

Release 5.1 Configuration

May 2010

This document describes the enhancements included in Credible 5.1 release. Any settings required to enable a new feature are listed, along with the steps for configuration and use. If a setting is in *italics*, it is a new setting specifically needed for the item being described.

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SECURITY UPGRADES

Name	Update Password Security
Description	<p>To help you close down unused user accounts, there is an automatic password reset that is based on inactivity. If a user does not log into the system for the specified number of days (60, 90, 120, 150, or 180), his or her password will be automatically reset (the default is 120 days). The user will need to contact the Administrator to get a new password.</p> <p>To ensure that only the user knows his or her password, the system forces a password update whenever someone else sets or changes that employee's password. This security feature helps prevent one user from taking over another user's account. The Password Update screen displays the first time the employee logs into Credible after his or her password has been changed.</p>
Settings	Partner Config: <i>Password Reset</i>
Steps to Configure	<p>If you want to use the default setting of Reset After 120 Days Inactive, no configuration is necessary.</p> <p>To change the default setting:</p> <ol style="list-style-type: none"> 1. Select the Admin tab and then select Partner Config (under Site Configuration). 2. Select the desired setting from the Password Reset dropdown (in the General Settings section). 3. Click Save Partner Config.
Steps to Use	N/A. The password reset and forced password update happen automatically.

ADVANCED VISIT SEARCH

Name	Filters and Fields Added to Advanced Visit Search
Description	<p>To help you find and report on visits in your Credible system, several fields and filters have been added to Advanced Visit Search.</p> <ul style="list-style-type: none"> • The Visit Type dropdown now includes expired Billing Matrix line visit types. An expired visit type is a visit type whose only matching billing matrix lines all have an Expiration Date in the past. • An Insurance Pending filter has been added to the Payer dropdown. • A Location dropdown (with multi-select capability) has been added to Advanced Visit Search. • Payer codes, the Visit Type External ID, and the Recipient External Code have been added as custom fields. • You can access Billing Matrix fields through Custom Fields.
Settings	Security Matrix: AdvSearch, ClientVisitList
Steps to Configure	Refer to Custom Text Fields for the Billing Matrix for information on how to configure Billing Matrix fields that you would then access in Custom Fields.
Steps to Use	<ol style="list-style-type: none"> 1. Select the Visit tab and then click advanced search. <ul style="list-style-type: none"> • To search for visits with an expired Billing Matrix visit type, select it from the bottom of the Visit Type dropdown (they are in their own section labeled “Expired Types”). • To search for visits that have insurance pending, select the corresponding filter at the bottom of the Payer dropdown. • To search for visits based on location, select the desired option from the Location dropdown. To select multiple locations, click Multi Select to make Location a multi-select dropdown. • To search for visits based on payer codes, the Visit Type External ID, and/or the Recipient External Code, click Custom Fields and select the desired fields. • To search for visits based on Billing Matrix fields, click Custom Fields > More Fields and then select the desired fields. 2. Click Filter.

Name	Second AND/OR Operator for Advanced Visit Search
Description	<p>A second AND/OR operator has been added to the WHERE clause in the Custom Filter in Advanced Visit Search. This allows for a three-part WHERE clause.</p> <p>For example, you can search for a client who has visits with a duration greater than 30 minutes AND a duration less than 120 minutes AND a rate that is more than \$50.</p> <p>Note that when mixing operators, the first two custom filters are processed together. For example, A = x AND B = y OR C = z is processed as (A = x AND B = y) OR C = z.</p>
Settings	Security Matrix: AdvSearch, ClientVisitList
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Visit tab and then click advanced search. 2. Click Custom Filter to access the WHERE clause. 3. Enter the desired WHERE clause conditions. 4. Select any other filters or custom fields needed and click Filter.

Name	Second Sort By on Advanced Visit Search
Description	<p>A second Sort By dropdown has been added to Advanced Visit Search. When used, the search results will be sorted by the field in Sort 1 and then by the field in Sort 2.</p>
Settings	Security Matrix: AdvSearch, ClientVisitList
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Visit tab and then click advanced search. 2. Select any desired filters for the search. 3. Select a value from Sort 1 and then a second one from Sort 2. 4. Click Filter. The results will be sorted first by Sort 1 then by Sort 2. <p>For example:</p> <ul style="list-style-type: none"> • Sorting by Client Name and Program will show Jane Doe's case management visits, John Doe's case management visits, then John Doe's outpatient visits. • Sorting by Program and Client Name will show case management visits for Jane Doe, case management visits for John Doe, then outpatient visits for John Doe.

EXPORTS

Name	Query Builder in the Export Tool
Description	With the integration of a query builder with the Export tool, you can use an intuitive visual interface to build complex SQL queries to extract and report on the data in your Credible system. A knowledge of SQL and building SQL queries will be helpful in using the query builder.
Settings	Security Matrix: ExportBuild, ExportRun
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Reports tab and then select Export Tool. 2. At the bottom of the screen, enter a name for the new export and then select Custom Ad Hoc from the Form/Table Name dropdown (in the Special section). 3. Click New Export (it may take a while to load due to the fact it is accessing the data table for your account). 4. Once you have made your selections in the query builder, click Submit. Now you are back in the Export Builder where you select the fields you want to include in the export. 5. Proceed like you normally would. 6. When done, run your new export.

Name	Export to MDB
Description	When you build an export, you can now select MDB as the file format. With this file format, you can open the export with Microsoft Access.
Settings	Security Matrix: ExportBuild, ExportRun
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Reports tab and then select Export Tool. 2. At the bottom of the screen, enter a name for the new export and then select a table from the Form/Table Name dropdown. 3. Click New Export. 4. While making your selections, choose MDB FILE in the Export Format dropdown. 5. Finish the process. 6. Run the export and save it locally. 7. Navigate to your saved MDB file and doubleclick it to open it. <p>If you are using Microsoft Access 2007 and get a "Cannot open database..." error message, click OK to continue.</p> <p>In Microsoft Access, the file will initially be listed as in the table panel on the left as "tempTable."</p>

NEW REPORTS

Name	Global HIPAA Log
Description	<p>With the Global HIPAA log, you can view log information across multiple clients, employees, or visits. You can switch the entity (client, employee, or visit) while in the log and view information for all actions or a single action.</p> <p>The information presented in the log depends on the entity selected:</p> <ul style="list-style-type: none"> • Client: Date, Client Name/ID, User, Action, Record, Description • Employee: Date, Employee Name/ID, Action, Record, Entity, Done By, Description • Visit: Date, Visit ID, User, Action, Record <p>The individual client, employee, and visit HIPAA logs are still accessible.</p>
Settings	<p>Security Matrix: ClientVisitViewLog, ClientViewLog</p> <p>Report Security: <i>Global HIPAA Log</i></p>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Reports tab and then select Global HIPAA Log. 2. Select Client, Employee, or Visit from the Entity dropdown (the only required field). 3. Select an action from the Action dropdown or leave it as is to report on all actions. 4. Select different start and end dates or use the default date range (first day of the month to today's date). 5. Click Run Report.

