New Schedule, Form, and Notification Features

August 2010 Release Highlights

- Actuals View in the Schedule
- Assigning Secondary Employees to a Visit
- Reassigning Appointments and Blocks
- Adding Conditional Questions to Forms
- Relinking Notifications
- New Notification Triggers
- Limiting Visit Location by Employee and/or Client Geo Area Assignment
- Assigning Saved Reports to Specific Teams
- External Provider and Medical Profile Enhancements
- Lock Export Option

New Features Available August 21, 2010

Credible delivers new and improved features in Release 5.2 to help you increase efficiency so more time can be spent caring for clients. The multiple schedule enhancements include viewing actual visits and assigning secondary employees to visits. And when you build forms, you can now add conditional questions and take advantage of new injection types. The improvements to notifications include relinking notifications and keeping employees informed with new notification triggers. And finally, several security rights have been added for better access control to the different functions in your system.

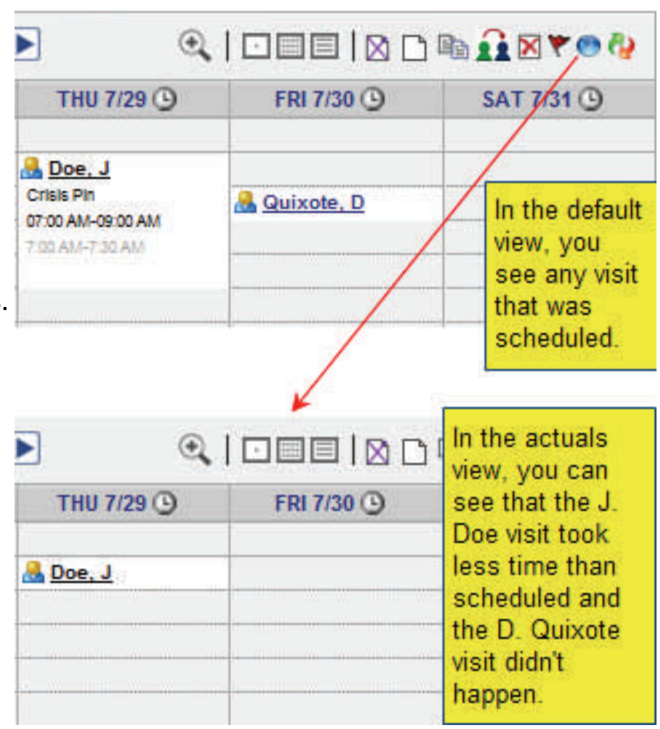
Please refer to the *Release 5.2 Configuration* document for the steps to configure and use all of the new features.

