CREDIBLE November 2009 Software Release Financial, Reports, and Search Updates



November 2009 Release Schedule Highlights

November 21, 2009

- Scheduling Update through Export to Microsoft Outlook
- Notification Updates
- Custom Formatting in Client Notes
- Treatment Plan History
- Medical Profile Updates
- External Provider
 Updates
- Advanced Search Totals
 Addition

Next Release: February 19, 2010

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

New Features Available November 21, 2009

Credible delivers more innovative features with Release 4.4. New features include added Scheduling functionality through an export to Outlook, more Notification updates, Advanced Visit Search and Export totals, custom formatting in Client Notes, and Treatment Plan history addition. <u>Please review the 4.4 configuration notes that detail configuration steps for all Release 4.4 items.</u>

Software Spotlight:

Export to Microsoft Outlook Calendar, Notification Updates, Custom Formatting in Client Notes, Treatment Plan History, Advanced Search Totals

Added Scheduling Functionality through Export to Outlook

Keep your Credible Schedule and Microsoft Outlook Calendar in sync! You can now export your scheduled appointments and time blocks to be imported into Outlook. Two formats are available. vCalendar can automatically add a single entry to your current default calendar or create a new vCalendar in your outlook schedule for multiple entries. Outlook Format(CSV) creates a CSV file that can be imported into your default Calendar with a few quick steps.

WED 11/18 (9) THU 11/1	9 🕑 🛛 FRI 11/20 🤇	SAT Export to Outlook
	Export	chedule for Andorinha Cuna:
Bates, S 08:30 AM-09:30 09:00 AM-10:15 AM	0 AM B B 09:1 Start Dat	ort Options
Calendar Format: Click the utton and then "Open." This utomatically load a vCalend our Outlook.	"Export" s will ar into Select Exp vCale	ort Format O Outlook Format(CSV)
Dutlook Format (CSV): Click Export" button and "Save" to lownload the file. In Outlook Import and Export" under the nenu. Choose Import from a program or file. Click Next ar choose "Comma Separated V Windows)." Click Next and o Do not import duplicate item Click Next and choose "Caler Click Finish and Outlook will i he schedule.	k the go to e "File" unother nd /alues check s." mport	t Instructions the "Export" button the "Open" button will automatically load a vCalender into your Outlook. te: vCalendar Format is designed (by Microsoft) to matically add a single entry to your current default dar or create a new vCalendar in your outlook schedule ultiple entries. If you prefer to keep just one schedule we recommend using the Outlook Format to export.

Complimentary Webcast Tutorial on Software Upgrades!

Please email andorinha@credibleinc.com if you would like to sign up for a webcast to review the new features. Please indicate in the email which day you would like to attend. You will receive a confirmation email.

Webcast Schedule

Tue, November 24 1:00 PM ET

Tue, December 1 10:00 AM ET

Tue, December 8 1:00 PM ET

Notification Updates

New Notification Triggers

Program Assigned/Unassigned: Get notified when a Client is assigned or unassigned from a Program.

Specific Visit/Program Type: Set triggers based on both Visit Type and Program and receive notification when the visit is added or when it is approved.

Trigger:	Visit Add -Specific Program
Program:	CISM -
Title:	Visit Add CISM
	All Team Members
	All Assigned Employees
	All Assigned Employees in Program of Visit
	Primary Teams
	Primary Employees
	Primary Employees in Program of Visit
Send To:	🗹 Case Manager
	Cupervisors / Team Leaders
	Profile Code SELECT
	Credential - SELECT

Client Date Trigger: Receive

notification based on the dates entered in the Client Profile and Client Extended information. For instance, set a trigger to occur 10 days after the client's first service date.

Client Attachment: Send notification when an attachment is added to a client's record.

New Send to Options

Credential: Notifications can now be triggered based on Credential.

Case Manager: Notifications can now be sent to Case Managers.

