



Monthly Software Update

August 2017

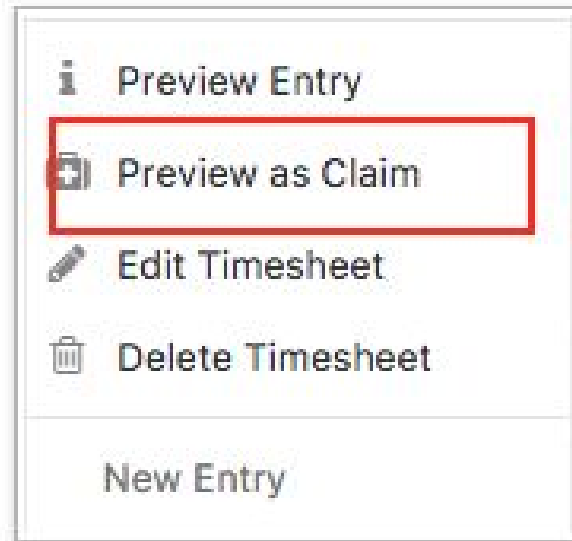


All New This Month

- Preview as Claim Button Removed
- Specify Service Code as Type
- ReachMe Group Live
- Able to Enforce Client Signature
- New Scheduling Permissions
- ABC Data Collection in Beta

Preview as Claim Button Removed

- Because the Preview as Claim button was causing a lot of errors in claims when the preview would be saved, the button has been removed.
- Removing this helps streamline workflow and prevent errors.



Specify Service Code as Type


- A new dropdown is available when creating or editing a Service Code
- The choices are Billable, Non-Billable, Unknown
- By default, any new codes added to the system will be set as billable
- User still needs to label each code for payroll and supervision report

← Service Codes **Properties**

BASICS NOTE TEMPLATES

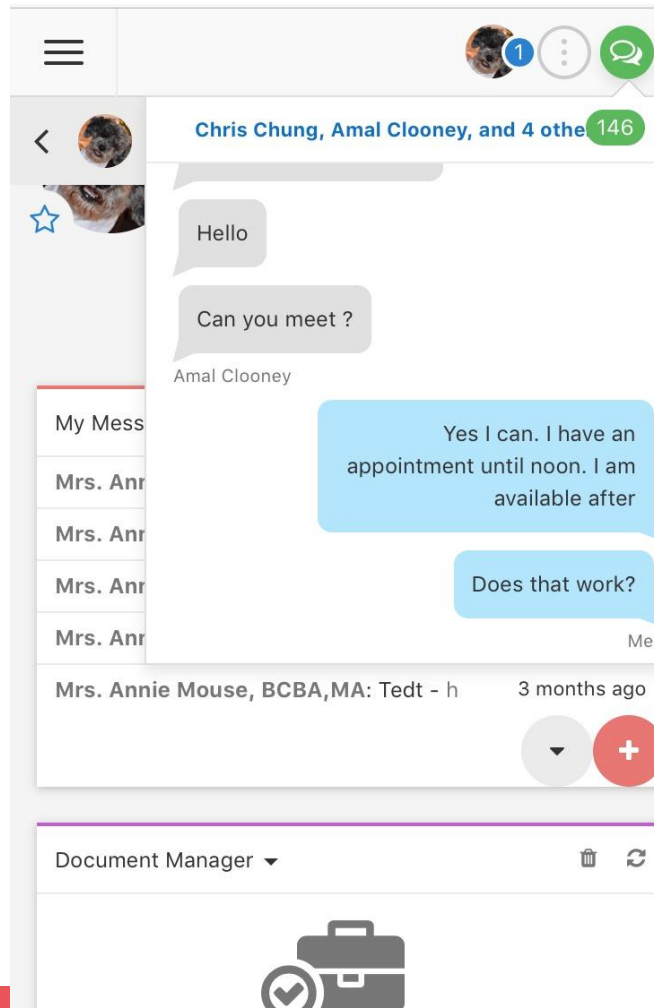
Type Unknown
 Billable
 Non-Billable

Code

The image shows a screenshot of a web application interface for managing Service Codes. At the top, there is a breadcrumb trail with a back arrow and the text 'Service Codes', followed by the current page title 'Properties'. Below this, there are two tabs: 'BASICS' (which is active and highlighted with a blue underline) and 'NOTE TEMPLATES'. In the 'BASICS' section, there is a 'Type' dropdown menu that is currently open, showing three options: 'Unknown' (which is selected with a checkmark), 'Billable', and 'Non-Billable'. Below the 'Type' dropdown is a 'Code' field, which is currently empty.

ReachMe Group is Live

- ReachMe Group is now available as of 8/1
- ReachMe is now out of Beta and is a paid feature. Promo offer is \$1 per month per user through October. Will be \$3 after.



Can Choose to Enforce Client Signature

- At the Service Code level, users can choose to require a client signature in order to convert a timesheet for that code
- Timesheet will not convert without a signature if this option is chosen

[Help Article](#)






Validation

Service Location	Required
Service Address	Not Needed
Procedure Info	Optional
Drive Time & Miles	Not Needed
Service Notes	Not Needed
Admin Notes	Not Needed
Provider Signature	Required
Client Signature	Required
Client Signature from	Client Account

New Scheduling Permissions

- Permissions have been added to help control the ability to cancel and delete appointments and recurring appointments.
- Permissions allow control over who can **cancel** one-off appointments, who can **cancel** recurring appointments, who can **delete** one-off appointments, and who can **delete** recurring appointments

[Help Article](#)

← Permissions	Edit	Permissions	Users	Add User
▼ Scheduling				
Access Basic access to the scheduling module				
Appointments > Allow Cancelling One-Off Ability to cancel a single appointments				
Appointments > Allow Cancelling Recurring Ability to cancel entire series of a recurring appointment				
Appointments > Allow Deleting One-Off Ability to delete a single appointment				
Appointments > Allow Deleting Recurring Ability to delete entire series of a recurring appointment				

ABC Data Collection in Beta

- At the Service Code level, users can choose to require a client signature in order to convert a timesheet for that code
- Timesheet will not convert without a signature if this option is chosen

[Help Article](#)

[Webinar](#)

The screenshot displays the ABC Data Collection interface. At the top, there is a tab labeled "ABC Data". Below this, the interface is divided into several sections: "Antecedent" with a dropdown menu showing "Demand presented"; "Behavior" with the text "Hitting - frequency per sessions"; "Consequence" with a dropdown menu showing "Task was removed" and an open list of options including "Access to preferred item/activity", "Denied access to item/activity", "Task was removed" (highlighted in blue), "Time out", "Attention given", "Verbal redirection", "Response blocking", "Nothing/ignored", "Physical prompt for compliance", and "Discomfort relieved/attenuated"; "Location / Activity" with a text input field containing "kitchen"; and "Notes" with a text input field containing "notes here". A red "Submit" button is located on the left side, and a "Close" button is on the right. At the bottom, there is a progress indicator showing "% Correct" and "waiting 10 seconds - AIM FOR 5", and a "Trial 1/10" label. A calendar view at the bottom right shows dates from May 15 to May 29.