Software Spotlight

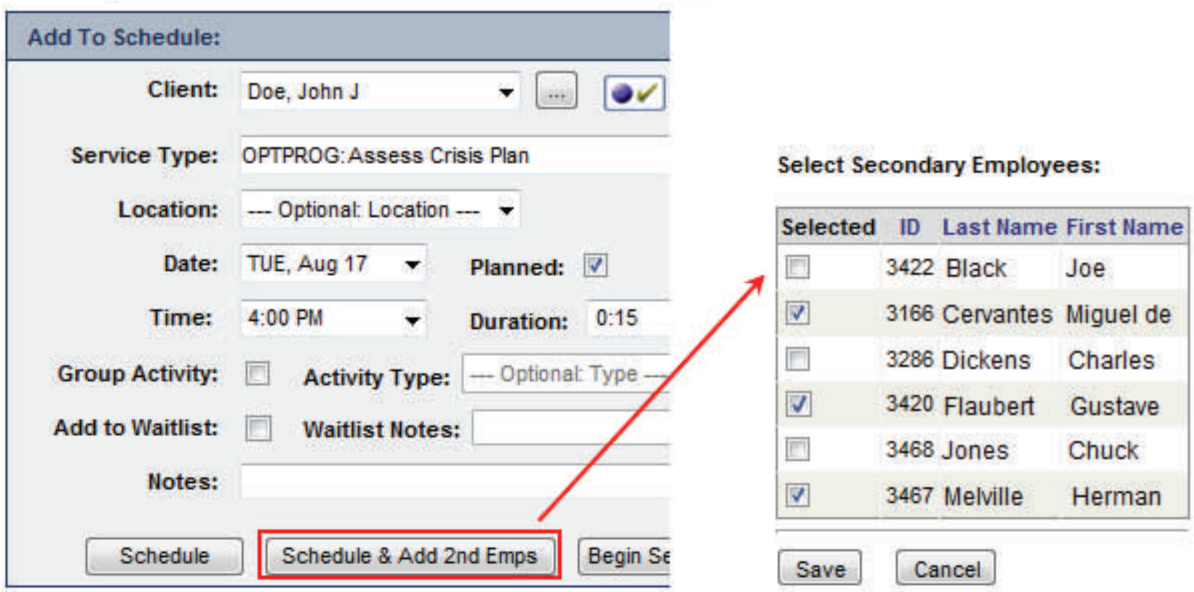
Viewing actual visits in the Schedule, assigning secondary employees to visits, adding conditional questions to forms, relinking notifications, and using new notification triggers

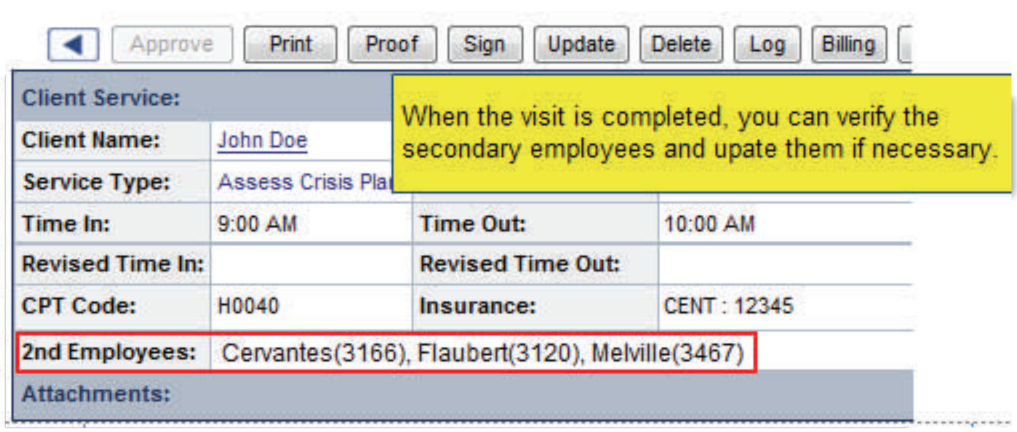
"Actuals" View and Other New Features in the Schedule

Using the new blue circle icon in the Schedule, you can now switch back and forth between the scheduled view you are used to and a new view that only shows actual visits.



Secondary employees and visits — Another schedule enhancement is the ability to assign secondary employees to a visit when you add it to a schedule, after it has been scheduled, and after it has been completed. Secondary employees can view the visit on their schedules but cannot change or start it. The secondary employees feature makes it easy to block time for multiple employees conducting the same visit and verify which employees were at a visit. You can use Advanced Visit Search to find all visits on which an employee is a secondary. Secondary Service Emps has been added to the Custom Fields.





New rights for the Schedule — With this latest release, you can now limit employees so they can only add and update scheduled visits to their own schedules (PlannerAdd and PlannerUpdate) or give them the right to add and update scheduled visits for other employees (PlannerAddOther and PlannerUpdateOther).

Complimentary Webcast Tutorial on the New Features!

To register to attend, click on your preferred date and then send the email that is generated. You will receive a confirmation email shortly.

