CREDIBLE

November 2006 Software Release

New Features are Easy to Fall Into

New Features available 11/13/06

A new season signals a start of many changes—changing weather, changing colors and many holidays to celebrate. This Fall season also brings new features and upgrades from Credible to make your work easier. Credible's Fall release enables you to complete tasks more efficiently with features such as Quick Visit and Visit Data Clone. Internal Instant Messaging is now also available to send instant messages. Take advantage of these new features and you won't fall behind.

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.

November 2006 Release Schedule Highlights

November 13

- Quick Visit
- Visit Data Clone
- Internal Instant Message
- Diagnosis and TxPlan Mapping
- Enhanced Update Screens for Client Visits
- Block Time
- Form Tracking
- New Signature Features
- Client Warnings
- 835 Updates
- Software Upgrades
- Report Updates
- Billing Enhancements

January 2007

- Look for an email from us with more info on what you can expect from the next Credible software release!

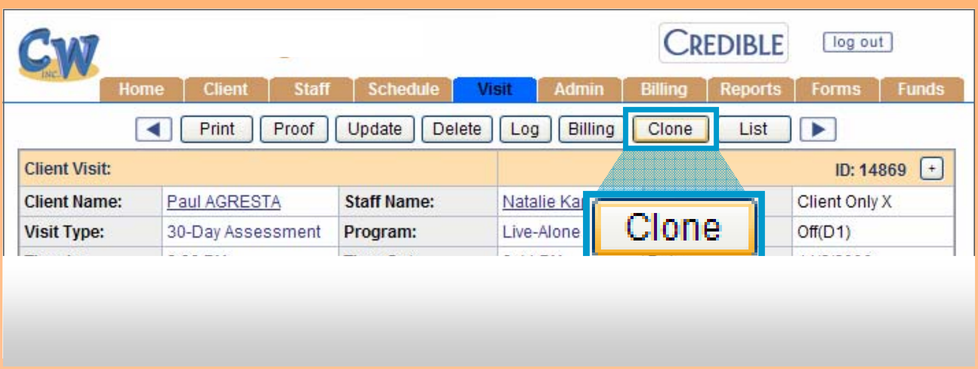
Quick Visit

Now there is an ever faster and easier way to start a visit. With the **Quick Visit** button on the Client View page, you can start a visit with just one click. It is determined by the most common visit type and program that is used by the employee.

This would be an easy way to document a phone consultation, since it can be accessed quickly if just a few notes need to be added about the call.

Visit Data Clone

From the Visit view screen you can now clone an existing visit. Simply click on the new **Clone** button and all visit data (excluding voice notes) is cloned with the current date and time. New changes can be made to the visit before the new visit is saved.



Complimentary Webcast Tutorial on Software Upgrades!

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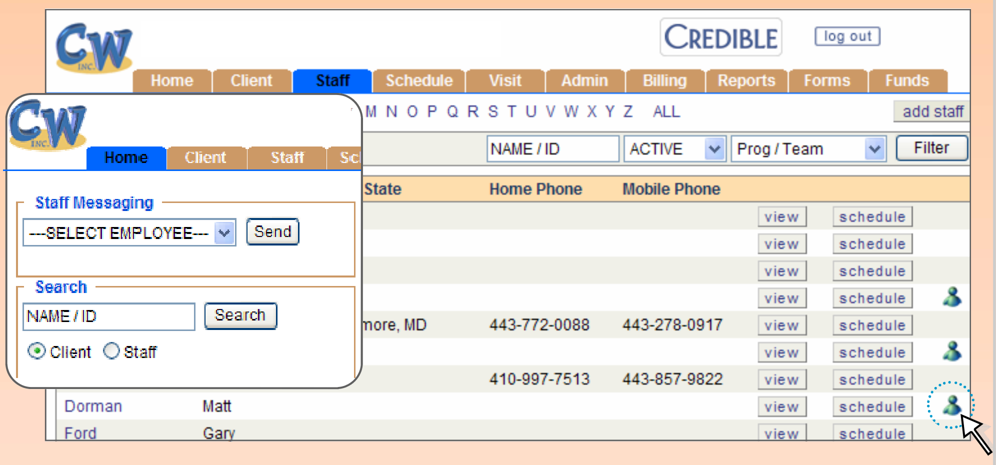
Internal Instant Message

