UPDATE
Upcoming Enhancements & Task Resolutions

DEAR PARTNER,

As you will see in the notes below, Credible's April release contains many new features and significant enhancements. Due to the significant QA effort required, Credible's April release date has been set for next **Thursday evening, April 27th, between 10:15 PM - 12:15 AM ET**.

In April 2017, Credible's Tech Team was able to meet its goal of 5% burndown of the backlog, which includes 38 enhancements and Task Ticket resolutions, as well as 7 released PPIs.

Credible's Partner Services team continues to work hard to provide you with a phenomenal Partner experience. We want to hear from every Partner on every resolved task about what went well and

where we can improve. At the conclusion of Q1, we have a 95% satisfaction rate on resolved tasks. Please take a few minutes to follow the link sent to you and complete the survey. Your feedback is valued and does impact change within our departments.

Also, if you haven't registered for the **All Partner User Group** coming up on April 26th, we would love for you to join us. Click Here to Register!

New Features

Restricted Clients

Credible's *Restricted Client* functionality allows Partners to limit client access to only assigned employees. For example, if a celebrity or high-profile community member is receiving services, they can be marked as "restricted." At this point they will become invisible to all employees, including employees that have *ClientListAll* and *ClientViewAll* rights. Only employees that are specifically assigned to the client will have access.

Benefit: This feature allows Partners to restrict client information of certain clients to only assigned employees.

Configuration

This feature must be enabled by Credible for an Agency's Domain. Once that has been completed, the following steps are required.

1. Go to *Admin* tab > *Data Dictionary*.
2. Add the **is_restricted** field to the *Client Profile*. Provide a user-friendly label, such as "Restricted Client", "VIP Client", or something similar. Credible recommends making this field "Super Edit" to limit the number of employees that can flag clients as having restricted access.
3. Go to *Admin* tab > *Security Matrix*.
4. Security profiles that should be able to access all restricted clients will need the following new rights added:

   o *ClientListRestricted* allows the user to see restricted clients in the Client tab's list.
   o *ClientViewRestricted* allows the user to see the details for restricted clients.

Partners that use *Geo Area* assignments may also wish to check *Partner Config*: *Enable Override Limited By Geo Area*. This adds an additional requirement for access: the employee must share a *Geo Area* assignment with the restricted client.

Please note: The existing *ClientEmergencyAccess*, *ClientListAll,* and *ClientViewAll* security rights do not grant access to restricted clients. If employees with emergency access will need to access restricted clients, they will need to be given the *ClientListRestricted* and *ClientViewRestricted* security rights.

Usage

- To mark an existing client as restricted, change the *is_restricted* field on the *Client Profile* to *Yes*. Only employees with the *ClientListRestricted* and *ClientViewRestricted* permissions will be able to see the client.
- To add a new restricted client, select *Yes* for the *is_restricted* field on the *Client Profile*.
- To permit selected staff to view the client, click the Employee button on the client's navbar, and assign or unassign employees as needed. Directly assigned employees can view a restricted client.
- All users with access to the Client tab will see a new **Restricted** button at the bottom of the client list page. Clicking the button will display all the restricted clients, if any, that the user has rights to see.

Restricted Clients and Reporting

When running reports which might include Restricted Clients – particularly ad hoc queries or Credible BI – any PHI exposed in those reports will be masked: XXXX in place of names or words, nines in place of identifying numbers, and 1/1/1753 for any dates. In this way, aggregate data can be collected without directly exposing the restricted information.

Restricted Clients and Mobile Solutions

Clients that are marked as *Restricted* will not be downloaded or otherwise available in any Credible Mobile applications (*Credible Care, Credible Manage, or NextGen Mobile*). If a visit has been started on mobile for a client who is subsequently marked as restricted on the web, that incomplete visit will not sync properly. However, if the visit is later completed on mobile, it will sync without issue.

Credible Mobile applications will be updated to allow access to restricted clients in the near future.

Provider Profile

A new Employee navbar button called **Provider Profile** has been introduced. This button allows providers access information about their prescription rights, NPI number, DEA number, and NADEA number.

Benefit: This new navbar button gives prescribers a single location in which to view all the requirements with regards to their prescribing rights captured in Credible.

Details

There are three sections to the **Provider Profile**.

- **Provider Identifiers** display NPI numbers and helps providers manage their DEA and NADEA numbers.
  - Users can enter multiple DEA numbers and NADEA numbers. One DEA and one NADEA number can be entered for each state.
  - Users can enter the individual or the institutional DEA number.
  - The DEA number entered for a state is automatically associated with any clinic location in the state that has been assigned to the prescriber. This location is also registered automatically with Surescripts.

