
9. Click the **Problem** to make it the active level (color changes to yellow).
10. Click **Goal** in the **TxPlus Items** box to add it to the problem.



11. Click the **Goal** name field to bring up predefined goals associated with the problem.
12. Select the appropriate problem.
13. Add objectives and interventions in a similar fashion.
14. Add additional problems and sublevels as necessary.
15. Click the **Save** button.

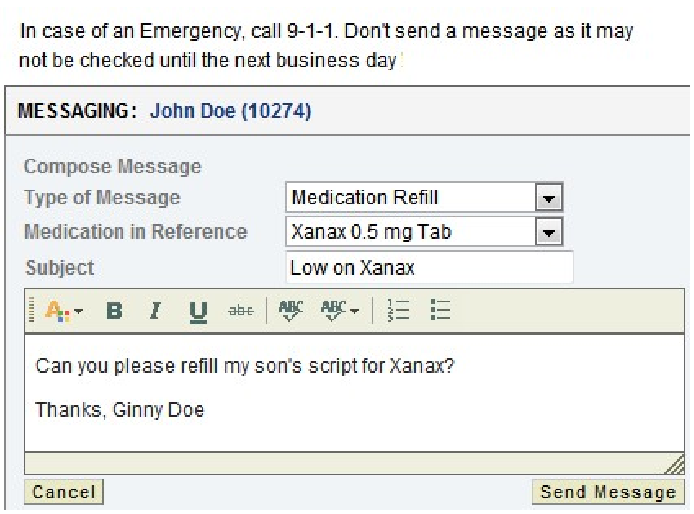
Last updated 12/23/2015 10:57 AM by marchall

Home > Admin > Site Configuration > Partner Config > Partner Config: Messaging Settings

Partner Config: Messaging Settings

Check Message Interval -- Use to control how frequently the system checks for new client user messages from the Credible Client Portal. In your Credible system, an envelope icon displays in the banner to notify you that a message has been sent from the Client Portal.

Message Disclaimer Text for Client Portal -- the Messaging function in the Credible Client Portal uses *offline* messaging and the messages are not delivered via email. Use this setting to configure "disclaimer text" to convey the offline nature of the messaging function to client users. As shown below, it displays above the Messaging screens in the Client Portal.



See also
Client-Agency Communication Via Client Portal
Employee Messaging Hub

Home > Admin > Site Configuration > Partner Config > Integration Settings

Integration Settings

For details, please see Methasoft Import.

See also

Partner Config: Basic Information
Partner Config: Sizes
Partner Config: Labels
Partner Config: Features
Partner Config: General Settings
Partner Config: Client Settings
Partner Config: Authorization Settings
Partner Config: Liability Settings
Partner Config: Visit Settings
Partner Config: Web Forms
Partner Config: Printouts
Partner Config: Billing
Partner Config: Notification Settings
Partner Config: Scheduler Settings
Partner Config: Styles
Partner Config: OQ Settings
Partner Config: Tx Plus
Partner Config: Messaging Settings

Updated: 5/30/2017 10:10 AM by CredibleEducation

Home > Admin > Site Configuration > Data Dictionary

Data Dictionary

Data Dictionary is an extremely important tool that controls what appears on various screens, the fields that can be imported or exported, as well as what data is stored in your database. **ONLY AN ADMINISTRATOR** should work with Data Dictionary.

Settings

Security Matrix: DataDictionary

IMPORTANT: Data Dictionary relates *what you see* throughout your system to *what is actually stored* in your database. Changing settings in Data Dictionary does *not* change the structure of the database -- it simply determines what is *viewed* and *stored* in the database.

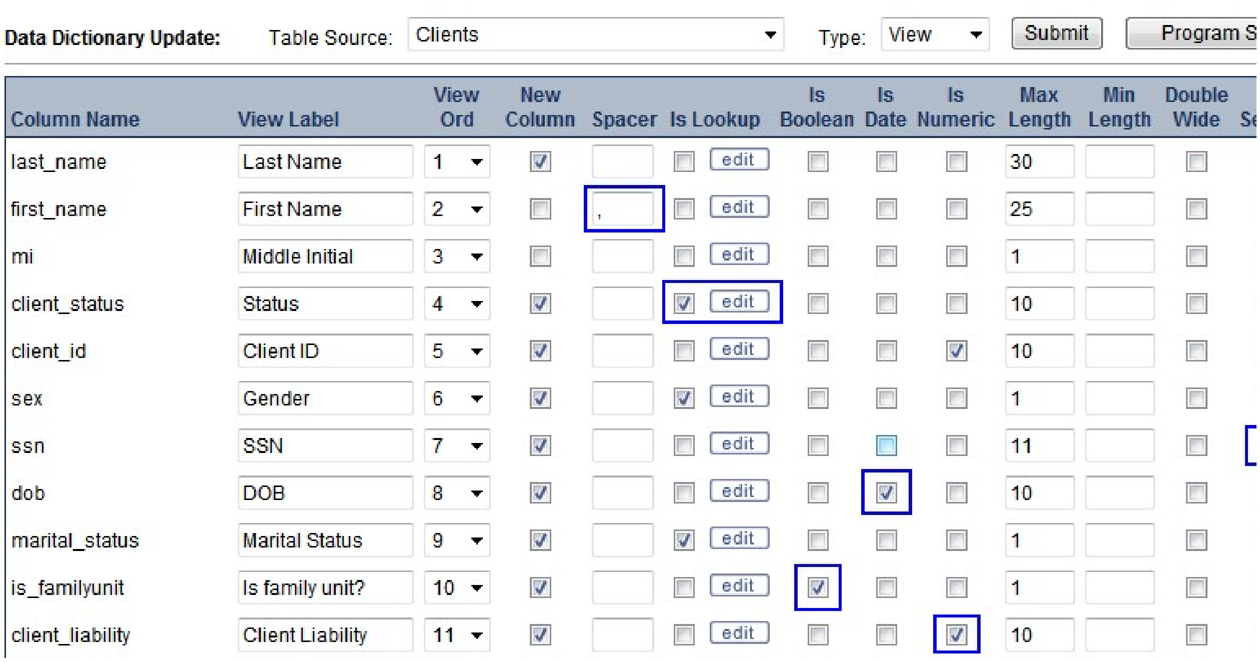
Data Dictionary controls:

- What users see on Client and Employee Profile screens, as well as on Client Episode and Client Extended screens. With Data Dictionary, you can customize which fields/labels, list columns, data capture fields, values, and layouts appear on these screens. See below for an example.
- Which Client, Client Episode, Client Extended, and Visit fields client users see in the Client Portal.
- Which fields are available in the Sort By/WHERE dropdowns and as custom fields in advanced search (note that several custom fields are system-supplied). For example, to add medical profile fields, add them to the ClientMedicalProfile table.
- What users see on Client and Employee List screens (note that some filtering fields and column headers are system-supplied). Data Dictionary does not control the Visit View screen.
- Imports and exports for every table in the system. For example, to do an export for medications, you must first use Data Dictionary to set up the View type for the Meds table.

As you work with Data Dictionary, be aware that Client ID and Employee ID are system-generated fields that cannot be changed.

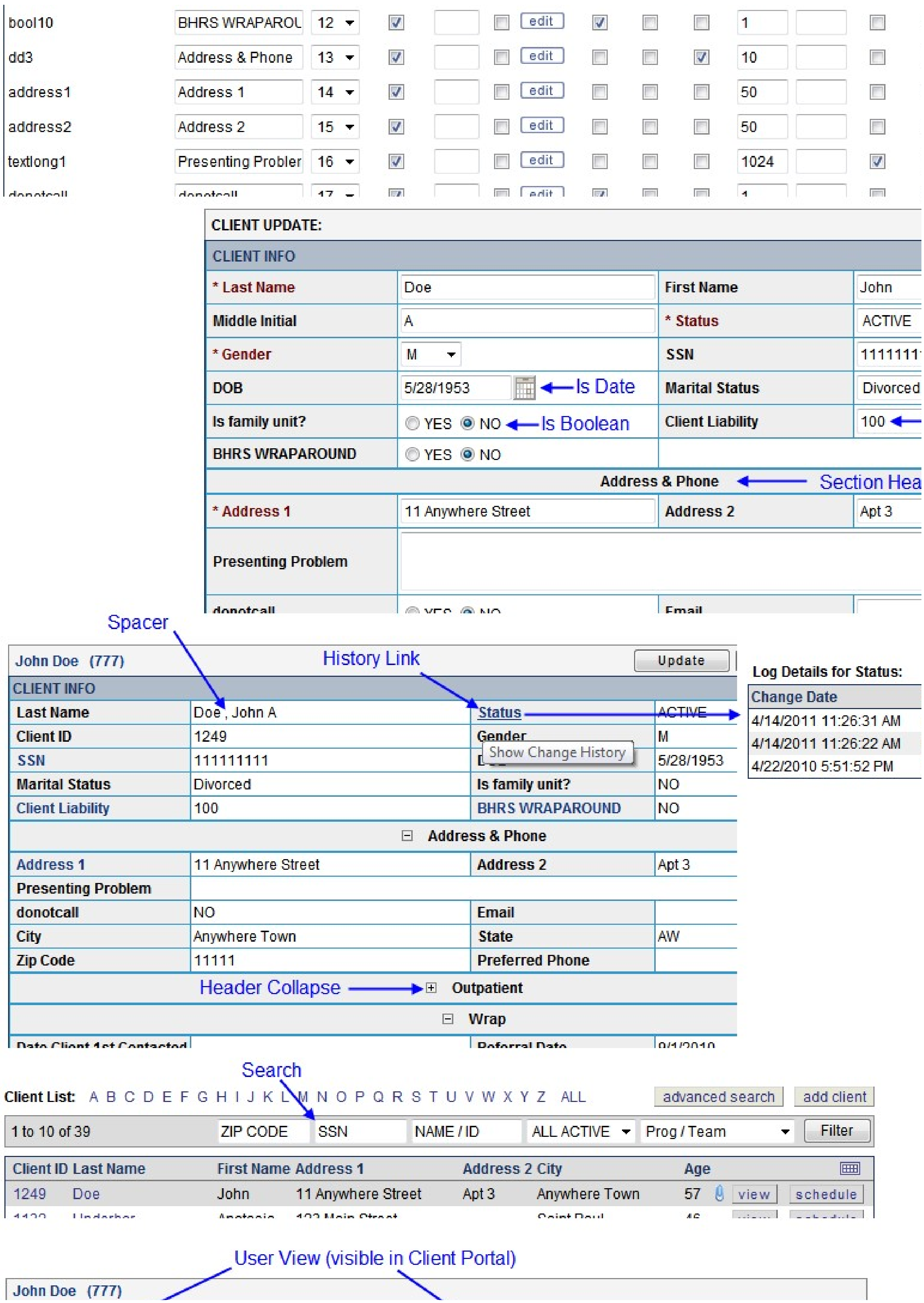
REMEMBER: Data Dictionary is a powerful tool that *significantly* impacts what occurs throughout your system. Carefully read the different Data Dictionary help topics before beginning to work with the tool.

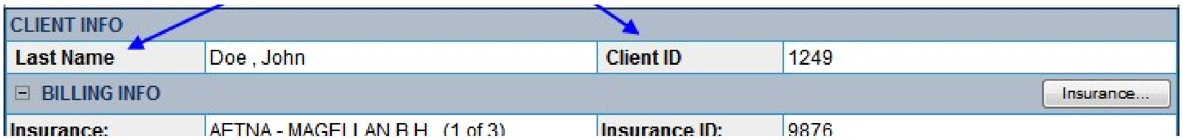
Example: View Version of the Clients Table



Data Dictionary Update: Table Source: Clients Type: View Submit Program S

Column Name	View Label	View Ord	New Column	Spacer	Is Lookup		Is Boolean	Is Date	Is Numeric	Max Length	Min Length	Double Wide	Se
last_name	Last Name	1	☑		☐	edit	☐	☐	☐	30		☐	
first_name	First Name	2	☐	,	☐	edit	☐	☐	☐	25		☐	
mi	Middle Initial	3	☐		☐	edit	☐	☐	☐	1		☐	
client_status	Status	4	☑		☑	edit	☐	☐	☐	10		☐	
client_id	Client ID	5	☑		☐	edit	☐	☐	☑	10		☐	
sex	Gender	6	☑		☑	edit	☐	☐	☐	1		☐	
ssn	SSN	7	☑		☐	edit	☐	☐	☐	11		☐	
dob	DOB	8	☑		☐	edit	☐	☑	☐	10		☐	
marital_status	Marital Status	9	☑		☑	edit	☐	☐	☐	1		☐	
is_familyunit	Is family unit?	10	☑		☐	edit	☑	☐	☐	1		☐	
client_liability	Client Liability	11	☑		☐	edit	☐	☐	☑	10		☐	


bool10 BHRS WRAPAROU 12 edit 1
dd3 Address & Phone 13 edit 10
address1 Address 1 14 edit 50
address2 Address 2 15 edit 50
textlong1 Presenting Probler 16 edit 1024
CLIENT UPDATE:
CLIENT INFO
* Last Name Doe
First Name John
Middle Initial A
* Status ACTIVE
* Gender M
SSN
DOB 5/28/1953
Is Date
Marital Status Divorced
Is family unit? YES NO
Is Boolean
Client Liability 100
BHRS WRAPAROUND YES NO
Address & Phone
Section Hea
* Address 1 11 Anywhere Street
Address 2 Apt 3
Presenting Problem
Spacer
History Link
John Doe (777)
Update
Log Details for Status:
Change Date
4/14/2011 11:26:31 AM
4/14/2011 11:26:22 AM
4/22/2010 5:51:52 PM
CLIENT INFO
Last Name Doe , John A
Status ACTIVE
Client ID 1249
Gender M
SSN 111111111
Show Change History
5/28/1953
Marital Status Divorced
Is family unit? NO
Client Liability 100
BHRS WRAPAROUND NO
Address & Phone
Address 1 11 Anywhere Street
Address 2 Apt 3
Presenting Problem
donotcall NO
Email
City Anywhere Town
State AW
Zip Code 11111
Preferred Phone
Header Collapse
Outpatient
Wrap
Search
Client List: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL
advanced search
add client
1 to 10 of 39
ZIP CODE
SSN
NAME / ID
ALL ACTIVE
Prog / Team
Filter
Client ID Last Name First Name Address 1 Address 2 City Age
1249 Doe John 11 Anywhere Street Apt 3 Anywhere Town 57 view schedule
User View (visible in Client Portal)
John Doe (777)



Fields Locked Against Definition Changes by Agency Staff

To meet certification requirements for Massachusetts, Credible added the ability to lock fields in Data Dictionary so definition changes cannot be made by agency staff. You will notice a new Credible Locked setting in Data Dictionary. When checked, it means only Credible staff can make changes to the definition of the field. You can change the View Order for a Credible Locked field.

See also

Adding a Field to a Table with Data Dictionary
Standard vs Generic (Customizable) Fields
Type = List
Type = View
Type = Update
Type = Search
Doctor's Credentials on CMS 1500
Adding Demographic Fields to Client Profile
Last Visit Type & Last Billed Visit Type Fields in Client Profile
Customizing Fields in Medical Profile Header & History Table
Displaying Medical Profile Fields in eMAR
Configuring Header Fields in Visit Print View

Home > Admin > Site Configuration > Data Dictionary > Adding a Field to a Table with Data Dictionary

Adding a Field to a Table with Data Dictionary

To access a table with Data Dictionary:

1. Admin tab > **Data Dictionary** (under Site Configuration).

   Whenever you set something up in Data Dictionary, *always* select the Table Source before selecting the Type.

2. From the Table Source dropdown, select the table you need to update:
   - Clients (the default)
   - Employee
   - Visit (this works differently - can set up Visit List in Data Dictionary, but NOT Visit View)
   - Clients Ext (additional Client Profile fields)
   - Client Episode
3. From the Type dropdown, select the type of screen that you need to update and click **Submit.**
   - List
   - View
   - Update
   - Search

   Note A field *must* be added to the View screen *before* you can add it to the List screen.

To add a field to the table:

1. Select the new field from the Column Name dropdown.
2. Select the order for the field in the Column Order dropdown and click **Insert Column.**
3. If necessary, add/change the view label, configure the field as appropriate with the different fields and checkboxes, and click **update.**

   Note If you changed the view label and need to add the field to the List screen, do the following: add the field to the List screen, change the view label and click update, delete the field, and then add it again to pull in the new view label.

See also

Standard vs Generic (Customizable) Fields
Type = List
Type = View
Type = Update
Type = Search
Doctor's Credentials on CMS 1500
Adding Demographic Fields to Client Profile
Last Visit Type & Last Billed Visit Type Fields in Client Profile
Customizing Fields in Medical Profile Header & History Table
Displaying Medical Profile Fields in eMAR
Configuring Header Fields in Visit Print View

Home > Admin > Site Configuration > Data Dictionary > Standard vs Generic (Customizable) Fields

Standard vs Generic (Customizable) Fields

Data Dictionary includes a number of standard fields such as last_name, first_name, dob (Date of Birth), ssn (Social Security Number), marital_status, and so on. Standard fields have descriptive column (field) names that indicate the data they are set up to capture. Data Dictionary also has generic fields that you can customize to meet the data capture needs of your organization. The column names for these fields depend on the field type.

You can set up a view label for each standard and generic field to make the field names that users see more friendly/understandable.

Field Type	Description	Column Name
Boolean	Y/N field	bool1, bool2, and so on
Date	System supplies a calendar picker and will not accept a non-date entry	date1, date2, and so on
Dropdown	While there is no limit on the number of options you can include in a dropdown, use the *least* number necessary for ease of use and on-screen visibility. If you run out of dropdown fields, you can use a text field (see below) as an additional dropdown (text fields are multi-purpose fields). Be sure to use up all of the available dropdown fields *before* using a text field for this purpose.	dd1, dd2, and so on
Numeric	System will not accept a non-numeric value	num1, num2, and so on
Text	Free text field; maximum # of characters = 100	text1, text2, and so on
Long text	Free text field; maximum # of characters = 1,000	textlong1, textlong2, and so on

The number of generic fields available depends on the table.

	Clients	Employee	Visit	Clients Ext	Client Episode
Boolean	20	15	3	30	10
Date	20	20	3	25	10
Dropdown	20	15	N/A	N/A	10
Numeric	10	5	3	20	5
Text	30	40	3	61	20
Long text	3	3	N/A	10	3

Note that the BillingMatrix table also has 10 text fields.

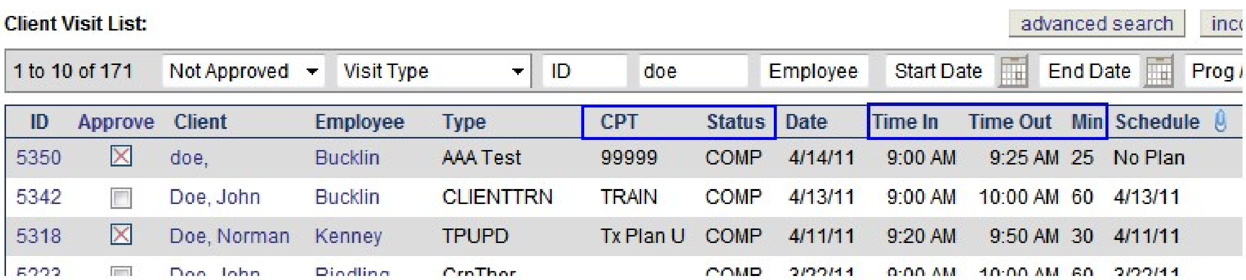
See also
Adding a Field to a Table with Data Dictionary
Type = List
Type = View
Type = Update
Type = Search
Doctor's Credentials on CMS 1500
Adding Demographic Fields to Client Profile
Last Visit Type & Last Billed Visit Type Fields in Client Profile
Customizing Fields in Medical Profile Header & History Table
Displaying Medical Profile Fields in eMAR
Configuring Header Fields in Visit Print View
Generic Text Fields for the Billing Matrix

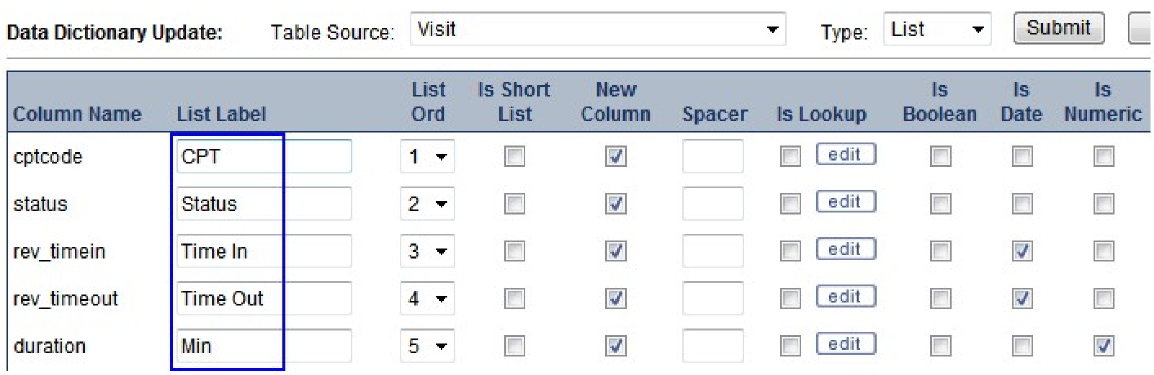
Home > Admin > Site Configuration > Data Dictionary > Type = List

Type = List

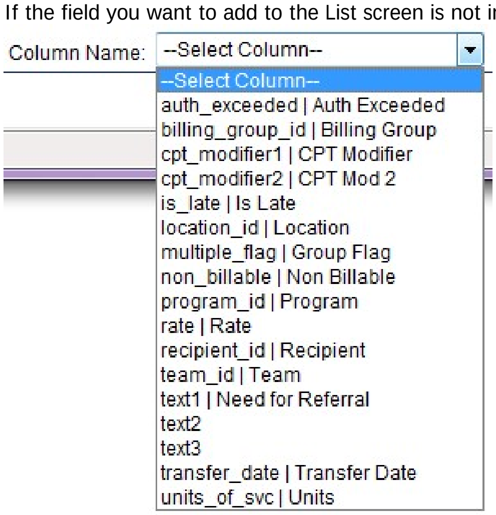
Each list screen in Credible -- Client List, Employee List, and Client Visit List -- has standard fields that are always included. With the List type in Data Dictionary, you can add additional fields to each list screen.

