

## CHAPTER 4: ICONS AND SCREENS IN CREDIBLE MOBILE



Schedule



Visit Queue



All Clients



Options



Admin Time  
(only on Schedule screen)

### Schedule screen



Download new scheduled visits for current date/future days and associated forms/client records (updates to six lookup tables are also downloaded)

Click and hold Download icon to download scheduled visits and any changes made to those visits for previous dates (Chrome and Android only)



Add unscheduled visit

(If the icon is not available, it means your administrator disabled Unscheduled Visit for all mobile users.)

Visit Queue screen – access open and queued visits, upload queued visits, and view details about sent/uploaded visits



Upload queued visits

All Clients screen – access the Manage Client screen for any client that has been downloaded to your mobile device or laptop/desktop



Download updates to all existing clients (OK at prompt) or just retrieve client records for visits recently added to your schedule in Credible Mobile (Cancel at prompt). The second option is useful if the application was not able to download an associated client record when it downloaded a scheduled visit.



Add new client

Options screen – configure settings for Credible Mobile and update the forms library and lookup tables

Admin Time Entries screen – add, edit, and delete admin time entries



Return to Admin Time Entries screen



Add new admin time entry

Manage Client screen – review information about the client and start/resume visits



Sync -- download updated client information



Schedule next visit

(If the icon is not available, it means your administrator disabled Next Visit for all mobile users.)

Perform Visit screen – access form associated with visit or Sign & Submit screen



Manage Client screen



Sign & submit

Sign & Submit screen – enter billing information for the visit, sign the visit, queue up the visit for upload



Manage Client screen



Discard visit

Note that icons that involve interaction (download/upload) with the Credible website are only available when you are in connected mode.