- **Clinic Locations and Prescription Rights** displays clinic locations that have been assigned to the prescriber, as well as the rights that the provider has at the clinic location (e.g., creating and sending new prescriptions electronically, refilling a prescription, etc.).
  - Ability to manage EPCS rights for a clinic locations will also be available here with the release of EPCS capabilities. EPCS capabilities will not be available in April 2017 release.
- **ID Proofing and TFA Credentials for EPCS** (Electronic Prescription of Controlled Substances)
  - Manage the provider's ID Proofing and TFA credentials for EPCS. This will become available with the release of EPCS capabilities.

Clinic Locations

Benefit: The addition of *Clinic Locations* allows Partners to use Geo Areas for things other than locations, if they wish. It also allows prescribers to be assigned to multiple locations to prescribe, which is another security requirement related to SureScripts.

Details

- **Clinic Locations for Geo Areas in Credible eRx**: *Clinic Locations* assigned to a prescriber will replace *Geo Areas* in Credible eRx. Instead of selecting *Geo Areas* in the *Rx Finalize* screen, the user now selects one of several clinic locations that can be assigned to the prescriber. The address of the location selected on the *Rx Finalize* page will be printed on the prescription and also sent to the pharmacy electronically.
- **Create and Assign Multiple Clinic Locations to Prescribers**: Multiple clinic locations can be created and every provider can be assigned one or more clinic locations. For each clinic location assigned to a prescriber, they can be given the rights to create new prescriptions, refill prescriptions, initiate prior authorization electronically, etc. Each clinic location that has been assigned to a prescriber will be automatically registered with Surescripts, and a unique *Surescripts Provider Identifier* (SPI) number will be provided for each assignment.

Enhanced Direct Messaging

Credible has partnered with Surescripts to offer **Enhanced Direct Messaging** capabilities. In addition to providing electronic prescribing services, Surescripts is certified as an *HISP*, *Certificate Authority*, and *Registration Authority* in the *Direct Trusted Agent Accreditation Program* (DTAAP).

Benefit: Credible is now part of SureScripts *Direct Trust Bundle* which provides a more efficient and secure route to transmit data if needed via Direct Messaging.

Usage

As an extension of Credible's existing Direct Messaging functionality, Enhanced Direct will provide access to:

- Care providers and hospitals using EHRs connected to the Surescripts network,
- Care providers and hospitals participating in a DTAAP certified network, and
- HIEs and HISPs.

Enhanced Direct allows secure emails to be sent to a specified Direct address, as well as copied to one or more other recipients. Authorized users can choose whether the message is associated with a client; client-specific messages provide the option to send a CDD and other attachments.

Configuration

Access to Enhanced Direct is controlled via the Security Matrix.

- The *ManageDirectMessages* right will allows users 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.
- The **SendDirectMessages** permission permits users to send a client-specific message via the *SureScripts Direct Message* button at the bottom of the *Client Profile* page.
- A new notification trigger, *Received Direct Message – SureScripts*, can be configured to alert staff that new messages have arrived.

Clinical Summaries and Attachments

- Client-specific Enhanced Direct messages provide the option to send a CDD and other attachments.
- There is a limit of 20 MB for both sending and receiving attachments via Enhanced Direct. However, there are no limitations on file types.
- Please note: The existing **Generate Clinical Summary** functionality remains available to all Partners.

Identity Proofing

SureScripts requires organization-level identity proofing for all Agencies participating in their Direct Trust network. This is separate from the ID proofing needed for prescribers, and does not involve knowledge-based authentication.

Availability

Enhanced Direct Messaging is a Credible Premium item requiring contract amendments. Please contact your PRM for more information, or email contracts@credibleinc.com.

Time Zone Enhancements

Benefit: Reports will now show run dates and times that correspond with the Partner's time zone on the *Report Usage Report.* Also, when viewing HIPAA Log reports, the timestamp is now displayed in the user's time zone.

Details

When a report is run, the date and time will now be stored in UTC format. The *Report Usage Report* will then display the UTC time converted to the user's time zone. Historical records that do not have a UTC time stored will continue to display in EST.

Additionally, since November 2012, the HIPAA log recorded a UTC timestamp in addition to a local time zone timestamp. When viewing the HIPAA logs (Client, Employee, Visit, and Global HIPAA Log

reports) the date and time that display is based on the UTC timestamp, and converted to the user's time zone. Records saved prior to November 2012 will reflect the local time zone.

New Flex Type Options

Credible has added two flex type options for *Visit Types* to handle client- and situation-specific billing. Partners can now 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*.

File Attachments on Liability Worksheets

Credible has added the ability to attach files directly to liability worksheets, allowing supporting documentation such as paystubs and W-2s to be stored with the worksheet.