Send quick messages to staff members that are logged into the Credible Web application. Notify a provider that his or her appointment has arrived in the clinic or send quick reminders to office staff. Internal instant message is easy to use and can be accessed directly through the home page, through from a scheduled visit on the Schedule tab an IM icon on the Staff tab and .



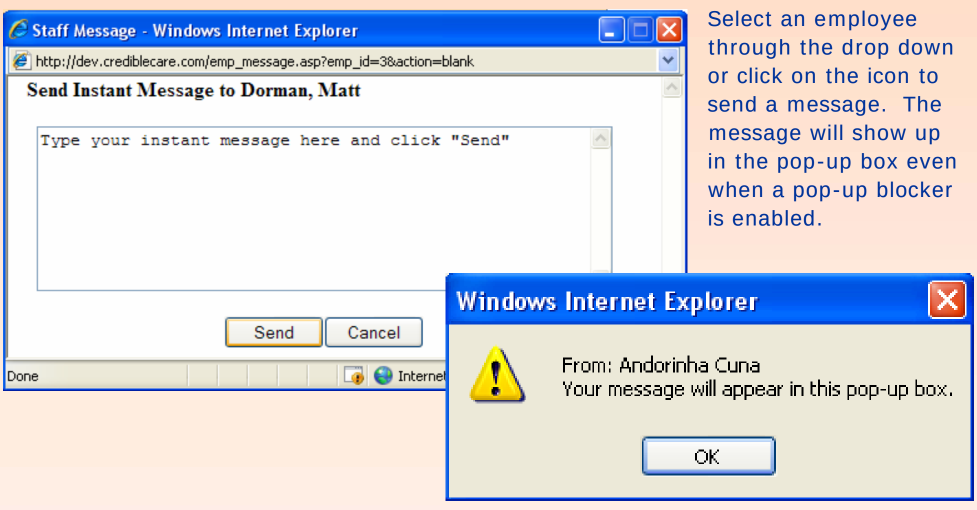
Credible Software Tips:

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

Need Software Tip.