For example, in the Client Visit List screen, ID, Approve, Client, Employee, Type, Date, Schedule, and Attachment (blue paperclip) are standard fields. CPT, Status, Time In, Time Out, and Min fields have been added through the List type.





If the field you want to add to the List screen is not in the Column Name dropdown, add it to the View type first.



1. Admin tab > Data Dictionary.
2. From the Table Source dropdown, select the table that corresponds to the list screen you want to update.
3. From the Type dropdown, select List and click Submit.
4. From the Column Name dropdown, select the field you want to insert.

5. From the Column Order dropdown, select appropriate number and click Insert Column.
6. If necessary, add a label for the field and click update.

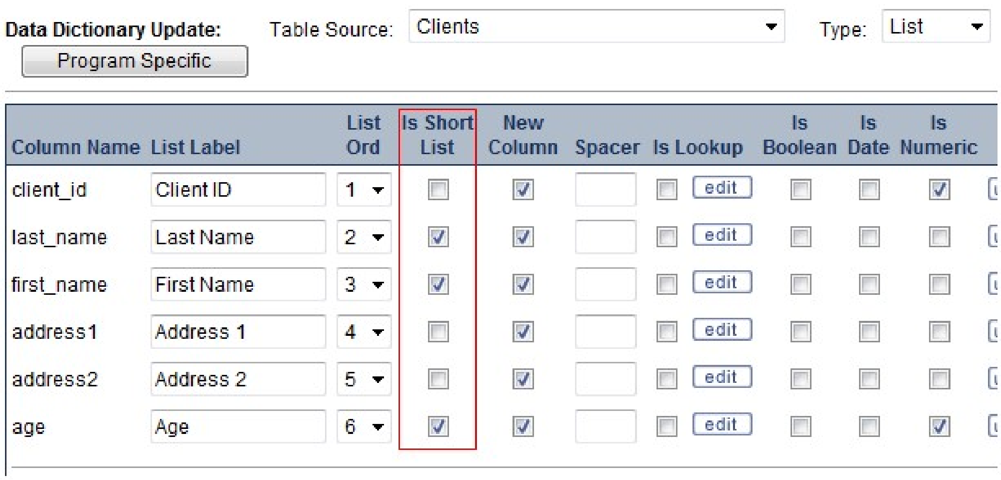
See also

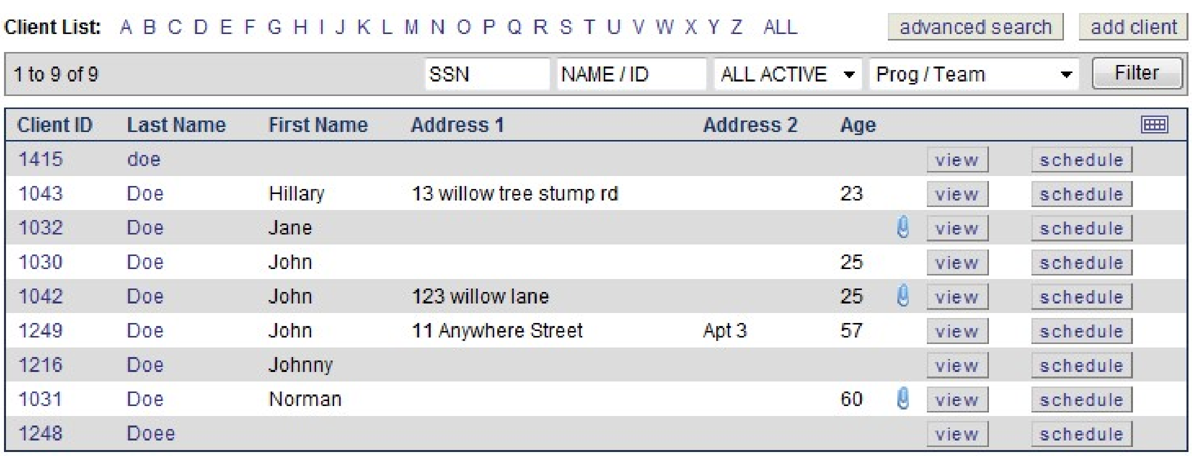
Adding a Field to a Table with Data Dictionary
Standard vs Generic (Customizable) Fields
Type = View
Type = Update
Type = Search
Doctor's Credentials on CMS 1500
Adding Demographic Fields to Client Profile
Last Visit Type & Last Billed Visit Type Fields in Client Profile
Customizing Fields in Medical Profile Header & History Table
Displaying Medical Profile Fields in eMAR
Configuring Header Fields in Visit Print View
Is Short List

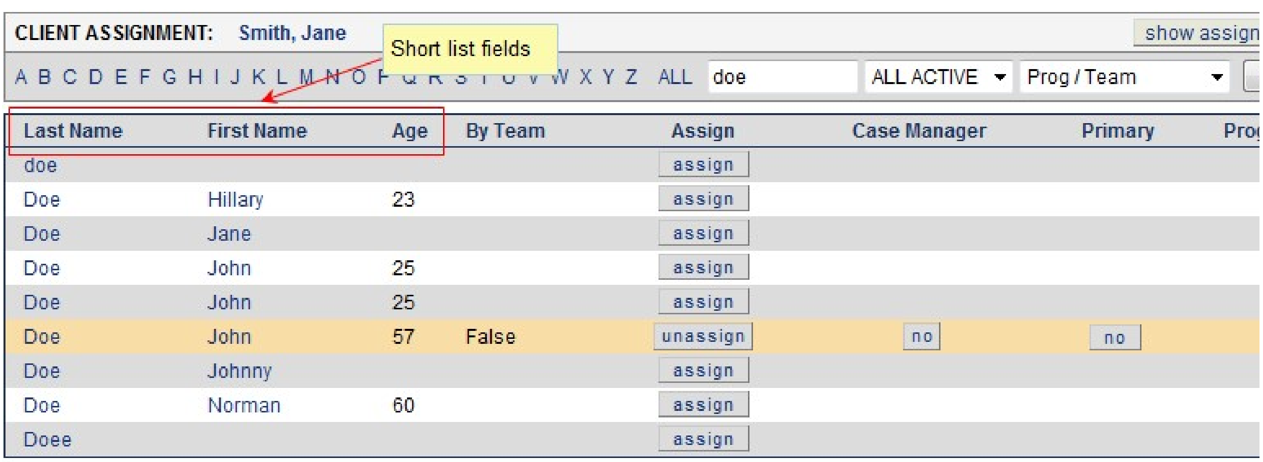
Home > Admin > Site Configuration > Data Dictionary > Type = List > Is Short List

Is Short List

The Client Assignment and Employee Assignment screens have standard columns that are always included. With the Is Short List checkbox in the List type, you can control which fields are included to identify the client or employee in the assignment screens. Typical fields include Client/Employee ID, Last Name, and/or First Name.







In the client assignment list, the values in the first two columns are links; both take the user to the Overview screen for the client. In the employee assignment list, the value in the first column is a link; it takes the user to the Overview screen for the employee.

See also

Client - Employee Assignment
Employee - Client Assignment

Home > Admin > Site Configuration > Data Dictionary > Type = View

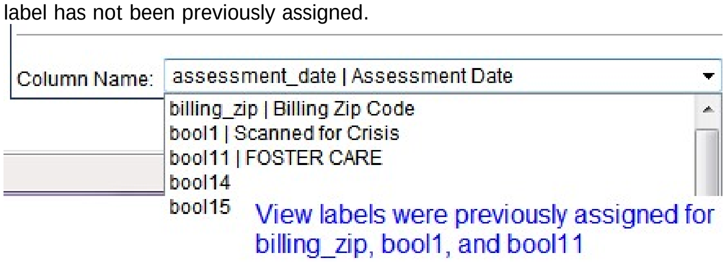
Type = View

The View type controls what appears in the Client Profile screen (in your internal system and in the Client Portal) and Employee Profile screen. You can also use the View type to add fields to the filtering row in the Client List screen.

When you add a field to Data Dictionary, it becomes a custom field for the corresponding advanced search. If a custom field is a dropdown, the "lookup description" selected in Data Dictionary determines what is displayed in the advanced search results. See **Is Lookup** below for more information.

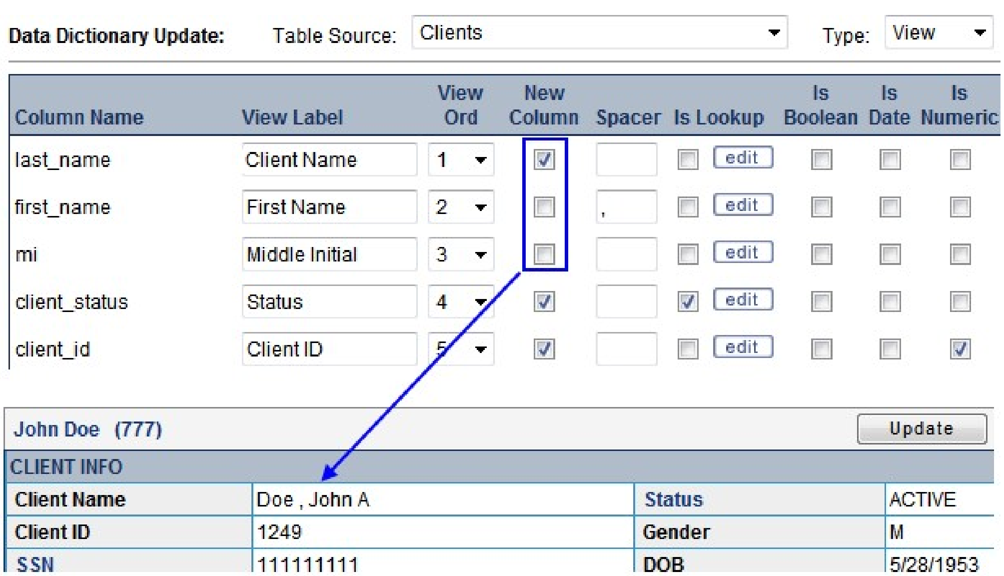
After making additions and/or changes to the View type, click the **Match Update to View** button so the setup is reflected in the Add/Update versions of the Client and Employee Profile screens.

- **Column Name** is the Credible-defined name for a field. In Form Builder, you see these field names when injecting a field or mapping form data back to a client record.
- **View Label** is the name you prefer to see in your system for a given field. View Label defaults to the Column Name if a view label has not been previously assigned.



- **View Ord** (View Order) is the order in which the field will appear on the List, View, or Update screen. Display order is from left to right on each row.
- **New Column** controls whether the field is a stand-alone item on List and View screens or is merged with the first field that precedes it that *has New Column checked*. Checked = stand-alone (recommended for most fields); unchecked = merged. Merging is useful for combining first and last names and parts of an address. You may want to update the view label of the "receiving" field to accurately describe the field contents.

New Column Example

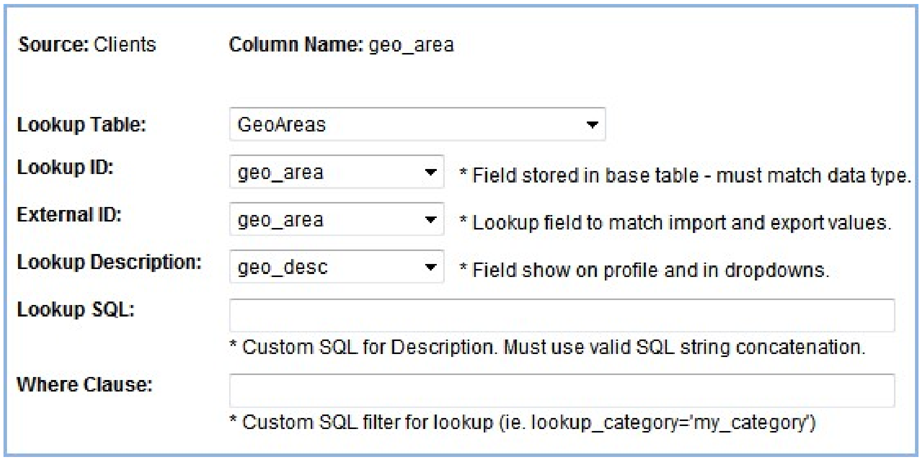


- **Spacer** is useful for separating the values in merged fields. In the New Column example, a comma was entered as the spacer for the First Name field.
  Testing note: Be sure to double-check the List and View screens after setting up merged fields (with or without spacers) to make sure the data displays properly in the correct fields.
- **Is Lookup** sets up a field as a dropdown. There are standard dropdowns such as client_status and geo_area and custom

dropdowns you set up with generic dropdown fields (dd1, dd2, and so on). When you set up a dropdown, you select the option "descriptor" you want to display in the dropdown, Profile, and advanced search results. The descriptor can be the code assigned to the option, option name, or description of the option.

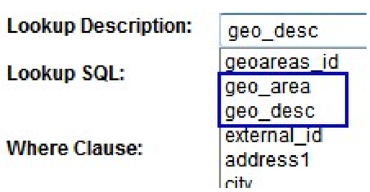
Standard Dropdown

1. Make sure options for the standard dropdown have been added via the corresponding Lookups and Code Tables func Admin tab. For example, for geo_area, use the Geo Areas/Offices function. Note that the options for some lookup tal State are predefined.
2. In Data Dictionary, select Is Lookup checkbox and click edit. The Admin Data Dictionary Where popup displays.



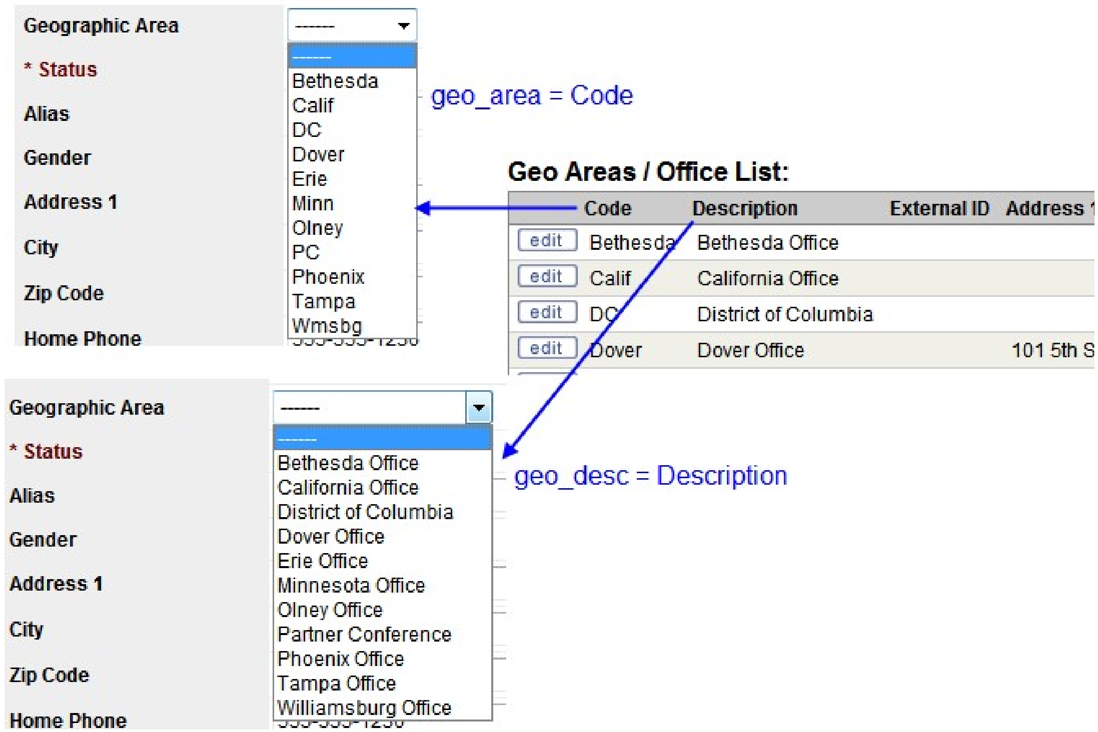
The Lookup Table is where the different options for the dropdown are stored. The lookup table name corresponds to name.

3. From the Lookup Description dropdown, select the option descriptor you want to display in the dropdown, Profile, anc search results. The choices available depend on the field but typically you will select the option itself or a description



To display both the code and description, enter the following in the Lookup SQL field: '(' + lookup_code +')' + lookup_

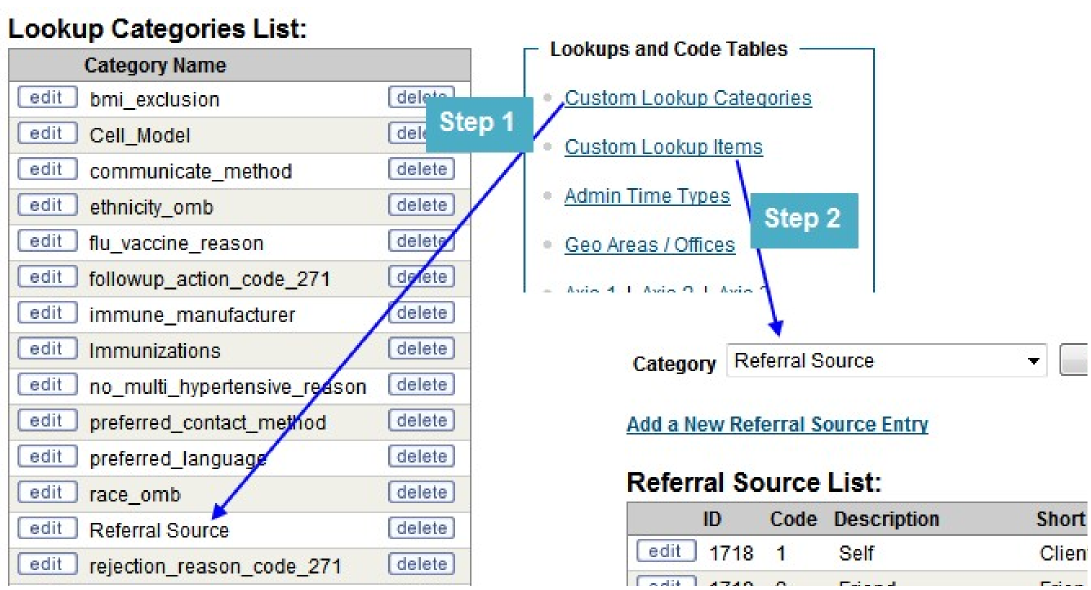
4. Click Save and then click Match Update to View to make the dropdown available in the Add/Update versions of the Pr

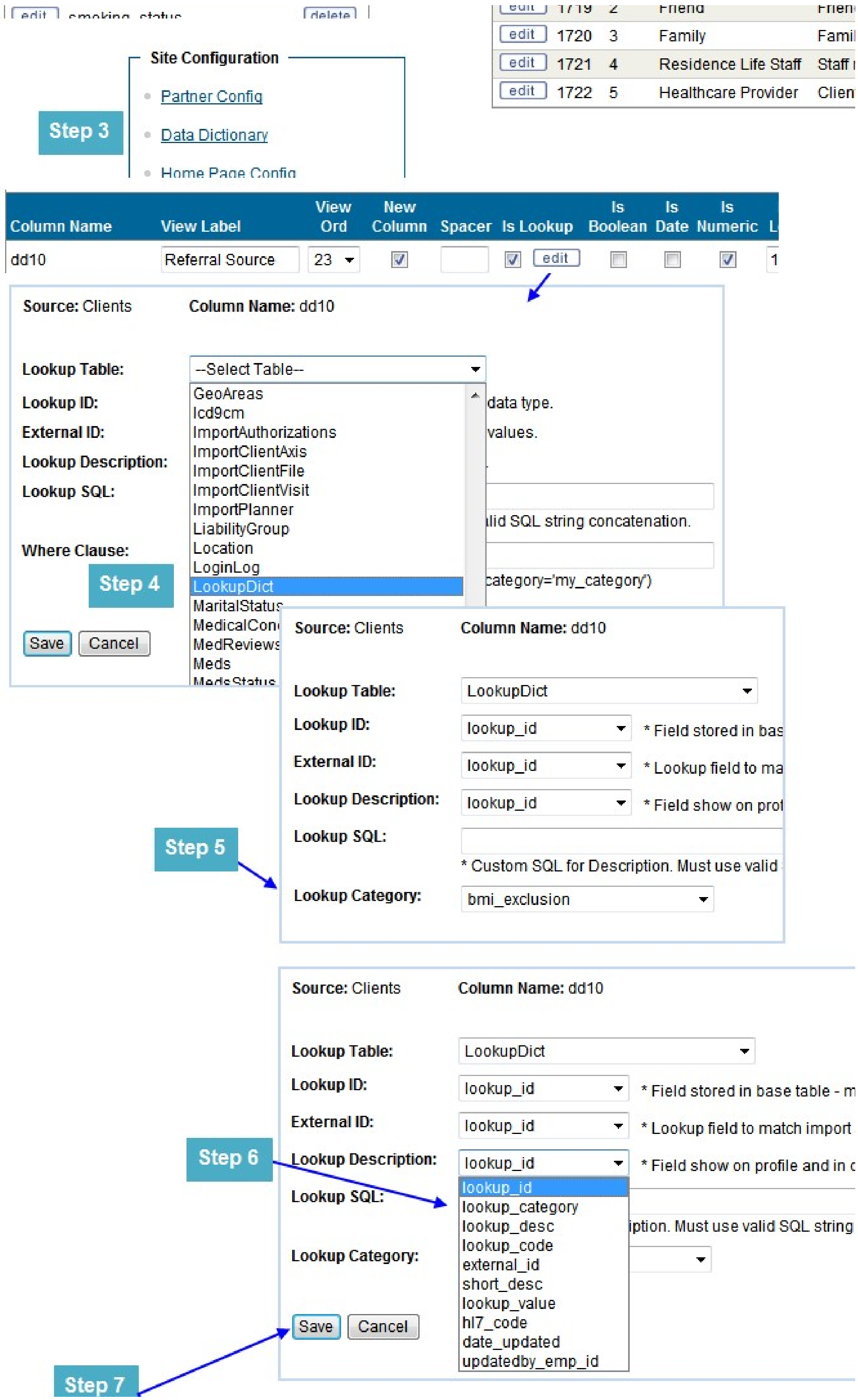


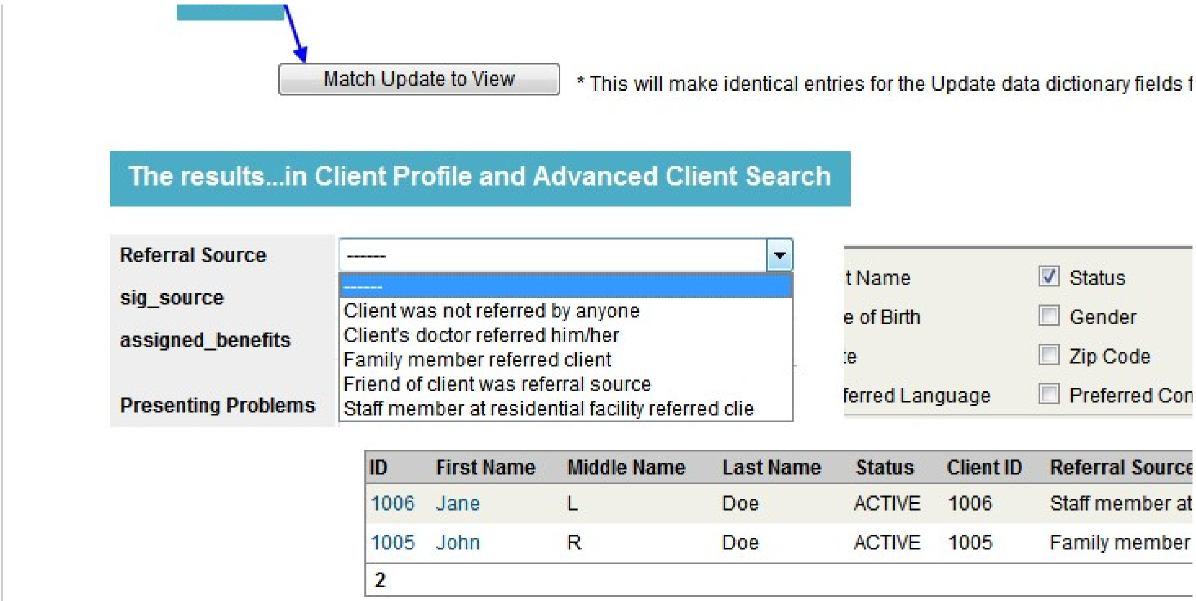
Refer to Custom Dropdown below to see an example of the lookup description in advanced search results.