Name	Employee Activity Report
Description	<p>The Employee Activity report shows all activity for clients assigned to programs by employee. The filters are Start Date and End Date, Program, Recipient, Employee, Billable/Non-Billable, and Visit Type.</p> <p>In the default view, each employee row shows totals for number of clients, duration, duration merged, units, and units merged. You can expand each row to view details such as the names of clients, service IDs, and recipients. The detail view is grouped by program.</p>
Settings	Report Security: <i>Employee Activity Report</i>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Reports tab and select Employee Activity Report. 2. Click Run Report to take advantage of the default settings that will report on all activity since the first day of the previous month or make your own selections and then click Run Report.

UPDATED REPORTS

Name	Appointment History Report – Multi-Select Program Dropdown
Description	In the filter selection screen for the Appointment History report, the dropdown for Program is now a multi-select field.
Settings	Report Security: Appointment History Report
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Reports tab and then select Appointment History Report. 2. Make your selections from the available filters (remember you can select multiple programs) and click Run Report.

Name	Authorization Pacing 2 – New Visit Type Filters
Description	The Authorization Pacing 2 report now lets you filter visit type by Program and Authorization Program. The report has also been upgraded from Crystal Reports to Microsoft SQL Server Reporting Services.
Settings	Report Security: Authorization Pacing 2
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Reports tab and then select Authorization Pacing 2. 2. Make your selections from the available filters and click Run Report.

Name	Authorization Pacing Report – Program Filter
Description	The Authorization Pacing report now has a filter for Program. The report has also been upgraded from Crystal Reports to Microsoft SQL Server Reporting Services.
Settings	Report Security: Authorization Pacing Report
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Reports tab and then select Authorization Pacing Report. 2. Make your selections from the available filters and click Run Report.

Name	Authorization Report – Pending Column and New Filters
Description	<p>You can now include a Pending column in the Authorization Report. If an authorization is pending, the word "True" displays in the column. The report also has three new filters:</p> <ul style="list-style-type: none"> • Show Pending/Actual -- lets you report only on pending authorizations actual authorizations or all authorizations • Show Future Auths -- shows auths with a future starting period • Show All -- shows future and closed <p>The default settings for the new filters are as follows: Show Pending/Actual = All, Show Future Auths = No, and Show All = No.</p> <p>See the Requested Authorizations section in the Release Configuration Notes for February 2010 (release 5.0) for more information on pending authorizations.</p>
Settings	<p>Partner Config: Use Auth Pending, Show Pending on Authorization Report</p> <p>Report Security: Authorizations</p>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Reports tab and then select Authorizations. 2. Make your selections from the available filters and click Run Report.

Name	Employee Productivity – New Filter and Duration Column
Description	<p>The Employee Productivity report now has a filter for billable or non-billable services. It also has a Duration column that shows the total duration of services for the time period specified. The report has been upgraded from Crystal Reports to Microsoft SQL Server Reporting Services.</p> <p>The Employee Productivity report measures productivity over the specified time range in units provided vs expected units set for the employee. It is grouped by employee and then by program. The Number of Work Days dropdown is used to divide the expected units in the employee's profile to determine daily expectations.</p> <p>The total number of expected units for a report is calculated as follows: number of expected units on the employee profile divided by the specified number of work days times the number of days in the report's date range.</p> <p>For example, if an employee's expected units is 100, the number of work days is 5, and the report is run for a 30-day time period, the total expected units will be 600 units (or 100 units / 5 work days = 20 units per day; 20 units per day * 30 reporting days = 600 expected units).</p> <ul style="list-style-type: none"> • Total Units is the total units used within the date range set for the report. • Duration is the amount of time covered by the Total Units. • % Expectations Met is the number of Total Units divided by the number of Expected Units.
Settings	Report Security: Employee Productivity
Steps to Configure	<ol style="list-style-type: none"> 1. Select the Admin tab and then select Data Dictionary (under Site Configuration). 2. Select Employee from the Table Source dropdown and click Submit. 3. Select expected_units from the Column Name dropdown. 4. Select the desired column order and click Insert Column. 5. Enter "Expected Units" in the View Label field and click update. 6. Click Match Update to View.
Steps to Use	<ol style="list-style-type: none"> 1. Select the Reports tab and then select Employee Productivity. 2. Enter different start and end dates or use the default date range. 3. Select one or more programs or go with the default of all programs. 4. Select one or more employees or go with the default of all employees. 5. Select a different number of work days or use the default value of 5. 6. If you only want to report on billable or non-billable services, select the corresponding filter from the Billable dropdown. 7. Click Run Report.

Name	Monthly Units Total – Billable/Non-Billable Filter
Description	The Monthly Units Totals report now has a filter for billable or non-billable services. The report provides a count of units per week and grand total per employee. The report has been upgraded from Crystal Reports to Microsoft SQL Server Reporting Services.
Settings	Report Security: Monthly Units Totals
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Reports tab and then select Monthly Units Totals. 2. Enter different start and end dates or use the default date range (first day of the month to today's date). Keep in mind this report is designed to give totals per week. 3. Enter a different minute threshold or use the default of 15 minutes. Visits that are shorter in duration than the threshold will not be included in the report. If you want to report on an individual program and/or team, select them from the dropdowns provided. 4. If you only want to report on billable or non-billable services, select the corresponding filter from the Billable dropdown. 5. Click Run Report.

Name	Units per Day Analysis – Billable/Non-Billable Filter
Description	<p>The Units per Day Analysis report now has a filter for billable or non-billable services. It provides the number of units per day per employee. It supplies you with a unit count over the date range set, estimates the work days, and then shows an average of units per work day.</p> <p>Work days are estimated by calculating the total number of days during the period that the employee or supervisor turned in at least one visit.</p> <p>The report has been upgraded from Crystal Reports to Microsoft SQL Server Reporting Services.</p>
Settings	N/A
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Reports tab and then select Units per Day Analysis. 2. If you do not want to use the default date range, enter different start and end dates. 3. If you only want to report billable or non-billable services, select the corresponding option from the Billable dropdown. 4. If you only want to report on one team, select it from the Team dropdown. 5. Click Run Report.

