CREDIBLE
Behavioral Health Software

Credible Best Practice: Crisis Plan

While we hope it is never needed, it is important to have a crisis plan in place *before* your Agency is faced with a disaster situation. The outline below will help you leverage Credible to keep your clients in treatment, your staff safe, and your Agency running smoothly.

Please note: This document now includes important information for Credible eRx users.

Temporary Addresses

To track any temporary addresses used by your clients or staff, add the following fields to the Client Profile and Employee Profile via the Data Dictionary.

- Temporary Address 1
- Temporary Address 2
- Temporary City
- Temporary State
- Temporary Zip Code
- Temporary Phone

Forms

Go to the Credible **LIBRARY** Domain and copy the following forms into your Agency's Domain.

- **Employee Wellness Check**
- **Employee Demographic Update**: This form is used to add or update the Employee Temporary Address

Advanced Search Saved Reports

You should consider creating the following **Advanced Searches** and saving them as **Global Reports** for your Agency. (Detailed instructions for creating these searches is found later in this document.) Please note: You may want to review the security settings of your employees and determine if additional staff should be granted permission to view or export this information. Information on granting those rights is found below.

- **Insurance Pending**: Show all services where the client's insurance is currently pending approval.
- **Total Time by Client**: This report shows the total of all the non-billable and billable time logged by a client in a single row.
- **Total Time by Service Type**: This report shows total of all the non-billable and billable time logged by Service Type in a single row
- Total Time by Employee – This report shows all the non-billable and billable time logged by employees in a single row
- **All Client Demographics**: This report exports all client demographic fields, for both active and inactive clients.

- **Client Diagnosis**: This report exports the client's address and temporary address, some basic identifying demographics (e.g., name, date of birth, sex, age), and client Problems 1-4.
- **Client Medications**: This report exports the client's phone number, address and temporary address, some basic identifying demographics (e.g., name date of birth, sex, age), along with the client's Medications.
- **Emergency Export**: This exports a set of basic client demographic information, including phone, address, language preferences, diagnoses, and emergency contact information, along with the client's medication, family members, allergies, and contacts.
- **Next Appointment W/ Phone #'s**: This report exports the client's phone numbers, address and temporary address, preferred language, last service date, and next service date, along with the related primary employees, family members, allergies, and contacts.
- **All Employee Demographics**: This report exports all employee fields for active and inactive employees.
- **Employee Emergency Contact**: This report exports all employee address and temporary address information, along with the employee's emergency phone number.
- **Employee Signatures**: This report shows the employee name, title, and the signature that is currently on file in the system.
- **Employee Stats (Date Req)**: This report provides all statistics available on employees through the *Advanced Employee Search*. It is designed to be used with the Period Start and End Dates but can be run without them.

Credible eRx Action Plan

To prepare for an emergency, ensure that the Pharmacy File is downloaded each day by 7:00 AM ET and made available promptly to your prescribers. Make sure that your providers are aware of the following potential impacts.

- Prescribers will receive an error message from Surescripts in the event that they attempt to send a **NewRx** to a pharmacy that has been taken offline and subsequently removed from the Directory.
- If a pharmacy is offline, the Store Name will be updated to read Closed, Temporarily Closed, or **Permanently Closed** in the Directory. In this case the pharmacy will be handling message processing and patient follow-up.
- Remind your prescribers to use **Medication History** through Credible, as this can be particularly crucial to treating displaced patients who may not have their prescription information available.

Printing Schedules

If you are not currently contracted for Credible Mobile Solutions, you may consider printing all schedules for the next seven days for each team. You can toggle "Hide Insurance ID on Schedule Print" on or off depending on what you like to see on the schedule print view.

1. Select the **Schedule** tab.
2. Access the **Team View**.
3. Select each team name from the dropdown in the top left area.
4. Click the **Print** icon on each Team schedule.
5. Click the **right-arrow icon**.
6. Complete steps 2d-2e for at least the next 7 days for each team.

Mobile in Emergencies

To prepare for a potential loss of power, we strongly recommend downloading all clients to your mobile app. If you are not currently contracted for a Credible Mobile solution (e.g., Credible Care), but need it, please contact us; we will execute it in the same day.

Export Queries

Run the following queries to extract data that may be helpful in the event of power loss.