Custom Dropdown

1. Create the custom lookup category for your custom dropdown.
2. Add the options (custom lookup items) for your custom dropdown.
3. In Data Dictionary, select Is Lookup checkbox and click edit. The Admin Data Dictionary Where popup displays.
4. From the Lookup Table dropdown, select LookupDict.
5. From the Lookup Category dropdown, select the custom lookup category you created in Step 1.
6. From the Lookup Description dropdown, select the option descriptor you want to display in the dropdown, Profile, and you will select lookup_desc or short_desc. To display both the code and description, enter the following in the Lookup lookup_desc
7. Click Save and then click Match Update to View to make the dropdown available in the Update version of the Profile s




Site Configuration
Partner Config
Data Dictionary
Home Page Config
Step 3
edit 1720 3 Family
edit 1721 4 Residence Life Staff
edit 1722 5 Healthcare Provider
Column Name
View Label
View Ord
New Column
Spacer
Is Lookup
Is Boolean
Is Date
Is Numeric
dd10
Referral Source
23
edit
Source: Clients
Column Name: dd10
Lookup Table:
--Select Table--
Lookup ID:
External ID:
Lookup Description:
Lookup SQL:
Where Clause:
GeoAreas
Icd9cm
ImportAuthorizations
ImportClientAxis
ImportClientFile
ImportClientVisit
ImportPlanner
LiabilityGroup
Location
LoginLog
LookupDict
Meds
data type.
values.
lid SQL string concatenation.
category='my_category')
Step 4
Save
Cancel
Lookup Table: LookupDict
Lookup ID: lookup_id
* Field stored in bas
External ID: lookup_id
* Lookup field to ma
Lookup Description: lookup_id
* Field show on prof
Lookup SQL:
* Custom SQL for Description. Must use valid
Lookup Category: bmi_exclusion
Step 5
* Field stored in base table - m
* Lookup field to match import
* Field show on profile and in c
lookup_id
lookup_category
lookup_desc
lookup_code
external_id
short_desc
lookup_value
hl7_code
date_updated
updatedby_emp_id
iption. Must use valid SQL string
Step 6
Step 7

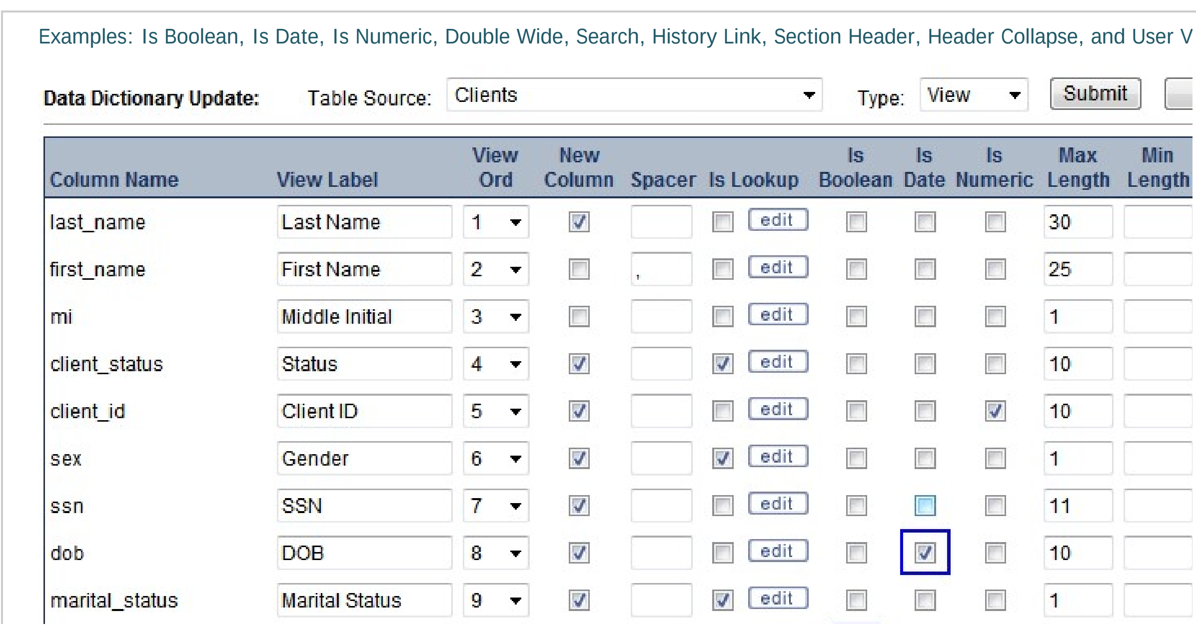


- **Is Boolean** designates that a field will have a Yes or No value. The field will have a Yes/No radio buttons (see example below).
- **Is Date** designates that the value in the field will be a date a field. The system displays a calendar picker and will not accept a non-date entry.
- **Is Numeric** designates that the field will have a numeric value. The system will not accept a non-numeric value in the field.
- **Max Length** sets the maximum character length that is permitted for the field.
- **Min Length** sets the minimum required character length for the field.
- **Double Wide** extends the field across two columns. This is useful for wide text boxes and wide dropdowns that have longer text options/selections within them.
- **Search** lets you add the field to the standard search criteria fields in the Client List screen.
- **Super View** restricts the ability to view a given field in the Clients or Employee table to only those users who have the SuperView right. Use this checkbox and the corresponding Security Matrix right to restrict view access to sensitive fields.

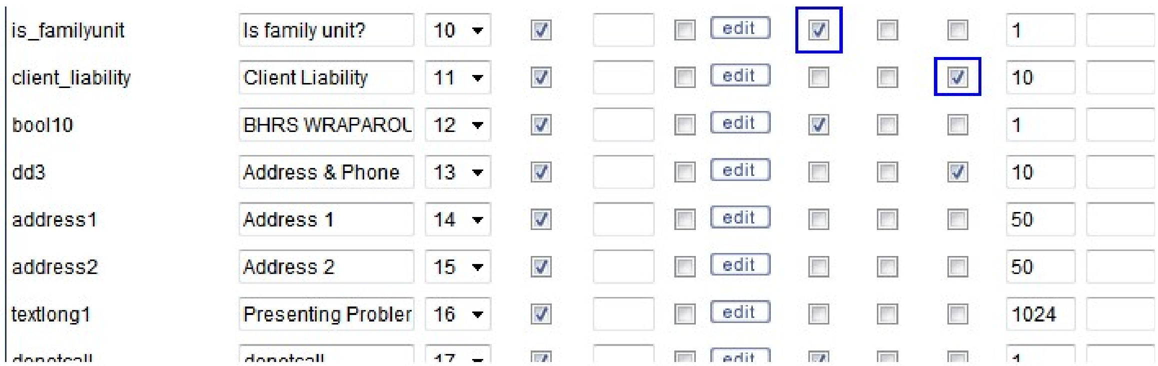
Note

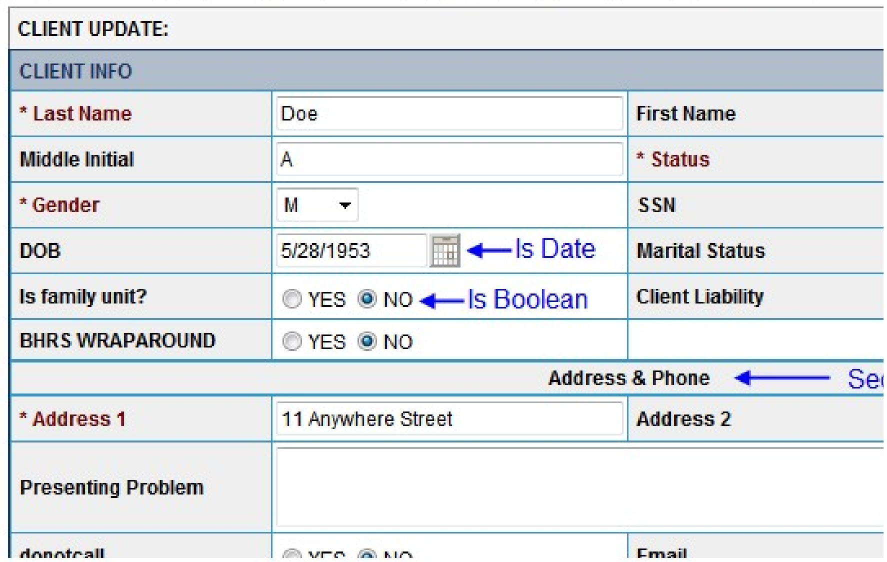
If Super View is checked, you MUST have ClientSuperView or ClientSuperEdit right to view/update (Super View is a way to hide fields from users who do not have this special right).

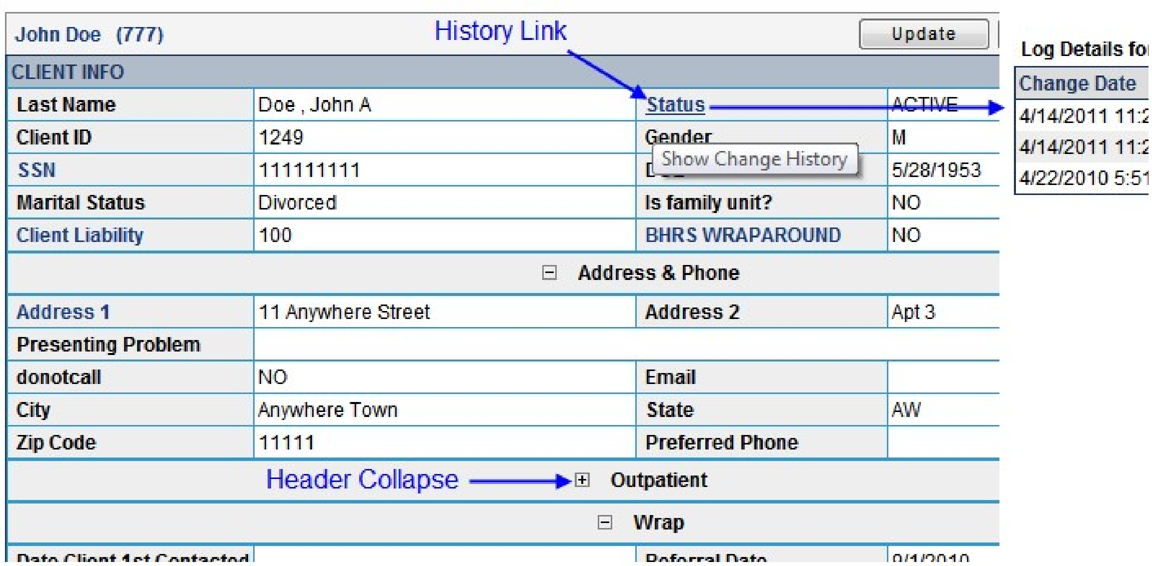
- **History Link** lets you track and display changes made to a field in the Client or Employee Profile screen (see example below).
- **Section Header** lets you create headings to visually break up the Profile screen into logical sections. A section header field is not used to store data. Use the dd# fields to create section headers.
- **Header Collapse** collapses the section header by default (Section Header must be checked).
- **User View** lets you control whether or not the field is displayed in the Client Portal.

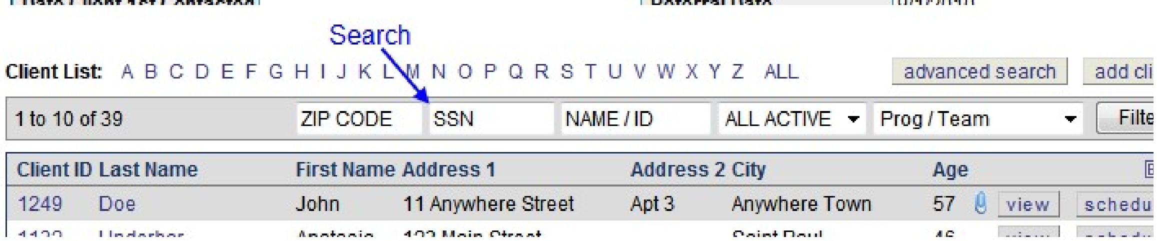


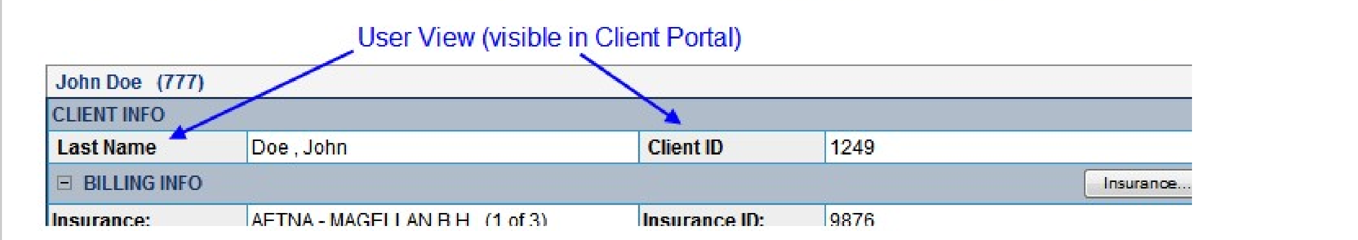
Column Name	View Label	View Ord	New Column	Spacer	Is Lookup		Is Boolean	Is Date	Is Numeric	Max Length	Min Length
last_name	Last Name	1	✓			edit				30	
first_name	First Name	2		,		edit				25	
mi	Middle Initial	3				edit				1	
client_status	Status	4	✓		✓	edit				10	
client_id	Client ID	5	✓			edit			✓	10	
sex	Gender	6	✓		✓	edit				1	
ssn	SSN	7	✓			edit				11	
dob	DOB	8	✓			edit		✓		10	
marital_status	Marital Status	9	✓		✓	edit				1	


is_familyunit
Is family unit?
10
edit
1
client_liability
Client Liability
11
edit
10
bool10
BHRS WRAPAROL
12
edit
1
dd3
Address & Phone
13
edit
10
address1
Address 1
14
edit
50
address2
Address 2
15
edit
50
textlong1
Presenting Probler
16
edit
1024


CLIENT UPDATE:
CLIENT INFO
* Last Name
Doe
First Name
Middle Initial
A
* Status
* Gender
M
SSN
DOB
5/28/1953
Is Date
Marital Status
Is family unit?
YES
NO
Is Boolean
Client Liability
BHRS WRAPAROUND
YES
NO
Address & Phone
* Address 1
11 Anywhere Street
Address 2
Presenting Problem


John Doe (777)
History Link
Update
Log Details fo
CLIENT INFO
Change Date
Last Name
Doe , John A
Status
ACTIVE
4/14/2011 11:2
Client ID
1249
Gender
M
4/14/2011 11:2
SSN
111111111
Show Change History
5/28/1953
4/22/2010 5:51
Marital Status
Divorced
Is family unit?
NO
Client Liability
100
BHRS WRAPAROUND
NO
Address & Phone
Address 1
11 Anywhere Street
Address 2
Apt 3
Presenting Problem
donotcall
NO
Email
City
Anywhere Town
State
AW
Zip Code
11111
Preferred Phone
Header Collapse
Outpatient
Wrap


Search
Client List: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL
advanced search
1 to 10 of 39
ZIP CODE
SSN
NAME / ID
ALL ACTIVE
Prog / Team
Client ID
Last Name
First Name
Address 1
Address 2
City
Age
1249
Doe
John
11 Anywhere Street
Apt 3
Anywhere Town
57
view



See also

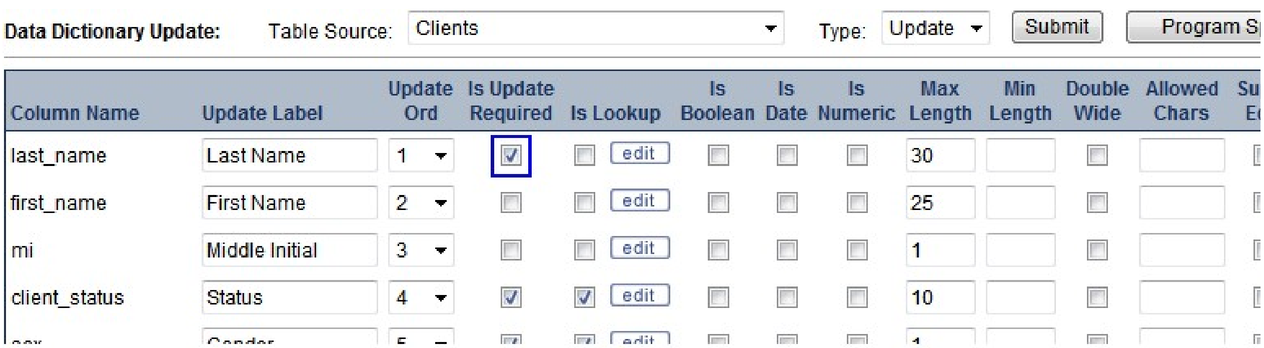
Adding a Field to a Table with Data Dictionary
Standard vs Generic (Customizable) Fields
Type = List
Type = Update
Type = Search
Doctor's Credentials on CMS 1500
Adding Demographic Fields to Client Profile
Last Visit Type & Last Billed Visit Type Fields in Client Profile
Customizing Fields in Medical Profile Header & History Table
Displaying Medical Profile Fields in eMAR
Configuring Header Fields in Visit Print View

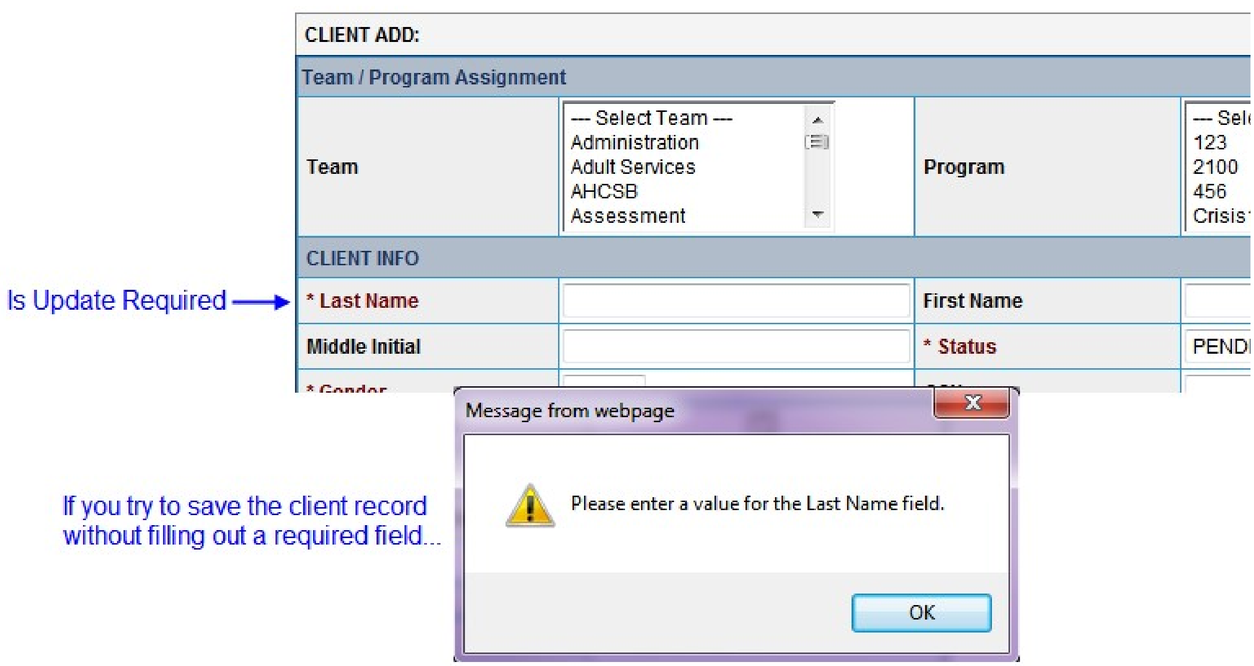
Home > Admin > Site Configuration > Data Dictionary > Type = Update

Type = Update

Update controls the Add and Update views for the Client Profile and controls which fields can be imported. Click here for info on importing data.

