CREDIBLE

SECURE. PROVEN. EASY TO USE.

February 2013 Software Release

Disconnected Mode for Exports, 64-Bit Query Builder, & More

February 2013 Release Highlights

- Running exports in disconnected mode
- Cross-browser support for Query Builder
- Tx Plus enhancements
- Real-time processing of credit/debit card payments
- Agency logo on client statements
- Credible Provider Portal enhancements

New Features Available February 16, 2013

With a focus on maximizing the performance of your Credible system, this release includes a new version of the Export Tool that runs exports in a disconnected mode. You can now perform other tasks in Credible while your run request is being processed and access the export file once notified of its completion. The new behind-the-scenes run mode will help ensure system responsiveness when large exports are processed and eliminates the output limit of 500,000 rows.

This release also marks the introduction of a 64-bit version of Ad Hoc Query Builder. You can now use the export builder with any of the supported browsers and no longer need the Microsoft ActiveX Analyzer Tool to use Query Builder with Internet Explorer.

Other release highlights include future dating treatment plans and printing them for client review, processing credit/debit card payments in real time, and including your agency logo on client statements.

The Credible Provider Portal continues to be enhanced. You can now update existing client records with data received in an exchange and exchange visit details in a PDF.

Please refer to the Release 8.0 Configuration document for the steps to configure and use all of the new features.

Software Spotlight

Disconnected mode for running exports, cross-browser support for Ad Hoc Query Builder, treatment plan enhancements, real-time processing for credit/debit card payments, agency logo on client statements, and Credible Provider Portal enhancements

Release 8.0 Is Certified for Meaningful Use

CCHIT®, an ONC-ATCB, extended the ONC-ATCB 2011/2012 Complete EHR certification status to Release 8.0 on February 5, 2013.

Complimentary Webcast Tutorial on the New Features!

Register for a webinar by clicking on a date below. Once registered, you will receive an email confirming your registration with information you need to join the webinar.

