

Messaging in Credible Client Portal, Wiley in Tx Plus, & More



New Features Available May 19, 2012

Credible continues its commitment to support the client-agency relationship with a new messaging function in the Credible Client Portal and a messaging hub in your Credible system. Clients initiate the communication and the appropriate staff use the messaging hub to respond. And on the treatment planning front, there are two new ways to save your staff time and help your agency standardize treatment plans:

- Contract to have Wiley treatment plan libraries integrated into the Tx Plus module. When you select a Wiley treatment plan, predefined problems and associated goals, objectives, and interventions are available via dropdowns.
- Create and use Tx Plus templates — create the templates from scratch or from existing Tx Plus plans.

May 2012 Release Highlights

- Client-Agency messaging functionality
- Wiley integration in Tx Plus
- Tx Plus templates & other enhancements
- Billing Groups assignment function
- Reporting e-prescribing G-codes

Two other highlights of Release 7.1 include the ability to report e-prescribing G-codes and a new Billing Groups assignment function — you can now control which billing groups are available to staff when signing and submitting or updating a visit.

Please refer to the *Release 7.1 Configuration* document for the steps to configure and use all of the new features.

Software Spotlight

Client-agency messaging functionality, Wiley libraries in the Tx Plus module, Tx Plus templates, ability to report eRx G-codes, Billing Groups assignment function

Release 7.1 Is Certified for Meaningful Use

CCHIT[®], an ONC-ATCB, extended the ONC-ATCB 2011/2012 Complete EHR certification status to Release 7.1 on May 9, 2012.

Credible BI Training in July

When:
July 16 & 17, 2012

Where:
[Courtyard by Marriott
Boston-Cambridge](#)
777 Memorial Drive
Cambridge, MA 02139

Credible group rate of
\$159/night is available
until June 15th

Learn how to maximize the
use of Credible's graphical
reporting module. **Credible
BI Training is mandatory in
order for user rights to be
activated.**

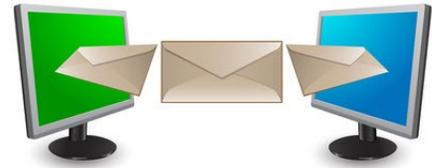
Registration fees: TBD

Registration form:
Click [here](#) to complete the
registration form or copy and
paste the link below in a
browser:

[https://events.r20.
constantcontact.com/
register/eventReg?oeidk=
a07e5xi-
oxig2d59c3c1&oseq=](https://events.r20.constantcontact.com/register/eventReg?oeidk=a07e5xi-oxig2d59c3c1&oseq=)

Secure Client Communication via Credible Client Portal

With the new Messaging function in
the Credible Client Portal, a client user
can securely send a general message
to your agency or one about an active
medication or scheduled appointment.



If the message type is Medication
Refill or Scheduled Appointment, the client user selects from a list of the
client's active meds or appointments scheduled for the current date and
future dates. Note that with the first release of the Messaging functionality,
messages can only originate from a client user.

The new function utilizes *offline* messaging and the messages are *not*
delivered via email. You can configure "disclaimer text" to convey the offline
nature of the Messaging function to client users. As shown below, the text
displays above the Messaging screens in the Client Portal.

In case of an Emergency, call 9-1-1. Don't send a message as it may
not be checked until the next business day

MESSAGING: John Doe (10274)

Compose Message

Type of Message: Medication Refill

Medication in Reference: Xanax 0.5 mg Tab

Subject: Low on Xanax

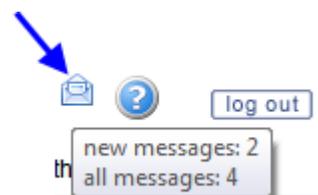
Can you please refill my son's script for Xanax?

Thanks, Ginny Doe

Cancel Send Message

A client user does not pick the recipient for the message. By default, it goes to
the client's case manager. If one is not assigned, the message goes to all
primary employees for the client. If there are no primary employees, it goes to
all employees assigned to the client.

In your Credible system, an envelope icon displays
in the banner to notify employees that a message
has been sent from the Client Portal. Hover over the
icon to see the number of new messages and
replies. You can control how frequently the system
checks for new messages with the Check Message
Interval setting in Partner Config.



Employees access the Messaging Hub screen by clicking the envelope icon or the new Messaging Hub button on the Employee nav bar.