- Gary

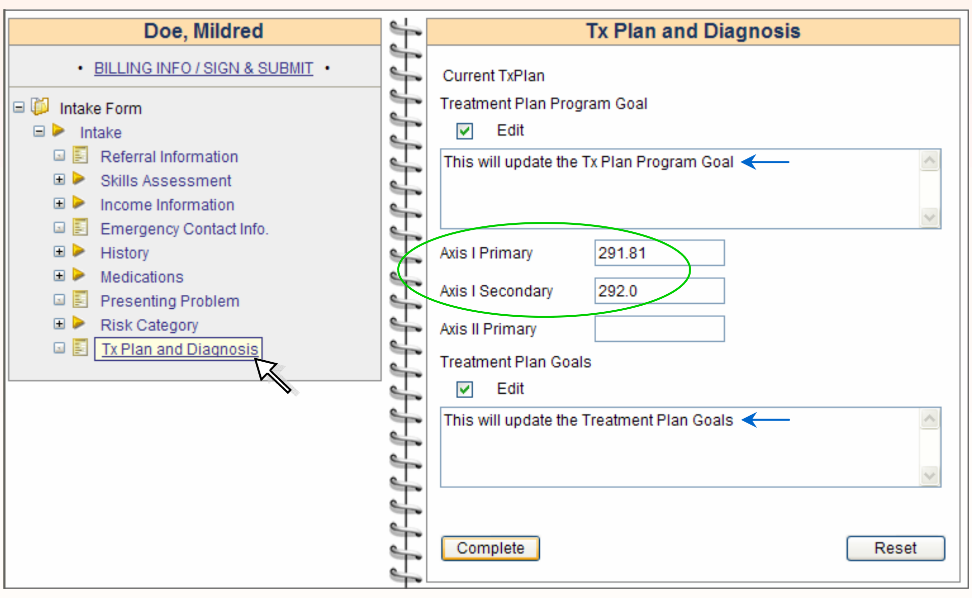
Gary Ford
Senior Account Manager

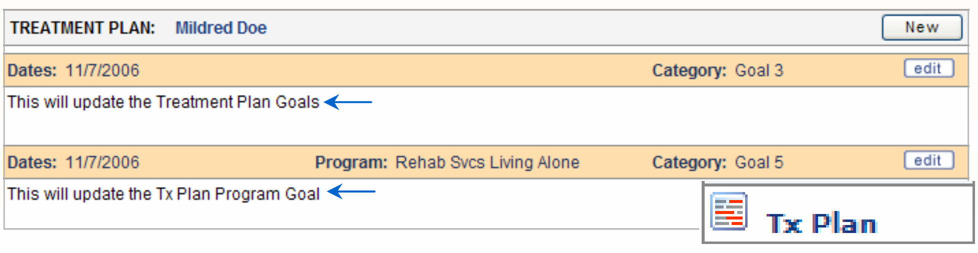


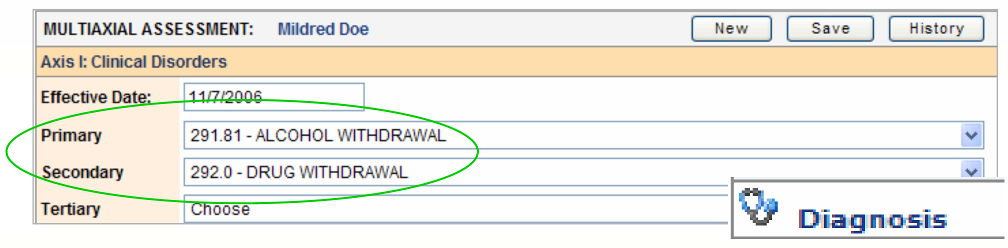
Select an employee through the drop down or click on the icon to send a message. The message will show up in the pop-up box even when a pop-up blocker is enabled.

Diagnosis and Treatment Plan Mapping from Visit Forms

Update Diagnosis and Treatment Plans while on the web or field when conducting a visit. This feature takes any Diagnosis or Treatment Plan form completed on the web or in the field and maps the information back to the Diagnosis or Treatment Plan portion on the Client View page.

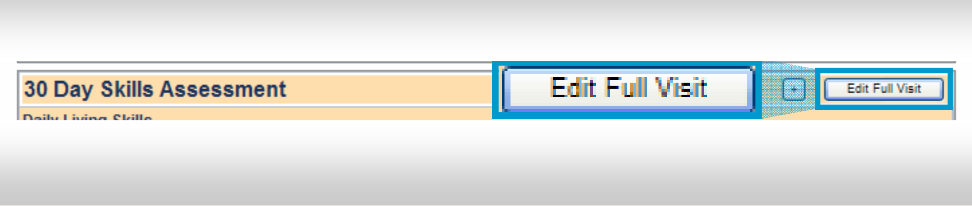






Enhanced Update Screens for Client Visits

Each category can be updated individually, as before, but with an enhanced look and feel identical to the original visit category Web Form pages. The ability to edit a full visit has been added to the client visit view screen to allow the user to edit the visit in a simulated web form environment.



Enhanced Client Scheduling

Now individual events or recurring events can be blocked out on client schedules, not just care provider schedules. All the recurring and repeating options apply. This feature helps to avoid scheduling conflicts, since the person scheduling client visits cannot schedule a non-forced visit over blocked time. If the client has a job interview or an appointment, you will be able to block out those times.