- Partners are encouraged to upload files to either a liability worksheet or to the client's general attachments page, but not both. Uploading to both locations may cause confusion for staff, as well as increase file storage usage.
- Configuration
  - Users require *Security Matrix: ClientLiabilityView* in order to access the client's liability page.
  - New Security Matrix settings control access to the Liability attachments and should be added as needed to the appropriate security profiles:
    - *ClientLiabilityFileAdd*: Right to attach a file to a client liability worksheet
    - *ClientLiabilityFileEdit*: Right to edit a file attached to a client liability worksheet
    - *ClientLiabilityFileDelete*: Right to delete a file attached to a client liability worksheet
    - *ClientLiabilityFileView*: Right to view files attached to a client liability worksheet

Updates and Enhancements

General Updates

0:00 Duration: *Visit Type Setting: Default Planner Duration* can be set to *0:00.* To support this, the scheduler now includes *0:00* in the *Duration* dropdown.

Calculated Fields: When the calculation for a Calculated Field performs arithmetic operations based on only numeric dropdowns, the answer will appear in the calculated field.

Orders Without Physicians: The *Orders* page — including the *Show Discontinued* results page — generated an error if the physician and/or "signed by" user did not have an *Employee ID.* If a Partner ran a script to sign old Orders, and in the script some of the ID fields for the physician and/or "signed by" user were left empty, then users would no longer be able to access that client's *Orders* page and/or *Show Discontinued* page. The *Orders* page — including the *Show Discontinued* results page — display Orders even if they contain empty fields.

Signatures on Template PDFs: The signature images on printed PDFs generated on services using the Template button were blurry, although they looked crisp on screen. The signatures are now clear.

Tx Plus Dates: Credible now uses server time for new Tx Plus elements, instead of the local PC's time.

***VisitEntryOtherEmp* and Signatures**: When a user with the right *Security Matrix: VisitEntryOtherEmp* completes a data entry service for another employee, the signature shown will be that of the employee for whom the service is being completed.

Billing Updates

271 Upload Hover Information: When uploading a 271 file into Credible, the orange "E" eligibility icon will now contain all appropriate information.

Billing Group on Sign and Submit: When users select a new *Billing Group* on the *Sign and Submit* page, selecting the *Save Billing Info* button will properly save the *Billing Group.*

Billing Payer Config Code Field: The length of the *Code* field in *Billing Payer Config* has been increased from 10 to 60 characters, in accordance with ASC X12 Standards documentation.

Client Payments Prior to 835 Upload: When a client now makes a payment prior to the 835 being uploaded/processed, the PR amount should not be processed as if it is the same amount as the client payment. For example, if the client paid $10 and the PR amount was $20, then only $10 of the PR should process. However, the FULL CO amount must always process in this scenario.

Eligibility and Inactive Payers: When an eligibility file (271) is loaded into Credible, the system will only attach to a currently active Billing Payer.

Longer Client Names in Client Statement 2.0: Client Statement 2.0 batches now display and render to PDF, even if they contain a client with a dependent who has a name longer than 35 characters.

Statement Logos on Test Domains: When printing Client Statement 2.0 from a test Domain, the Partner logo would fail to print. This has been resolved. Please note: Test Domains are a Credible

Premium feature, and require a contract order form, addendum, or modification. For more information, please contact your Partner Relationship Manager, or email contracts@credibleinc.com.

TRN1 Segment in 270/271: When a file containing a 1 or 2 in the TRN1 Segment is sent from a Payer to a Partner, the file will now upload properly.

Umbrella Insurance and Eligibility Icon: When uploading a 270/271 in which a client has an umbrella insurance, the NM1 segment was providing insufficient data for Credible to determine which insurance was applicable. As a result, information was missing when hovering over the orange "E" icon.

Visit Links in As-of Aging Reports: The *Visit ID* links in the reports *Aging by As of Date Details* and *Payer As of Aging by Client* will now open in new windows in Chrome, Internet Explorer 11+, and Firefox.

Security Updates

Idle Logout: Some users were experiencing a logout before the time selected in the setting *Partner Config: Idle Logout*, potentially causing them to lose work. Users will now see an *Idle logout* warning after remaining idle for a set amount of time. The warning message will display a 2 minute countdown before they are logged out automatically.

Idle Logout Redirect: The Blank option has been removed from *Partner Config: Idle Logout Redirect*.

Whitelisting and Password Updates: If whitelisting has been enabled for a Domain and a user is opted out of the white list, when that user's password was updated they were not able to login to Credible. This has been corrected.

Credible plans to push these enhancements **Thursday evening, April 27th, between 10:15 PM - 12:15 AM ET**. There may be intermittent service during this time.

Should you have any questions, please do not hesitate to contact a Partner Service Coordinator for assistance at 301-652-9500. *Please note: In an effort to continually improve our Partnership and quality of service, a task resolution audit will be emailed to you upon the resolution and closure of every single task you have submitted. We strongly encourage you to utilize this tool so that we can better support you.*

Thank you for your continued Partnership,

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