CLIENT

Name	Guarantor in Family Members Screen and Other New Fields
Description	<p>You can now designate a family member as the guarantor for the client. If a guarantor is set at the time of service, he or she will be associated with the service. If a guarantor has been set for a visit (or visits), the guarantor's name and address will be used when generating client statements and not the client's. To support this, address fields have been added to the Family Members screen.</p> <p>Clients can only have one active guarantor at a time. You can change the guarantor for a visit through the Client Visit Details screen (Update button).</p> <p>With additional new fields in the Family Members screen, you can indicate if a family member is the primary care giver and if his or her rights have been terminated.</p>
Settings	<p>Partner Config: Use Client Family</p> <p>Security Matrix: ClientVisitUpdate (if you need to change the guarantor for a specific visit)</p>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Click the Family button on the Client nav bar. 2. When editing a family member or adding a new one, select the Guarantor checkbox and enter an address. 3. Click Save Changes or Add Family Member depending on whether you were editing or adding a family member. <p>Now every visit that is signed and submitted will automatically be associated with the guarantor.</p> <p>Some notes:</p> <ul style="list-style-type: none"> • The guarantor is not retroactive. Visits entered prior to having a guarantor set will need to be manually updated. • The guarantor's name displays on the client visit details screen (at the bottom of the header information). • When generating a client statement, the guarantor's name and address will be used instead of the client's. • If the client has multiple visits with different guarantors, one statement will be generated per guarantor. • You cannot delete a family member who is also a guarantor for any visit. <p>When associated with a visit, the guarantor trumps the billing fields on the client profile (billing_first_name, billing_last_name, and so on) for the purposes of client statements. The billing fields will still be used for any visit that is not associated with a guarantor.</p>

Name	Applied Methods in Treatment Plans
Description	<p>You can now associate an applied method to a treatment plan with the new Use Tx Plan Methods Partner Config setting. The applied methods are visit type groups. Visit type groups are a new grouping of visit types that are set up through the Admin tab.</p> <p>There is also a new visit type admin setting called Blocked w/o Group that you can use in conjunction with applied methods. If Use Tx Plan Methods is selected in Partner Config <i>and</i> the visit types are set to block without group <i>and</i> the visit type is not associated with the treatment plan through a group for a client (and if applicable for treatment plan dates), then the client will not be able to receive those services. The blocking is applicable for visits conducted through data entry and scheduling.</p> <p>You can map applied methods to web forms.</p>
Settings	Partner Config: <i>Use Tx Plan Methods</i> (use applied methods with treatment plans)
Steps to Configure	<p>Visit Group</p> <ol style="list-style-type: none"> 1. Select the Admin tab and then select Visit Type Groups (under Billing Configuration). 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 button 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. 5. When done, press the visit type group name at the top of the screen to return to the Visit Type Group Admin screen. <p>Blocked w/o Group</p> <ol style="list-style-type: none"> 1. Select the Admin tab and then select Visit Type (under Billing Configuration). 2. Edit a visit type. 3. Select Blocked w/o Group. 4. When done, click Save.
Steps to Use	<p>There are two ways to associate an applied method with a treatment plan:</p> <ul style="list-style-type: none"> • Map the applied method to a treatment plan web form. • Edit the client’s existing treatment plan or create a new one and select the applied method. <p>If you try to schedule a client for a blocked visit type through the Schedule, the error message “ERROR: This Visit type is not part of the Clients Applied Methods” will be displayed. A similar message will be displayed if you try to add a visit through data entry or web forms.</p>

Name	Axis I and II Descriptions
Description	Axis I and Axis II descriptions can now be up to 80 characters. Note that when viewing Axis I and II descriptions in the Employee Profile (or Print View), only the first 50 characters will be displayed.
Settings	N/A
Steps to Configure	<ol style="list-style-type: none"> 1. Select the Admin tab and then select Axis I or Axis II (under Lookups and Code Tables). 2. Edit an existing Axis diagnosis or add a new one. You can enter up to 80 characters including spaces in the Description field. 3. Click save or Add Axis 1 (or 2) when ready.
Steps to Use	<ol style="list-style-type: none"> 1. Click the Diagnosis button on the Client nav bar. 2. Update an assessment or start a new assessment. 3. Open either an Axis I or Axis II dropdown and select the diagnosis you created.

Name	Diagnosis by Program Enhancements
Description	<p>An Axis III diagnosis can now be set to default for a program. When combined with the Diagnosis Dropdown setting in Partner Config, the default diagnosis will be highlighted in yellow in the Diagnosis dropdown on the Sign & Submit page and Client Visit Update screen. The associated programs are now displayed in the Diagnosis (Multiaxial Assessment) screen.</p> <p>Note that the Diagnosis dropdown on the Sign & Submit page only sets the diagnosis for billing (it lists the diagnoses from the assessment that was current at the time of the visit). It does not change the client's actual diagnosis.</p>
Settings	<p>Partner Config: Diagnosis Dropdown (optional)</p> <p>Security Matrix: DxView and DxUpdate (both required for setting a client's diagnosis as a default for a program)</p>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Click the Diagnosis button on the Client nav bar and update an assessment or start a new one. 2. Click the scroll icon for the secondary (or lower) diagnosis for Axis I, II, or III. 3. Select the desired program from the Default for Program(s) list and click Save. <p>Any visit done for the client in the specified program will have that diagnosis assigned to the visit. If Diagnosis Dropdown is selected in Partner Config, the defaulted diagnosis will be preselected and highlighted yellow on the Sign & Submit page.</p>

Name	Authorizations by Credential/Provider
Description	<p>Credential groups and a multi-select dropdown for Providers have been added to Authorizations. You can set an authorization to be specific to a credential group of the provider that did the visit or to one or many providers. The authorization check on the Add to Schedule popup and the Authorization ID gray X on the Client Visit Details screen will reflect these new filters.</p> <p>Authorizations are now displayed on two lines with Program, Location, and Provider in the second line.</p>
Settings	N/A
Steps to Configure	<p>To set up credential groups:</p> <ol style="list-style-type: none"> 1. Select the Admin tab, select Credential Types (Lookups and Code Tables), and then click Edit Credential Groups. 2. Edit an existing credential group or add a new one. 3. Set the Credential Group Code, Credential, and Billing Priority and save when ready.
Steps to Use	N/A

Name	Hospital Admission Date
Description	<p>A Hospital Admit date field is available to add to the Episode screen. And the Billing Matrix has a Use Hospital Admit Date setting that can be used in conjunction with the new field.</p> <p>When the Billing Matrix setting is checked and the hospital admit date is in the episode associated with the service, then the hospital admit date will be sent with the 837P (for 837P claims only).</p>
Settings	Billing Config: <i>Use Hospital Admit Date</i>
Steps to Configure	Add hospital_admit_date to the Client Episode table in the Data Dictionary.
Steps to Use	<ol style="list-style-type: none"> 1. Click Episodes on the Client nav bar. 2. Update an existing episode or add a new one. 3. Enter a hospital admit date and then click Update Episode or Save. 4. Conduct a visit that is associated with the episode and then sign and submit it. 5. Batch the service and create the 837. The Hospital Admit date will be used and appear like this in the file: DTP*435*D8*YYYYMMDD~.

