# CREDIBLE

## March 2007 Software Release

# Spring Into New Features

**March 2007 Release Schedule Highlights**

**March 2, 2007**

- Employee Advanced Search
- Resource Management
- Predefined Groups
- Auths/Warnings for Scheduling
- Injected Dx
- Report Upgrades
- Billing Enhancements

**April 2007**

- Look for an email from us with more info on what you can expect from the next Credible software release!
- Coming soon: Laptop Mobile, Credible eRx Module and more.

**Complimentary Webcast Tutorial on Software Upgrades!**

Tue, 3/6/07 2:00 PM EST

Thu, 3/8/07 2:00 PM EST

Mon, 3/12/07 2:00 PM EST

Wed, 3/14/07 2:00 PM EST

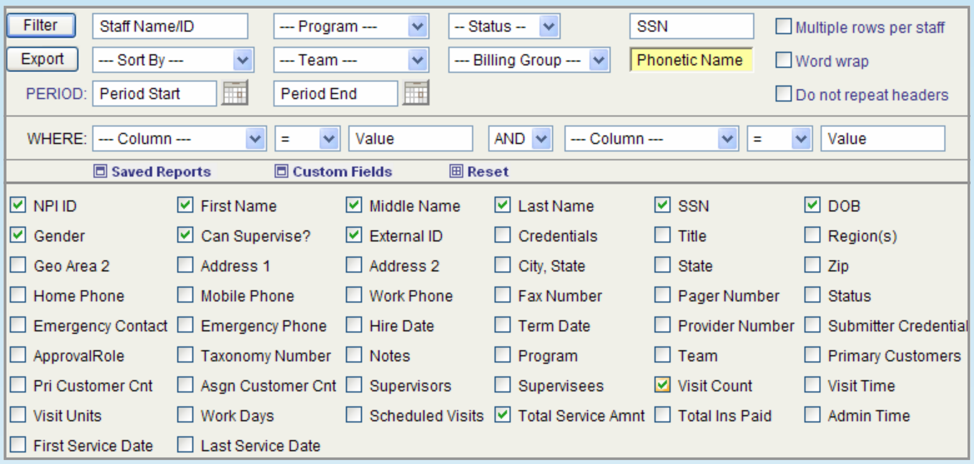
**New Features available March 3, 2007**

Spring into new features, upgraded searches, additional management tools, improved group management and much, much more. New features simplifying your ability to manage your organization and provide quality care include: Employee Advanced Search, Resource Management, Group Naming and Scheduling and Enhanced Reporting.

**March Software Spotlight:** Employee Advanced Search, Real-time Authorization and Warnings Checks, Resource Management, Predefined Groups, Injected Dx

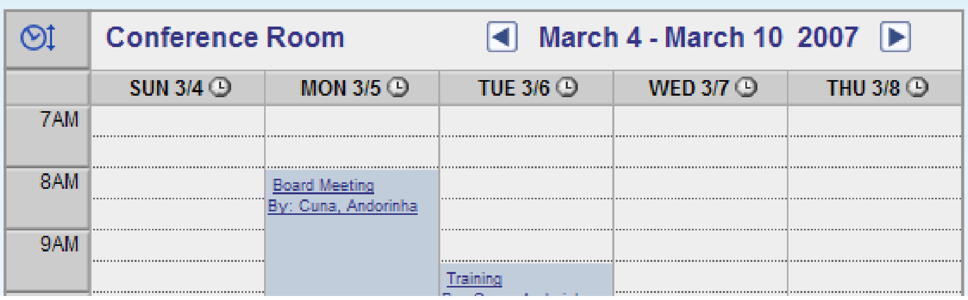
## Employee Advanced Search

Productivity and Ad-hoc reporting on employees available! Credible has extended the Advanced Search capability to Employee data. All of the great ad-hoc query features currently available for Clients and Billing information has been extended to employees. Sort, customize and save results using over 40 Custom Fields that are linked real time to your Employee information. Track employee performance by searching for items such as Visit Count, Total Service Amount and Work Days. View employee information for a given team. You now have the ability to run advanced reports, save reports for future viewing and even export this data. This is your data, we want you to be able to generate any and all reporting information you need.




## Resource Management—Schedule conference rooms, vehicles, etc.

Resource Management allows you to schedule, reserve and track organizational resources such as meeting rooms, training rooms, projectors, company vehicles, etc. Quickly schedule and view one time or reoccurring events. Team specific capabilities also available. Each resource has its own Schedule where you keep track of those resources that are used by many people. This assures that your resources are being well managed.