When Type = Update, you can make a field required (Is Update Required) and set a default value -- both are useful when adding clients to the system.





REMINDER: System-generated fields (such as Client ID, Employee ID, Last Service Date, etc.) cannot be updated.

See also

Adding a Field to a Table with Data Dictionary
Standard vs Generic (Customizable) Fields
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Type = View
Type = Search
Doctor's Credentials on CMS 1500
Adding Demographic Fields to Client Profile
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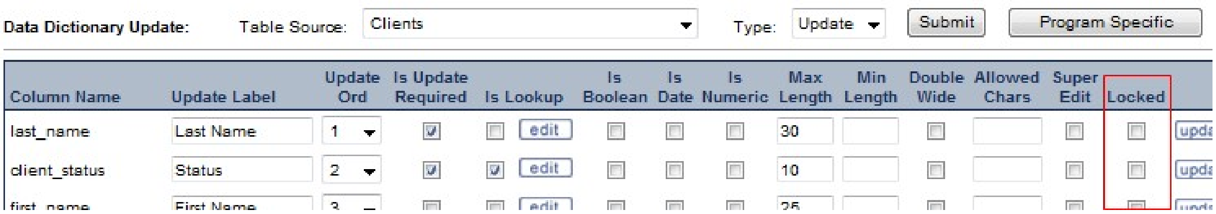
Home > Admin > Site Configuration > Data Dictionary > Type = Update > Locking Fields to Restrict Editing

Locking Fields to Restrict Editing

You can lock the fields in several tables so users can only populate them when adding information for the first time – they will not be able to edit the fields in the future.



The Locked checkbox is available for the Clients, Employee, Clients Ext, and Client Episode tables.

Note that the effect of the Locked setting depends on whether a user has the *ClientAdd, ClientUpdate,* and *ClientSuperEdit* rights and whether the Super Edit setting in the Data Dictionary is selected for the field. Click the toggle below to see the different scenarios and results.

Locked Setting Scenarios

ClientAdd	ClientUpdate	ClientSuperEdit	Super Edit	Locked	Result
☑	☑	☑	☑	☑	User can populate field User can edit field
☑	☑	☑	☑	☐	User can populate field User can edit field
☑	☑	☑	☐	☐	User can populate field User can edit field
☑	☑	☐	☑	☐	User *cannot* populate field User *cannot* edit field
☑	☑	☐	☐	☐	User can populate field User can edit field
☑	☑	☐	☑	☑	User *cannot* populate field User *cannot* edit field
☑	☑	☐	☐	☑	User can populate field User *cannot* edit field

Note that the Super Edit and Locked settings on a field do not block mapping.

1. **Admin** tab > **Data Dictionary**.
2. From the Table Source dropdown, select Clients, Employee, Clients Ext, or Client Episode.
3. From the Type dropdown, select **Update** and click **Submit.**
4. For each field you want to prevent users from editing, select the **Locked** checkbox and click **update.**

See also
Type = Update
Security Matrix

Home > Admin > Site Configuration > Data Dictionary > Type = Search

Type = Search

Search *(Note: this refers to Advanced Search)* is ONLY used for imports (i.e. - when you need to import certain *non*-updatable fields). Search allows you to select the fields that will show during an advanced search that are NOT on your Data Dictionary View screen.

See also

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Type = Update
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Last Visit Type & Last Billed Visit Type Fields in Client Profile
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Displaying Medical Profile Fields in eMAR
Configuring Header Fields in Visit Print View

Home > Admin > Site Configuration > Data Dictionary > Doctor's Credentials on CMS 1500

Doctor's Credentials on CMS 1500

To include a doctor's credentials on the CMS 1500, add the referred_id and referred_id_qualifier fields to the Clients table. The CMS 1500 will pull the values in these fields unless you select Use PCP as Referring Provider in Payer Config.

Steps to Configure	1. **Admin** tab > **Data Dictionary**. 2. From the Table Source dropdown, select **Clients** and click **Submit.** 3. From the Column Name dropdown, select **referred_id** and click **Insert Column.** 4. Repeat step 3 for the referred_id_qualifier field. 5. Click **Match Update to View** button and exit.
Steps to Use	Click the **Profile** button on the Client nav bar and update the client's profile with the appropriate values in the two new fields.

See also

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Type = View
Type = Update
Type = Search
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Configuring Header Fields in Visit Print View

Home > Admin > Site Configuration > Data Dictionary > Adding Demographic Fields to Client Profile

Adding Demographic Fields to Client Profile

You can add dropdowns for Preferred Contact Method, Preferred Language, Ethnicity, Race, and Smoking Status to the client profile. Set up the fields in the Data Dictionary using the existing custom lookup categories in your system. There are existing custom lookup items – values from the CDC website – for Preferred Language, Ethnicity, Race, and Smoking Status.

Steps to Configure

1. **Admin** tab > **Data Dictionary** > Table source = **Clients** | Type = **View.**
2. Add the following fields: preferred_contact, preferred_language, ethnicity_omb, race_omb, and smoking_status.
    a. Set the following Lookup parameters: Lookup Table = LookupDict, Lookup Description = lookup_desc or lookup_code, Lookup Category = category that corresponds to the field.
    b. Select the User View checkbox for each field.
    c. Make sure to add the same fields to the Update type.
3. **Admin** tab > **Custom Lookup Items**.
4. Select preferred_contact_method from the Category dropdown and click **Display.**
5. Add different methods of contact to the category (for example, email, regular mail, or phone).

The lookup items for preferred language, ethnicity_omb, race_omb, and smoking_status have been set up in your system.

The preferred_language lookup items correspond to the 50 most widely spoken languages.

If your staff needs to be able to record more than one race for a client, you can add fields race_omb2 and race_omb3 to the Clients table. The system will use these two fields and the existing race_omb and ethnicity_omb fields for HL7 messaging.

If you use different Client Profile or Client Extended Profile fields for race and ethnicity, the lookup items must be coded in accordance with Federal standards. Additional information on the race and ethnicity codes can be found at: http://www.whitehouse.gov/omb/fedreg_1997standards (OMB Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity, Statistical Policy Directive No. 15, October 30, 1997).

Users can select the appropriate values when adding a client to the system. For existing clients, users can update their client profiles with the appropriate values.

See also

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Type = Search
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Displaying Medical Profile Fields in eMAR
Configuring Header Fields in Visit Print View
Custom Lookup Categories
Custom Lookup Items

Home > Admin > Site Configuration > Data Dictionary > Last Visit Type & Last Billed Visit Type Fields in Client Profile

Last Visit Type & Last Billed Visit Type Fields in Client Profile

If you would like to track the last visit type and last billed visit type for each client, add the following fields to the Client Profile: last_visit_type_id and last_billed_visit_type_id.

Security Matrix: Data Dictionary

To configure:

1. Admin tab > **Data Dictionary** > Table source = Clients and Type = View*
2. Add the fields (columns) last_visit_type_id and last_billed_visit_type_id. For both, select Is Lookup and set up the lookup as follows:
    1. Lookup Table = VisitType
    2. Lookup ID = visittype_id
    3. External ID = visittype_id
    4. Lookup Description = description

*Since last_visit_type_id and last_billed_visit_type_id are calculated automatically, they are not available on the Update screen.

To report on the fields for multiple clients:

1. Client tab > **advanced search.**
2. Add a WHERE statement: select the fields from the Column dropdowns, select the desired operators, and enter the appropriate values.
3. Select the fields as custom fields.

Select other search criteria as appropriate and click **Filter.**

See also

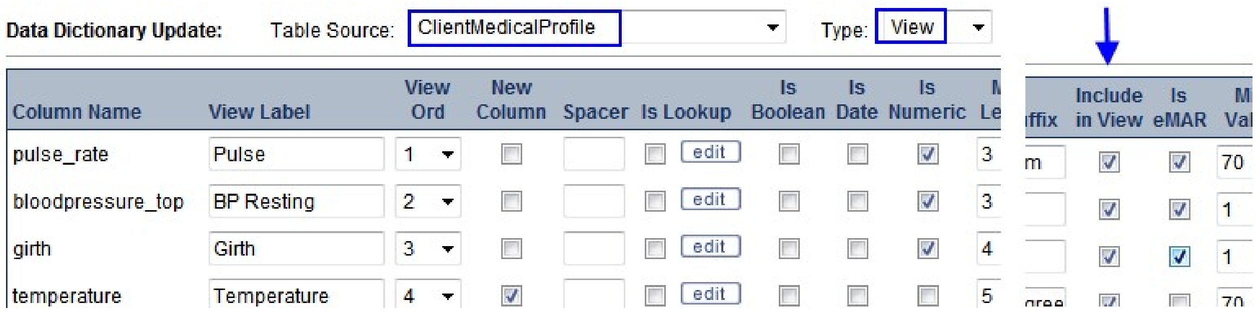
Adding a Field to a Table with Data Dictionary
Standard vs Generic (Customizable) Fields
Type = List
Type = View
Type = Update
Type = Search
Doctor's Credentials on CMS 1500
Adding Demographic Fields to Client Profile
Customizing Fields in Medical Profile Header & History Table
Displaying Medical Profile Fields in eMAR
Configuring Header Fields in Visit Print View

Home > Admin > Site Configuration > Data Dictionary > Customizing Fields in Medical Profile Header & History Table

Customizing Fields in Medical Profile Header & History Table

You can 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 Medical Profile print option) and fields injected into a form (answer format is Injected Medical Profile Header).

You can include standard profile fields and 20 custom text and date fields in the Medical Profile header. 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.



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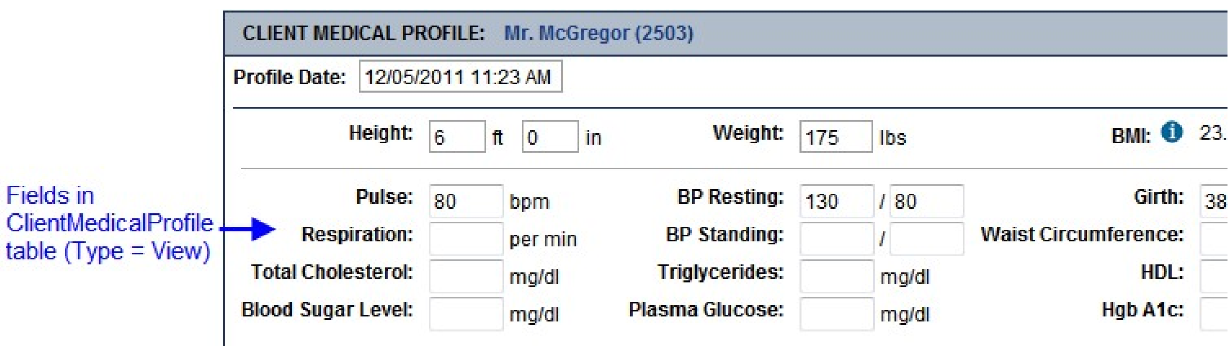
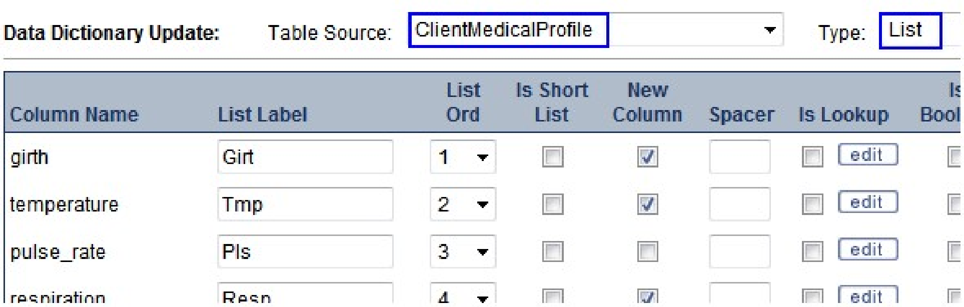
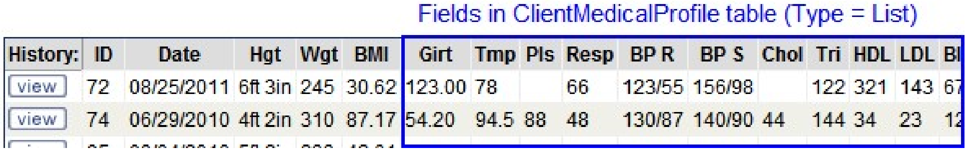


You can also customize the fields that appear in the summary table in the Medical Profile History screen.



Fields in ClientMedicalProfile table (Type = List)



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
3. Select the Include in View checkbox – necessary for the field to display.
4. To include the field in the Client Medication Schedule screen, select the Is eMAR checkbox. Click here for more info.
5. Click update.
6. 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.

See also
Medical Profile
Client Profile
Setting Up a Question to Inject Data into a Form

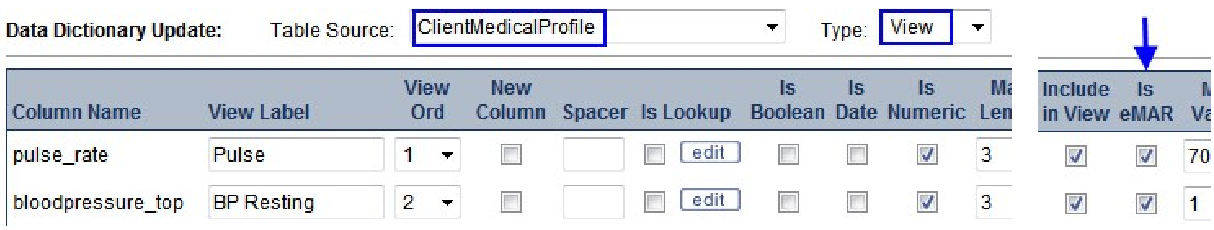
Adding a Field to a Table with Data Dictionary
Standard vs Generic (Customizable) Fields
Type = List
Type = View
Type = Update
Type = Search
Doctor's Credentials on CMS 1500
Adding Demographic Fields to Client Profile
Last Visit Type & Last Billed Visit Type Fields in Client Profile
Displaying Medical Profile Fields in eMAR
Configuring Header Fields in Visit Print View

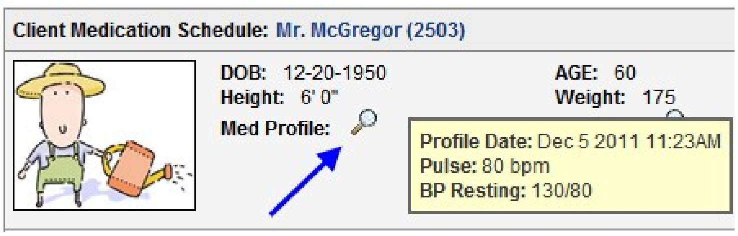
Home > Admin > Site Configuration > Data Dictionary > Displaying Medical Profile Fields in eMAR

Displaying Medical Profile Fields in eMAR

To set up a Medical Profile header field to display in the Client Medication Schedule screen:

1. Admin tab > Data Dictionary > ClientMedicalProfile as the table source and View as the type.
2. Select the Is eMAR checkbox and click update.





See also

Adding a Field to a Table with Data Dictionary
Standard vs Generic (Customizable) Fields
Type = List
Type = View
Type = Update
Type = Search
Doctor's Credentials on CMS 1500
Adding Demographic Fields to Client Profile
Last Visit Type & Last Billed Visit Type Fields in Client Profile
Customizing Fields in Medical Profile Header & History Table
Configuring Header Fields in Visit Print View

Home > Admin > Site Configuration > Data Dictionary > Configuring Header Fields in Visit Print View

Configuring Header Fields in Visit Print View

With a setting and table in Data Dictionary, you can 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: As of May 2012, Custom Print Views are no longer supported.

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.

See also
Adding a Field to a Table with Data Dictionary
Standard vs Generic (Customizable) Fields
Type = List
Type = View
Type = Update
Type = Search
Doctor's Credentials on CMS 1500
Adding Demographic Fields to Client Profile
Last Visit Type & Last Billed Visit Type Fields in Client Profile
Customizing Fields in Medical Profile Header & History Table
Displaying Medical Profile Fields in eMAR

Printing the Visit Details

Home > Admin > Site Configuration > Adding Program and Team to Client Profile

Adding Program and Team to Client Profile

You can add Program and Team as predefined fields in the Client Profile. If you give them a low view order, they will display 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. If a client is assigned to multiple programs or teams, they will display as a concatenated list.

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.

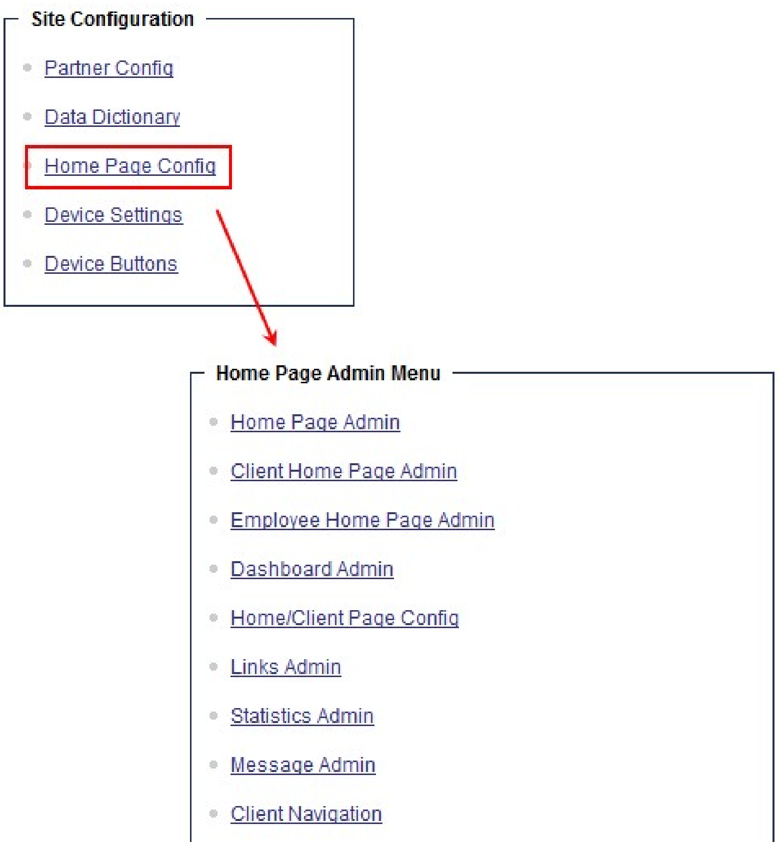
See also
Client Profile

Partner Config
Data Dictionary
Home Page Config
Device Settings
Device Buttons

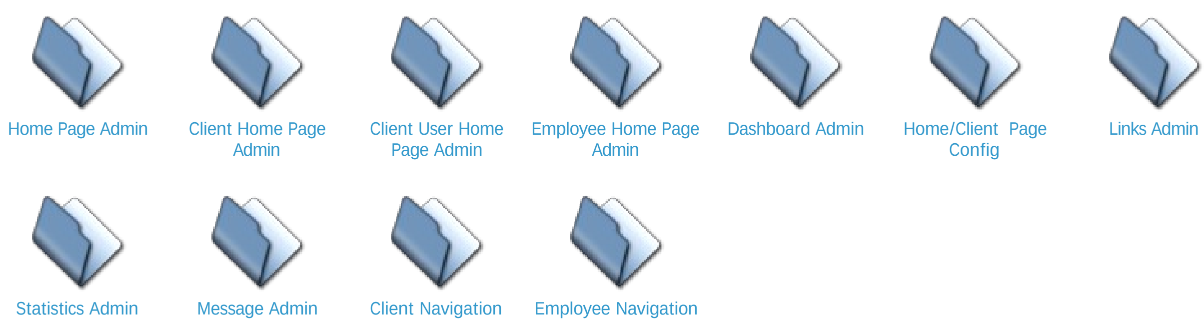
Home > Admin > Site Configuration > Home Page Config

Home Page Config

If you have administrative rights (MyCWAdmin), there will be a **Home Page Config** link under Site Configuration on the Admin tab. This link takes you to the Home Page Admin menu.



The links available on this menu depend on additional MyCW rights in the Security Matrix.

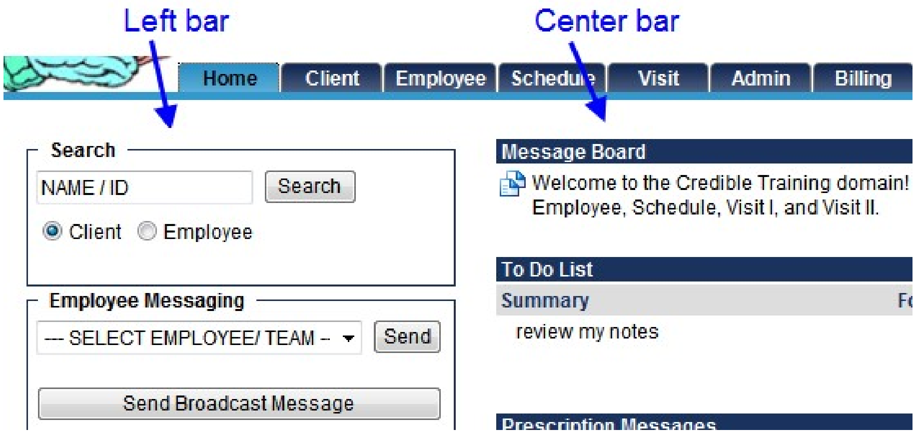


See also
Partner Config
Data Dictionary
Adding Program and Team to Client Profile
Device Settings
Device Buttons

Home > Admin > Site Configuration > Home Page Config > Home Page Admin

Home Page Admin

Use this function to customize the Credible Home Page screen with the information and functions that are relevant to your organization (requires Security Matrix right *MyCWAdmin*). When enabling a feature for the Home Page, you specify its location -- left bar or center bar -- and the order.