MESSAGING HUB: Jane Smith			
Sender	Subject	Message Date	Options
Doe, John	Not feeling well (General Message)	05/17/2012 01:22 PM	
Doe, John	Dosage change (Medication Refill - Adderall 30 mg Tab)	05/17/2012 01:15 PM	

In both the Client Portal and employee Messaging Hub, the number of replies for a message is indicated via a speech bubble. In the message thread, the original message is at the top followed by the most recent reply.

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.

[Tuesday, May 22](#)
1:00 PM ET

[Wednesday, May 23](#)
1:00 PM ET

[Tuesday, May 29](#)
1:00 PM ET

MESSAGING: John Doe (10274)

Subject	
Low on Xanax (- Xanax 0.5 mg Tab)	

Dear Dr. Smith, can you please refill my son's script for Xanax? Thanks, Ginny Doe

On: 5/7/2012, Smith, Jane

Using the Portal is a great idea!

On: 5/7/2012, Doe, John (10274)

Thanks for the speedy reply
Can I use the Client Portal to request an appt time?

On: 5/7/2012, Smith, Jane

John needs to come in for a new appointment before I can refill his Xanax script. Please contact the office to schedule an appointment.

Like the other functions in the Client Portal, you control which client users have access to the Messaging function. As a reminder, you need to have your Implementation or Account Manager turn on the Client Portal for your system.



Integration of new or upgraded Instant Messaging functionality and other messaging features in the Messaging Hub

New Credible Website

Credible is excited to announce the launch of our new website, which goes live Friday, June 15, 2012!

The website features innovative design, rich video content, and additional resources for Partners such as Recent News. Partner Conference information will be even more easily accessible on the new site. Point your browser to credibleinc.com on June 15th to check out all the new features.

Wiley Integration in Tx Plus

To achieve consistency in the problems/goals/objectives/interventions in Tx Plus plans – which ones are used and how they are described – you can now contract to use the Wiley treatment planning “library” as part of Tx Plus. If you select “Use Wiley” when you are building a Tx Plus plan, the predefined problems/goals/objectives/interventions for the treatment plan you select are available via dropdowns.

Program: -- Select Program -- Start: 05/05/2012
Methods: TXPLUS
Use Wiley:
COC: Adult
COC: Adolescent
Employee Assistance
Pastoral Counsel

Problem: Start: 05/05/2012
Select Axis
Anxiety
Chemical Dependence
Conduct Disorder/Delinquency
Depression
Eating Disorder

Problem: Depression Start: 05/05/2012 Target: 05/26/2012
Select Axis
Goal: Start: 05/05/2012 Target:
1. Acknowledge the depression verbally and resolve its causes, state.
2. Elevate the mood and show evidence of usual energy, activities.
3. Reduce irritability and increase normal social interaction with family and friends.
4. Show a renewed typical interest in academic achievement, so

You can set up your system to use Wiley exclusively or let staff use Wiley and free-form entry for the different components in a Tx Plus plan.

Using the Wiley treatment planning library requires an addendum to your contract. For more information, contact contracts@credibleinc.com. Once you have contracted to use Wiley, your Implementation or Account Manager needs to turn on the functionality in your system.



Option to create your own library of treatment plans with predefined problems/goals/objectives/interventions that meet the specific needs of your agency

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

Tx Plus Templates and Other Enhancements

To save time when building Tx Plus plans, you can now save existing plans as templates and have staff use them instead of building the treatment plan structure on the fly. You can also use the new Admin function TxPlus Templates to build a Tx Plus template and manage existing templates. Because the Admin function is just for templates, the "Builder" screen does not have the Program dropdown and Date fields that are in the Client Tx Plus Builder screen.

TxPlus Template Builder:

TxPlus Items

- Problem
- Goal
- Objective
- Intervention

Save Cancel

Use Wiley: Save Tx as Template: Tx Name:

For existing Tx Plus templates, you can view, edit, and delete them from the Tx Plus Templates list screen.

TxPlus Templates:

New TxPlus

View Closed

Template Name			
<input type="button" value="select"/>	<input type="button" value="edit"/>	<input type="button" value="delete"/>	Addiction: Narcissistic Traits & Psychosis

When you are in the Client TxPlus Builder screen for a client, you can load an existing template and use it as is or make changes and save it as a new template. The other option is to save an existing Tx Plus plan as a template. In this scenario, the system does not retain the program selected, any dates entered, or any documentation entered against the plan. In addition, start dates are not required like they are when you save a Tx Plus plan for a client.

