CREDIBLE

August 2012 Software Release

Provider Portal, Tasks Portal, Patch Report, & More

August 2012 Release Highlights

- Credible Provider Portal
- Task Tracker 2.0
- Patch Report
- Spell checking treatment plan documentation
- Adding copays for group visits
- Exporting Security Matrix and Client User Security Matrix

New Features Available August 18, 2012

Credible takes the ability to share health-related information to a new level with the introduction of the Credible Provider Portal. With it, you can securely and easily exchange client records with another Credible Partner or a non-Credible entity such as a primary care physician. Non-Credible entities receive the information via secure FTP exchange; they use the Credible Provider Portal to securely send data to a Credible Partner.

Release 7.2 also has two new tools to improve information sharing between Credible and our Partners: the Tasks Portal and the Patch Report. With the Tasks Portal, you can keep track of the tasks you submit and get access to related information such as notes and attachments. And the Patch Report will keep you abreast of “hot fixes” that go out between releases and patches that are slated for an upcoming release.

Other highlights in the release include the ability to spell check treatment plan documentation, a copay option for scheduled group visits, and the ability to export the Security Matrix and Client User Security Matrix.

Please refer to the *Release 7.2 Configuration* document for the steps to configure and use all of the new features.

Software Spotlight

Credible Provider Portal, Credible Tasks Portal, Patch Report, spell checking treatment plan documentation, adding copays for clients in a group visit, and exporting login profiles and assigned rights

Release 7.2 Is Certified for Meaningful Use

CCHIT®, an ONC-ATCB, extended the ONC-ATCB 2011/2012 Complete EHR certification status to this latest release of Credible Behavioral Health Software.

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.

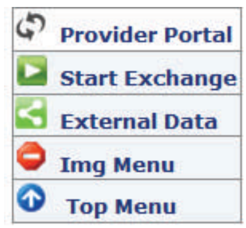
Friday, August 24
2:00 PM ET

Thursday, August 30
1:00 PM ET

Friday August 31
1:00 PM ET

Secure Data Exchange via the Credible Provider Portal

With the Credible Provider Portal, you can securely exchange client and employee records in your Credible system with another Credible Partner or a non-Credible entity such as a primary care physician. If a client relocates or needs services that your agency doesn't provide, such as residential care, you can use the Provider Portal to get the client's information to the appropriate agency quickly and cost-effectively.



When you send client records, you specify which parts of the record you want to send. Currently, you can exchange demographic information, diagnoses, medications, allergies, family members, and the medical profile. Additional elements, such as visit information, will be available for exchange in future releases.

When you receive client records from a Credible Partner, the Provider Portal maps the incoming data fields with the corresponding fields in your Clients table. You can configure the mapping for any custom Data Dictionary field.

Add Mapping Field +

	Source Data Field	Credible Destination Field
✕	Client.First_Name	Name, First
✕	Client.Last_Name	Name, Last
✕	Client.dob	Date of Birth

When you accept the incoming data, the system creates a *new* record for each client.

You need to establish an agreement with each Credible Partner/ non-Credible entity you will be exchanging data with and provide information about the agreement to your Implementation or Account Manager.

Provider Portal Manager

New exchanges to receive

Summary		
1 Client transferred at 8/16/2012 from 'BH Care' organization	Receive/Process	Delete

Exchanges Received & Completed

Record Count	Transfer Complete Date		
2	8/14/2012	View	Delete & Rollback

Credible Software Tips

Shortcut to Your Employee Overview Screen

Did you know that your username in the banner is a link to your Employee Overview screen?

– Sage

Sage McEnery
Technical Lead

Copying Categories/ Questions from One Form to Another

Did you know that you can copy a category or individual question from one form to another? Both forms have to be in edit mode to be able to access the copy and paste icons.

In the form you are pasting into, make sure you have the category container or category screen selected before pasting.

–Jodi

Jodi MacDormand

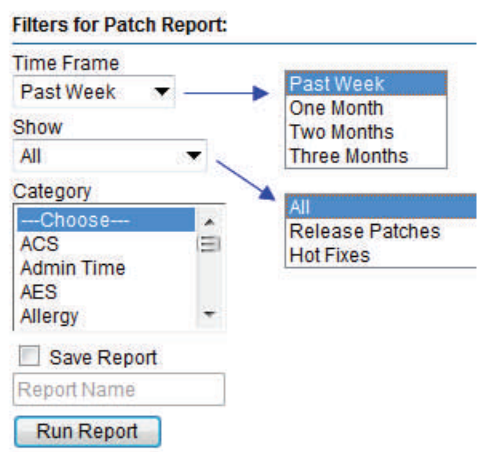
Task Tracker 2.0 – Partner Access into Tasks

With the new Tasks Portal, you have dynamic access to information about each task you submit to Credible. In addition to viewing notes added to a task, you can view and add attachments. There is also a Contacts function so you have access to contact information for staff on your Credible team. Note that the Tasks Portal will be available the week of August 27th.

Keeping Track of Hot Fixes and Release Patches

To further improve Credible-Partner communication, this release includes a new Patch Report. With it, you can stay abreast of all hot fixes and release patches. A hot fix is a task that is pushed out to Partners outside of a release cycle while a release patch is a fix scheduled to occur with a release.

Hot fixes are added to the report after they are pushed out. Release patches are added to the report once they are assigned to a release and are removed after the release goes out. You can filter back up to three months to review hot fixes or view the release patches for the release currently in progress. Once released, you can review all actions taken on release patch items in the configuration notes for the release.