Access Admin tab > Home Page Config > Home Page Admin

Add To Do Item and To Do List	With the Add To Do Item box, employees can quickly add an item to their To Do Lists (summary only). With the Detailed To Do List Add link, they can enter a To Do Item with additional details such as target date and priority. When To Do List is selected, the top 10 items in an employee's To Do List will be displayed on the Home Page. For more information about the To Do List, click here.
Critical or Expiring Authorizations	Critical authorizations are authorizations that are getting close to being used up. Expiring authorizations have a period end date.
Incomplete Visits	List of the four most recent incomplete visits for an employee. Buttons to delete and begin each incomplete visit are provided. An employees can view all of his or her incomplete visits by clicking the corresponding link.
Internal Message From Credible Wireless	Periodically, Credible will broadcast a message to all Partners (for example, to notify you about an upcoming release or Partner Conference). Select this option to display the message on the Home Page.
Client Episodes	The episode number and Client name are displayed along with an All Client Episodes link.
Employee Forms	The list indicates the Employee the form was filled out for, the Employee who filled out the form, and the date it was filled out. A green circle with a checkmark indicates the form (Visit) has been approved.
Employee Messaging	To use Credible's internal instant messaging from the Home Page, click here.
Links	List of commonly used hyperlinks for your organization. When you click a link, it may open within your Credible system or in a new browser window.
Low Employee Activity	Lets you see a list of Employees that with the fewest number of Visits completed in the last 30 days.
Message Board	As the administrator, you can add a Home Page message entry to the system. To make it available to all users via the Home Page, you must select this option.
Most Active Clients	The system lists the name and status of the most active clients in the system. Clicking the client name takes you his or her Overview screen. You can also access the Client List screen with the All Clients link.

Notification Events	List of notification events for the current day. Use the navigation arrows to view events for past and future dates. To see all notifications for the current day, click All Notifications (the day view of your schedule displays).
Pending Orders	List of clients with pending orders. The list indicates the physician responsible for the order and the date and time it was made. To access the Physicians Orders screen for a client, click his or her name. To display a list of all pending orders, click the All Pending Orders link.
Prescription Messages	If your organization uses the Credible eRx module, you can display prescription messages for clients that you have rights to. Prescription messages include electronic failures, refill requests, and fax failures.
Recent Visits	The list of the most recent Visits completed is displayed with the Client name, date of the Visit, time in, and time out. You can click the view button for each Visit to open the Visit View screen and see the details of the Visit. Only Visits that you have permission to see will be displayed on this list. Click the All Visits link to go to the Client Visit List screen.
Recent Reports and Saved Reports	A list of the last five reports an employee ran or ran and saved will be displayed on the Home Page. To view the results of a report, click the report name. For the Saved Reports, you can access the Saved Reports screen and view all saved reports with the All Saved Reports link.
Scheduled Items	List of visits and blocked times scheduled for the current day. For a scheduled visit, you can start it by clicking the paper icon to the left of the client's name. Use the navigation arrows to view scheduled items for past and future dates. To display the week view of your schedule, click All Scheduled Items.
Search for a Client or Employee	The Search box is usually on the top left corner of the Home Page. You can search for a Client or an Employee in the system by entering a last name or ID. If there is a match, the result will be displayed.
Unapproved Prescriptions	If a prescriber has unapproved prescriptions created by a nonprescriber, the first five will be listed on the Home Page. With the All Unapproved Prescriptions link, the prescriber can go to his or her Client Medications screen to view all unapproved prescriptions and approve them.

After making your position and order selections in the Home Page Admin screen, click the **Save** button.

The recommended options are as follows:

- Add To Do Item -- Left Bar, Order 3
- Critical Auths -- Left Bar, Order 6
- Expiring Auths -- Left Bar, Order 7
- Incomplete Visits -- Left Bar, Order 4
- Employee Messaging -- Left Bar, Order 2
- Links -- Left Bar, Order 5
- Message Board -- Center Bar, Order 1
- Notification Events -- Center Bar, Order 6
- Pending Orders -- Center Bar, Order 5
- Prescription Messages -- Center Bar, Order 3
- Recent Reports -- Center Bar, Order 8
- Scheduled Items -- Center Bar, Order 7
- Search -- Left Bar, Order 1
- To Do List -- Center Bar, Order 2
- Unapproved Prescriptions -- Center Bar checked, Order 4

Note that some sections will not display on the Home Page if corresponding data does not exist. For example, if an employee does not have any to do list items, the To Do List section will not appear.

See also
Home Page

Client Home Page Admin
Client User Home Page Admin
Employee Home Page Admin
Dashboard Admin
Home/Client Page Config
Links Admin
Statistics Admin
Message Admin
Client Navigation

Employee Navigation

Home > Admin > Site Configuration > Home Page Config > Client Home Page Admin

Client Home Page Admin

Use this function to customize the Client Overview (Home Page) screen with content that is relevant to your organization (requires Security Matrix right *MyCWAdmin*). You specify the position and order of the content.

The system will populate the different sections on the Client Overview screen when corresponding data is saved in client, employee, and visit records.

The recommended options are as follows:

- Client Schedule -- Center Bar, Order 2
- Add To Do -- Left Bar, Order 2
- Allergies -- Left Bar, Order 5
- Assignments -- Left Bar, Order 6
- Attachments -- Left Bar, Order 8
- Authorizations -- Center Bar, Order 6
- Billing Info -- Center Bar, Order 5
- Clinical Support -- Center Bar, Order 3
- Contacts -- Center Bar, Order 8
- Diagnosis -- Left Bar, Order 4
- Client Episode -- Left Bar, Order 9
- Client Info -- Center Bar, Order 1
- Client Outcomes -- Center Bar, Order 4
- Client Picture -- Left Bar, Order 1
- Visits -- Left Bar, Order 7
- Meds -- Center Bar, Order 7
- Notification Events -- Center Bar, Order 9
- Quick Notes -- Center Bar, Order 10
- Warnings -- Left Bar, Order 3

See also

Client Overview

Home Page Admin
Client User Home Page Admin
Employee Home Page Admin
Dashboard Admin
Home/Client Page Config
Links Admin
Statistics Admin
Message Admin
Client Navigation
Employee Navigation

Home > Admin > Site Configuration > Home Page Config > Client User Home Page Admin

Client User Home Page Admin

Use this function to specify the position and order of the information displayed on the Credible Client Portal Home Page (requires Security Matrix right *MyCWAdmin*).

Whether or not the information is displayed is determined by the settings in the Client User Security Matrix for the client user's login profile.

The recommended options are as follows:

- Allergies -- Left Bar, Order 4
- Attachments -- Left Bar, Order 5
- Billing Info -- Center Bar, Order 5
- Clinical Support -- Center Bar, Order 4
- Contacts -- Center Bar, Order 2
- Diagnosis -- Left Bar, Order 3
- Family -- Center Bar, Order 3
- Client Info -- Center Bar, Order 1
- Visits -- Left Bar, Order 1
- Meds -- Center Bar, Order 6
- Quick Notes -- Center Bar, Order 7
- Tx Plans -- Left Bar, Order 2

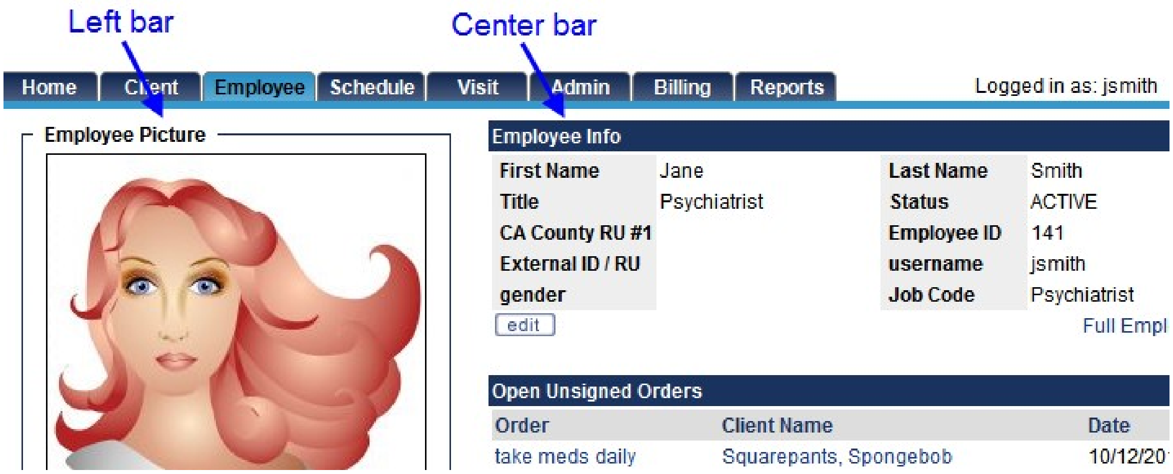
See also
Credible Client Portal
Client User Security Functions

Home Page Admin
Client Home Page Admin
Employee Home Page Admin
Dashboard Admin
Home/Client Page Config
Links Admin
Statistics Admin
Message Admin
Client Navigation
Employee Navigation

Home > Admin > Site Configuration > Home Page Config > Employee Home Page Admin

Employee Home Page Admin

Use this function to customize the Employee Overview (Home Page) screen with content that is relevant to your organization (requires Security Matrix right *MyCWAdmin*). You specify the position and order of the content.



The system will populate the different sections on the Employee Overview screen when corresponding data is saved in client, employee, and visit records.

The recommended options are as follows:

- Add To Do -- Left Bar, Order 2
- Admin Time -- Left Bar, Order 5
- Assignments -- Left Bar, Order 3
- Attachments -- Left Bar, Order 6
- Employee Info -- Center Bar, Order 1
- Employee Picture -- Left Bar, Order 1
- Employee Schedule -- Center Bar, Order 4
- Visits -- Left Bar, Order 4
- Notification Events -- Center Bar, Order 3
- Open Unsigned Orders -- Center Bar, Order 2
- Quick Notes -- Center Bar, Order 6
- To Do List -- Center Bar, Order 5

See also

Home Page Admin
Client Home Page Admin
Client User Home Page Admin
Dashboard Admin
Home/Client Page Config
Links Admin
Statistics Admin
Message Admin
Client Navigation
Employee Navigation

Home > Admin > Site Configuration > Home Page Config > Dashboard Admin

Dashboard Admin

Use this function to customize the Dashboard screen with the necessary features relevant to your Facility and the features available for Employee viewing (requires Security Matrix right *MyCWAdmin*). The Content Title headers are hard coded, therefore leaving you with the ability to select and order those categories pertainent to Employee viewing.

To show featured headers on the **Left Bar** (left handside of the screen) of the Dashboard, check a box along the header line of choice. To show featured headers in the **Center Bar** (middle of screen) of the Dashboard, check the box along the header line of choice. To select the **Order** in which the headers appear, scroll through the numeric dropdown. To save selected header and order choice, click on the **Save** button.

To view the selected Dashboard category headers; access the **Home** tab, navigate to the Links section and click on the **Dashboard 2.0 link**, to view the Dashboard Overview.

To view the selected Dashboard category headers; access the [**Employee**] tab, navigate to the **Dashboard** tab of the **Employee Nav Bar**, to view the data specific to that Employee. When the data is collected for the selected category headers of the Dashboard, the screen will populate the information.

To view the selected Dashboard category headers; access the [**Client**] tab, navigate to the **Dashboard** tab of the **Client Nav Bar**, to view the data specific to that Client. When the data is collected for the selected category headers of the Dashboard, the screen will populate the information.

See also

Home Page Admin
Client Home Page Admin
Client User Home Page Admin
Employee Home Page Admin
Home/Client Page Config
Links Admin
Statistics Admin
Message Admin
Client Navigation
Employee Navigation

Home > Admin > Site Configuration > Home Page Config > Home/Client Page Config

Home/Client Page Config

Use the this function to set the criteria for information displayed on the Credible Home Page and Client Overview/Home Page (requires Security Matrix right *MyCWAdmin*). Some of the settings correspond to Home Page Admin settings.

Click **Save Config** once you have set the desired values.

- Most Active Client Days -- number of days before the current date to retrieve Client activity from (for Most Active Client setting in Home Page Admin)
- Critical Auth Percent -- percentage in which an auth becomes critical in decimal format (for Critical Auths setting in Home Page Admin).
- Expiring Auth Days -- number of days before Auth Expires (for Expiring Auths setting in Home Page Admin)
- Employee Activity Days -- number of days before the current date to retrieve Employee activity from (for Low Employee Activity settting in Home Page Admin)
- # Visit Weeks -- this setting is not currently being used
- # Visit Months -- number of months to chart Visit totals
- Login Months -- number of months to chart logins
- Auths by Primary -- when selected, only display critical and expiring auths for clients that the employee is assigned to as Primary will be displayed on the Home Page (make sure Critical Auths and Expiring Auths are selected in Home Page Admin). 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.

See also

Home Page Admin
Client Home Page Admin
Client User Home Page Admin
Employee Home Page Admin
Dashboard Admin
Links Admin
Statistics Admin
Message Admin
Client Navigation
Employee Navigation

Home > Admin > Site Configuration > Home Page Config > Links Admin

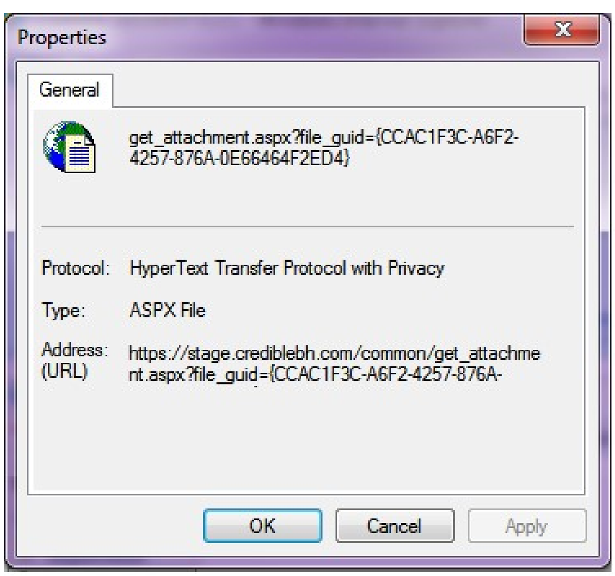
Links Admin

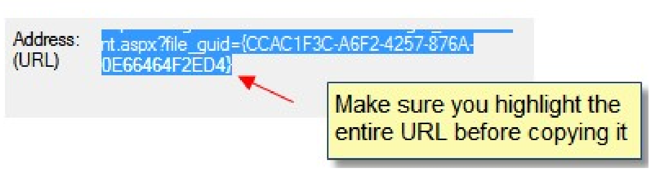
You can add links to the Home Page and make them available to all employees or a subset of employees. A link can be to a website or a document that is attached to an employee record.

Note that the Submit Task Ticket, Submit Library Ticket, and Dashboard 2.0 links are standard links that only display if the employee has the corresponding Security Matrix rights.

If you are going to add a link to a document, you need to first get its URL.

1. **Employee** tab > Employee Overview screen > **Attachments** on the nav bar.
2. Right click the attachment and select **Properties.**
3. Highlight the URL in the Address (URL) field -- make sure you highlight all of the URL as some of it is not visible in the field. The last character in the URL should be a curly right bracket.





4. Right click again and select **Copy.**
5. Click **Cancel** to close the Properties popup.

To add a link:

1. **Admin** tab > **Home Page Config** > **Links Admin** > **Add a New Home Page Links Entry.**
2. Enter a label for the link and paste in the URL.
3. If appropriate, enter a date range when you want the link to be available.
4. Determine the viewing rights. Select the All checkbox to make the link available to all employees or select specific teams and/or profiles if the link is for a subset of employees. After you select teams or profiles, click the **Add Team >>**/**Add Profile >>** link to add them to the Associated Teams/Profiles list. You can remove a team or profile from the Associated Teams/Profiles list by clicking it and clicking the **<< Remove Team**/**<< Remove Profile** link.
5. Click the **Save MyCw Link** button to save the link.

Note If you set up a link to a document and the document is updated and reattached to an employee record, you will need to copy the new URL and update the link entry.

To change an existing link, click the **edit** button.
To remove an existing link, click the **delete** button and then click **OK** in the Confirmation popup.

If the Links section is not currently displayed on the Home Page, use the Home Page Admin function to enable it.

See also

Home Page Admin
Client Home Page Admin
Client User Home Page Admin
Employee Home Page Admin
Dashboard Admin
Home/Client Page Config
Statistics Admin
Message Admin
Client Navigation
Employee Navigation

Home > Admin > Site Configuration > Home Page Config > Statistics Admin

Statistics Admin

Click on the **Statistics Admin link** to manage a list of **Home Page Statistics** relevant to your facility and for employee viewing of the dashboard.

- To change the Description, Stat details and Viewing Rights of a predefined Statistics line entry, click on the **edit** button.
- To determine the Viewing Rights; Check All to make Stat viewable to everyone OR select specific Teams And/Or Profiles to view Stat.
- To Associate Team(s) for which the Stats will be available, click on a Team(s) from the Available Teams section, click on the **Add Team link** to have it appear in the Associated Teams dropdown. To remove a Team(s) from the Associated Team section, click on a Team(s) in the Associated Teams section then click on the **Remove Team link**.
- To Associate Profile(s) for which the Stats will be available, click on a Profile(s) from the Available Profiles section, click on the **Add Profile link** to have it appear in the Associated Profiles dropdown. To remove a Profile(s) from the Associated Profiles section, click on a Profile(s) in the Associated Profiles section then click on the **Remove Profile link**. Click on the **Save MyCw Stat** button to save criteria once the Viewing Rights have been determined.
- To view the Stats, based on the viewing rights: access the **Home** tab, navigate to the Links section and click on the **Dashboard 2.0 link**.
- To view the Dashboard Employee Details, click on the **Employee** tab, select an Employee and click on the **Dashboard** tab of the **Employee Nav Bar**.
- To view the Dashboard Client Details, click on the **Client** tab, select a Client and click on the **Dashboard** tab of the **Client Nav Bar**.

See Also

Home Page Admin
Client Home Page Admin
Client User Home Page Admin
Employee Home Page Admin
Dashboard Admin
Home/Client Page Config
Links Admin
Message Admin
Client Navigation
Employee Navigation

Updated 6/24/2016 2:05 PM by marchall

Home > Admin > Site Configuration > Home Page Config > Message Admin

Message Admin

Click on the **Message Admin link** to add and manage a list of Home Page Message Lists relavent to your Facility and for Employee viewing.

To add a Message entry, click on the **Add a New Home Page Message Entry link**. Enter a Description and Message (date range is optional). Determine the Viewing Rights- Check All to make message viewable to everyone OR select specific Teams And/Or Profiles to view message.

To Assoicate Team(s) for which the Message will be available, click on a Team(s) from the Available Teams section, click on the **Add Team link** to have it appear in the Associated Teams dropdown. To remove a Team(s) from the Associated Team section, click on a Team(s) in the Associated Teams section then click on the **Remove Team link**.

To Associate Profile(s) for which the Message will be available, click on a Profile(s) from the Available Profiles section, click on the **Add Profile link** to have it appear in the Associated Profiles dropdown. To remove a Profile(s) from the Associated Profiles section, click on a Profile(s) in the Associated Profiles section then click on the **Remove Profile link**. Click on the **Save MyCw Link** button to save the message once the Viewing Rights have been determined,.

Click on the **edit** button to change a current Message criteria. Click on the **delete** button to remove a current Message; click **OK** on the Confirmation Box.

To view the Message, based on the viewing rights; click on the **Home** tab and navigate to the Message Board section.

See also

Home Page Admin
Client Home Page Admin
Client User Home Page Admin
Employee Home Page Admin
Dashboard Admin
Home/Client Page Config
Links Admin
Statistics Admin
Client Navigation
Employee Navigation

Home > Admin > Site Configuration > Home Page Config > Client Navigation

Client Navigation

Use this function to control the order of the functions on the Client navbar and to specify which functions will be in the Intake navbar. The Intake navbar is a subset of the Client navbar that employees can access from within a web form when documenting a service. Click here for more information.

Access Admin tab > Home Page Config > Client Navigation

1. To control the order of functions on the Client navbar, use the Order number dropdown.
2. To include a function on the Intake navbar, select the checkbox provided and then select the order you want it to appear in from the Intake Order dropdown.
3. Click Save.

See below for the recommended settings.

Client Navigation Order:

Title	Order	Include in Intake	Intake Order
Overview	1		
Profile	2	☑	1
Client Ext	3	☑	2
Episodes	4	☑	3
Bed Assign	5	☑	4
Add Visit	6		
Visit List	7		
Tx Plus	8	☑	5
Diagnosis	9	☑	6
Insurance	10	☑	7
Authorization	11	☑	8
Team	12	☑	9
Program	13	☑	10
Employee	14	☑	11
GeoAreas	15		
Contacts	16	☑	12
Family	17	☑	13
Allergy	18	☑	14
Medical Profile	19	☑	15
eLabs	20		
Medications	21	☑	16
eMAR	22		
eMAR Group	23		
Orders	24		
Clinical Support	25		
Attachments	26	☑	17
Warnings	27	☑	18
Ext Provider	28	☑	19
Schedule	29		

Form Groups	30		
Schedule Grp	31	☑	20
Quick Visit	32		
1st Available	33		
Users	34		
Notes	35	☑	21
Dashboard	36		
Liability	37		
Liability	37		
Liability	37	☑	22
Liability	37		
Claims	38		
Notification	39		
Log	40		
Payments	41		
Ledger	42		
Enrollment	42		
Funds	42		
Tx Plan	42	☐	1
Client Links	42	☐	1

See also
Working with a Nav Bar

Home Page Admin
Client Home Page Admin
Client User Home Page Admin
Employee Home Page Admin
Dashboard Admin
Home/Client Page Config
Links Admin
Statistics Admin
Message Admin
Employee Navigation

Home > Admin > Site Configuration > Home Page Config > Employee Navigation

Employee Navigation

Use this function to control the order of the functions on the Employee nav bar.