Name	Bed Board Updates
Description	<ul style="list-style-type: none"> You can now assign program/visit type combinations to an assigned bed as well as the bed board interval. When billing, you will have to select Assigned Only to filter on services that have been assigned. To have Initial Types available, the 'is residential' flag for the visit type has to be selected. Bed Board Billing does not pull from intervals that have already been billed. An Include Date Out checkbox has been added to the Bed Board Billing screen. If the interval released the bed, setting this to “No” will exclude the out date. A Merge Interval checkbox has been added and when applied all intervals with visits will be merged and billed as one visit. <p>Some notes:</p> <ul style="list-style-type: none"> When admitting a client to a bed, a visit type can be assigned to the initial interval – this is an Assigned Interval. If no visit type is selected, it is an Unassigned Interval. Each interval can have its own visit type or be unassigned. For VA Partners: the merged interval feature is not compatible with the CCS Service Export; residential services require one visit per day.
Settings	Security Matrix: BedBoardAdmin, BedBoardBilling, ClientBedBoardAssign, ClientBedBoardIntervalEdit
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> On the Bed Board Billing screen, select Assigned Only, leave the default values for Merge Interval (No) and Include Date Out (Yes), enter appropriate start and end dates, and click Filter. There will be a separate row for each day your client was out of the bed having a visit or service. Change the Merge Interval to Yes and click Filter again. Now there will only be one row per Type Assignment (Visit Type). Click Continue to Billing Options. Since your visits are merged and you had two different types used, the message will indicate two entries. Click Add All and go see the single visit that was created for each visit type; notice the times are merged.

Name	Foster Care Updates
Description	<ul style="list-style-type: none"> You can now assign program/visit type combinations to a Foster Care Interval. When billing, you will have to select Assigned Only to filter on services that have been assigned. To have Initial Types available, the 'Foster Care' flag for the visit type has to be selected. Foster Home Billing does not pull from intervals that have already been billed. An Include Date Out checkbox has been added to the Foster Home Billing screen. If the interval discharged the child from foster care, setting this to No will exclude the out date. A Merge Interval checkbox has been added and when applied, all intervals with visits will be merged and billed as one visit. The following fields are available to be added to the Foster Home profile: Is Respite, Existing Minors, General Note, DHS ID, and Additional ID. You can access Foster Home fields in Advanced Visit Search or Advanced Ledger Search (via the More Fields button in Custom Fields). <p>Some notes:</p> <ul style="list-style-type: none"> When assigning a client to a foster home, a visit type can be assigned to the initial interval – this is an Assigned Interval. If no visit type is selected, it is an Unassigned Interval. Each interval can have its own visit type or be unassigned. When adding or modifying foster home interval reasons, you will have to go through the Bed Board Intervals Reasons interface.
Settings	Security Matrix: FosterHomeAdmin, FosterCareBilling, FosterHomeIntervalEdit
Steps to Configure	Add fosterhome_id to the Visit table and any desired foster home fields to the FosterHome table in the Data Dictionary.
Steps to Use	<p>After assigning a client to a foster home through the Episode screen, click the Foster Home Interval button to create an interval to bill.</p> <p>For foster care billing:</p> <ol style="list-style-type: none"> On the Foster Care Billing screen, select Assigned Only, leave the default values for Merge Interval (No) and Include Date Out (Yes), enter appropriate start and end dates, and click Filter. There will be a separate row for each day your client was in the foster home Change the Merge Interval to Yes and click Filter again. Now there will only be one row per Type Assignment (Visit Type). Click Continue to Billing Options. Since your visits are merged and you had two different types used, the message will indicate two entries. Click Add All and go see the single visit that was created for each visit type; notice the times are merged.

EMPLOYEE

Name	Credentials Can Be Ordered
Description	Employee Credentials can now be ordered. Previously assigned credentials will be set Order = 1.
Settings	N/A
Steps to Configure	N/A
Steps to Use	<p>Click the Credentials button on the Employee nav bar. You will see a new column named 'Order' to the right of the End Date column. Previous credentials will have the Order value set to 1.</p> <ul style="list-style-type: none"> To change the order of an Assigned credential, click Unassign, select the Order # from the dropdown, and click Assign. To assign a new credential, select the Order # from the dropdown and click Assign. <p>Credentials will appear in the desired order in the visit details (screen and print views) and in the employee profile (if the Credentials field has been added to the Data Dictionary).</p> <p>Regardless of the order, a credential that is marked as True for Do Not Print On Visit (in the Credentials List set up through Admin), will not appear either on the profile or on a visit print.</p>

Name	Assigning Programs to Admin Time Types
Description	<p>You can now assign an admin time type to a program to limit the employees who you can use it. If an employee is not assigned to the same program, that admin time type will not appear in the Type dropdown on the Admin Time Add and Admin Time Update screens.</p> <p>If you do not assign a program to an admin time type, all employees will have access to it.</p>
Settings	Security Matrix: AdminTimeAdd, AdminTimeApprove, AdminTimeDelete, AdminTimeList, AdminTimeListAll, AdminTimeUpdate
Steps to Configure	<ol style="list-style-type: none"> Select the Admin tab and then select Admin Time Types (under Lookups and Code Tables). Edit an existing admin time type or add a new one. Select the program you want to assign to the admin type from the dropdown and click save.
Steps to Use	N/A

SCHEDULE

Name	Canceling a Client from a Group Visit
Description	<p>If a client cancels from a scheduled group visit, you can now cancel that individual client without affecting the status of the group visit as a whole. To cancel an individual client, you must access the scheduled visit through the client's schedule. You can also complete a Cancellation Form for the individual client if set up to do so.</p> <p>The Schedule will always reflect the original number of clients but when the service is started, it will only contain clients that are not cancelled.</p> <p>The Appointment History Report will display each client's individual status.</p> <p>The Scheduled Visit Status report and the employee's schedule will display the groups scheduled for the employee. To have the Scheduled Visit Status report include your clients, you have to be on a team (it doesn't matter what team or if your clients are on it).</p>
Settings	<p>Partner Config: Use Cancellation Form (if applicable)</p> <p>Security Matrix: FormBuilder and FormBuilderEdit (if you need to create a cancellation form)</p> <p>Report Security: Scheduled Visits Status, Appointment History Report</p>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Access the scheduled group visit through the client's schedule. 2. In the Schedule Visit popup, select CANCELLED, CNCLD>24hr, or NOSHOW from the Status dropdown. 3. If your system is set up to use a cancellation form, a Begin Cancellation/No-Show Form button will appear. Click the button to access the form. Complete the form and then sign and submit it. The visit will be recorded in the client visit list. While the client's appointment history report will indicate the selected status, it will still show the visit type for the original scheduled appointment. <p>Note that you can discard the visit when you are on the Sign & Submit page. If you do, the visit will not be recorded on the client visit list but will remain on the client's schedule as cancelled. The cancelled visit will show the group name but the # of clients assigned is removed and there is a red X to indicate it has been canceled.</p> <p>If a cancellation is a <i>billable</i> event, you <i>must</i> complete the Cancellation/No-Show Form visit.</p>

Name	Client's Full Name in Schedule View
Description	When you mouse over an appointment on a client's schedule, you can now see the client's full name and a short description of the scheduled visit. The visit type will only show if it is set up with a label.
Settings	N/A
Steps to Configure	N/A
Steps to Use	Mouse over a scheduled appointment on a client's schedule.