**Wed, 3/14/07**
**2:00 PM EST**

Click on your preferred date to register to attend. Hit reply and you will receive a confirmation email shortly.

**Credible Software Tips:**

Check here every release for easy-to-use tips from Credible team members.

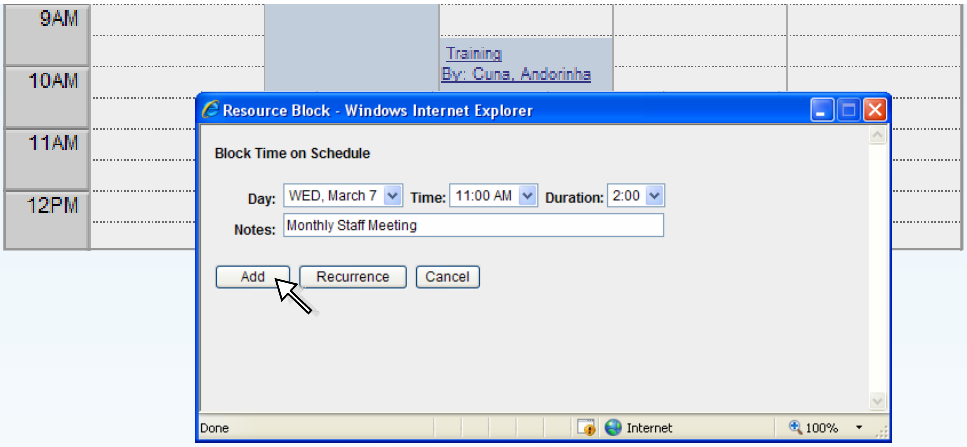
*We welcome Adrienne Gamble as our newest Account Manager.*

**Secure Internal Messaging Simplifies Communication:** Did you know you can send secure, internal "instant messages" to other staff? This can be set up from your home page, schedule or employee list. It even works if they are not logged in. Send them a message and they will received it as soon as they log in!

- Adrienne

Adrienne Gamble
Account Manager

Do you want to share these release notes with a colleague? Do you need a PDF version of this email for printing? Click here with your request.

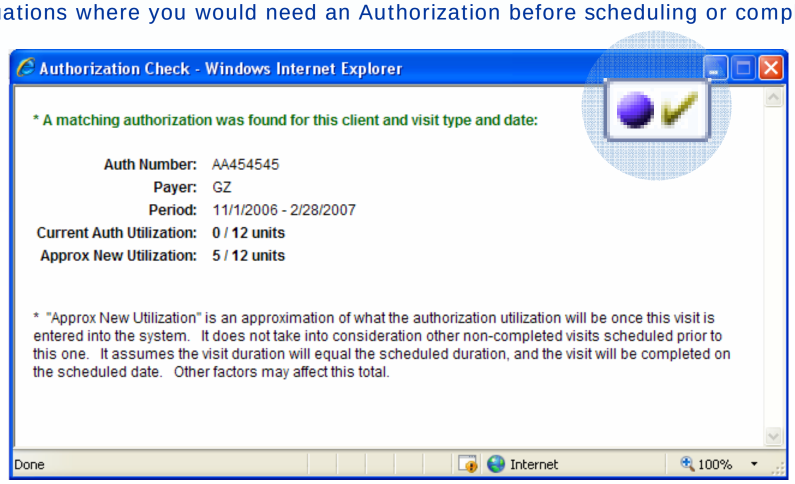



## Predefined Groups — Naming, Scheduling, Management

Using the Predefined Group feature, you now have the ability to assign Clients to specific Groups. This feature allows efficient scheduling for a predefined group in one click. For instance, if you have a group set for Clients receiving service in a group setting, the event may be scheduled for the entire Group at the same time. Once you begin the Visit, you will be taken to the Visit Web Forms, where you can edit and complete the Visit for each person in the Group. Each Visit is saved individually, and you are able to go back to complete unfinished Visit entries if you cannot enter all of the data in one sitting.