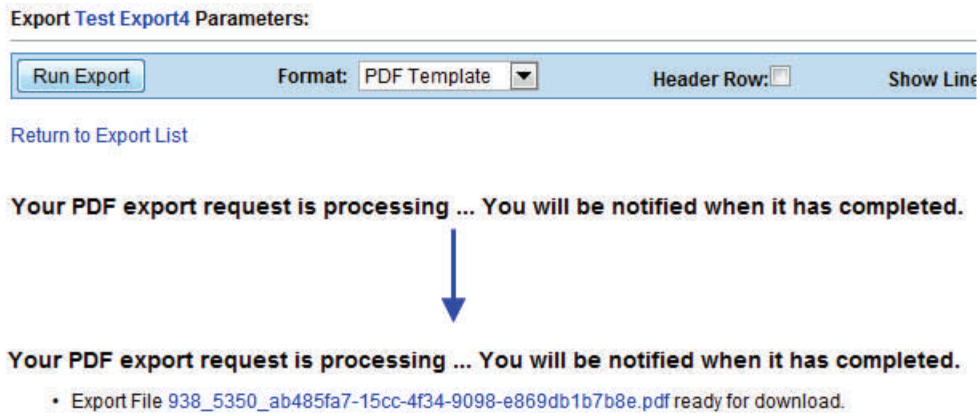
Tuesday, February 26
11:00 AM EST

Tuesday, March 5
12:00 PM EST

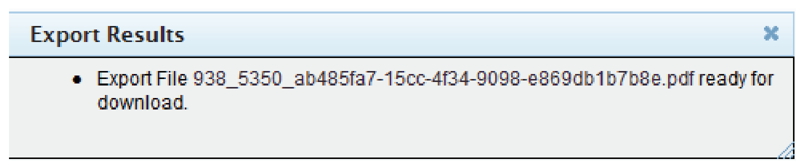
Wednesday, March 6
4:00 PM EST

Running Exports in Disconnected Mode

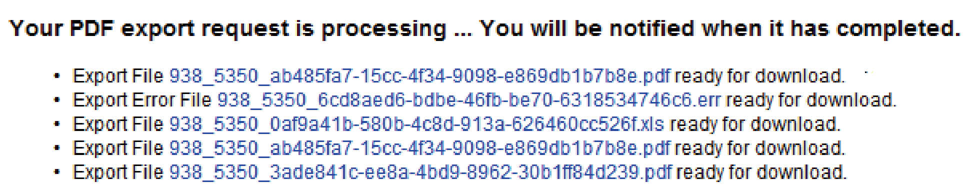
To help system performance and eliminate the time outs that occurred when running large exports, all exports will be run in disconnected mode. If you stay on the Run Export screen, a "ready for download" link will be added when the export file is ready.



If you navigate away from the Run Export screen, a popup will display with the ready for download link.



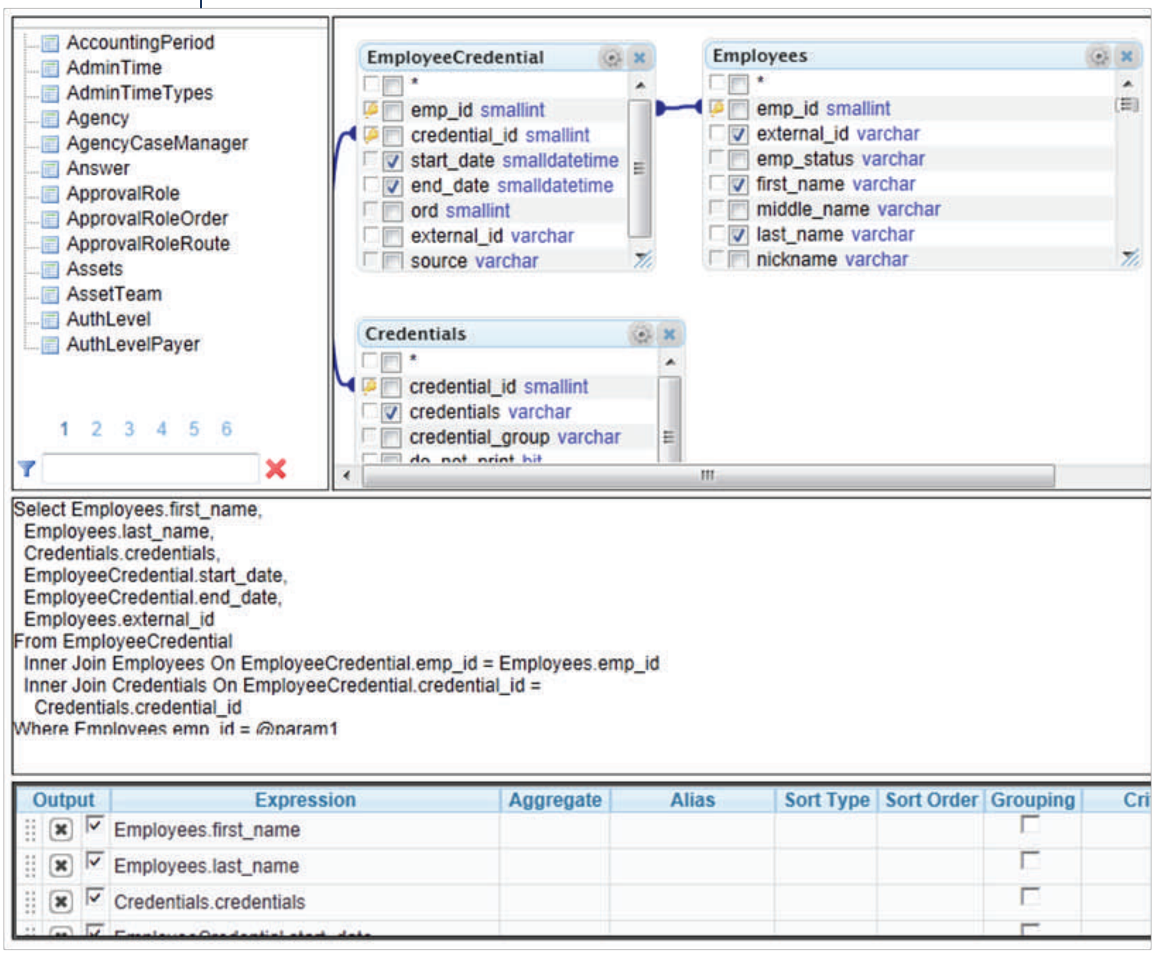
As you run additional exports, they will be added to the Export Results screen/popup. If an error occurs when running an export, an error file (.err) will be made available.