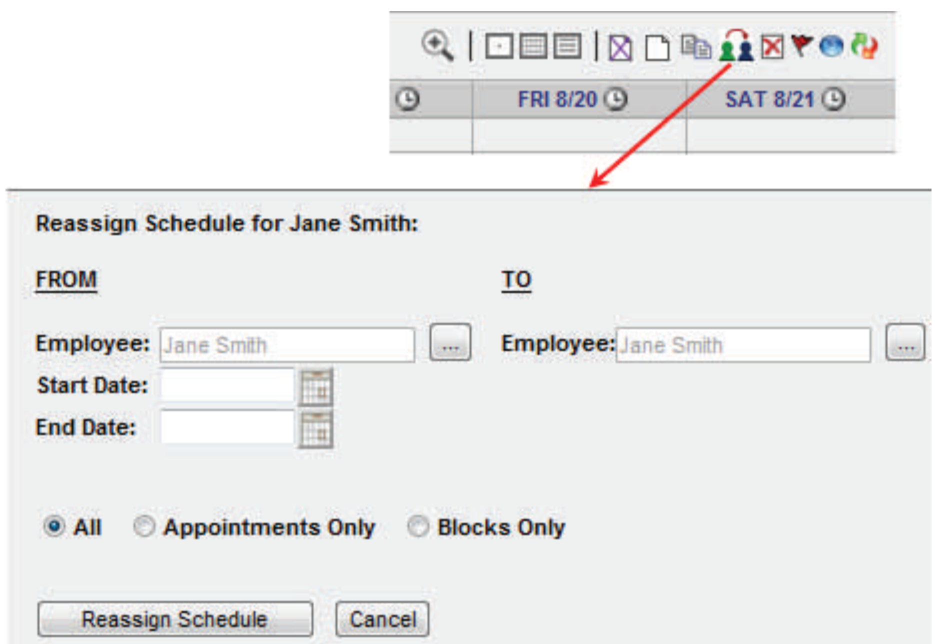
[Friday, August 27
1:00 PM ET]

[Tuesday, August 31
1:00 PM ET]

[Thursday, September 2
1:00 PM ET]

Blocking appointments based on client due — With a new setting in Partner Config, you can block the scheduling of visits where clients owe more than the amount you specify. Note that the blocking does not apply if an employee conducts a visit through the Add Visit or Quick Visit functions.

Reassigning appointments and blocks — Using the new two-person icon in the Schedule, you can now reassign all of the appointments and/or blocks for one employee to another for the time period you specify.



Credible Software Tips

Check here every release for an easy-to-use tip from a Credible team member.