Custom Formatting in Client Notes

Have the flexibility to format Client Notes just like you would in a word processor. Customize Client notes by changing font size, color, and appearance. You can also organize text into numbered and bulleted lists. The formatting icons are along the top of the notes box. The far right has a small up arrow that enables you to hide the formatting icons. The bottom right corner has a handle that allows you to resize the window.

NOTES: Sally Bates	
Entered by: Andorinha Cuna 11/18/2009 2:19:00 PM	delete
Change the SiZP and color use bold <i>italics</i> underline, or strikethrough . You can even add numbered and bulleted lists.	
 One Two Three 	
Add Note	
Size Aur B _c I U and Aff Aff Aff I ≟⊟	
Use any of the above tools to format your note.	
Add Note	

Credible

Software Tips:

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

You now can use word like formatting when writing notes from the navigation bar! Change the font size, text color, or make it bold or underlined! Best of all you can spell check your notes too!



Pat Lanning Implementation Manager

Treatment Plan History

All changes to the a treatment plan are now logged and available to be reviewed and compared through the treatment plan module. History can be viewed through a new "history" button. Click on the "history" button next to the treatment plan and all changes will be listed in a new log. To view the full goals of old plans, click the "view" button on the desired history line.

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Bates will request for her prescriptions prior to using all of the medication with minimal assistance from staff. Ms. Bates will verbalize accurate information regarding the reasons for the side effects of medications and the expected outcome of prescribed medications. But this is a new plan for Ms. Bates as of today and will be effective until further notice.

Medical Profile Updates

Include even more detail on clients' Medical Profiles and keep a better track of their health. The Medical Profile has a new field called "Girth." Input numbers between 1 and 500. Blood Pressure tracking has also been enhanced. You can now record both Standing and Resting Blood Pressure rates.

CLIENT MEDICAL PROFILE: Sally Bates		History					
Profile Date: 6/18/2008	Created By: Andorinha Cuna						
Height: 5 ft 6 in	Weight: 145 lbs Girth: 28 in	BMI: 1 21.25					
BP Resting: 120 / 80	BP Standing: 130 / 85 Pulse: 60						
Blood Sugar Level: 90	Pulse Oxygen Level: 97 % Temperature: 96.8 degre	es					
Check In Notes:							
	*						
	-						
<u> </u>							

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!

External Provider Updates

Updates to the External Provider screen allow you to sort by provider type when adding a new provider. ROI information can now be captured and displayed on the Provider screen as well.

EXTERNAL CARE	PROVIDERS:	Steven Carter						Template
lame	Specialty	Phone	Start Date	Term Date	ROI Obtained	ROI Obtained Date	ROI Expires Date	
Amanda Jones	Psychologist	202-555-5202	10/1/2009	12/31/2009	True	11/19/2009	11/30/2009	detail edit delet
ox, Bradley P. M.D	. PCP	814-868-9828	1/5/2009	6/30/2009	False			detail edit delet
Add New Client	Provider —							
Type:	Psychologist	-						
	All							
	Endocrinologis Foster Parent	t plogist	(Washing	ton,DC)				
i i	Interpreter	st (Wa	shington,D	C)				
	MR Case Mana	iger list (B	etriesda, wit))				
Provider:	OB-GYN					Ac	ld From List	
	OCY							
	Oncologist			OR				
	PCP							
Name:	Probation / Par	ole	Тур	e:	Select	• •		
Dhone:	Psychiatrist Psychologist		Mol	hilo			Fav	
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Email:	TCM	•						
Address:	Therapist Urologist							
City:	-		Sta	te:			Zip:	
Company/Prov:				4	gency:	Select	•	
NPI:			Me	dicare ID:				
Start Date:			Ter	m Date:				
ROI Obtained:	ROI Obtai	ned Dt:			ROI Expire	s Dt:		
Add New P	rovider							

Advanced Search Totals Addition

Quickly view Visit and Client data totals with the addition of a "Grp Total Only" checkbox in Advanced Search. Visit and Client Advanced Search can now show Group Totals Only, giving you more search options and flexibility. You can also choose to export and report on only the group totals data.



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



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