Current Basic Vital Signs from Medical Profile

```
SELECT client_id, effective_date, height_ft, height_in, weight, CASE WHEN bmi > -1
THEN bmi ELSE NULL END AS bmi, pulse_rate, temperature, bloodpressure_top,
bloodpressure_bottom, standing_bp_top, standing_bp_bottom, lying_bp_top,
lying_bp_bottom, pulse_oxygen_level, blood_sugar_level
FROM ClientMedicalProfile
WHERE active =1
```

Current Medical Conditions from Medical Profile

```
SELECT client_id, effective_date, mc.medicalcondition
FROM ClientMedicalProfile cmp
INNER JOIN ClientMedicalProfileMedicalCondition cmpmc ON cmp.clientmedicalprofile_id =
cmpmc.clientmedicalprofile_id
INNER JOIN MedicalCondition mc ON cmpmc.medicalcondition_id = mc.medicalcondition_id
WHERE cmp.active = 1
```

Current problem list

```
SELECT ca.client_id, cad.problem_list_order, cad.axislevel, cad.axisorder,
cad.axis_code, cad.icd10_code, Axis1.axis_1_desc AS dsm5_icd9_description,'' AS
icd10_description
FROM ClientAxis ca
INNER JOIN ClientAxisDetail cad ON ca.client_axis_id = cad.client_axis_id
INNER JOIN Axis1 ON cad.axis_id = Axis1.axis1_id
WHERE ca.active_flag = 1 AND cad.axislevel = 1 AND ca.client_id IS NOT NULL
UNION
```

```
SELECT ca.client_id, cad.problem_list_order, cad.axislevel, cad.axisorder,
cad.axis_code, cad.icd10_code, Axis2.axis_2_desc,''
FROM ClientAxis ca
INNER JOIN ClientAxisDetail cad ON ca.client_axis_id = cad.client_axis_id
INNER JOIN Axis2 ON cad.axis_id = Axis2.axis2_id
WHERE ca.active_flag = 1 AND cad.axislevel = 2 AND ca.client_id IS NOT NULL
UNION
SELECT ca.client_id, cad.problem_list_order, cad.axislevel, cad.axisorder,
cad.axis_code, cad.icd10_code, ICd9CM.ICD9_DESC, ICD10View.icd10_short_desc
FROM ClientAxis ca
INNER JOIN ClientAxisDetail cad ON ca.client_axis_id = cad.client_axis_id
LEFT OUTER JOIN ICD9CM ON cad.axis_code = ICD9CM.icd9_code
LEFT OUTER JOIN ICD10View ON cad.icd10_code = ICD10View.icd10_code
WHERE ca.active_flag = 1 AND cad.axislevel = 3 AND ca.client_id IS NOT NULL
```

Current Meds List (excludes discontinued meds)

```
SELECT Meds.client_id, Meds.med_id, Meds.medication, Meds.dosage_quantity,
Meds.dosage, COALESCE(Meds.route_string,Meds.route_of_admin) AS admin_route,
Meds.route_per, Meds.frequency, Meds.rx_sig, Meds.start_date,
MedsStatus.med_status, COALESCE(Providers.provider_name, Employees.first_name + ' ' +
Employees.last_name) AS prescriber, Meds.ndc, Meds.rx_norm_id
FROM Meds
INNER JOIN MedsStatus ON Meds.rx_status = MedsStatus.status_code
LEFT OUTER JOIN Employees ON Meds.provider_id_int = Employees.emp_id
LEFT OUTER JOIN Providers ON Meds.provider_id = Providers.provider_id
WHERE Meds.disc_date IS NULL
UNION
SELECT client_id, NULL, 'Client has reported no current medications.', NULL, NULL,
NULL, NULL, NULL, NULL, NULL, NULL, NULL, NULL, NULL
FROM Clients
WHERE deleted = 0 AND no_med_flag = 1
```

Current Allergy List (excludes discontinued allergies)

```
SELECT client_id, allergy, addtl_text, reaction,
CASE severe WHEN '399166001' THEN 'fatal'
            WHEN '255604002' THEN 'mild'
            WHEN '371923003' THEN 'mild to moderate'
            WHEN '6736007' THEN 'moderate'
            WHEN '371924009' THEN 'moderate to severe'
            WHEN '24484000' THEN 'severe'
            ELSE NULL END AS allergy_severity
FROM ClientAllergy
WHERE discontinued = 0
UNION
SELECT client_id, ' Client has reported no allergies.', NULL, NULL, NULL
FROM Clients
WHERE deleted = 0 AND no_allergy_flag = 1
```