Credible
Behavioral Health Software

Notification Trigger Definitions

Contents

7529 Standish Place, Suite 270, Rockville, MD 20855
o: 301-652-9500 f: 240-744-3068 e: info@credibleinc.com w: credibleinc.com

CREDIBLE

CREDIBLE

Nth or Greater Medication Added

Choose Nth number (1 or higher) = when Nth number or more medications added to a client record triggers a notification to the specified SEND TO team/employee/etc. Specified Employee/Team members will only get notifications when they are assigned to the client.

Admin Time Entered

Triggers a notification for specified SEND TO team/employee/etc when Admin Time is entered by an employee. Specified Employee/Team will only get notifications when they are assigned as the supervisor to the employee completing admin time.

Age Change

Triggers a NIGHTLY notification for specified SEND TO team/employee/etc when the auto calculated field of AGE in Client Profile has been changed to reflect the SPECIFIC VALUE entered on the Notification screen. For this trigger to update the Client Profile AGE field the SPECIFIC FIELD must=DOB. Specified Employee/Team members will only get notifications when they are assigned to the client.

Authorization End

Triggers a notification for specified SEND TO team/employee/etc when a client Authorization ends. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Add

Triggers a notification for specified SEND TO team/employee/etc when a new client is entered in Credible.

Client Admitted to Bed

Triggers a notification for specified SEND TO team/employee/etc when a client is added to a bed in a residential /group home program. Specified Employee/Team will only get notifications when they are assigned to the program.

Client Attachment Added

Triggers a notification for specified SEND TO team/employee/etc when a client attachment is added. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Diagnosis Add/Delete

Triggers a notification for specified SEND TO team/employee/etc when a client diagnosis is added or updated. Specified Employee/Team will only get when they are assigned to the client.

Client Episode Add

Triggers a notification for specified SEND TO team/employee/etc when a client episode is added. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Episode End Date

Triggers a notification for specified SEND TO team/employee/etc when a client episode end date is assigned or modified. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Episode Start Date

Triggers a notification for specified SEND TO team/employee/etc when a client episode start date is assigned or modified. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Ext Update

Triggers a notification for specified SEND TO team/employee/etc when a SPECIFIC FIELD selected from the Client Extended Profile is updated with the SPECIFIC VALUE value (i.e. Field = Deaf, Value = Completely. When the Deaf field on the Client Extended is changed from either Null, Partial, or No to completely, the specified receiver will be notified).

NOTE: Specific Value MUST be the Lookup ID if the field has a lookup.
When the SPECIFIED FIELD is left blank, the selected receiver(s) will be notified if any field in the Client Extended Profile is updated. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Extended Date Field Trigger

Triggers a notification for specified SEND TO team/employee/etc when the SPECIFIC FIELD (dropdown is populated with the date fields on the Client Extended Profile) selected from the Client Extended Profile is assigned a value or updated. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Form Answer Selected

Triggers a notification for specified SEND TO team/employee/etc when a specific QUESTION from a specified FORM is answered (dropdown is populated with field(s) from the specified form). This notification only works when answer(s) in the specified form have IS NOTIFICATION TRIGGER = TRUE when building the form. This notification is triggered when the service is completed. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Form Date Field Trigger

Triggers a notification for specified SEND TO team/employee/etc when a specific QUESTION (dropdown is populated with date field(s) from the specified form) from a specified FORM is answered. This notification only works when date fields in the specified form have IS NOTIFICATION TRIGGER = TRUE when building the form. This notification is trigger when the service is completed. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Incident Visit Add

Triggers a notification for specific security profile that has view Incident Form right. This notification only works for those service types with a form that has been identified with **Is Incident Form = True**. Employees will only get notifications when they are assigned to the client.

Client Insurance Added – Specific Payer

Triggers a notification for specified SEND TO team/employee/etc when the specified payer selected is added to a client's insurance list. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Insurance Updated – Specific Payer

Triggers a notification for specified SEND TO team/employee/etc when the specified payer selected is updated in a client's insurance list. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Liability Added

Triggers a notification for specified SEND TO team/employee/etc when an employee saves the initial liability form for a client or starts a new form. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Profile Date Field Trigger

Triggers a notification for specified SEND TO team/employee/etc when the SPECIFIC FIELD (dropdown is populated with the date fields on the Client Profile) selected from the Client Profile is assigned a value or updated. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Program Assigned

Triggers a notification for specified SEND TO team/employee/etc when a client is assigned to the specified PROGRAM. Specified Employee/Team will only get notifications when they are assigned to the program.

Client Program Unassigned

Triggers a notification for specified SEND TO team/employee/etc when a client is unassigned to the specified PROGRAM. Specified Employee/Team will only get notifications when they are assigned to the program.