If you select an Excel export format, a large export will be split into multiple worksheets.

Cross-Browser Support for Ad Hoc Query Builder

With the 64-bit version of Query Builder, the tables you can select for reporting purposes are on the left side of the screen and the list is pulled from the active list of tables each time you use the Query Builder. For easier viewing, only 13 tables are displayed at a time.



Other user interface changes include:

- Removal of the object/expression tree from the screen
- Display of the raw SQL above the Expressions table
- Addition of a delete icon in the Expressions table

Next release: May 11, 2013

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

Tx Plus Enhancements

You can now create multiple Tx Plus plans for the same program for a client as long as the date ranges do not overlap. This makes it possible to create a additional Tx Plus plans for a client with future start dates. And if you need to present a future Tx Plus plan to a client for review, you can print it out from the Client Tx Plus screen with the new print button. The fully expanded Tx Plus plan will print in HTML or PDF depending on how your system is configured.

Start planning for the

CREDIBLE CONNECTIONS Partner Conference

SECURE. PROVEN. EASY TO USE

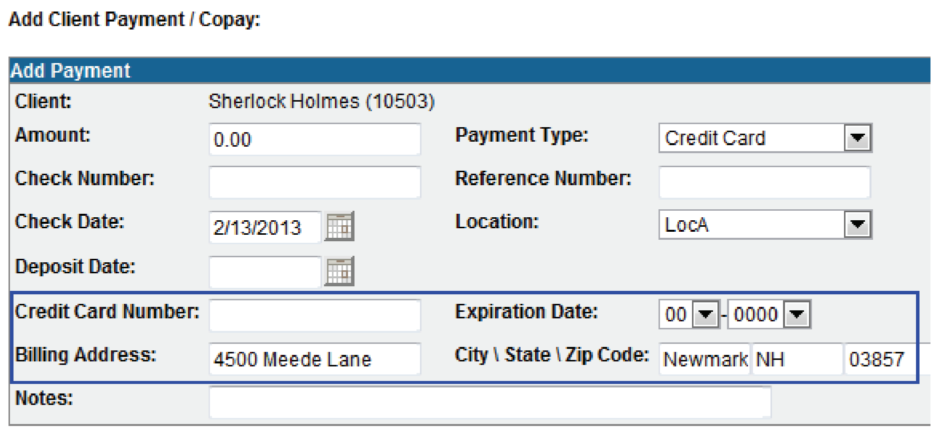
March 13 - 15, 2013
at the Baltimore Marriott Waterfront

Credible group rate
available until March 1st

Click [here] for all the details including a preliminary agenda

Real-Time Processing of Credit/Debit Card Payments

The Client Payments function has been integrated with a payment gateway so you can accept credit card and debit card payments in real time. You can accept a credit/debit card payment from a client at the time of service or via the Payments or Manage Client Payments functions.



After you enter the card number and expiration date and save the payment, there is an instantaneous check to see if it was accepted or declined. If declined, an error message displays on the Add Payment screen and you can make the necessary corrections. If accepted, the Client Payments screen displays and the authorization number sent back from the payment gateway is stored in the Reference # field. For security/privacy purposes, the credit/debit card information entered is not stored in your system.