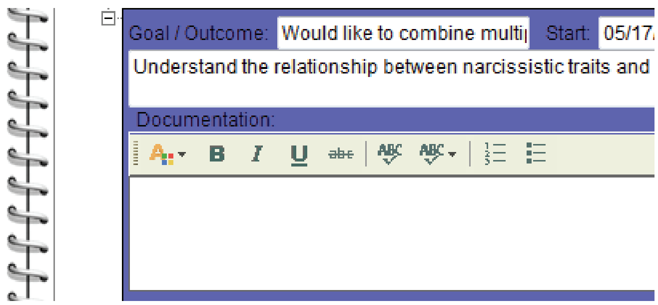


Next release: November 17, 2012

Look for an email with information on what you can expect from the next Credible software release!

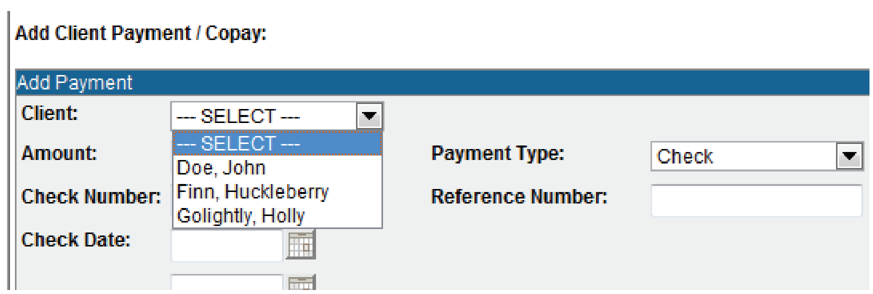
Spell Checking Treatment Plan Documentation

The spell checker and formatting tools that you are familiar with from other text boxes in Credible have been added to the Documentation field for treatment plans. Now you can make sure that the information entered into a client's treatment plan is spelled correctly and looks good! The Documentation field is only available in a form that has a Tx Plus category.

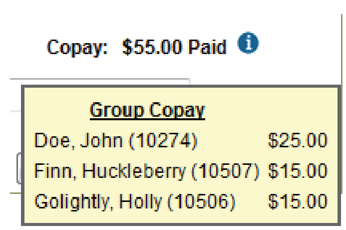


Adding Copays for Group Visits

With the addition of the Add Copay button to the Scheduled Group Visit popup, you can now easily add a copay for each client in a group visit. The button lets you access a group version of the Add Client Payment/Copay screen.



After copays have been entered, the total copay amount paid by all clients in the group displays in the Scheduled Group Visit popup. Hovering over the Copay info icon displays the copay amount paid by each client.



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

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.

Contact Us

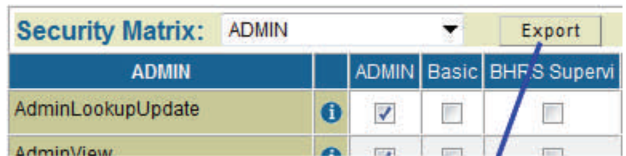
888-453-6873

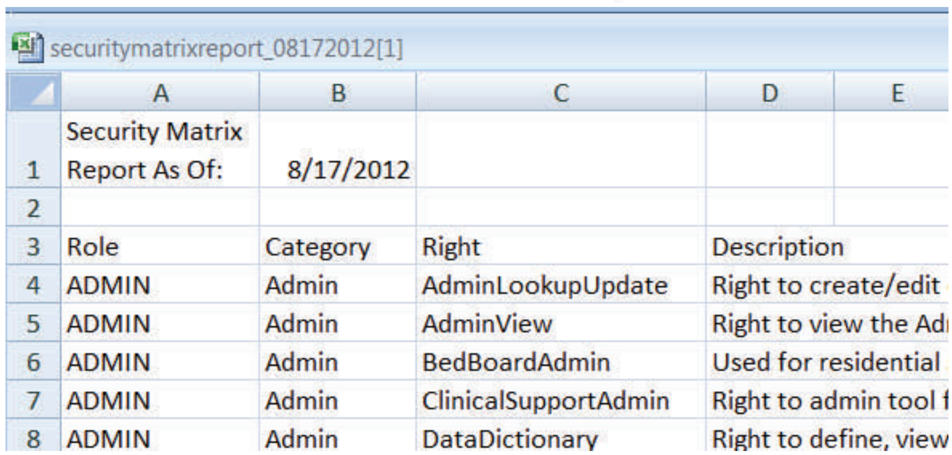
info@credibleinc.com

credibleinc.com

Exporting Security Rights Assigned to Different Profiles

With the new Export button in the Security Matrix and Client User Security Matrix, you can create a spreadsheet that lists the rights assigned to the different login/security profiles. The spreadsheet lists the category the right is in and the tooltip. For the Client User Security Matrix, there is only one category (CLIENT USER).




securitymatrixreport_08172012[1]

	A	B	C	D	E
1	Security Matrix Report As Of:	8/17/2012			
2					
3	Role	Category	Right	Description	
4	ADMIN	Admin	AdminLookupUpdate	Right to create/edit	
5	ADMIN	Admin	AdminView	Right to view the Adı	
6	ADMIN	Admin	BedBoardAdmin	Used for residential	
7	ADMIN	Admin	ClinicalSupportAdmin	Right to admin tool f	
8	ADMIN	Admin	DataDictionary	Right to define, view	

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