Access Admin tab > Home Page Config > Employee Navigation

To control the order of functions on the Employee nav bar, use the Order number dropdown and then click **Save**.

See below for the recommended order.

Employee Navigation Order:

Title	Order
Overview	1
Profile	2
Team	3
Program	4
Client	5
Emergency	6
Supervisor	7
GeoAreas	8
Billing Groups	9
Medications	10
eMAR	11
eMAR Group	12
Attachments	13
Schedule	14
Work Hours	15
Work Sched	16
Resource Sched	17
Add Visit	18
Visit List	19
Admin Time	20
Notes	21
Notification	22
Messaging	23
Message Log	24
To Do List	25
Messaging Hub	26
Forms	27
Login	28
Config	29
Signature	30
Password	31
Credentials	32
Dashboard	33
Log	34

See also
Working with a Nav Bar
Home Page Admin
Client Home Page Admin
Client User Home Page Admin
Employee Home Page Admin
Dashboard Admin
Home/Client Page Config
Links Admin

Statistics Admin
Message Admin
Client Navigation

Home > Admin > Site Configuration > Device Settings

Device Settings

Device Settings allows you to manage and establish the settings for all *mobile* devices. You need the *MyCWAdmin* right to access this link.

For each item in this section, simply check the box next to each setting you need activate and use.

When finished selecting your desired settings, click the **Save Settings** button at the bottom of the screen. To exit without saving selections, click **Cancel**.

Note: These settings have no effect on Credible Care.

See also

Partner Config
Data Dictionary
Adding Program and Team to Client Profile
Home Page Config
Device Buttons

Updated 7/6/2016 2:27 PM by marchall

Home > Admin > Site Configuration > Device Buttons

Device Buttons

You need the *MyCWAdmin* right to access this link.

Note: These settings have no effect on Credible Care.

See also

- Partner Config
- Data Dictionary
- Adding Program and Team to Client Profile
- Home Page Config
- Device Settings

Updated 7/6/2016 2:27 PM by marchall

Home > Admin > Credible eRx Admin

Credible eRx Admin

With the Credible eRx module, prescribers -- employees with a Surescripts Provider Identifier (SPI) number set up in Credible -- and nonprescribers with the appropriate security rights can create and refill prescriptions. Once a prescription is approved, a prescriber or nonprescriber can generate a printable version of it (for printing or faxing) or send it electronically to a pharmacy. If a nonprescriber has the *PrescriptionCreateNonSPI* right and the prescription is for a noncontrolled substance, he or she can print or submit it prior to the prescriber approving it.

Electronic Prescriptions for Controlled Substances: Credible's priority development roadmap projects the release of *ePrescribing for Controlled Substances* in Q1 2017. If your state regulations allow it, you can use the electronic faxing capabilities for controlled substances that are available today in Credible eRx.

To create prescriptions, you need to have the Credible eRx module and your Implementation Manager or Partner Services Coordinator needs to turn on Credible eRx and e-faxing (if applicable) in your system. Refer to Credible Library reference 32908 for the *Credible eRx Setup* guide.

For prescribers: Credible sends a prescriber's information to Surescripts and then enters the SPI number assigned into your Credible system; no additional security rights are necessary.

For nonprescribers, you can assign one or more of the following security rights:

eRxViewAllMessages	By default, an employee can only view a prescription message if he or she is the prescriber. Select this right to give employees the ability to view prescription messages for any clients they have rights to view. Prescription messages include electronic failures, refill requests, and fax failures. To enable prescription messages on the home page: 1. Admin tab > **Home Page Config** > **Home Page Admin**. 2. Select Prescription Messages for the left or center bar and click **Save**.
PrescriptionCreate	Allows an employee to create a prescription and submit it to a registered prescriber for approval. Once approved, the employee can complete the prescription – generate a printable version of it, send it electronically to a pharmacy, or e-fax it. If an employee has this right, there will be a **Create Prescription** button on the Client Medications and Physicians Orders screens. The employee can also as view client medications prescribed by other employees that he or she has rights to.
PrescriptionCreateNonSPI	Allows an employee without a Surescripts Provider Identifier (SPI) to create a prescription for a noncontrolled substance and then print it or send it to a pharmacy prior prescriber approval. The prescriber associated with the prescription should approve it within 48 hours of it being printed or sent. Note that nothing happens within your Credible system if the provider does not approve the prescription. On the prescription request, the system identifies the provider as the Prescriber and the nonprescriber employee as the Prescriber Agent. **Important:** your IM/PSC needs to turn on the non-SPI prescription function in your system.
PrintOriginalRx	Allows an employee to print the original prescription (no Duplicate watermark) when using the print button for an existing prescription. If you use e-faxing in Credible eRx, the employee can also print the original script when you using the Fax & Print Copy function. **Important:** your IM/PSC needs to turn on the ability to print an original script when faxing controlled substances. **Caution:** you should limit the users you give the new *PrintOriginalRx* right to since it gives them the ability to create additional copies of original prescriptions.
RxRefill	Allows an employee to refill a prescription without prescriber approval. Note that the employee cannot change the prescription.
RxReprint	Allows the employee to print a copy of a prescription after it has been created.

Important: Credible employees are not allowed to enable Credible eRx Security Matrix settings for you.

Note: In accordance with Surescripts© requirements, client ZIP codes are now validated against U.S. requirements when creating a script with Credible eRx. If the Client Profile ZIP code is present but not in a valid format, the **Send to Pharmacy** button is disabled and the button tooltip indicates that a valid U.S. format is required.

Drug/Drug & Drug/Allergy Interaction Warnings

You can to set up a custom severity level message for the interaction tab for the different type/severity level combinations (for example, Drug/Drug 2 – Severe Interaction). You also have the option of suppressing the interaction warning message and tab for each type/severity level combination for different login profiles. Click here for more information.

See also
Prescriptions and Credible eRx

Daily Activities
Lookups and Code Tables
Security Configuration
Billing Configuration
Site Configuration
Methasoft Import
Configuring Family Unit As a Client Entity
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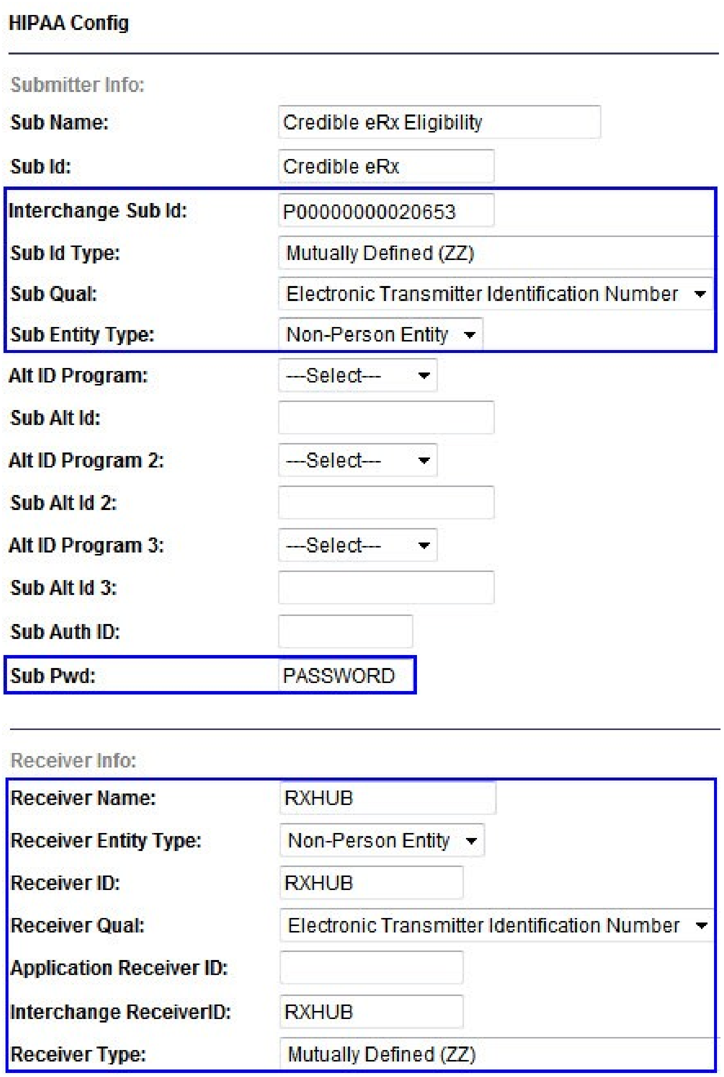
Last updated 2/21/2017 7:40 PM by CredibleEducation

Home > Admin > Credible eRx Admin > Rx Eligibility: Steps to Configure

Rx Eligibility: Steps to Configure

Security Matrix right: BillingConfig

1. Billing tab > **Billing Office/Claim Config** > **Add a New Config Entry**.
2. Fill in the Sub Name, Sub Id, and Contact fields with the desired values.
3. Fill in the Interchange Sub Id, Sub Id Type, Sub Qual, Sub Entity Type, Sub Pwd, and Receiver Info fields *with the values indicated below*.



4. Select the Is Rx Eligibility checkbox (at the bottom of the Submitter Info section).
5. Select 005010X279A1 from the 270 Version Code dropdown and Production Data from the Claim Usage 270 dropdown.
6. Select 5010 Standard from the ICS VersionNum dropdown and use the default Claim Indicator setting (Reporting).
7. Click **Save Settings**.

See also
Checking Rx Eligibility

Home > Admin > Methasoft Import

Methasoft Import

Configuring your Domain to use the Methadone Custom Import Tool is a three stage process. Additionally, you may choose to use **Client Specific Overrides**, which are detailed here.

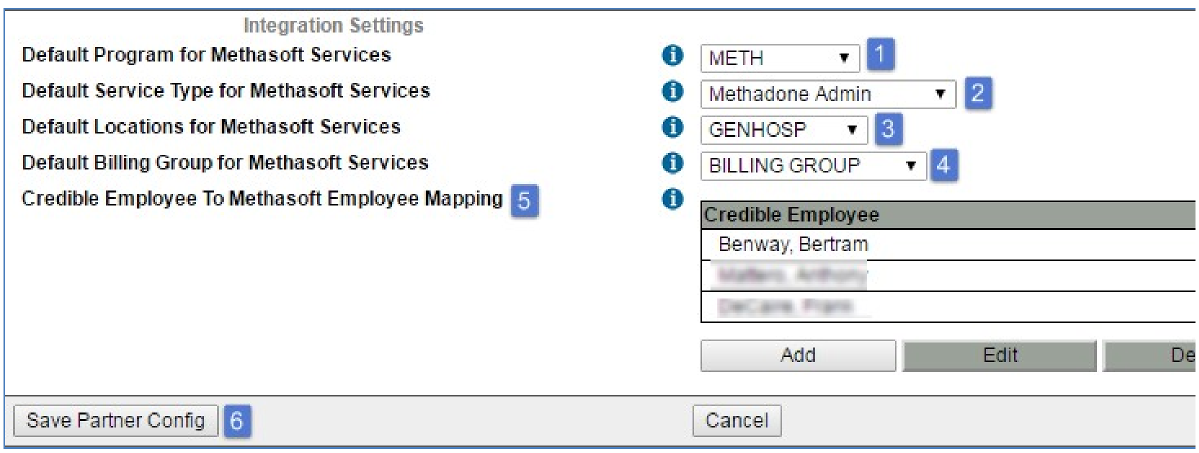
Determine Appropriate Programs, Visits, Locations, and Employees

Before beginning the configuration process, determine the Programs, Visits/Services, Locations, and Employees will be used with the Methasoft process. If necessary, create those items.

Implement Partner Config Settings

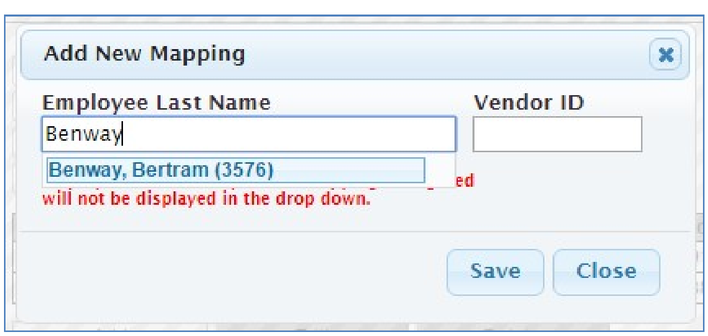
There are six Partner Config setting which apply to the Methasoft Import process.

Integration Settings



1. **Partner Config: Default Program For Methasoft Visits**: Select which Program Methasoft Visits should be Signed and Submitted under.
2. **Partner Config: Default Visit Type for Methasoft Visits**: Select which Visit Type should be used for the Methasoft charge.
3. **Partner Config: Default Location For Methasoft Visits**: This specifies the Location that used for Methasoft Visits that are created.
4. **Partner Config: Default Billing Group For Methasoft Visits**: This specifies the Billing Group used for Methasoft Visits.
5. **Partner Config: Credible Employee To Methasoft Employee Mapping**: This configures the mapping between the Employee's Methasoft ID and their Credible user account. The Vendor ID is determined by the Methasoft system, while the employee is selected from a dropdown of active employees. You may **Add**, **Edit**, or **Delete** mappings.

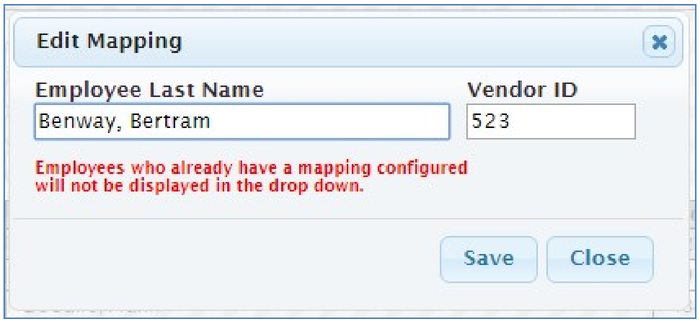
    1. To **Add** an Employee Mapping:
        1. Click the **Add** button. The **Add New Mapping** popup will appear.



        2. Type the last name of the Employee desired. A list will appear of employees who have not already been mapped to Methasoft. Click the appropriate name.

    3. Enter the Methasoft **Vendor ID**.
    4. Click the **Save** button to complete the mapping.

2. To **Edit** a mapping:
    1. Click the name of the employee in the list. It will be highlighted.
    2. Click the **Edit** button.



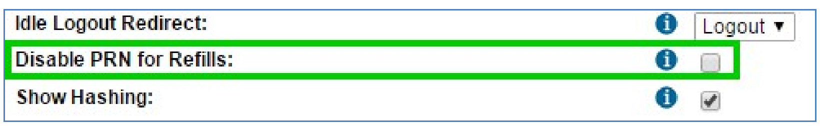
    3. Make the desired change, then click **Save**.

3. To **Delete** a mapping:
    1. Click the name of the employee in the list. It will be highlighted.
    2. Click the **Edit** button.
    3. The mapping will be deleted. **Warning**: The deletion is immediate, and does not ask for confirmation.

6. Click the **Save Partner Config** button to save your settings.

General Settings

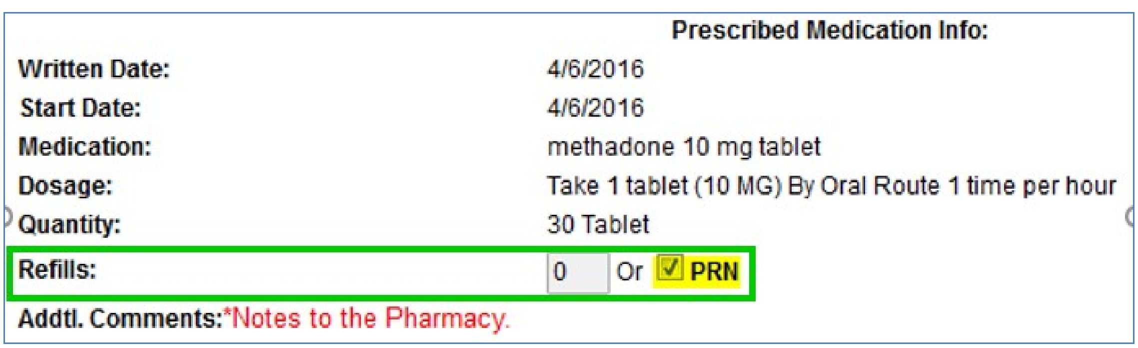
The setting **Disable PRN for Refills** must be left unchecked. If it is checked, the PRN flag will not be displayed in the necessary **Create Prescription Workflow.**



Create the Prescription

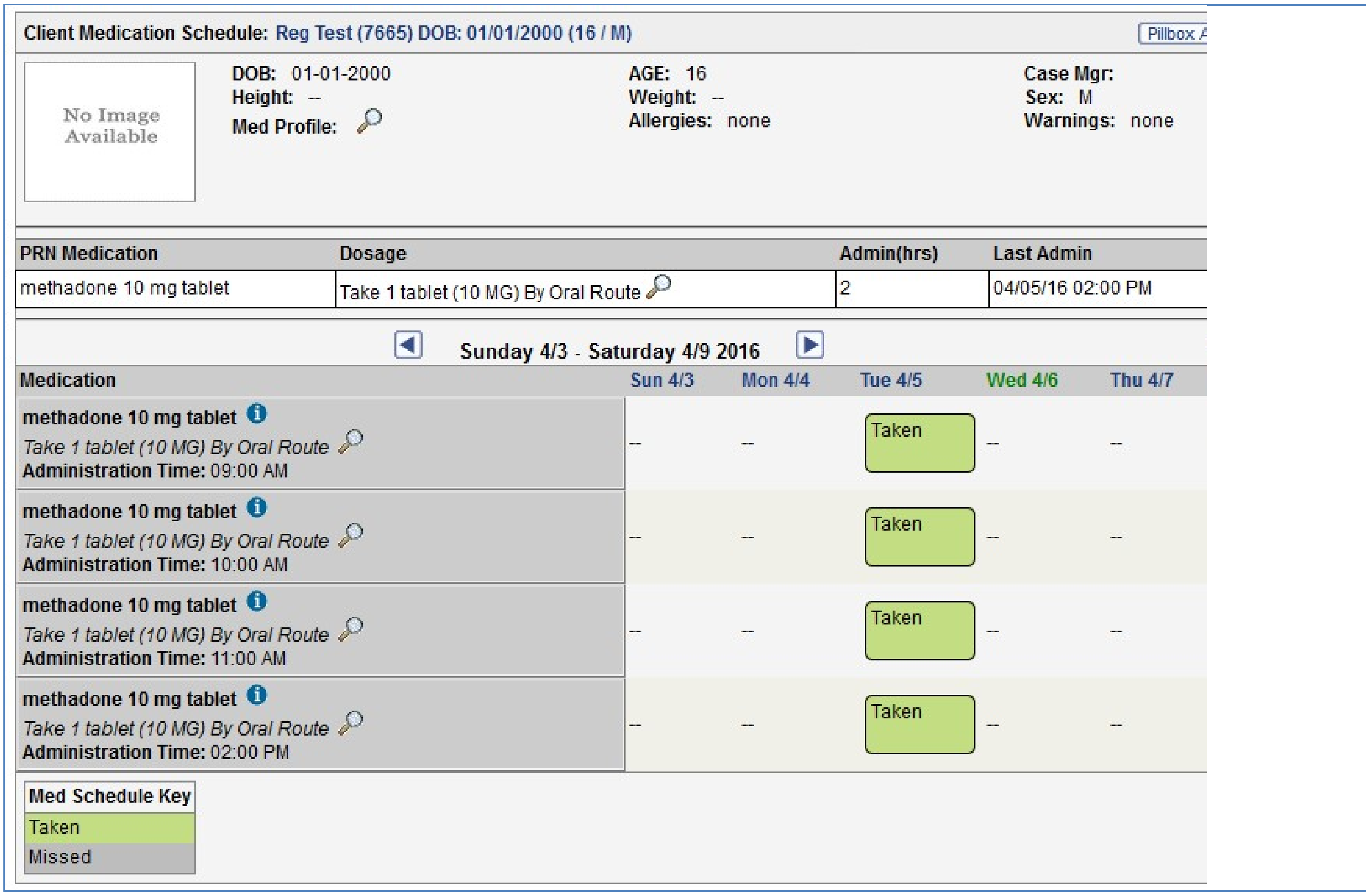
The next step is to prescribe methadone to the client. This prescription has two requirements:

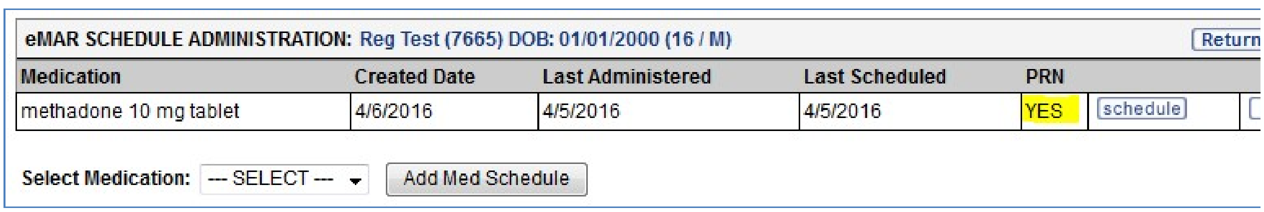
- The Refill must be set to PRN.
- The medication's NDC number must match the NDC number that is returned in the Import file.



Create an eMAR Record

After creating the methadone prescription, you must set up an **eMAR Admin Schedule** for the medication. This schedule should be configured as a PRN Schedule (the PRN box must be checked).



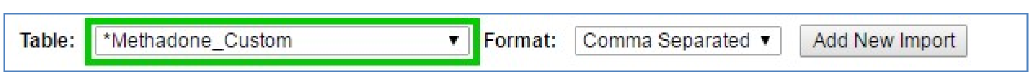


Create Import Tool

In addition to the Partner Config and Client set-up requirements, the Partner must also set up the ***Methadone_Custom** import tool. Please note that this Import Tool does not allow the user to configure desired fields.