Client Record Granted Emergency Access

Triggers a notification for specified SEND TO team/employee/etc when a client is assigned to an employee who has the Client Emergency Access security right. Specified Employee/Team will only get notifications when they are assigned to the program.

Client Released From Bed

Triggers a notification for specified SEND TO team/employee/etc when a client is released from a bed in a residential/group home program. Specified Employee/Team will only get notifications when they are assigned to the program.

Client Update

Triggers a notification for specified SEND TO team/employee/etc when the SPECIFIC FIELD selected from the Client Profile is updated to equal the SPECIFIC VALUE entered. **NOTE**: Specific Value MUST be the Lookup ID from the Custom Lookup Items under Admin if the field in the Data Dictionary for Client has a lookup. However if this is a Credible table, then whatever the value is in the external_id of the lookup for the Client Data Dictionary field.
When SPECIFIC VALUE is left blank, a notification will be sent to specified receiver(s) when the SPECIFIC FIELD in the Client Profile is updated to equal any value. When SPECIFIC FIELD is left blank, a notification will be sent to specified receiver(s) when any field in the Client Profile is updated. Specified Employee/Team will only get notifications when they are assigned to the client.

Client Warning Level

Triggers a notification for specified SEND TO team/employee/etc when a client warning level is added that is equal to the specified LEVEL chosen. When no SPECIFIED LEVEL is chosen, receiver(s) will be notified whenever a client warning is added or updated. Specified Employee/Team will only get notifications when they are assigned to the client.

Contact Add

Triggers a notification for specified SEND TO team/employee/etc when a contact is added to a client's record. Specified Employee/Team will only get notifications when they are assigned to the client.

Contact Update

Triggers a notification for specified SEND TO team/employee/etc when an existing contact for a client is updated. Specified Employee/Team will only get notifications when they are assigned to the client.

Electronic Message Received

Triggers a notification for specified SEND TO team/employee/etc when an employee clicks OK on the Instant Message window. Specified Employee/Team will only get notifications when they are assigned as supervisor to the employee who received the message.

Employee Form Date Field Trigger

Triggers a notification for specified SEND TO team/employee/etc when a specific QUESTION (dropdown is populated with date field(s) from the specified form where answer has IS NOTIFICATION TRIGGER = TRUE) from the specified employee FORM is answered. This notification is trigger when the employee form is completed. Specified Employee/Team will only get notifications when they are assigned as supervisor to the employee who completed the form.

Employee Add

Triggers a notification for specified SEND TO team/employee/etc when a new employee is entered in Credible.

Employee Admin Time Approved

Triggers a notification to the employee when his/her Admin Time is approved.

Employee Assigned As Case Manager

Triggers a notification for specified SEND TO team/employee/etc when an employee is assigned as a Case Manager. Specified Employee/Team will only get notifications when they are assigned to the client the case manager assignment is being made to.

Employee Assigned As Primary

Triggers a notification for specified SEND TO team/employee/etc when an employee is assigned as a Primary to a client. Specified Employee/Team will only get notifications when they are assigned to the client the primary assignment is being made to.

Employee Form Answer Selected

Triggers a notification for specified SEND TO team/employee/etc. when an employee who has *Client Emergency Access* security right to assign themselves to a Client. Specified SEND TO team/employee/etc. will only receive notifications if the employee's profile has CAN SUPERVISE= and the employee who is granted Emergency Access is the supervisor's Assigned Supervisee.

Employee Granted Emergency Access

Triggers a notification for specified SEND TO team/employee/etc when an employee who has Client Emergency Access security right is assigned to a client. Specified Employee/Team will only get notifications when they are assigned to the program.

Employee Incident Visit

Triggers a notification for specific security profile that has view Incident Form right. This notification only works for those client service types with a form that has been identified with **Is Incident Form = True**. Employees will only get notifications when they are assigned as the supervisor to the employee completing the form.

Employee Profile Date Field Trigger

Triggers a notification for specified SEND TO employee/team leaders & supervisors etc. when the SPECIFIC FIELD (dropdown is populated with the date fields on the Employee Profile) selected from the Employee Profile is assigned a value or updated. Specified Employee/Team Leader & Supervisor will only get notifications when they are assigned to the employee.

Employee Update

Triggers a notification for specified SEND TO team/employee/etc when the SPECIFIC FIELD selected from the Employee Profile is updated to equal the SPECIFIC VALUE entered. When SPECIFIC VALUE is left blank, a notification will be sent to specified receiver(s) when the SPECIFIED FIELD in the Employee Profile is updated to equal any value. When SPECIFIED FIELD is left blank, a notification will be sent to specified receiver(s) when any field in the Employee Profile is updated. Specified Employee/Team will only get notifications when they are assigned as the supervisor to the employee whose profile is being updated.