Saving Injected Data in Forms

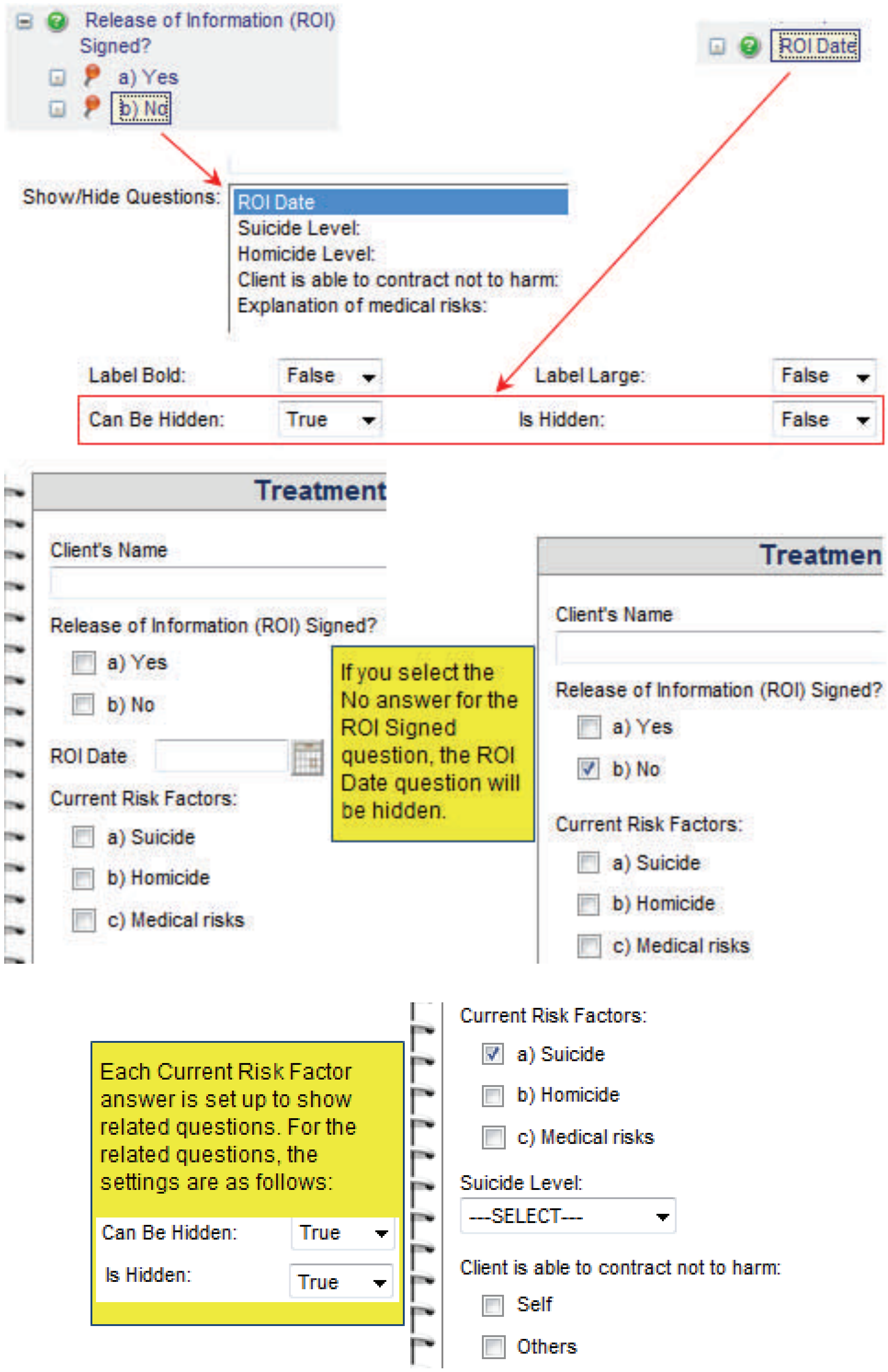
When you inject data from a client's record into a form, the employee conducting the visit needs to click the **Complete** button to save the injected data. To help ensure that this happens, add a question that instructs the employee to click **Complete** at the end of each category that has injected data.

– Julie

Julie Deyett
Account Management

Creating Conditional Questions in Forms

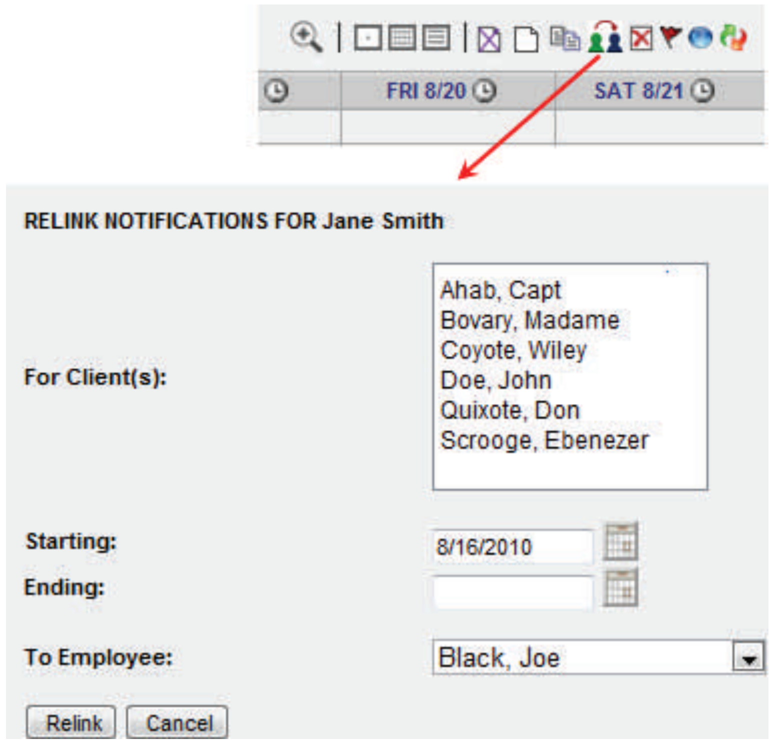
With two new Question fields in Form Builder, you can set up a question so that it is displayed or hidden until a condition is met that hides or shows it.