VISITS

Name	Red X for Approval Report
Description	With the new Only RedX filter in the Status dropdown in the Client Visit List screen, you can search for and view all unapproved client visits that have a red X that you have rights to. The reason for the red X is included in each record row.
Settings	Security Matrix: ClientVisitList (required to see the Visit tab and the listing of visits)
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Visit tab. 2. Select Only RedX from the first dropdown on the left and click Filter (other criteria can be added as usual). <p>The results will just show those visits marked with a Red X.</p>

Name	Axis III Descriptions Included in Forms When Mapped
Description	When conducting a visit with a web form that maps a client's Axis III diagnosis, the descriptions and codes will appear in the form and visit view. Previously, only the codes were shown.
Settings	N/A
Steps to Configure	N/A
Steps to Use	N/A

Name	Program/Team Filter Added to Client Visit List Screen
Description	The Client Visit List screen (accessed through the Visit tab or Visit List button on the Client nav bar) now has a Program/Team dropdown in the filtering row.
Settings	Security Matrix: ClientVisitList
Steps to Configure	N/A
Steps to Use	<p>The client visit list includes a Program column by default.</p> <p>To add a Team column to your search results, select it from the List Column Config screen (accessed via the ice cube tray icon in the column header row).</p> <p>To use the Prog/Team filter, select either a program or team from the dropdown, set any other filters you'd like, and then click the Filter button.</p>

Name	Client Visit Log Updates
Description	The Client Visit Log now captures updates to the CPT modifiers and the Manual Red X Note field.
Settings	Security Matrix: ClientVisitViewLog, ClientVisitManualRedX, BillingCPTCodes
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Open the Client Visit Details screen for a completed visit and click Update. 2. Enter some CPT modifiers, select the Set Manual Red X checkbox, and then enter a brief description of the manual Red X in the Manual Red X Note field. Click Update Visit to apply the changes. 3. Click the Log button to view the visit log. Click the details button for the UPDATE CLIENT VISIT RECORD action you just performed to see the log details.

ADMIN

Name	Viewing Approval Roles and Adjustment Types
Description	<p>If an approval role has a visit type associated with it, an info icon will now display in the Approval Role List. When you mouse over the icon, you can view the visit types assigned to the approval role.</p> <p>There is also an Adjustment Types column that will show you a count of how many adjustment types are applied to the approval role.</p>
Settings	N/A
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Admin tab and then select Manage Approval Roles (under Daily Activities). 2. In the Approval Role List, mouse over an info icon to see the visit types are assigned to an approval role.

Name	Form Group Updates
Description	When creating or editing a form group, you can set default values for duration, location, and recipient.
Settings	N/A
Steps to Configure	<ol style="list-style-type: none"> 1. Select the Admin tab and then select Form Groups (under Lookups and Code Tables). 2. Edit an existing form group or add a new one. 3. Select values from the Default Duration, Default Location, and Default Recipient dropdowns and click save.
Steps to Use	<ol style="list-style-type: none"> 1. Open a client's schedule. 2. Click on the schedule to access the Add To Schedule popup. 3. Open the Visit Type dropdown. The form group(s) available will actually have the words Form Group in parenthesis after the name of the form group. 4. Locate your form group and select it. <p>The Location, Recipient, and Duration of each visit will use the defaults that were set for the form group.</p>

Name	Security Matrix Enhancements
Description	The following new security rights have been added: AdvSearch, AdvSearchExport, BedBoardBilling, and FosterCareBilling.
Settings	Security Matrix: AdminView and SecurityUpdate (needed for changing the security matrix)
Steps to Configure	<ol style="list-style-type: none"> 1. Select the Admin tab and then select Security Matrix. 2. Check the box for each new right that a profile should have: <ul style="list-style-type: none"> • AdvSearch – controls access to advanced searches for clients, employees, visits, and the ledger • AdvSearchExport – requires the companion right of AdvSearch; controls exporting from an Advanced Search • BedBoardBilling – controls access to the Bed Board Billing link under the Billing tab • FosterCareBilling – controls access to the Foster Care Billing link under the Billing tab 3. Click Save All.
Steps to Use	N/A. Once configured, the security rights are automatically applied to all affected users.

NOTIFICATIONS AND NOTIFICATION TRIGGERS

Name	Nightly Notification Triggers
Description	There are two new nightly notification triggers: Incomplete Visits and Visits Not Approved. The trigger is calculated based on the end date of the visit for unapproved services.
Settings	Security Matrix: NotificationTriggers, NotificationDelete if you want the ability to remove notifications
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Admin tab and then select Notification Triggers (under Daily Activities). 2. Click Add a New Trigger Entry. 3. Open the Trigger dropdown and select one of the new triggers from the Nightly Notifications section (Visit Not Approved in Nth Day or Visit Not Completed in Nth Day). 4. Enter the specific value for the Nth number. 5. Set the Send To and occurrence options and then click Save. <p>On the Nth day after a visit, depending on which trigger you set, you will be notified of any visit that does not get approved or completed.</p>

Name	New Send To Option for Triggers: Specified Team
Description	There is a new Send To option for notification triggers called Specified Team. For client triggers, both the client and employee must be in the selected team. For employee triggers, the employee must be in the selected team.
Settings	Security Matrix: Notification Triggers
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Admin tab and then select Notification Triggers. 2. While creating or editing a trigger, select Specified Team in the Send To section and choose the desired team from the dropdown. 3. Save your trigger when done. <p>When the trigger is activated, a notification will be sent to everyone on the specified team.</p>

Name	Notification Unassigned Employee Program Role
Description	When activated, this new Partner Config setting will cause all notifications for the employee to be deleted when that employee is unassigned from the program role that was part of the notification.
Settings	Partner Config: <i>When Employee Is Unassigned From Program Role</i>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Have notifications already triggered that were based on program roles. 2. Select the Admin tab and then select Partner Config. 3. Select When Employee is Unassigned from Program Role and click Save All. 4. Remove a program role assignment from an employee (on the employee assignment screen through the client). 5. Check the notifications area on the Schedule to see that the notifications based on program roles have been removed.

Name	Discontinued Medication Trigger
Description	There is a trigger that will send a notification when a medication has been discontinued.
Settings	Security Matrix: Notification Triggers
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Select the Admin tab and then select Notification Triggers. 2. Click Add a New Trigger Entry. 3. Select Medication Discontinued from the Trigger dropdown. 4. Set the Send To and occurrence options and save when done. 5. To see this work, discontinue a medication for one of your clients.