Form Tracking

All Form Letters can now be uploaded to a central location. For each client, the form can be downloaded, which will be marked on the client record locally so the user may complete it as necessary. When the form is completed the user can update the clients record and mark it as completed.

Client Warnings

There is a new button on the Client Record page to add Warnings, which can advise clinicians of any situation that could be dangerous. For instance, a warning could be that the client has a gun in his or her house, a clinician was bitten by a vicious dog at a prior visit to the client's home, the client has a violent temper, or even that the client is a high suicide risk.

835 Updates for Large Files

Large claim lists can be viewed more efficiently on the 835 Reconcile page with the new paging feature. The 835 Upload page has been modified to accept larger files, with up to 100,000 claims.

New Signature Features Added

Visit Signature Injection: There is a new button at the bottom of the Employee View page called Attach Signature (in the Attachments section). When there is a signature attached to an employee record, and a visit for that employee is completed without a signature, the employee signature will now be automatically added to that visit.

Add Signatures after Visit Completed: Another new feature is the ability for employees to add a signature on the Visit View screen for a visit. If you are viewing your own visit and have your account configured to use the signature pad (and no signature exists for the visit), you will see a Sign button which will allow you to add your signature to the visit.

Credible Software Upgrades

- **Form Group Red X:** When processing claims, you will now be aware of any client who has not completed all forms in a Form Group such as an Intake Package. A red X will appear next to the visit on the Batch Claim screen to indicate the Form Group was incomplete for that client. This new feature is optional and can be turned on for any Program.
- **Visit Type Appears on Schedule:** The visit type is now displayed on the Schedule for the Daily view, and it is displayed on the Weekly view as space allows.

Report Updates

- **New Report Fields added:** There is a new row on the Cost Center Report for the adjusted due amount, which includes the addition of disallowed and adjusted billing information. There is a new column on the Duplicate Billing Report for CPT Code.
- **New Report Filters added:** The Scheduled Visits Status report can now be filtered by team. The Monthly Visit Totals report can now be filtered by Program and Team. The Combined Balance Aging report can be now be filtered by Start Date.

Billing Enhancements

- **Client Credit:** There are many times when clients pre-pay for a visit, or at least pre-pay for their co-pay. When this happens, you can now store that client credit and apply it to a visit at a later date (when the visit appears in the system). Any visit that is not paid in full can have a client credit used to pay the difference.
- **Improved Insurance Re-processing:** When adding or updating insurance re-cords for a client, you used to get a list of affected visits and had to determine how to process these visits. Now, the insurance re-processing is automatic for all visits affected by the insurance changes.
- **Manage Insurance Payments Upgrade:** There is a new filter on the Manage Insurance Payments screen that allows you to sort by payer, and this report can now be exported as a CSV file.
- **Updates to Search Claims and Visits:** On the Search Claims and Visits page, seven new criteria have been added to the Billable filter to enhance your searching capabilities.
- **Recreate Batch Update:** Now, when you click on the Recreate button for a batch, you are taken to the batch list page, so you can review and remove visits from the batch before it is recreated.

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!

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November Software Spotlight: Internal Instant Messaging, Quick Visit, Diagnosis and Treatment Plan Mapping from Forms

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When working with a list of records, it is at times easier to open hyperlinks in a different window. Links such as client records can be opened in separate windows for better work flow.

One way to do this is to hold down the shift key while clicking on the link with your mouse. Another way is to right-click on the link and select "Open in New Window".