Employee Visit Add – Specific Visit Type

Triggers a notification for specified SEND TO team/employee/etc when the specified employee VISIT TYPE selected is Completed. Specified Employee/Team will only get notifications when they are assigned as the supervisor to the employee who completes the form.

Facility Certification

Triggers a notification for specified SEND TO Profile Code/Specified employee X days before a Bed Board Facility certification is due. This notification only works when Bed Board Facility Certification Date(s) are entered: Admin – Lookups and Code Tables – Bed Board Facilities.

First Authorization in Auth Level/Visit Type Used

Triggers a notification for specified SEND TO team/employee/etc when the first Authorization unit/minutes is used. You can choose this notification to trigger on only specific Auth Level **OR** only specific Visit Type **OR** both. Specified Employee/Team will only get notifications when they are assigned to the client.

Foster Home Certification

Triggers a notification for specified SEND TO Profile Code/Specified Staff X days before a Foster Home Facility certification is due. This notification only works when Foster Home Facility Certification Date(s) are entered: Admin – Daily Activities – Manage Foster Homes.

Late Client Visit

Triggers a notification for specified SEND TO team/employee/etc when a client visit is entered late (signature date is greater than the visit date). This notification will only work when FLAG LATE WHEN GREATER THAN = a specified hour amount in the Visit Settings in Partner Config. Specified Employee/Team will only get notifications when they are assigned to the client.

Medication Add

Triggers a notification for specified SEND TO team/employee/etc when a medication is added to a client record. Specified Employee/Team will only get notifications when they are assigned to the client.

Medication Discontinued

Triggers a notification for specified SEND TO team/employee/etc when a medication is discontinued in a client record. Specified Employee/Team will only get notifications when they are assigned to the client.

Medication Intra-Class Polypharmacy

Triggers a notification for specified SEND TO team/employee/etc when a medication or prescription in the same drug class as another active medication or prescription is added to a client's medication list. Specified Employee/Team will only get notifications when they are assigned to the client.

Medication Update

Triggers a notification for specified SEND TO team/employee/etc when a medication is updated/changed in a client record. Specified Employee/Team will only get notifications when they are assigned to the client.

Multi-Stage Visit Approval

Triggers a notification for specified SEND TO employee when that employee has visits waiting for their approval in the multi-stage approval process. This notification will only work when services are set up for multi-stage approvals: Admin – Daily Activities – Manage Approval Roles.

New Team Member

Triggers a notification for specified SEND TO team/employee/etc when an employee is added to a Team. Specified Employee/Team will only get notifications when they are assigned to the Team.

Physician Order Line Add

Triggers a notification for the physician who the order was for when a new Physician's Order is added.

Prescription – Refill Added

Triggers a notification for the prescriber who the order was for when a prescription has been refilled and needs a prescriber's approval.

Prescription – Unapproved Added

Triggers a notification for the prescriber when a prescription is entered needing to be approved.

Refill Request

Triggers a notification for specified SEND TO team/employee/etc when a refill request comes in from a pharmacy for a client. Specified Employee/Team will only get notifications when they are assigned to the client.

Refill Request Orphan

Triggers a notification for specified SEND TO team/employee/etc when an Orphan Refill Request is entered into a client record. Specified Employee/Team will only get notifications when they are assigned to the employee that the orphan refill is for.

Resource Scheduled

Triggers a notification for specified SEND TO team/employee/etc when an employee schedules a resource. Specified Employee/Team will only get notifications when they are assigned to the employee who schedules the resource.

Schedule Cancellation – Employee Has Waitlist

Triggers a notification to the employee if an employee has a waitlist and the employee has an appointment cancelled.

Schedule Update – Status Changed To

Triggers a notification for specified SEND TO team/employee/etc when the specified service STATUS is changed. Specified Employee/Team will only get notifications when they are assigned to the client.

Treatment Plan End Date

Triggers a notification for specified SEND TO team/employee/etc X days before a client's treatment plan end date (Tx Plan and Tx Plus). Specified Employee/Team will only get notifications when they are assigned to the client.

TxPlan Add

Triggers a notification for specified SEND TO team/employee/etc when a treatment plan is added in a client record via Tx Plan or Tx Plus button on the Client nav bar. Specified Employee/Team will only get notifications when they are assigned to the client.

TxPlus Problem Add

Triggers a notification for specified SEND TO team/employee/etc when a new “Problem” (top-level item) is added to a Tx Plus plan or template. Specified Employee/Team will only get notifications when they are assigned to the client.