Setting up the Import tool consists of 3 steps:

1. Navigate to **Reports** tab > **Import Tool** on the navbar.
2. At the bottom of the page, select ***Methandone_Custom** from the **Table** dropdown, with **Comma Separated** as the **Format**.



3. Click the **Add New Import** button.

Updated: 10/6/2016 2:45 PM by CredibleEducation

Home > Admin > Methasoft Import > Client Specific Overrides for Methasoft Services

Client Specific Overrides for Methasoft Services

Client Specific Overrides allow you to set up a Client Profile field for use in storing Methasoft information. If configured AND the client has data in the field, the Methasoft visit will use that information instead of the default.

Usage

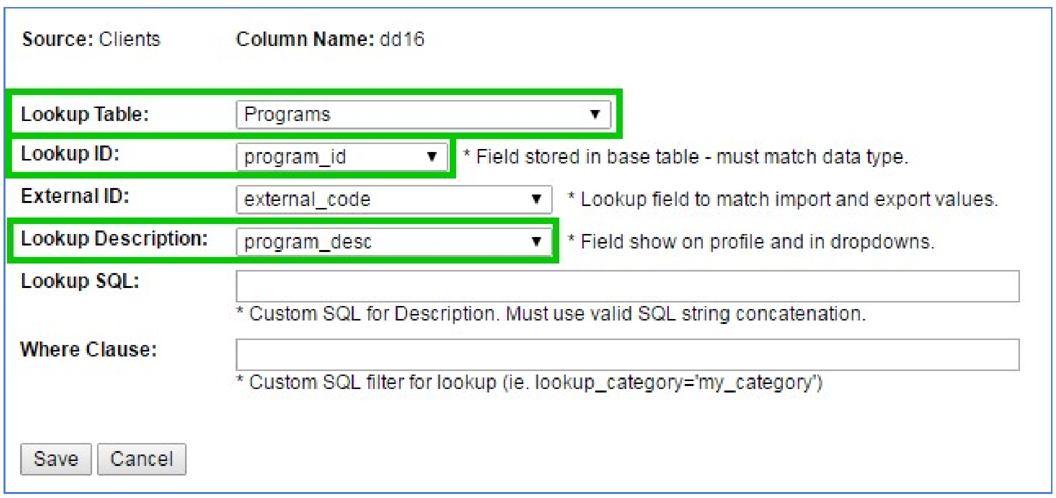
There are five possible overrides: **Program**, **Service Type**, **Location**, **Recipient Type**, and **Billing Group**. Each dropdown is a list of Client Profile fields. Select the one that is being used for that data.

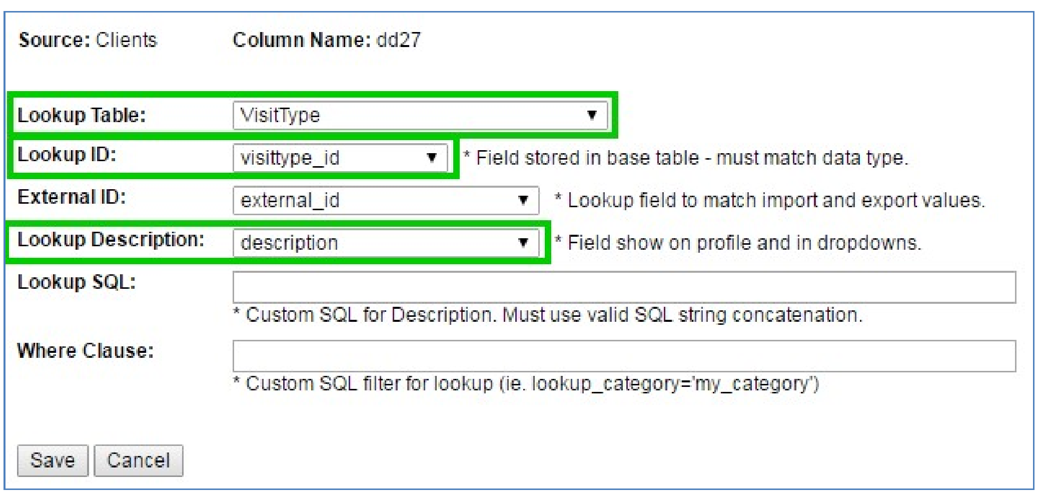
Configuration

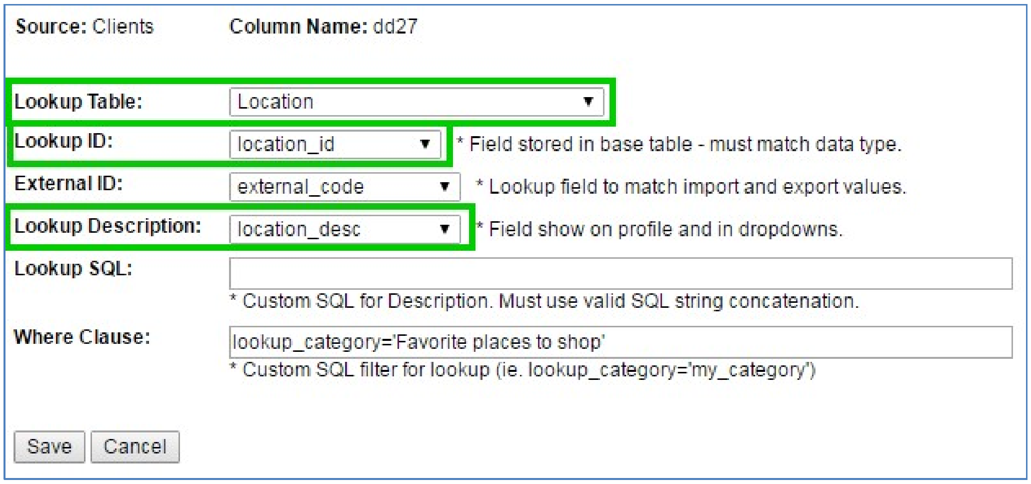
The Data Dictionary must first be configured to create lookups to the various tables. The specific Client field used isn't important, as long as it is numeric; it can be a **dd** field or a **num** field. The *Lookup Table* and *Lookup ID* are the main settings, while the *Lookup Description* could be the code or description; the Credible Best Practice is to use the table's full description field.

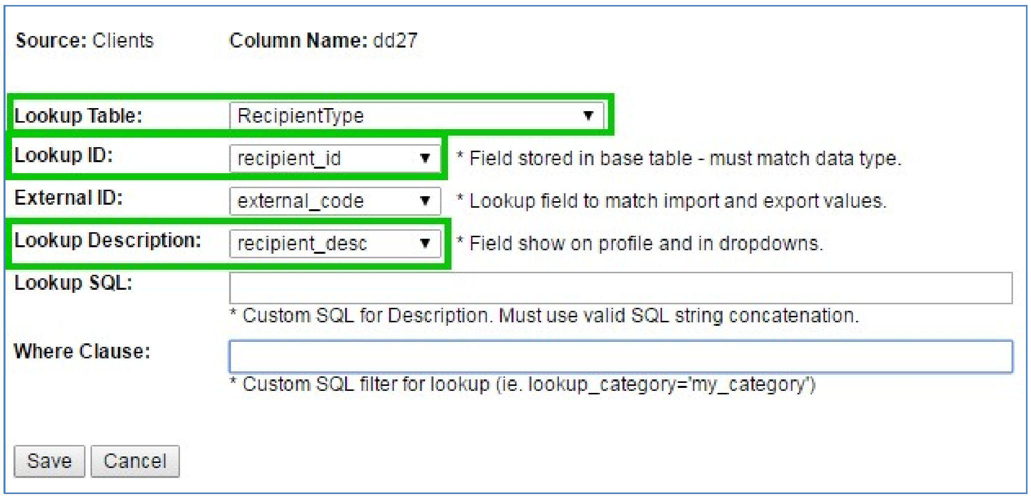
Please note: It is not necessary to set all five overrides; if the location is the only thing that varies between clients, you might configure the *Client Specific Location for Methasoft Services* dropdown, and leave the others alone.

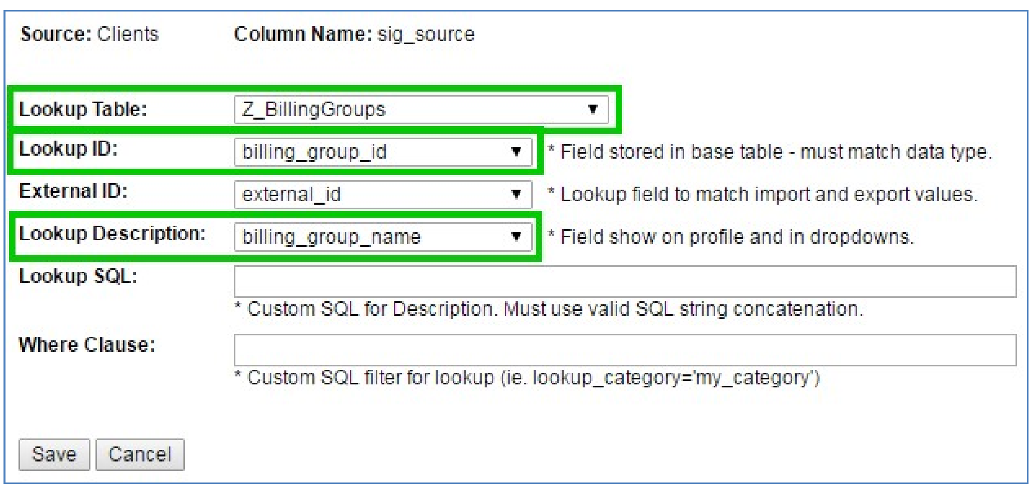
Below are sample lookups for each override.











Updated: 10/6/2016 2:43 PM by CredibleEducation

Home > Admin > Configuring Family Unit As a Client Entity

Configuring Family Unit As a Client Entity

Settings

Security Matrix: DataDictionary
Partner Config: Use Client Family

1. Select Use Client Family (under Client Settings) in Partner Config.
2. Add is_familyunit to the Clients table:
    a. Admin tab > Data Dictionary.
    b. From the Table Source dropdown, select Clients and click **Submit.**
    c. From the Column Name dropdown, select is_familyunit and click **Insert Column.**
    d. For the is_familyunit line you added, select the Is Boolean checkbox and click **update.**
3. Click **Match Update to View** button and exit.

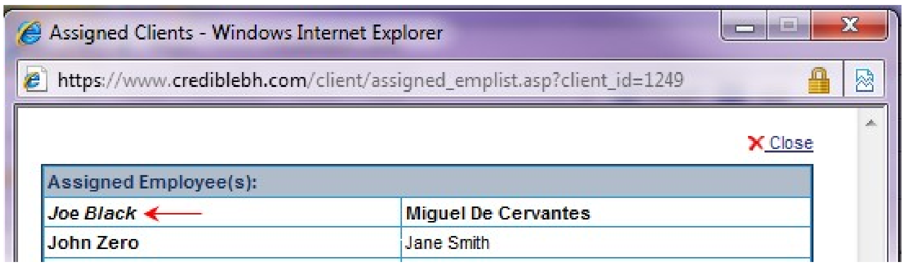
See also
Family Unit As a Client Entity

Home > Admin > Case Manager Notes

Case Manager Notes

The case_manager_emp_id field in the Clients table is automatically updated when a case manager assignment is made. It is automatically set back to null when a case manager assignment is removed. You can add this field to the View type of the Clients table in Data Dictionary but not to the Update type.

The name of the case manager is indicated in the system with boldface and italics. (The name of a primary employee is indicated with boldface.)



See also
Client-Employee Assignment

Home > Admin > Employee-Specific Time Zones

Employee-Specific Time Zones

If you have employees that work in multiple time zones, you can take advantage of functionality that lets them set their own time zone depending on their location. Also, if you have employees who travel between offices in different time zones, you can have the system prompt them to switch time zones when logging in. With the *Security Matrix* right *EmployeeTimeZone*, you can control which employees can use the two time zone settings in *Employee Config*.

It is important to note that the "automatic" dates for a visit -- transfer, signature, and approval dates – and the dates in the Visit Log will use the current time zone the employee is using. All other timestamps stay the same.

Also, the time zone an employee had set at time of login, whether it was changed at login, changed via Employee Config, or just based on the Partner Config setting, is now recorded in the Login Report.

If your system is set up to use a system clock, the employee time zone displays to the right of the time under the log out button. It also displays anywhere that a date automatically appears in Credible and can be edited (for example, on the Sign & Submit page). Note that this does not include the Schedule, as the time selected will be used, or times that naturally default to 12:00 AM (for example, immunizations in the Client Medical Profile).

Settings

Your Implementation Manager or Partner Services Coordinator needs to turn on the Employee Time Zone functionality in your system.

Partner Config: Time Zone, Use System Clock (optional)

Security Matrix: EmployeeConfig, EmployeeTimeZone

Use

1. Employee nav bar > Config.

2. Select the appropriate time zone from the Employee Time Zone dropdown.

3. Select Set Employee Time Zone at Login (optional). When set, you will be prompted at login to change your time zone.

See also
Config

Updated: 10/9/2015 1:32 PM by marchall

Home > Admin > Flag Attachments for HR Use Only

Flag Attachments for HR Use Only

If your organization uses the is_hr field in the Employee Profile to identify HR staff members, you can take advantage of the new Is HR setting for employee attachments to attach files that only those with HR rights can view. Only employees that have is_hr = YES in their employee profiles can designate an attachment for HR use only and view attachments where Is HR = True.

To configure:

1. Add is_hr to the Employee table (Type = View and Update).
2. Set the employee’s profile to is_hr = True.

See also
Data Dictionary
Employee Profile
Employee Attachments

Home > Admin > Recipient, Location, & Billing Group Fields Default to Null

Recipient, Location, & Billing Group Fields Default to Null

To help ensure that an employee selects the correct recipient, location, and billing group when signing and submitting a visit added through the Schedule, the fields default to null and selecting a value is required. --SELECT-- appears in each dropdown instead of the first option in the list.

You can override the null defaults on the Sign & Submit page in the following ways:

- Set a Recipient default through Employee Config or Visit Type config or use the new Default Recipient setting in Partner Config.
- Have users select a Location in the Add to Schedule screen.
- Set a billing group default in the Employee Profile.

Settings:

- Employee Config: Default Recipient Type = ---- (null)
- Visit Type: Default Recipient = --SELECT--
- Partner Config: Default Recipient = --SELECT--
- Employee Profile: Billing Group = ---- (null)

See also

Daily Activities
Lookups and Code Tables
Security Configuration
Billing Configuration
Site Configuration
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Flag Attachments for HR Use Only
Additional Fields in Visit Details Screen
Drug Schedule & NDC for Client Medications
Setting Up the Credible Client Portal
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Setting Up Your System to Use a Cancellation/No-Show Form
Setting Up eLabs
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User Management Best Practice

Home > Admin > Additional Fields in Visit Details Screen

Additional Fields in Visit Details Screen

If the following fields are used in a visit, they will be displayed in an Additional Fields section in the Visit Details screen: text1-3, bool1-3, date1-3, num1-3, overlapped_primary_id, auth_level, submission_reason_code, non_release, cascaded_units, cascaded_comb_units, reprocess_for_payroll, subtract_overlapping, bedboardbed_id, and fosterhome_id.

If a user doesn't enter value into one of the fields during a visit, it will not be displayed in the Visit Details screen. Note that none of the fields are displayed when you use the View All function.

To control which users can view the fields, use the *ClientVisitSuperView* right. Only users with this right can view the fields if they are set up to require Super View rights in the Data Dictionary.

To configure:

1. Use the Data Dictionary to add the fields to the Visit table (Type = View). If you want to restrict who can view the fields in the Visit Details screen, select Super View and then select *ClientVisitSuperView* for the appropriate profile.
2. Create a form that uses the text1-3, bool1-3, date1-3, num1-3, overlapped_primary_id, auth_level, submission_reason_code, non_release, cascaded_units, cascaded_comb_units, and/or reprocess_for_payroll fields.

To use:

1. Have a user document a visit that uses the form you created or complete a visit via Bed Board Billing or Foster Home Billing.
2. Display the Visit Details screen for the visit and look for the fields in the Additional Fields section.

See also

Daily Activities
Lookups and Code Tables
Security Configuration
Billing Configuration
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Case Manager Notes
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Recipient, Location, & Billing Group Fields Default to Null
Drug Schedule & NDC for Client Medications
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Outcome Tracking Setup
Setting Up Your System to Use a Cancellation/No-Show Form
Setting Up eLabs
Setting Up eMAR
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Configuration for Generating Clinical Summaries
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User Management Best Practice

Home > Admin > Drug Schedule & NDC for Client Medications

Drug Schedule & NDC for Client Medications

Whenever you add a medication to a client's record or create a prescription for a client, the system records the drug schedule and NDC for the drug in the Meds table. You can build an export that includes these fields for each medication in a client's record.

Settings = ReportList, ExportBuild, ExportRun Security Matrix rights

Steps to configure:

Reports tab > **Export Tool** button on nav bar

Create an export:

1. Form/Table Name = Custom Query
2. Custom query = select client_id, drug_schedule, ndc, medication from meds where Meds.client_id = @param1
3. In the Export Builder screen, enter Client ID in the Custom Param1 field and select the four fields under the Custom Columns folder.

To use: run the export you created, entering the ID of the client you want a medication list for in the Parameters screen.

See also

Daily Activities
Lookups and Code Tables
Security Configuration
Billing Configuration
Site Configuration
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Setting Up eLabs
Setting Up eMAR
Setting Up Bed Board
Configuration for Generating Clinical Summaries
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User Management Best Practice

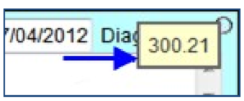
Home > Admin > Setting Up the Credible Client Portal

Setting Up the Credible Client Portal

Note: To have the Client Portal enabled for your Domain, please contact your Implementation Manager, or open a Task Ticket.

1. Select the Client Profile fields you want client users to view:
   a. Admin tab > Data Dictionary
   b. Make sure Table Source = Clients and Type = View and then click Submit.
   c. For each field that you want a client user to have view access to, select the User View checkbox and click update.
2. Add a client user security profile:
   a. Admin tab > Login Profiles > Add a New Security Profile Entry. You need to add at least one security profile where Is Client User = True.
   b. In the Profile Code field, enter the name of the profile.
   c. Enter a description, select True from the Is Client User dropdown, and click Add Security Profile.
3. Set up multiple client user security profiles if you want to vary the parts of a record client users have access to. For example, you can have one full access profile and several partial access profiles. You use the Client User Security Matrix to control the parts of a record profile has access to.
4. Set up the Client User Security Matrix:
   a. Admin tab > Client User Security Matrix.
   b. Select the options you want each client user profile to have access to and click Save All.

   Note: *TxPlusViewCU* lets a client user view a client's Tx Plus plans. If one of the client's diagnoses is linked to a problem in a Tx Plus plan, a client user will be able to view the diagnosis code by hovering over the Diagnosis magnifying glass.

5. Give users the right to add client users by selecting *ClientUserView* for the appropriate profiles in the Security Matrix.
6. Configure the Client User Home Page:
   a. Admin tab > Home Page Config > Client User Home Page Admin.
   b. Select the options you want to display on the portal home page and click Save.

Profile Print View and Immunizations

A client user can generate a print view of their records through the Client Portal. The client user uses the same Print Options popup that your staff uses to generate client profile print views; the options available in the popup are controlled by the client user's Security Matrix.

After the client user is logged into the Client Portal, he/she uses the Profile button on the nav bar to access the Print View function of the Immunizations button to view immunization records. A detail button is available for each immunization record.