- Dave

Dave Webb
Chief Software Architect

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Internal Instant Messaging

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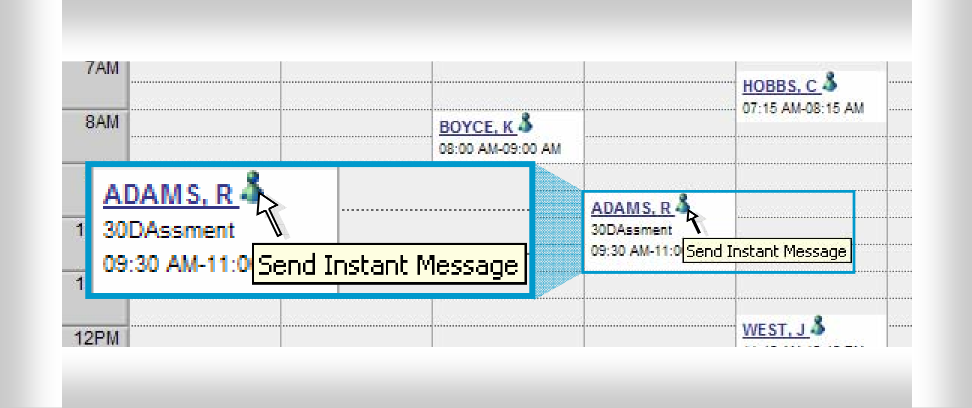

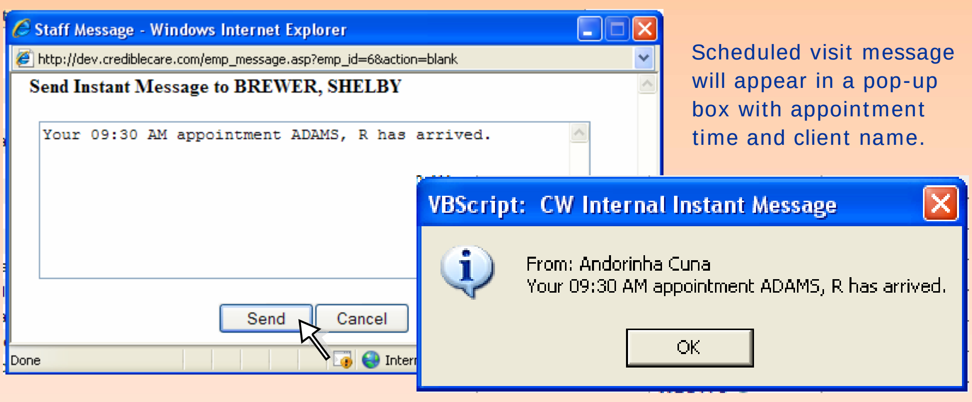

Scheduled visit message will appear in a pop-up box with appointment time and client name.