BILLING

Name	Additional Fields for Payer Config
Description	<p>The Payer Config screen has fields for the payer's FAX number, purchase order (PO) number, DFA (Department of Finance and Administration) number, and grant number. With these fields, you can record additional payer information for reporting purposes (you can include these and other Payer Config fields in your exports).</p> <p>The payer's phone and FAX numbers are included in the tooltip that displays when you mouse over the payer name in the client's insurance list.</p>
Settings	Security Matrix: BillingModule, BillingConfig
Steps to Use	<ol style="list-style-type: none"> 1. Select the Billing tab and then select Billing Payer (under Billing Config). 2. Edit an existing payer or add a new one. 3. Locate and fill in the new fields and any other fields needed. 4. Click Save Settings. <p>PO Number, DFA number, and Grant Number accept up to 25 numbers, letters, and dashes.</p> <p>FAX number accepts up to 15 numbers and dashes</p>

Name	Maximum Number of Claims per Page
Description	<p>The Payer Config CMS 1500 override setting "1 claim per page" has been replaced with a Number of Claims per Page dropdown. You can now set the maximum number of claims per page from 1 to 6 claims.</p> <p>The same dropdown is also in a new section for CMS 1450 Claims Overrides. For the CMS 1450 (UB04), you can set the maximum number of claims per page from 1 to 22. When forcing an 837 Institutional batch to the CMS format, the CMS 1450 will used.</p> <p>Payers that were previously configured using the one claim per page checkbox will have the dropdown automatically set to 1. You can also set a maximum number of claims per page for a Payer Group.</p>
Settings	<p>Security Matrix: BillingConfig; BillingModule</p> <p>Billing Config: <i>Number of Claims per Page</i></p>
Steps to Configure	<ol style="list-style-type: none"> 1. Select the Billing tab and then select Billing Payer (under Billing Config). 2. In the CMS 1500 Claim Overrides section and CMS 1450 Claim Overrides sections, select the maximum number of claims per page from the corresponding dropdown. 3. Click Save Settings.
Steps to Use	N/A. The appropriate setting will be automatically used when generating a batch or forcing the CMS format.

Name	AR/GL Export Setup and Config Tool
Description	AR to GL exports can now be configured in Credible. No custom queries are required. For assistance in configuring the AR/GL export, please contact your Implementation or Account Manager.
Settings	Partner Config: deselect Use Custom AR-GL Export (If your domain already has a custom AR/GL export, please contact your Implementation or Account Manager to discuss.) Security Matrix: BillingConfig, BillingModule, ARGLEExport
Steps to Configure	<ol style="list-style-type: none"> 1. Select the Billing tab and then select AR/GL Setup and Configuration (under Billing Config). 2. Make the appropriate selections in the different sections of the AR/GL Export Settings and Configuration screen: <ul style="list-style-type: none"> • Export Contents – specify how you want to export debits and credits • Export Files – specify whether the export will be a single file or separate files for revenue/adjustments and payments • Debit/Credit Columns – choose between one column with +/- or separate columns • Rollup/Details Lines – choose between rollup export lines or full detail lines with a summary report • Export Only Approved – select to export only approved services; not recommended • Export Only Batched – select to export only batched services; not recommended • Export Filter Dates – choose between filtering by posting date or the calculated accounting date • Cash Accounts – specify the cash account(s) • Non Billable Auto Adjust – select to automatically adjust non-billables; highly recommended • Merged Secondaries – select to set zero rates for merged services; highly recommended • Summary Fields – select which fields will be exported in the summary • Detail Report Fields – select which fields will be exported in the detailed report 3. When done, click Update Settings.
Steps to Use	<ol style="list-style-type: none"> 1. Select the Billing tab and then select AR/GL Export. 2. Set a date range and then click Filter Batch. The date basis (posting or accounting) will be what was selected when the AR/GL export was configured. The screen shows how many entries are available for batching. 3. Click Generate File for AR/GL Export Batch. 4. Click Click here to download AR/GL export batch file. Depending on the configuration, there will be either a single link for the AR/GL Export batch file or two links: Receivables AR/GL Export and Revenue AR/GL Export. 5. Click the link(s) to save the file(s) locally. 6. Click Return to AR/GL Export Batch list page to see the listing of AR/GL batches. There will be at least two buttons on the list – regen (remakes the file but leaves the batch) and delete (fully deletes the AR/GL batch). 7. If there is a report button, click it to obtain the detailed AR/GL report. (The button will be available if "Rollup export lines plus separate detail report" was selected when the AR/GL export was configured.)

Name	Pending Client Insurance
Description	<p>You can now flag a client's insurance as 'Pending.' When combined with a custom Red X, this can block a visit from being approved or batched while the insurance is pending. Without a custom Red X in place, this is just a way to flag the person's insurance as pending - any visit will still be approvable and batchable.</p> <p>If a payer is set to automatically write off insurance balances, the combination of the Pending flag and a custom Red X will not prevent the automatic adjustment.</p>
Settings	Security Matrix: ClientInsuranceAdd, ClientInsuranceView, BillingModule, BillingConfig
Steps to Configure	<p>If you are going to create a custom Red X, you need to add the is_pending field to the ClientInsurance table. The steps to do this are as follows:</p> <ol style="list-style-type: none"> 1. Select the Admin tab and then select Data Dictionary (under Site Configuration). 2. Select ClientInsurance from the Table Source dropdown and click Submit. 3. Select is_pending from the Column Name dropdown and click Insert Column. 4. Click Match Update to View. <p>To add a custom Red X:</p> <ol style="list-style-type: none"> 1. Select the Billing tab and then select Custom Red X (under Billing Config). 2. Click Add a New Custom Red X Entry. 3. For blocking approval: <ol style="list-style-type: none"> a. Field Type: ClientInsurance b. Field Name: is_pending c. For Approval is checked d. Boolean Value: False 4. For blocking batching: <ol style="list-style-type: none"> a. Field Type: ClientInsurance b. Field Name: is_pending c. Boolean Value: False <p>For auto-write off payers, the auto-adjustment will still occur when the insurance is marked as pending.</p>
Steps to Use	<ol style="list-style-type: none"> 1. Click the Insurance button on the Client nav bar. 2. Edit an existing insurance provider or add a new one and select Yes from the Pending dropdown. 3. Click Save Changes or Add Insurance depending if you were adding or editing. <p>To see this applied to a visit:</p> <ol style="list-style-type: none"> 1. Conduct a visit for a client who has pending insurance. 2. Sign and submit the visit. View the client visit list to see that the visit has been Red X'd. <p>To see this applied to batching:</p> <ol style="list-style-type: none"> 1. Locate a client with active insurance who also has a visit that is approved and ready to be batched. 2. Change the client's insurance to Pending. 3. Attempt to batch the visit. The visit will have a Red X.