CLIENT TxPlus Builder: John Doe (10274)

TxPlus Items

- Problem
- Goal
- Objective
- Intervention

Save Cancel

Program: -- Select Program -- Start: 5/17/2012 Target:

Use Wiley: Save Tx as Template:

Load Template: -- Select Template --
 -- Select Template --
 Addiction: Narcissistic Traits & Psychosis
 coc adolescent

End: Active:

Save Tx as Template: Tx Name: Addiction TP f
 Load Template: -- Select Template --

**Next release:
August 18, 2012**

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

Release 7.1 includes several other enhancements to Tx Plus including:

- Active flag to control availability of Tx Plus plan in a form
- Locking existing Tx Plus visits against Tx Plus plan edits
- New notification trigger — TxPlus Problem Add — and Tx Plus support for existing treatment plan triggers
- Ability to make Tx Plus plans available in Client Portal
- Active Tx Plus plans in Client Profile Print View
- Autopopulating of end date in sublevels without one
- Collapse All/Expand All link in Tx Plus form
- ADD TX PLUS link in web form (eliminates need for Intake nav bar)

Assigning Billing Groups to Your Employees



To help ensure that employees select the correct billing group for each visit, you can now control which ones are available when they enter, sign and submit, and update a visit.

If you do not assign billing groups to an employee, all groups will be available in the Billing Group dropdown. If you assign one or more billing groups, only the assigned ones will be available. As shown on the right, there is one exception to this. If you assign one or more billing groups and have an unassigned billing group set as the default, the default plus the assigned ones will be in the dropdown.

EMPLOYEE BILLING GROUPS: Jane Smith		
Billing Group	Assign	Default
Addiction Psych	<input type="button" value="assign"/>	<input type="button" value="no"/>
Autism	<input type="button" value="unassign"/>	<input type="button" value="no"/>
BH 123	<input type="button" value="assign"/>	<input type="button" value="no"/>
General Services	<input type="button" value="unassign"/>	<input type="button" value="no"/>
Group Services	<input type="button" value="assign"/>	<input type="button" value="no"/>
Integrated	<input type="button" value="assign"/>	<input type="button" value="yes"/>

When the default billing group is set or changed in the Employee Billing Groups screen, it will be reflected in the Employee Profile and vice versa. You can assign a default to an employee without assigning any billing groups (all billing groups will be available in the Billing Groups dropdown). The new Billing Groups function does not affect the functionality behind the billing group assignment for Billing Matrix entries.

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.

Reporting e-Prescribing G-Codes

With the new ability to report on G-codes, it will be easier for your organization to obtain the Medicare incentive for e-prescribing. When you sign and submit a visit or update a

Cotherapy: No Yes
 Non-Billable: No Yes
 Create eRx G-Code: No Yes
 Files: ATTACHMENTS

completed visit, you can flag the visit for an eRx G-code. Behind the scenes, the system creates a secondary visit for billing purposes. If you follow the best practice of setting the eRx G-code Billing Matrix entry to Auto Approve, it will free up your clinical staff from having to approve the secondary visit.

You can identify the primary and secondary eRx G-code visits by the Rx icon in the Client Visit List.

Client Visit List:

1 to 8 of 8 Not Approved Visit Type ID

ID	Approve	Client	Employee	Type	CPT
581624	<input type="checkbox"/>	Doe, John	Smith	Incident	<input checked="" type="checkbox"/> 55555

Client Visit List:

1 to 1 of 1 Approved Visit Type ID

ID	Approve	Client	Employee	Type	CPT
581625	<input checked="" type="checkbox"/>	Doe, John	Smith	Incident	<input checked="" type="checkbox"/> G8523

In the Visit Details screen, you can click the Secondary (or Primary) link in the Merged/GCode field to view the details for that visit.

Billing Matrix:
 Authorization ID: X
 Merged / GCode : / Secondary
 MobileForm Version: Web Entry

Because the eRx G-code visit is a secondary visit, it will not decrement an authorization.

To use the eRx G-code functionality, you have to create the visit via a web form. You can control which employees can create eRx G-code visits with a new Security Matrix right. Note that you cannot undo (roll back) an eRx G-code primary/secondary split.

For more information on the Medicare eRx Incentive Program, click [here](#).



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