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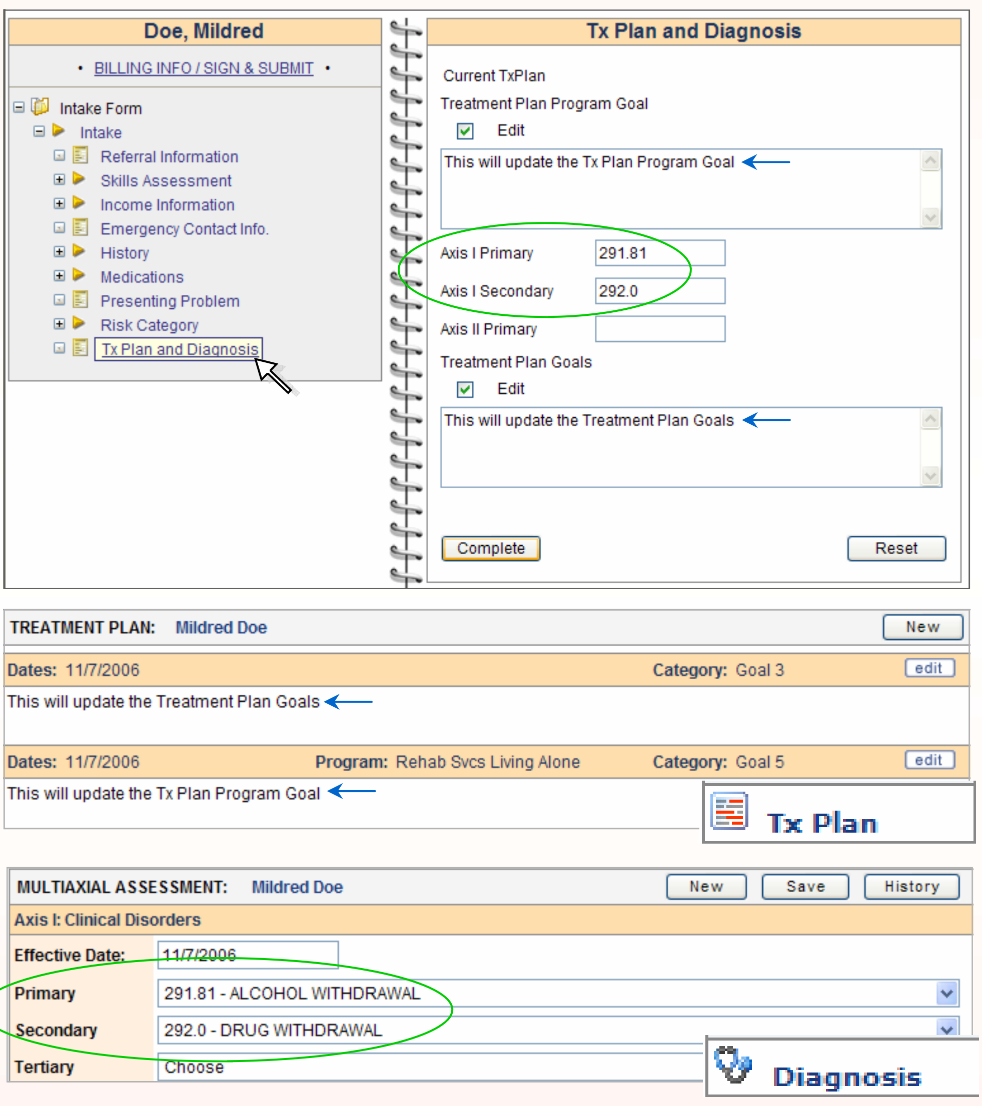

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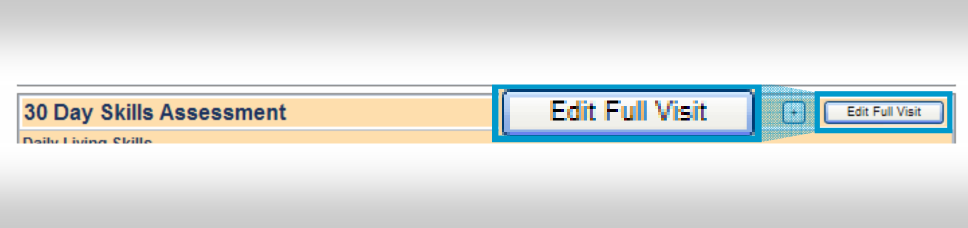

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Add Signatures after Visit Completed: The user now has the ability to add a signature on the Visit View screen for a completed visit.

Report Updates

New fields and data filters have been added. Adjusted amounts have been added to financial reports and additional codes have been added. Additional team visit sorting features and date sorting criteria have been added to the Scheduled Visits Status, Monthly Visit Totals, and Combined Balanced Aging reports.

Billing Enhancements

Additional Billing features include optimized 835 processing, simplified client credit tracking, improved re-processing of insurance data, new filters for managing insurance payments, additional export capabilities, additional advanced search data points for billing, and simplified recreation of batches.

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!

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4424 Montgomery Avenue l Suite 304 l Bethesda, MD 20814

Email us at info@credibleinc.com or call (888) 453-6873

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Release Reminder

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During Friday, November 10 from 10 PM to 12 AM EDT, users may experience some difficulty when accessing your site due to installation of these upgrades.

November Software Spotlight: One-click Visit, Visit Data Clone, Internal Instant Message

Register Early for a Webcast Tutorial!

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