Name	Batch ID in Name for 837s and 270s
Description	When an 837 or 270 batch is generated, the file name now includes the batch ID in this format: 837_MMDDYYYY_batchid.dat or 270_MMDDYYYY_batchid.dat.
Settings	Billing Config: <ul style="list-style-type: none"> • Billing Office/Claim Config > 270 Version Code, Claim Usage 270 • Billing Payer > Override Claim Format = 837
Steps to Configure	N/A
Steps to Use	N/A

Name	Custom Text Fields for the Billing Matrix
Description	Ten custom text fields are now available to be added to the Billing Matrix. These fields can be used for tracking any data by matrix line and accessed through Advanced Visit Search or Advanced Ledger Search.
Settings	N/A
Steps to Configure	<ol style="list-style-type: none"> 1. Select the Admin tab and then select Data Dictionary (under Site Configuration). 2. Select BillingMatrix from the Table Source dropdown and click Submit. 3. Select a custom text field (for example, text1) from the Column Name dropdown, select the desired column order, and click Insert Column. 4. Enter a view label and maximum length for the field and click update. 5. Repeat the above steps for each custom text field. 6. When you are done, click Match Update to View.
Steps to Use	<ol style="list-style-type: none"> 1. Select the Admin tab and then select Billing Matrix (under Billing Configuration). 2. Edit an existing one billing matrix line or add a new one. 3. In the Custom Section you will find the field(s) you added. 4. Enter text and click Save Settings. <p>To access the fields in advanced visit search:</p> <ol style="list-style-type: none"> 1. Select the Visit tab and click advanced search. 2. Click Custom Fields and then click More Fields. 3. Find the Billing Matrix section, select your field(s), and click Save List. 4. Set your filters for your advanced visit search and click Filter. <p>The Billing Matrix custom text fields will be included in the search results.</p>

Name	Billing Groups in Billing Matrix
Description	Billing Groups can be applied at the Billing Matrix level. This includes at the Payer Specific Rates and Codes. At this level, a Billing Group set here will trump anything set through the visit.
Settings	N/A
Steps to Configure	<ol style="list-style-type: none"> 1. Select the Billing tab and then select Billing Matrix. 2. Edit an existing Billing Matrix line or add a new one. 3. Scroll to the Misc section and locate Billing Group. 4. Set the billing group for the visit. The billing group set here will trump anything set through the visit. 5. Click Save Settings. 6. Either in the same Billing Matrix Config or a different one, locate the Rate and Units Calculations section and click Payer Specific Rates & Codes. 7. Edit an existing payer line or add a new one and while doing so, open the Billing Group dropdown and select a billing group. 8. When ready, click New Payer Settings and then Save Settings.
Steps to Use	Once configured, these settings are used when you process a visit/service that meets the criteria to utilize the Billing Groups you set.

Name	Splitting Revenue Codes
Description	<p>Service Ledger Revenue Lines (INSURANCE REVENUE, CLIENT REVENUE, OTHER REVENUE) have been enhanced to split revenue when visits merge across different revenue codes.</p> <p>If the merging does not result in a rate change (for example, the overproduction cap has been reached), the revenue lines will not split.</p>
Settings	N/A
Steps to Configure	Automatic provided the Revenue Code Matrix has been configured. The Revenue Code Matrix is available under the Billing tab.
Steps to Use	<p>Revenue will automatically be split based on the percentage units contributed to the merge by each revenue code; this will then be the percentage of the total revenue that gets assigned to each revenue code.</p> <p>For example, the visits comprising a merge have two revenue codes (200 and 700). The sum of the base units from each individual visit is 9 (two units for revenue code 200, seven units for revenue code 700). Revenue code 200 gets 2/9ths or 22.22% of the revenue and revenue code 700 gets 7/9ths or 77.77%. It does not matter what the merged units are. Any rounding will go the primary visit's revenue code.</p>

Name	Attach Ledger Type to AP
Description	<p>If you change the date of the visit, it will update the accounting date for the ledger lines under these conditions:</p> <ul style="list-style-type: none"> • Action type is one of the following: SERVICE INIT, SERVICE RATE INIT, SERVICE RATE CHANGE, CLIENT REVENUE, or INSURANCE REVENUE • It has not been undone • It has not been exported in an ARGL batch • The previous visit date is not in a closed accounting period • The new visit date is not in a closed accounting period
Settings	N/A
Steps to Configure	N/A
Steps to Use	N/A

Name	EOB Date
Description	<p>The EOB date is now being captured when reconciling an 835. It is located in the bottom right of the Reconcile Service area.</p> <p>The EOB date is displayed when you mouse over the adjustment.</p>
Settings	N/A
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Open a billed visit and in the Client Visit Details screen, access the Billing screen. 2. In the Reconcile Service area, enter an EOB date. 3. Make your other payment selections and click Submit.

Name	Location NPI Info
Description	NPI field has been added to Geo Areas. A flag has been added to payers to determine if the NPI should be sent with 2310D. If this is set, the NPI for the geo area associated with the location for the service will be in the NM109 element in the 2310D loop.
Settings	Billing Config: Payer Config > Send NPI w/2310D:
Steps to Configure	<p>Send NPI w/2310D</p> <ol style="list-style-type: none"> 1. Select the Billing tab and then select Billing Payer. 2. In the Electronic Claim Overrides field, select Send NPI w/2310D: 3. Click Save Settings. <p>Add NPI to Geo Area</p> <ol style="list-style-type: none"> 1. Select the Admin tab and then select Geo Areas/Offices (under Lookups and Code Tables). 2. Create or edit a Geo Area/Office Entry and add an NPI. 3. Save when done. <p>Assign Geo Area to Location</p> <ol style="list-style-type: none"> 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.
Steps to Use	<ol style="list-style-type: none"> 1. Run a Visit using the Location you selected 2. Batch the visit and generate the 837. The NPI number from the Geo Area associated with the Location will be present in the NM109 element in the 2310D loop.

Name	Medicaid Crossover Batching
Description	You can now add disallowed amounts when applying an additional claim payment and add up to 5 disallowed codes on a primary payment on the Claim Billing Details screen.
Settings	N/A
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Open Visit tab and locate a batched visit. 2. Press Billing to access the Claim Billing Details screen 3. In the Reconcile Service area, select a payment to be applied to the visit. 4. Next to 'Disallowed Amount' press the plus sign 5. You will now see 5 spaces for Disallowed Amounts as well as 5 spaces for Adjust Group/Codes 6. Now go to a service to make an additional claim payment make the payment and utilize the 5 Disallowed amounts

Name	Disallow Code Can Be Dropdown
Description	There is a new partner setting called Use Dropdown for Disallowed Codes. When set, the disallowed code free text box changes to a dropdown of valid HIPAA claim adjustment codes on the Claim Billing Details screen.
Settings	Partner Config: <i>Use Dropdown for Disallowed Codes</i>
Steps to Configure	N/A
Steps to Use	<ol style="list-style-type: none"> 1. Open a batched visit. 2. In the Reconcile Service area, click on the Adjust Group/Codes dropdown. 3. Make your selection from the list instead of entering by hand.