The ability to process credit/debit card payments in real time is a contract item. For more information, send an email to contracts@credibleinc.com.

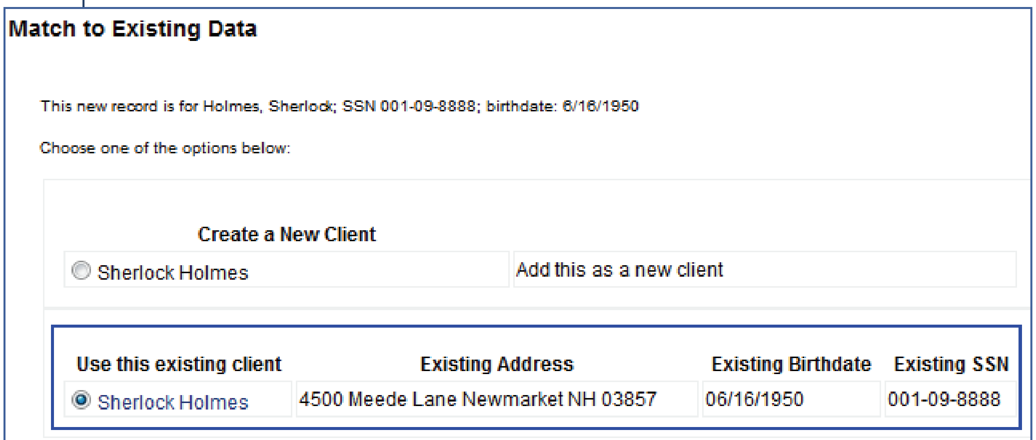
Include Your Agency Logo on Client Statements

With a new Partner Config setting, you can now display your agency logo in the upper left hand corner of each client statement. When the client statement logo functionality is enabled, the system will use the same logo you uploaded to display in the upper left corner of your Credible system.

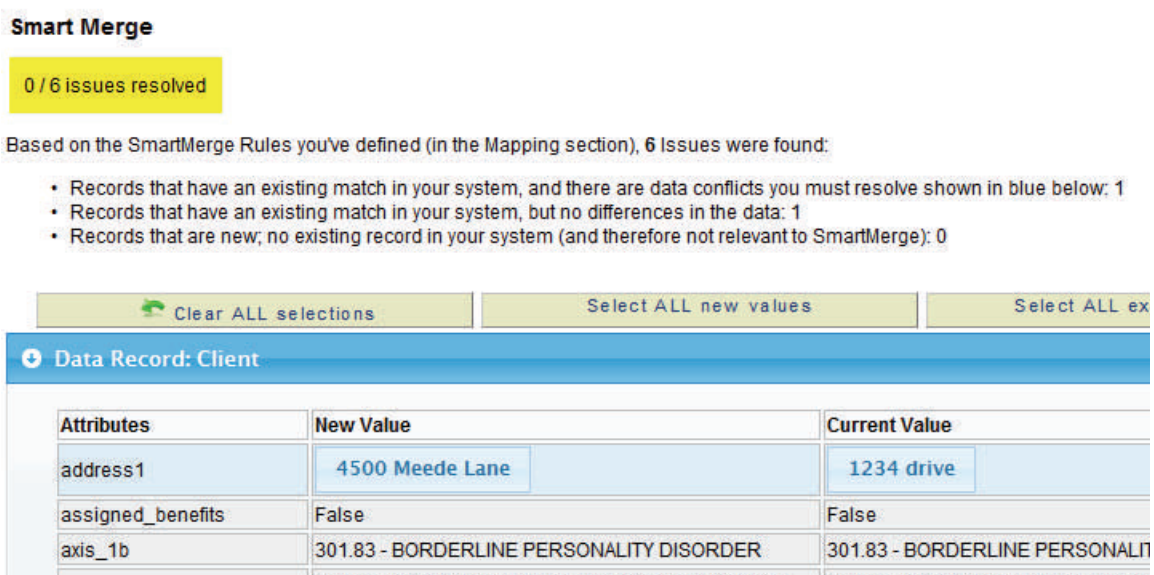
Do you want to share these release notes with a colleague? Email sarah@credibleinc.com with your request.