See also

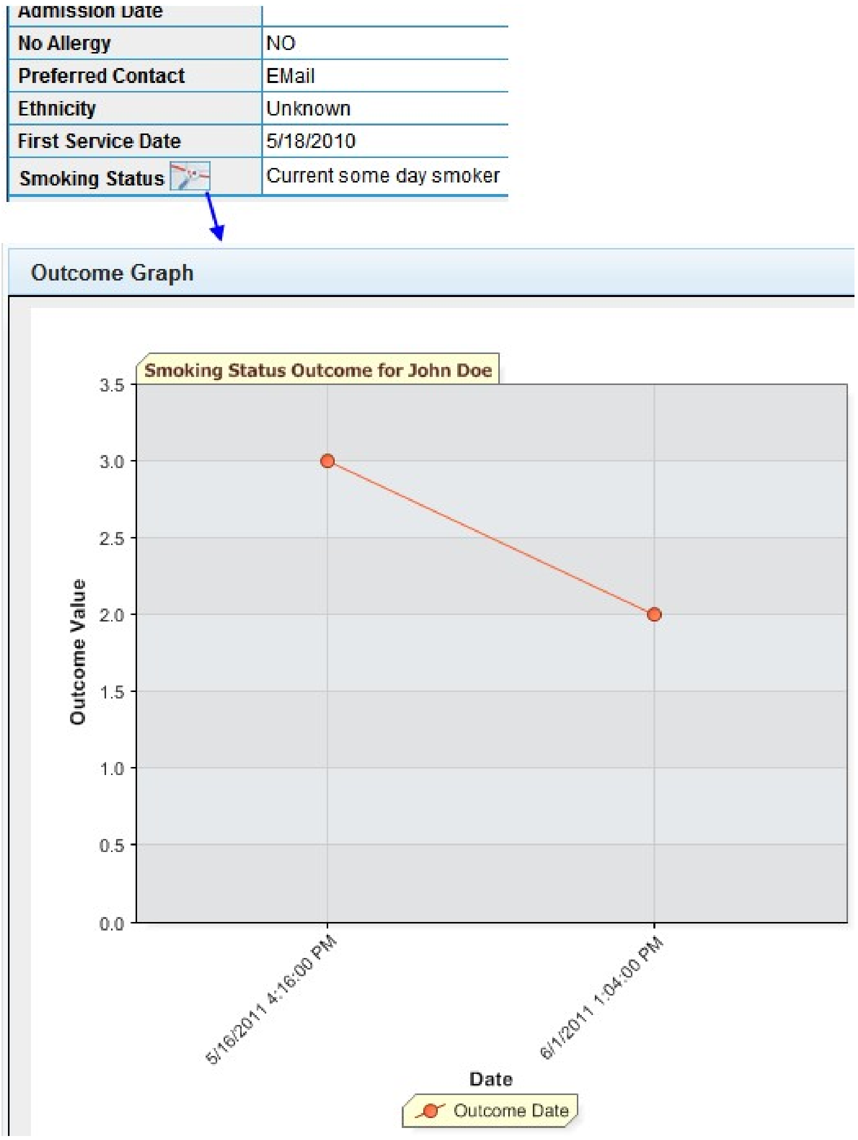
- Data Dictionary
- Security Configuration
- Client User Security Functions
- Site Configuration
- Credible Client Portal
- Client-Agency Communication Via Client Portal

Updated 5/31/2017 10:15 AM by CredibleEducation

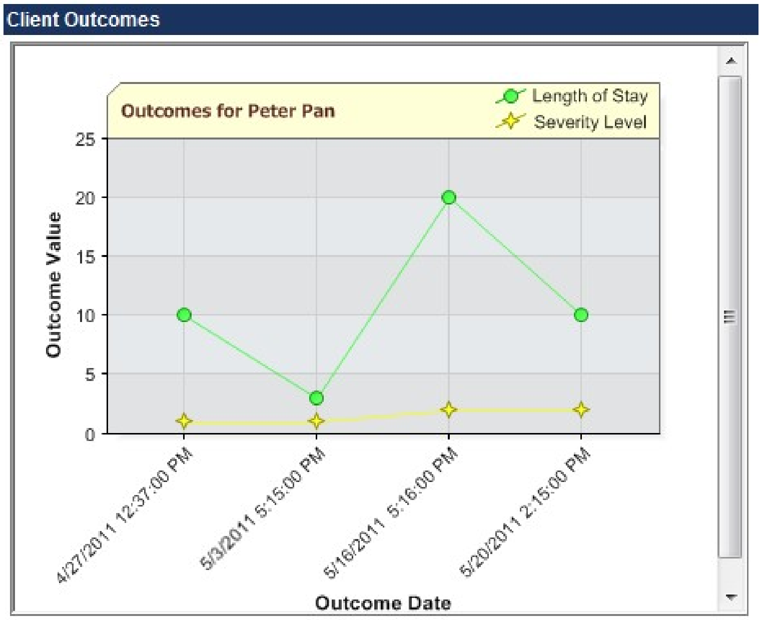
Home > Admin > Outcome Tracking Setup

Outcome Tracking Setup

With the Is Outcome setting in Data Dictionary and a custom lookup, you can set up a field in the Client Profile, Client Extended, or Client Episodes screen for outcome tracking. Each time a user updates the value for an outcome field, the system plots it on an outcome graph. If the value of an outcome field is changed multiple times within 2 minutes, only the last selection is plotted. At any time, a user can view the graph by clicking the icon to the right of the field name. Having outcome measurement data can help guide the treatment a client receives.



You can also set up the Client Overview screen so it has a Client Outcomes graph that combines the data from the different outcome



fields.

Settings

Security Matrix: DataDictionary, AdminLookupUpdate

Partner Config: Use Client Episodes, Show Client Extended Fields

To configure:

1. Determine if a custom lookup category exists for the field you want to track. If it doesn't, add a new lookup categories entry (Admin tab > **Custom Lookup Category**).
2. Edit or add lookup items to the category, specifying an outcome value for each item (Admin tab > **Custom Lookup Items**). An outcome value must be numeric, but can be negative and have decimals.

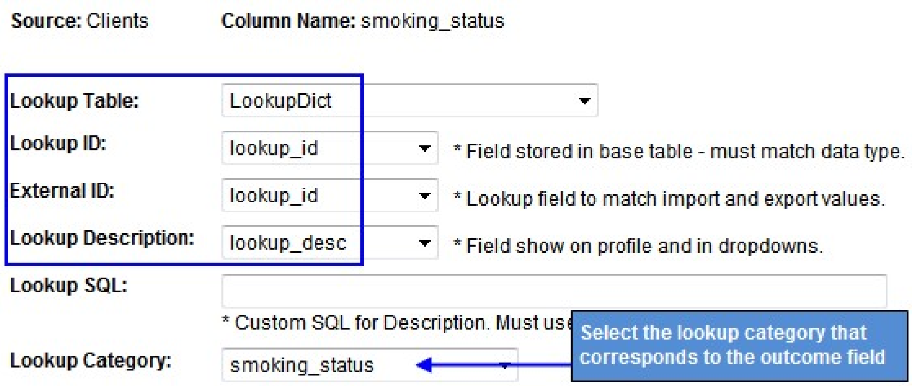
Category smoking_status Display

Add a New smoking_status Entry

smoking_status List:

	ID	Code	Description	Short Description	Ext Code	Outcome Value	HL7 Code	
edit	630	1	Current every day smoker			3		delete
edit	631	2	Current some day smoker			2		delete
edit	632	3	Former smoker			1		delete
edit	633	4	Never smoker			0		delete
edit	634	5	Smoker, current status unknown			2		delete
edit	635	6	Unknown if ever smoked			0		delete

3. In Data Dictionary, access the Update type (screen) for the appropriate table, select the Is Outcome checkbox for the field, and click **update** (insert the field if it doesn't exist).
4. Select the Is Lookup checkbox and set the parameters as follows:



Note that if you are setting up an existing field, only future changes to the field will be recorded as outcomes.

Optional: add Client Outcomes section to the center bar of the Client Overview screen (Admin tab > **Home Page Config** > **Client Home Page Admin**).

For additional outcome reporting, use the ClientOutcome table.

See also
Outcome Fields

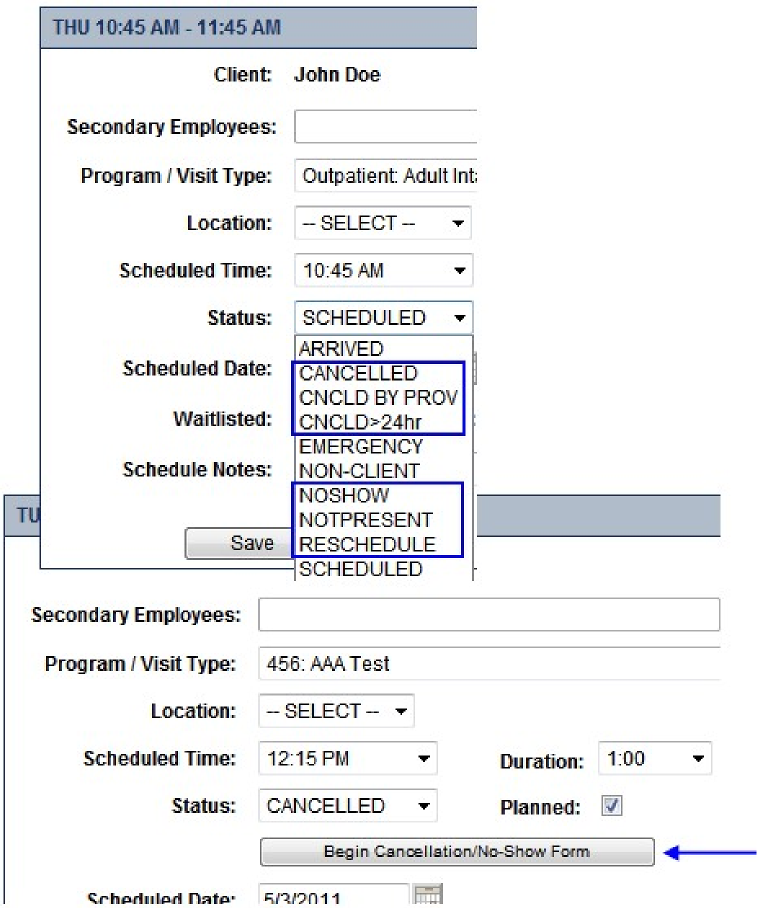
Custom Lookup Categories
Custom Lookup Items
Data Dictionary
Client Profile
Client Ext (Extended)
Episodes

Setting Up Your System to Use a Cancellation/No-Show Form

A Front Desk best practice is to set up your system to use a cancellation/no-show form and have your staff fill it out when a client cancels a scheduled visit or is a no-show. Filling out a cancellation/no-show form is a convenient way to document and bill for all cancellations and no-shows. If your organization doesn't bill for any cancellations or no-shows, having the Front Desk staff fill out the cancellation/no-show form is still recommended for documentation purposes. If you bill for only certain cancellations or no-shows, you will need to set up a separate visit type/Billing Matrix entry for each cancellation/no-show that is billable or non-billable. See Billable/Non-Billable Considerations below for more information.

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

Clicking the button brings up the cancellation/no-show form. The employee completes the form and then signs and submits it the "visit."



Note that name and signature of the employee who fills out the cancellation form will be used when the visit is completed and not the name and signature of the employee who began the visit. This will be the case even if the employee filling out the cancellation form has the VisitEntryOtherEmp right.

To set up your system to use a cancellation/no-show form:

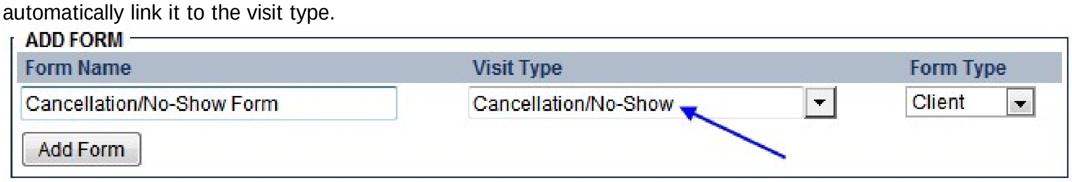
1. Select the Partner Config setting *Use Cancellation Form* (Admin tab > Partner Config; under Scheduler Settings).
2. Add a visit type and select the For Cancellation checkbox (Admin tab > Visit Type). Note that you can only set up one visit type for cancellations/no-shows.
3. Determine if cancellations/no-shows are billable and complete the Billing Matrix setup as applicable (Admin or Billing tab > Billing Matrix).

   Billable/Non-Billable Considerations

   If your organization:

   - Bills for all cancellations and no-shows, add a Billing Matrix entry for the cancellation visit type and set it as billable
   - Does not bill for any cancellations or no-shows, add a Billing Matrix entry for the cancellation visit type and set it as non-billable
   - Bills for only certain cancellations or no-shows, set up a separate visit type/Billing Matrix entry for each cancellation/no-show that is billable or non-billable. In this scenario, employees must change the visit type in the Scheduled Visit popup to the appropriate cancellation/no-show visit type and begin the visit instead of completing the cancellation/no-show form.

4. Use Form Builder to create a cancellation/no-show form. Select the cancellation/no-show visit type when you add the form to automatically link it to the visit type.



5. Build and activate the form.

While the cancellation Partner Config and Visit Type config settings were designed for a cancellation/no-show form, you can link any form to the cancellation visit type to generate a billable visit via the Begin Cancellation/No-Show Form button.

See also
Scheduler Settings
Visit Type
Billing Matrix
Forms
Cancelling a Scheduled Visit
Canceling a Client from a Group Visit
High No Show

Home > Admin > Setting Up eLabs

Setting Up eLabs

Please note: This Credible Premium feature requires a contract order form, addendum, or modification. For more information, please contact your Partner Relationship Manager, or email contracts@credibleinc.com.

With **Credible eLabs**, you can electronically order lab tests, print lab test orders, and electronically receive the results. There is also a manual result entry feature and for Meaningful Use purposes, a manual upload feature. Separate contracting is required for this module. If contracting for the eOrder/eReceive functions, the average lead time is 12 weeks. For more information, talk to your Partner Relationship Manager.

You can make lab results available in the Client Portal, inject them into forms, and use them as a trigger for a clinical support or as criteria in Advanced Client Search.

Configuring Manual Entry of Lab Results

Security Matrix: eLabs, DataDictionary, EmployeeUpdate

Client User Security Matrix: eLabsCU

Your Implementation Manager or Partner Services Coordinator needs to turn on the eLabs Result Entry feature and the Client Portal in your system.

Admin tab > **Data Dictionary** > **Table source = Employee and Type = View**

1. Add the **is_doctor** field and select the **Is Boolean** checkbox.
2. Click **Match Update to View** or add the field to the **Update** screen manually.
3. For each physician in your organization, update his or her profile so **is_doctor = Yes**.

For information on setting up the Client Portal, click here.

Adding and Managing Lab Facilities

To add a lab facility to your system from the Admin tab:

1. Select the **Lab Facilities** function
2. Fill out the fields in the **Add Lab Facility** section
3. Click **Add Facility**

To add a lab facility while entering lab results:

1. **Client navbar** > **eLabs** button > **Add Result** button.
2. Enter the code and name of the facility in the fields provided.
3. Fill out the other fields and click **Save Result Header**.

To edit or delete an existing lab facility:

1. **Admin** tab > **Lab Facilities**
2. Use the corresponding buttons

The most recent **Change Healthcare Lab Listings** are located here.

See also

Data Dictionary
Client Profile
eLabs

Updated 3/29/2017 10:47 AM by CredibleEducation

Home > Admin > Setting Up eMAR

Setting Up eMAR

eMAR is an electronic Medication Administration Record module in Credible. It can help your organization administer medications and reduce possible medication errors. eMAR is fully integrated with the rest of your Credible system.

To set up eMAR for your organization:

1. Enable eMAR in Partner Config: Use eMAR Functionality, Window to Administer eMar Medications (optional).
2. Use Data Dictionary to flag med profile fields as Is eMar (optional).
3. Give employees the appropriate rights (see below).
4. Use Manage eMAR Groups function to add one or more eMAR groups and assign employees and clients to them (optional).
5. Use eMAR Setup function to add "not taken" administration responses (by default, Taken and Missed are the only administration results).
6. Use eMAR Setup function to add custom administration times (optional).
7. Set up notification triggers: Medication Add, Medication Update, and eMAR Schedule End (best practice; see Library reference 33154 for details).
8. Add med schedules for each client.

Security Matrix:

eMar	Access to eMAR button on Client and Employee nav bars
eMarAdministerMeds	Access to eMAR button on Client and Employee nav bars
eMarAdminMissed	Ability to edit missed administrations
eMarAdminRecordEdit	Ability to edit details of administered meds
eMarClientGroup	Access to eMAR Group button on Client nav bar
eMarCreateMedSchedule	Ability to add and manage med schedules (insufficient rights message displays when user without right clicks Admin Schedule button on Client Medication Schedule screen)
eMarEmployeeGroup	Access to eMAR Group button on Employee nav bar
eMarManageGroups	Access to Manage eMAR Groups function on Admin tab
eMarPillBoxAdmin	Access to Pillbox Admin button on Client Medication Schedule screen
eMarPillBoxReconcile	Access to reconcile button for existing pillboxes (on eMAR Pillbox Administration screen)
ReportList and/or ClientViewLog	Ability to view HIPAA logging of eMAR actions

Report Security: Global HIPAA Log

See also
Use eMAR Functionality
Security Matrix
Manage eMAR Groups
eMAR Setup
Adding a Med Schedule

Home > Admin > Setting Up Bed Board

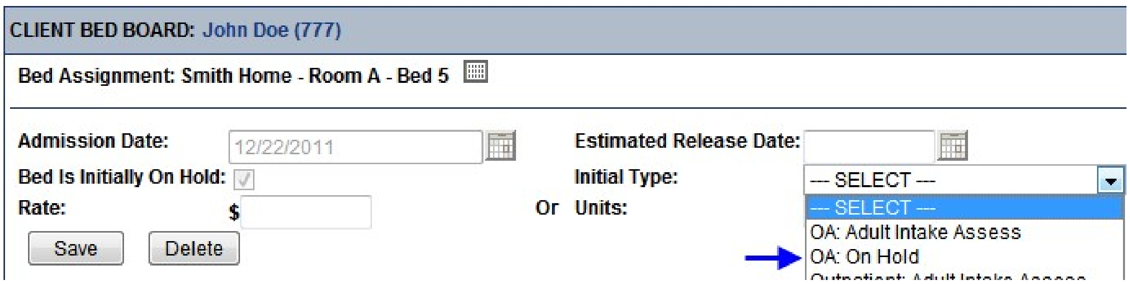
Setting Up Bed Board

To set up bed board functionality in Credible, you need to add board facilities, rooms, and interval reasons. To access the corresponding functions on the Admin tab, you need the BedBoardAdmin right.

If your organization puts beds on hold for clients, you need to set up an "on hold" nonbillable visit type so clients will not get billed for an "on hold" interval. The system bills for each interval unless you select a nonbillable visit type. You also need to add a "hold removed" interval reason.

To set up a nonbillable on hold visit type:

1. Click here for the steps to set up a visit type. Make sure you select the Residential checkbox. The Initial Type dropdown in the Client Bed Board screen lists all residential visit types.



2. Click here for the steps to add a Billing Matrix entry. In the Visit Matching Criteria section, select the visit type you added in Step 1. To make the on hold visit type available for all programs, do *not* select a program for the visit to match on. Make sure you select the Non-bllable checkbox in the Billing section.

See also
Bed Board Facilities
Bed Board Rooms
Bed/Foster Interval Reasons
Bed Assign
Bed Board Billing

Home > Admin > Configuration for Generating Clinical Summaries

Configuration for Generating Clinical Summaries

Settings

Partner Config: Use Clinical Summary Features, CCD Author Address

Security Matrix: PatientSummaryGenerator, ClientVisitViewExt

Client User Security Matrix: ClientPortalCreateCCD

Your IM/PSC needs to turn on the Credible Client Portal for your system.

Configuration

1. For each visit type that you want to include visit information for in a clinical summary:
   a. **Admin** tab > **Visit Type** > edit.
   b. Select **Include Summary**.
   c. If your organization uses the eMAR module, select **Associate eMAR**.
   d. To include the visit information in the Procedures section in the clinical summary, select **Is Procedure for CDA** documents. When this setting is unchecked, the visit information will be in the Encounters section.
   e. Click **Save**.

   When a visit type is flagged for Include Summary, two fields are available to support the C-CDA format: **Reason for Visit** and **Chief Complaint**. Staff can populate these fields via form mapping when documenting a visit, or by updating a completed visit.
2. If you want staff to populate **Reason for Visit** and **Chief Complaint** fields via form mapping, add the fields to the appropriate forms and set them up for mapping (**ClientVisit:reason** for visit and **ClientVisit:chief complaint**).

See also

Generating a Clinical Summary
Setting Up the Credible Client Portal

Updated 7/28/2016 4:32 PM by marchall

Home > Admin > Purging Client Records

Purging Client Records

If your organization is required to purge inactive client records after a specified amount of time (for example, after 6 years), you can meet the requirement with the new administrative function Purge Client. Purging permanently removes all non-financial information in a client's record and "anonymizes"1 the client's payment, authorization, claim, and liability information. The information cannot be retrieved. Retaining the deidentified financial information maintains the integrity of your financial reports.

In summary, purging permanently removes all traces of a client from your system – and you cannot restore/retrieve the data once the client record has been purged.

You control which employees can purge client records with the new Security Matrix right PurgeClient. Due to the significance of purging client records, password entry is required as part of the process and the employee's supervisor(s) is notified when the client records are purged. You can set up a notification trigger to alert the appropriate staff when a purge request has been scheduled.

When an employee schedules a purge, SCHEDULE CLIENT PURGE is recorded in his or her log. When the physical purge is completed as part of a nightly process, the action PURGE CLIENT RECORD(S) is added to the employee's log.

Settings

Your Implementation Manager or Partner Services Coordinator needs to turn on the Purge Client functionality in your system.

Security Matrix: PurgeClient

Additionally, **Purge Clients** must be checked in Partner Config.

Configuration

Set up the Purge Client Records notification trigger. Do not set a reminder. See Notification Triggers in the help for more informatic

Note

If your system is set up to delete notifications when a client is deleted, the delete process will occur when clients are purg deletes up to 100 clients, his or her Employee Log will be overwhelmed with the action REMOVED NOTIFICATION TRIGGERS

Use

1. Admin tab > Purge Clients (in Security Configuration section).
2. Import or manually enter the client IDs of the records you need to purge. Note: if importing, make sure that the file does nc column headers.
3. Review the client information displayed to make sure you are purging the correct records. The client should have an inactive or INACTIVE) and the last visit date should not be recent.
4. Uncheck the Include checkbox if you do not want to purge a specific record.
5. Click Purge Selected Client(s) and click OK when the confirmation popup displays. The Enter Password to Continue screen di
6. If you are sure the client records listed should be purged, enter your password and click Continue. A message displays indic scheduled and will be processed during the night.

To view a report of client records that have been purged, use the Purge Client Log Report.

1 Anonymizes defined: Previously identifiable data that has been deidentified and for which a code or other link no longer exists. An investigator would not be able to link anonymized information back to a specific individual. For more information, go to http://www.gpo.gov/fdsys/pkg/CFR-2002-title45-vol1/pdf/CFR-2002-title45-vol1-sec164-514.pdf

See also

Daily Activities
Lookups and Code Tables
Security Configuration
Billing Configuration
Site Configuration

Home > Admin > User Management Best Practice

User Management Best Practice

User management is critical to the health of your Domain. Credible has provided various tools to assist you in that process.

- The User List provides you a list of all users in your domain. It is located at Admin tab > Security Configuration > User List.
- The Usage Tracking Report gives a breakdown of full-time, part-time, and test users. You can find it at Reports tab > Admin button > Usage Tracking.
- User Management Best Practice requires that you remove users who are no longer employed with your Agency. Step by step instructions are provided at Removing an Employee from the System.

Maintaining an accurate user list is critical, and Credible has provided these tools to make the process as simple as possible. As your user count is invoiced monthly, it is critical to incorporate these user management tools into your regular workflows and processes.

If you need assistance in accessing any of the resources outlined above, please contact your Partner Relationship Manager.

Updated: 12/22/2016 4:19 PM by CredibleEducation

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