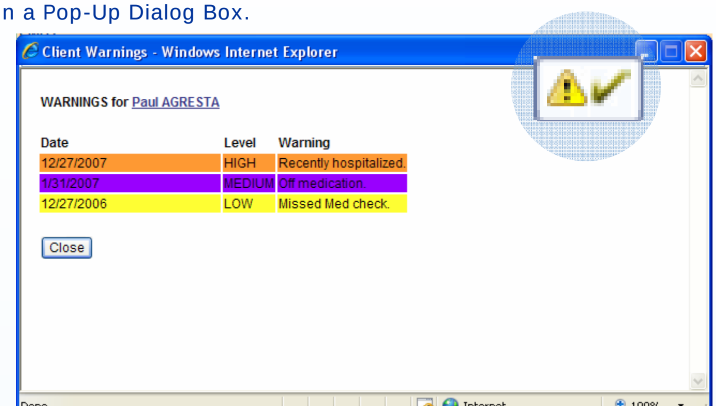
## Authorizations for Scheduling

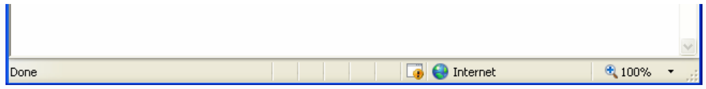
While scheduling a Visit, you can check to see if an Authorization exists for that potential visit. When you provide the Client Name and Visit Type, the system will look for the best Authorization match for the Scheduled Visit. This will make you aware of any situations where you would need an Authorization before scheduling or completing a Visit.




## Client Warnings for Scheduling

You can also now check Warnings when scheduling a Visit. Select a Client, and click on the new Check Warnings button. If there are any Warnings for that Client, they will be displayed in a Pop-Up Dialog Box.






## Injected Diagnosis — available for web and mobile users

Similar to Credible's Injected Tx Plan functionality, we have now expanded that to include Injected Diagnosis. When completing a document/visit, the Client's most recent Diagnosis can be injected into your documentation. No more need to search around for Client information, see the Diagnosis codes directly on the screen while documenting.

## Duplicate Client Check Enhancement

We've added new features to simplify your checking for duplicate clients. You now have the ability to make sure the Client you are entering into the system is not a duplicate. Once you provide the First Name and Last Name OR the Social Security Number OR the External ID, you can use the Check Duplicate Client button on the Add Client page to see if any Clients match the criteria you entered. All possible matches are displayed.

## Gender Block on Schedule

For your Clients that can only be seen by one gender, there is a new feature to note the Gender Preference for a Client. Once this field is manually set, when you schedule a Visit with the wrong gender, you will be notified real-time of the problem. You will only be allowed to schedule Visits with Providers of the Gender specified as the Preference for that Client.

## Block Visits for Providers

You can now block visits for Providers without the proper Credentials. When you try to Schedule a Visit for a Client with a Provider that doesn't have the required Credentials, you will be warned and prevented from doing so.

## Billing Enhancements

**Custom Red X:** You now have the ability to create your own Red X entries. You can cause Visits to Red X for missing required fields, for being non-numeric when numeric is required, and for Visit dates that occur before or after required times, for various reasons. You can also cause Visits to Red X if the data set for a field is too long or too short. You can Red X Visits that are completed after an Employee's Term Date. You can Red X Visits for Clients who have missing data for a custom Client Extended field. You can Red X Visits if the Client Insurance was updated after the Visit was completed. The possibilities are endless with this customizable list.

**Payer Specific Rates:** On the Billing Matrix, you can now add a rate specific to a Payer. You are allowed to enter one new rate for each Payer in the system, and there will also still be a default rate. When the Visit entered matches the criteria for a Billing Matrix entry, the system now checks to see if there is a rate specific to the Payer. If so, that rate will be billed, otherwise, the default rate will be used.

## Authorizations for Individual Policies

There is a new field in the Client Insurance record called Auth Req (Authorization Required). When this is set to FALSE, it will override the Auth settings for the Billing Matrix and Payer, and it will not Red X for an Auth Required for a Visit being batched to that Payer. If this value is set to N/A, it will use the default Auth settings for the Billing Matrix or Payer. This is an optional feature.

## Resubmit on "Search Claims Visits"

We've expanded the capability of Search Claims Visits (SCV). We've added a Resubmit button on the Search Claims and Visits screen to simplify billing, reporting and tracking. Visits with a Batched or Pending status can be resubmitted directly through this screen.

## Report Updates— Additional Filters Added

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A new required filter has been added to the **Cost Center Reports**. The report is now viewed by Quarter. **Balance Detail Report** has been improved so you can now see multiple payers on one report, allowing the payer field to now be optional.

## New Fields for Searches

**Client Advanced Search:** Client Extended Fields are now available on the Client Advanced Search page. They appear in the Custom Fields section and can also be used for Sorting.

**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!**

CREDIBLE

Secure, proven, easy to use, innovative, affordable and flexible.

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