TxPlus Target Date

Triggers a notification for specified SEND TO team/employee/etc when the target date for a treatment plan is entered or updated. Note that the notification triggers based on the target date for the treatment plan – not the target date for the problems/goals/objectives/interventions in the plan. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Add – Active Episode

Triggers a notification for specified SEND TO team/employee/etc when a service is added to the client record that is attached to an active episode. Notifications will be sent when service date < or = episode closed date; notifications will end when service date is > episode closed date. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Add – Specific Visit Type

Triggers a notification for specified SEND TO team/employee/etc when the selected specific VISIT TYPE is completed for a client. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Add – Specific Visit Type & Program

Triggers a notification for specified SEND TO team/employee/etc when the selected specific VISIT TYPE in the specific PROGRA< is completed for a client. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Add – Visit Date Greater than 3 Weeks Old

Triggers a notification for specified SEND TO team/employee/etc when a service is added more than 3 weeks after the visit occurred (signature/transfer date is greater than three weeks older than service date). Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Add – Specific Visit Program

Triggers a notification for specified SEND TO team/employee/etc when a service is added in the specific PROGRAM. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Approval

Triggers a notification for specified SEND TO team/employee/etc when a service is approved. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Approval (derived from revised date)

Triggers a notification for specified SEND TO team/employee/etc when a visit is approved. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Approval – Specific Program

Triggers a notification for specified SEND TO team/employee/etc when a service is approved in the specified PROGRAM. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Approval – Specific Visit Type

Triggers a notification for specified SEND TO team/employee/etc when the specified VISIT TYPE is approved. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Approval – Specific Visit type & Program

Triggers a notification for specified SEND TO team/employee/etc when the specified VISIT TYPE is approved in the specified PROGRAM. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Manual Red X Set

Should be set with Sent To of "Employee Who Completed the Visit".

Triggers a notification when an employee selects the Set Manual Red X checkbox when updating a completed visit. By selecting the checkbox and entering a manual red X note, a supervisor can inform the employee who conducted the visit that it cannot be approved and the reason why.

Nightly Notifications

Nightly notifications are defined as notifications that occur every night when set up in a Partner's domain. When setting up a nightly notification, follow these rules regarding the Specific Value and Occur fields:

Specific Value field: enter the number of days before or after (depending on the notification) the trigger event that you want to notify employees. For example, for the Employee Password Expiration notification, if you enter 10 and the Partner Config setting = Expire Every 30 Days, the system will send a notification 10 days in advance of the 30-day expiration.

Occur field: enter a zero. If you enter a number other than zero, it will affect when the notification is sent. For example, if you enter 3 in the Occur field and a 10 in the Specific Value field, the notification will go out 7 days before an employee's password expires.

Authorization – Last Period Ending

Notification will trigger to the specified SEND TO team/employee/etc when the number of days specified equals the number of days before a client's authorization ends. If the client has multiple authorizations *of the same auth level* with different end dates, the system will look at the authorization with the latest end date to determine if the notification should be sent. Specified Employee/Team will only get notifications when they are assigned to the client.

Contact ROI Expiring in Nth Day

Notification is triggered based on the ROI Expired date in the Contacts list in client record. Notification will trigger on Nth day (usually a negative number) before the ROI expires. Specified Employee/Team will only get notifications when they are assigned to the client.

eMAR Schedule End

Notification will trigger to the specified SEND TO team/employee/etc if Notify at End of Schedule is selected for a med schedule and it is n days before the med schedule is scheduled to end. Note that the Notify at End of Schedule checkbox in the Create/Edit Med Schedule screen must be selected for the notification to trigger. Specified Employee/Team will only get notifications when they are assigned to the client.

Employee Password Expiration

Notification will trigger on the Nth day before an employee's password expires. This notification will only work if the partner has PASSWORD EXPIRATION = SPECIFIC VALUE in Admin > Partner Config (under General settings). Specified Employee/Team will only get notifications when they are assigned as the supervisor to the employee whose password is expiring.

External Provider ROI Expiring in Nth Day

Notification is triggered based on the ROI Expired date in the External Care Providers list in client record. Notification will trigger on Nth day (usually a negative number) before the ROI expires. Specified Employee/Team will only get notifications when they are assigned to the client.

Form Mapping Failed Nth Day from Transfer Date

Notification fires when form mapping has not happened X number of days after the transfer date. In Credible Mobile, Transfer Date is when Send is clicked. If visit was entered on the web, Transfer Date = "signed" date – date Sign & Submit button for web form was clicked.

Service Not Completed in Nth Day in Program

Notification will trigger on the Nth day after a scheduled service is not begun in the specified PROGRAM. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Not Approved in Nth Day in Program

Notification will trigger on the Nth day after a service is not approved. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Not Completed (Incompletes) in Nth Day in Program

Notification will trigger on the Nth day after an incomplete visit is not completed. Specified Employee/Team will only get notifications when they are assigned to the client.

Visit Not Completed Since N Days

Notification is triggered when a client has a specific visit type completed in the past but does not have a completed visit of the same type again within N days (and the client is still active). The notification will only trigger on the Nth day. Specified Employee/Team will only get notifications when they are assigned to the client.