Name	Change CPT Code on Cascade
Description	There is a new Billing Matrix setting called Update CPT on Cascade that will update the CPT code, modifiers, and Billing Group when a visit cascades to the next insurer.
Settings	Billing Config: <i>Update CPT on Cascade</i>
Steps to Configure	<ol style="list-style-type: none"> 1. Select the Billing tab and then select the Billing Matrix. 2. Edit an existing line in the billing matrix or add a new one. 3. Select Update CPT on Cascade (in the Billing section). 4. Click Save Settings.
Steps to Use	N/A

Name	Payer Specific 837I Rev Code
Description	<p>You can now enter a revenue code in the Billing Matrix Payer Rates and Codes screen for the 837I. The field is called 837i Rev Code. Note that this code is not for accounting purposes.</p> <p>Note that the 837i Revenue Code is only used for Institutional Billing and has no effect on Revenue Matrix or AR Export.</p>
Settings	N/A
Steps to Configure	<ol style="list-style-type: none"> 1. Select the Billing tab and then select the Billing Matrix. 2. Edit an existing line in the billing matrix or add a new one. 3. Click the Payer Specific Rates & Codes button (in the Rate and Units Calculations section). 4. Edit an existing payer line or add a new one and type in a code into the 837i Rev Code field 5. Click update.
Steps to Use	<ol style="list-style-type: none"> 1. Select the Billing tab and then select the Billing Payer. 2. Set a payer to utilize the 837i. 3. Process a visit for a client who uses that payer. 4. Batch the visit and that code will be present.

Name	270 – Batch List Modifications
Description	You can now quickly select and deselect clients when creating a 270 file with a new Include checkbox at the top of the batch list.
Settings	Security Matrix: BillingModule (to access the 270)
Steps to Configure	<p>N/A. The Include checkbox appears automatically after generating a 270 batch.</p> <p>Use of the 270/271 process requires the Eligibility module; please contact your Implementation or Account Manager for more information.</p>
Steps to Use	<ol style="list-style-type: none"> 1. Select the Billing tab and then select Generate Eligibility(270) Batch (under Billing). 2. Select the desired options and click Filter. 3. Click the Include checkbox in the header row to deselect all. Click it again to reselect all.

CREDIBLE eRx

Name	New Security Right to Refill Prescriptions
Description	You can now limit which employees can refill prescriptions with the new security right RxRefill. Previously, employees with an SPI and employees who could add a prescription could do refills. If you select RxRefill for a profile in the Security Matrix, only employees with SPI and employees this that profile will be able to refill prescriptions.
Settings	Security Matrix: <i>RxRefill</i>
Steps to Configure	You need to have the Credible eRx module.
Steps to Use	Use the Refill button on the Medications screen.

Name	Physicians Orders Screen Updates
Description	The Physicians Order screen now has all of the functionality needed to create and manage prescriptions (you no longer need to go to the Medications screen).
Settings	Security Matrix: PrescriptionCreate, PhysicianOrdersView, PhysicianOrdersAdd, and PhysicianOrdersSignAll or be a prescriber Note that setting the Is Doctor field in the employee's profile to Yes is an alternative to setting the three PhysicianOrders rights.
Steps to Configure	You need to have the Credible eRx module.
Steps to Use	After you have sent a prescription, you can use the notes, discount, refill, and history buttons to manage the order. When you refill a prescription, the original order is discontinued and a new order is created for the refill. The original order and any refills stay together in the order history. If a prescription fails, you will get a retry button instead of a refill button.

Name	Change Pharmacy
Description	When you refill or retry a prescription, you can now change the pharmacy with a new Edit button. Using the button will update the pharmacy associated with the prescription. This button is hidden when using the printed methods.
Settings	Security Matrix: <i>RxRefill</i> or be a prescriber
Steps to Configure	You need to have the Credible eRx module.
Steps to Use	<ol style="list-style-type: none"> 1. Click the Retry or Refill button for a prescription on the Orders or Medications screen. There will be an Edit button on the Pharmacy row to the right of the currently assigned pharmacy. 2. Click Edit to access the pharmacy selection screen. 3. Select a new pharmacy for the prescription and then proceed as you normally would.

Name	Refill Request Orphan Trigger
Description	<p>You can set a trigger to be notified when an orphan medication refill request happens. Refill request orphans do not happen too often.</p> <p>Note that you need to have the Credible eRx module and either be a prescriber or have the RxRefill security right.</p>
Settings	Security Matrix: Notification Triggers and RxRefill or be a prescriber
Steps to Configure	You need to have the Credible eRx module.
Steps to Use	<ol style="list-style-type: none"> 1. Select the Admin tab and then select Notification Triggers. 2. Click Add a New Trigger Entry. 3. Select Refill Request Orphan, set your Send To's and Occurrences, and click Save.

Name	Edit Button on Refills and Unapproved Meds
Description	An Edit button is now available for refills and unapproved meds. The button is available on the Medications and Physicians Orders screens.
Settings	Security Matrix: <i>RxRefill</i> or be a prescriber
Steps to Configure	You need to have the Credible eRx module.
Steps to Use	<ol style="list-style-type: none"> 1. Click the Medications button on the Client nav bar. 2. Use Refill and then the edit button for dosage. 3. Finish processing. The system tracks these changes; you can use the History button to view them.

FORM BUILDER

Name	Dropdown Added to Form Builder Visit Type Field
Description	In Form Builder in the Add Form section, the Visit Type field is now a combination text box and dropdown. When adding a new form, the dropdown will show visit types that do not have an attached form.
Settings	Security Matrix: FormBuilderEdit
Steps to Configure	You need to have the Form Builder module.
Steps to Use	<ol style="list-style-type: none"> 1. Select the Forms tab and locate the Add Form section at the bottom of the screen. 2. Enter the name of the form you want to add in the Form Name field and then click on the Visit Type field (pressing Tab on your keyboard is another way to get there). The dropdown will open and the top item will be selected. 3. Select an item from the dropdown or start typing the name of the visit type you want to use – field will simultaneously clear and start accepting your input. 4. Click Add Form and build your form.

Name	Copying Forms Between Your Test Site and Live Site
Description	You can now use Form Builder to copy forms from your test site to your live site and vice versa. The Copy Form screen has a dropdown where you can select your test site or live site.
Settings	Security Matrix: FormBuilderCopy
Steps to Configure	You need to have the Form Builder module.
Steps to Use	<ol style="list-style-type: none"> 1. Select the Forms tab and locate the form you want to copy. 2. Click the copy button for that form. A copy form screen displays. 3. Select the site you are copying the form to and then click Copy. <p>Once copied, you will need to build and activate the form. Also note that field mapping is not copied over.</p>