Credible Provider Portal Enhancements

Updating existing records — When you receive a data exchange, the Provider Portal now checks to see if the clients in the exchange exist in your system. If a match is found, you can choose to update an existing client's record or create a new record (the default).



The Provider Portal then uses Smart Merge to identify data conflicts between the existing record and the record you received. You pick and choose which fields in a client's record should be updated with new values.

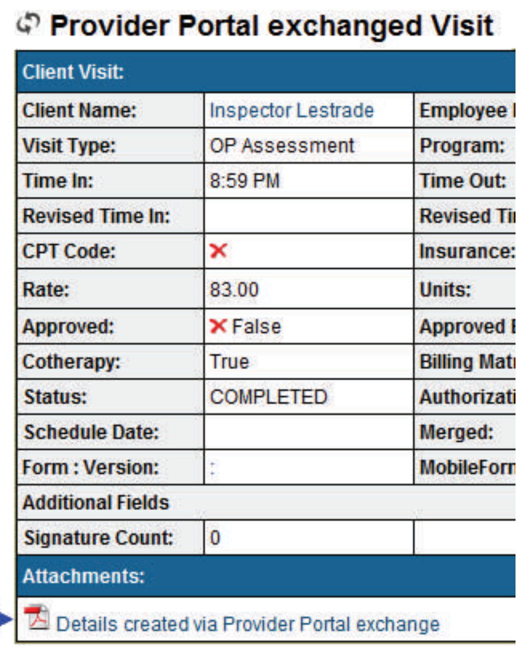


Smart Merge requires a one-time setup. For each part of a client record that you can receive in an exchange (allergies, diagnosis, family, and so on), you specify the fields that the Provider Portal will use to determine uniqueness – the Smart Merge rules. The fields you select depends on the record type. For example, for medications, you probably want the fdb_medid and start_date as unique attribute fields since a client may have multiple meds with the same fdb_medid.

We want to hear from you!

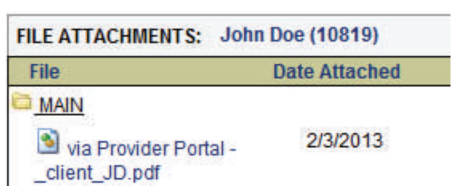
If you have an idea, question, or comment regarding Credible software releases or our release process, please call or email Credible today.

Exchanging visit details — Sending and receiving client visits through the Provider Portal has been enhanced to now include visit documentation. When you send a client visit to another Partner or non-Credible entity, a PDF of the print view is created in a behind-the-scenes process and sent along with the record.

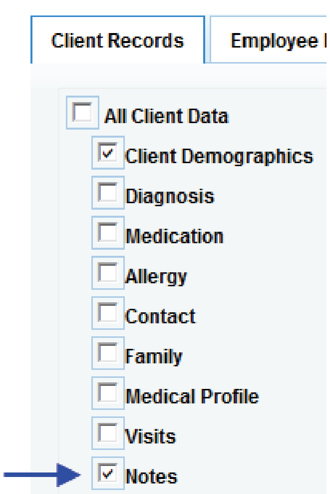


When you receive a client visit from another Credible Partner, the PDF will be attached to the visit record.

The ability to send attachments has an even wider use for non-Credible entities because they are not limited to sending visit details. When you receive an exchange with attachments from a non-Credible entity, you can view the attachments and attach each one to the appropriate client record in the exchange. The files are then accessible via the Attachments function on the Client nav bar. As shown below, "via Provider Portal" is added as a prefix to each attachment received from a non-Credible entity.



Exchanging client notes — Notes have been added to the list of client data that you can send and receive in a Provider Portal exchange. While you cannot select specific notes for an exchange (all notes for the client will be sent), the recipient can accept or decline each note.



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