Do you want to share these release notes with a colleague? Email andorinha@credibleinc.com with your request.

Enhancements to Notifications

If an employee gets unassigned from a client, you can transfer existing notifications about that client to another employee – even if the new employee isn't currently assigned to the client.



With four new client notification triggers, you can have the system send out a notification if an employee:

- Changes the status of a scheduled visit to the status you specify (for example, CANCLD>24HR)
- Enters an episode start date or end dates
- Adds a warning to a client's record — you can select a specific warning level or have the trigger apply to all warnings
- Adds a certification date to a bed board facility or foster home — this trigger is useful for reminding employees when a facility or foster home needs to be recertified.

There is also a new nightly notification trigger you can use to alert employees when their passwords are about to expire. This trigger works in conjunction with the Password Expiration setting in Partner Config.

Did you know that the Credible Library (https://library.crediblebh.com/) is a good source for documentation? Check out the **User Documentation** reference area. Currently it has a setup guide for Credible eRx and user guides for Credible Mobile and Credible Form Builder.

Limiting Visit Location by Employee and/or Client Geo Area Assignment

With the new GeoAreas assignment function and a new Partner Config setting, you can limit the locations available when scheduling or adding a visit to the ones an employee and/or client are configured to work with. Configuring the geo area/location connection involves setting up geo areas and then selecting one for each location. You then use the new GeoAreas function on the Employee and Client nav bars to make the geo area assignments.

When an employee schedules or adds a visit, the Location dropdown will only contains locations that are not associated with geo areas and locations associated with geo areas that are assigned to the employee and client. Geo areas are now included in the Assignments section of client and employee records.

Assigning Saved Reports to Specific Teams

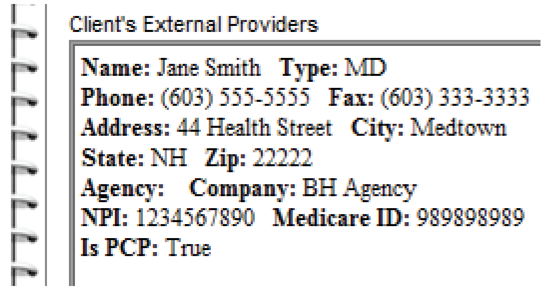
When you save your advanced search criteria as a report, you can now assign the report to a specific team – even if you are not assigned to the team. When a team is selected, only the employee who created the report and the employees on the specified team can view it.

New Rights for Deleting Client and Insurance Payments

With two new ClientPaymentDelete or InsPaymentDelete settings, you can control which users can delete client payments and insurance payments. When you deselect these settings, the delete button is removed from the corresponding screen (Client Payments or Ins Payments).

