

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.

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.

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
 Case Manager
 Supervisors / Team Leaders
Profile Code: -- SELECT --
Credential: -- SELECT --

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 SIZE and color, use bold, italics, underline, or strikethrough. You can even add numbered and bulleted lists.
1. One
2. Two
3. Three

Add Note
Size [dropdown] [color] [bold] [italic] [underline] [strikethrough] [bulleted list] [numbered list]
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

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.

TREATMENT PLAN: Sally Bates Add Blank Tx Add Form Tx

All -- Select Program -- -- Select Category -- Start Date End Date Filter

Dates: 12/01/2009 - 05/15/2010 Program: SA CaseMgt Category: Ps - Primary Goal **history** edit
Target Date: 06/01/2010

Medication Compliance: Ms. Bates will utilize a pill box to manage her 16 medications prescribed by three different doctors. Ms. 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.

Dates: 08/01/2009 - 11/30/2009 Program: SA CaseMgt Category: Tx - Secondary Goal history edit
Target Date: 11/30/2009

Ms. Allensworth pay more attention to her personal hygiene and manage finances better through weekly and monthly budgeting.

ENTER TX PLAN: Sally Bates Return

History:	Change Date	Start Date	End Date	Target Date	Program	Category
view	Current	12/01/2009	05/15/2010	06/01/2010	SA CaseMgt	Ps - Primary Goal
view	11/19/2009	12/01/2009	06/01/2010	06/01/2010	SA CaseMgt	Tx - Primary Goal
view	11/19/2009	12/01/2009	05/15/2010	06/01/2010	SA CaseMgt	Tx - Primary Goal

Start Date: 12/1/2009 End Date: 6/1/2010
Target Date: 6/1/2010
Program: SA CaseMgt Category: Tx - Primary Goal

Goals:
Medication Compliance: Ms. Bates will utilize a pill box to manage her 16 medications prescribed by three different doctors. Ms. 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: 21.25

BP Resting: 120 / 80 BP Standing: 130 / 85 Pulse: 60

Blood Sugar Level: 90 Pulse Oxygen Level: 97 % Temperature: 96.8 degrees

Check In Notes:

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!



Contact Us

888-453-6873

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www.credibleinc.com

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

Name	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 delete
Fox, Bradley P. M.D.	PCP	814-868-9828	1/5/2009	6/30/2009	False			detail edit delete

Add New Client Provider

Type: Psychologist
--- All ---
Endocrinologist
Foster Parent
Interpreter
MR Case Manager
Neurologist
OB-GYN
OCY
Oncologist
Other
PCP
Probation / Parole
Psychiatrist
Psychologist
Surgeon
TCM
Therapist
Urologist

Provider: [Add From List](#)

OR

Name: Type: --- Select ---

Phone: Mobile: Fax:

Email:

Address:

City: State: Zip:

Company/Prov: Agency: --- Select ---

NPI: Medicare ID:

Start Date: Term Date:

ROI Obtained ROI Obtained Dt: ROI Expires Dt:

[Add New Provider](#)

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.

[Filter](#) Client Name/ID Start Date Batch ID --- Visit Type --- --- Billing Group ---

[Export](#) Employee Name/ID End Date Service ID --- Team --- --- Program ---

--- Sort By --- -Date Type- Claim ID --- Status --- Billable ---

Grp Total **Grp Total Only** Show Unappr Svcs Show Merged Svcs Show All Claims

Saved Reports Include only a sum total line after each grouping (grouping based on Sort By), but no detail lines. Multi Select

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