External Provider Enhancements

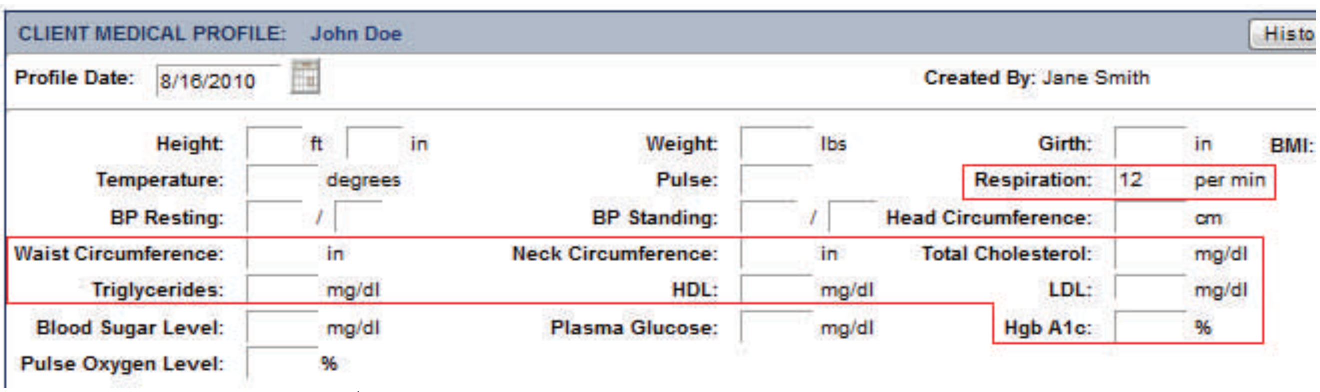
You can now control whether users can view a client's external providers. If the new ExternalProviderView setting is *not* selected, the Ext Provider button will not be on the Client nav bar. You can also inject external provider information into forms.


Client's External Providers

Name: Jane Smith **Type:** MD
Phone: (603) 555-5555 **Fax:** (603) 333-3333
Address: 44 Health Street **City:** Medtown
State: NH **Zip:** 22222
Agency: **Company:** BH Agency
NPI: 1234567890 **Medicare ID:** 989898989
Is PCP: True

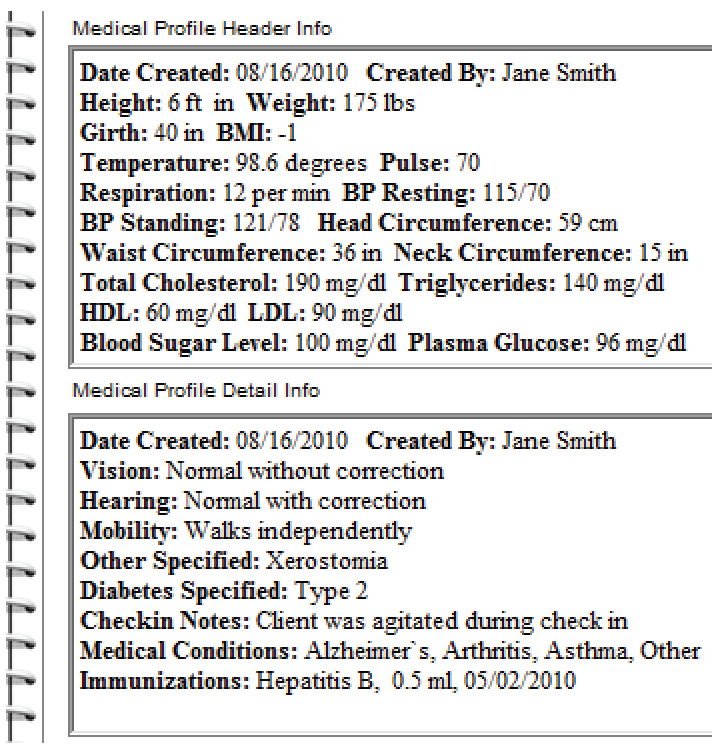
Medical Profile Enhancements

You can capture more medical information about a client with the new fields in the Client Medical Profile screen. And with two new answer formats in Form Builder, you can inject medical profile information into forms.


CLIENT MEDICAL PROFILE: John Doe
Histo

Profile Date: 8/16/2010 Created By: Jane Smith

Height:	ft in	Weight:	lbs	Girth:	in BMI:
Temperature:	degrees	Pulse:		Respiration:	12 per min
BP Resting:	/	BP Standing:	/	Head Circumference:	cm
Waist Circumference:	in	Neck Circumference:	in	Total Cholesterol:	mg/dl
Triglycerides:	mg/dl	HDL:	mg/dl	LDL:	mg/dl
Blood Sugar Level:	mg/dl	Plasma Glucose:	mg/dl	Hgb A1c:	%
Pulse Oxygen Level:	%				


Medical Profile Header Info

Date Created: 08/16/2010 **Created By:** Jane Smith
Height: 6 ft in **Weight:** 175 lbs
Girth: 40 in **BMI:** -1
Temperature: 98.6 degrees **Pulse:** 70
Respiration: 12 per min **BP Resting:** 115/70
BP Standing: 121/78 **Head Circumference:** 59 cm
Waist Circumference: 36 in **Neck Circumference:** 15 in
Total Cholesterol: 190 mg/dl **Triglycerides:** 140 mg/dl
HDL: 60 mg/dl **LDL:** 90 mg/dl
Blood Sugar Level: 100 mg/dl **Plasma Glucose:** 96 mg/dl

Medical Profile Detail Info

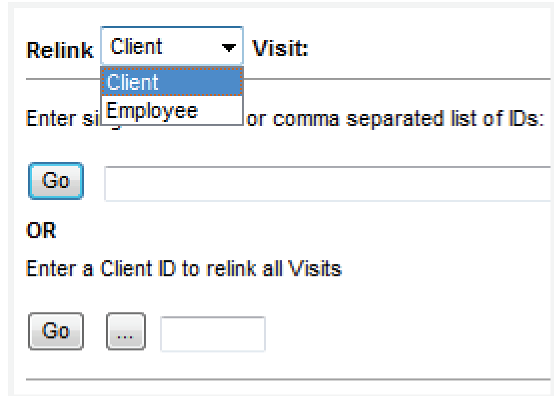
Date Created: 08/16/2010 **Created By:** Jane Smith
Vision: Normal without correction
Hearing: Normal with correction
Mobility: Walks independently
Other Specified: Xerostomia
Diabetes Specified: Type 2
Checkin Notes: Client was agitated during check in
Medical Conditions: Alzheimer`s, Arthritis, Asthma, Other
Immunizations: Hepatitis B, 0.5 ml, 05/02/2010

We want to hear from you!

If you have an idea, question, or comment regarding Credible software releases or our release process, please call or email Credible today.

Relink Visits Function Includes Employee Forms

You can now use the Relink Visits function to relink an employee form to different employees. This new functionality is useful if an employee entering the form mistakenly chooses the wrong employee.



Lock Export Option and Right to Edit Locked Exports

When you create an export report, you can now lock it to prevent other users from editing or deleting it. If you select the new Lock Export checkbox, the run button will be the only button available to other users. You can also lock existing exports.

In the example below, the user accessing the Export List is Jane. She can only edit, delete, and run unlocked exports like the AHCS AR-GL Export and exports she created.

Export List:

#	Export Name	Form/Table Name	Form	Format	Created	Last Run	Template			
228	AHCS AR-GL Export	CUSTOM		HTML	5/28/2010	8/2/10 7:24 PM		edit	delete	run
275	Jane's Locked Export	EmployeeClients		HTML	8/11/2010	8/11/10 10:45 AM		edit	delete	run
272	John's Locked Export	ClientProviders		HTML	8/11/2010	8/11/10 9:45 AM				run

If you want to give certain users the right to edit reports locked by other users, use the new ExportEditLocked setting in the Security Matrix.

Contact Us

888-453-6873
info@credibleinc.com
www.credibleinc.com