CREDIBLE

November 2010 Software Release

Client Access, Library Subscriptions, and More

November 2010 Release Highlights

- Credible Client Portal
- Improved User Interface for Credible Reports
- New and Improved Functionality for Attachments
- Credible eRx Enhancements
- Credible Library Subscriptions

New Features Available November 20, 2010

Credible provides new client access functionality, an improved interface for reports, and numerous enhancements to functions such as attachments and Credible eRx in Release 5.3. By viewing different parts of their records through a secure online portal, clients and client representatives can increase their participation in the care provided by your organization. The Credible Library has also been enhanced — you can now subscribe to receive emails with updates to reference areas that interest you.

Please refer to the *Release 5.3 Configuration* document for the steps to configure and use all of the new features.

Software Spotlight

Providing read-only access to clients, setting up private folders for employee attachments, designating employee attachments for HR use only, viewing unapproved prescriptions on the Home Page, and accessing a monograph when creating a prescription

Introducing the Credible Client Portal

With the new Credible Client Portal, a client, family member, or other client contact can log into a *read-only version* of your Credible system to view different parts of his or her record. The client portal functionality is a step towards Meaningful Use certification requirements of providing clients with electronic copies of their health information.

We will make upgrades to the Credible Client Portal over the next year and we want your feedback! Click here to go to the client portal reference in the Credible Library. Click **Add Info** on the nav bar to access the evaluation form.

Secure access to the Credible Client Portal — As part of the configuration, you set up a client user list to control who can log into the portal. If a client user needs to access the records for more than one client, he or she will need separate logins as you can only access a single client's record when logged into the Credible Client Portal.

Client User List: Showing 1 to 18 of 26. Export

#	For Client ID	Last Name	First Name	User Name	Email	Profile	
1	**39**	Smith	Jane	jsmith	jsmith@email.com	ClientUser	update
2	**337**	Doe	John	jdoe	jdoe@email.com	ClientUser	update
3	**353**	Jones	Bob	bjones	bjones@email.com	ClientUser	update

You can track who logs into the portal with the Client User Login Report.

Client User Login Log: USERNAME OR ID: Successful 11/1/2010 End Date Filter Export

#	Login Date	Username	Name	Type	IP Address
1	11/10/2010 4:04:00 PM	jsmith	Smith, Jane	in	00.11.222.33
2	11/10/2010 4:03:00 PM	jdoe	Doe, John	in	00.66.555.44
3	11/4/2010 9:49:00 AM	bjones	Jones, Bob	in	00.99.888.77

Initially, you may want to restrict the use of the Credible Client Portal to your staff so it can get comfortable with the functionality.

Client User Profile — With a Security Matrix just for client users, you control the information client users have access to in the portal. You can also control the information displayed on the Credible Client Portal Home Page.

Security Matrix:

CLIENT USER		ClientUser
AllergyViewCU	i	☑
ClientFileViewCU	i	☑
ClientInsuranceViewCU	i	☑
ClientNotesViewCU	i	☑
ClientVisitListCU	i	☑
DxViewCU	i	☑
ExternalProviderViewCU	i	☑
FamilyViewCU	i	☑
FinancialsViewCU	i	☑
MedicalProfileViewCU	i	☑
PlannerViewCU	i	☑
RxViewCU	i	☑
TxViewCU	i	☑

Client User Page Admin:

Content Title	Left Bar	Order	Center Bar	
Allergies	☐	4	☑	
Assignments	☑	6	☐	
Attachments	☐	8	☑	
Billing Info	☑	3	☐	
Contacts	☐	3	☑	
Diagnosis	☐	5	☑	
Family	☐	1	☐	
Client Info	☐	1	☑	
Services	☑	5	☐	
Meds	☐	7	☑	7
Quick Notes	☐	1	☐	1
TxPlans	☐	1	☐	1

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, December 7
1:00 PM ET

Thursday, December 9
1:00 PM ET

Tuesday, December 14
1:00 PM ET

Credible Software Tips

Check here every release for an easy-to-use tip from a Credible team member.

Auto Process Self Pay and Liability

Are you using a Self Pay payer and/or a Liability worksheet? If you are, you can use the Partner Config setting *Auto Process Self Pay and Liability* to push the balance of a service from the Self Pay payer through Liability (if one exists) to the client. This will save you from having to batch and reject the service or batch and transfer the balance to the client. The push happens each night through a script that runs automatically.

Prerequisites: the service must be approved and the balance needs to be sitting at the Self Pay payer. The client must have an active Liability form prior to when the nightly script is run.

– Josh
Josh Clickman
Account Manager

Improved User Interface for Credible Reports

The reports in Credible have been grouped into categories and are now accessible via a Reports nav bar. The Reports tab defaults to a new Last Run category that lists the most recently run reports. The system tracks usage based on profile vs individual user and does not include custom reports or exports in the list.

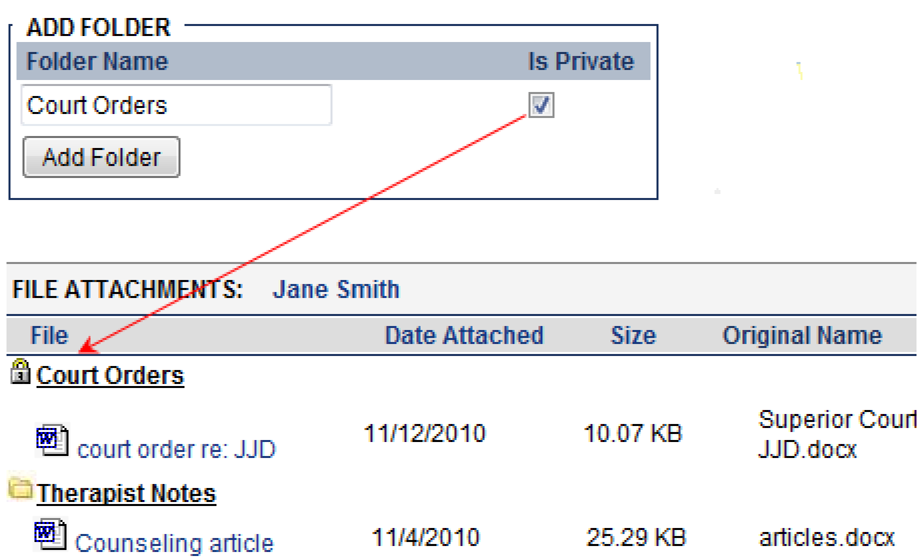
The Other category is for exports where "Show on Reports Tab" has been selected.

The nav bar also includes buttons for the Export, Import, and Saved Reports functions.

With this release, the upgrading of reports to Microsoft SQL Server Reporting Services is complete. The last few reports that were upgraded will have a slightly different look and feel.

New and Improved Functionality for Attachments

You can now set up private folders for employee attachments and control employee access with the new Security Matrix right *ViewPrivateFolders.*

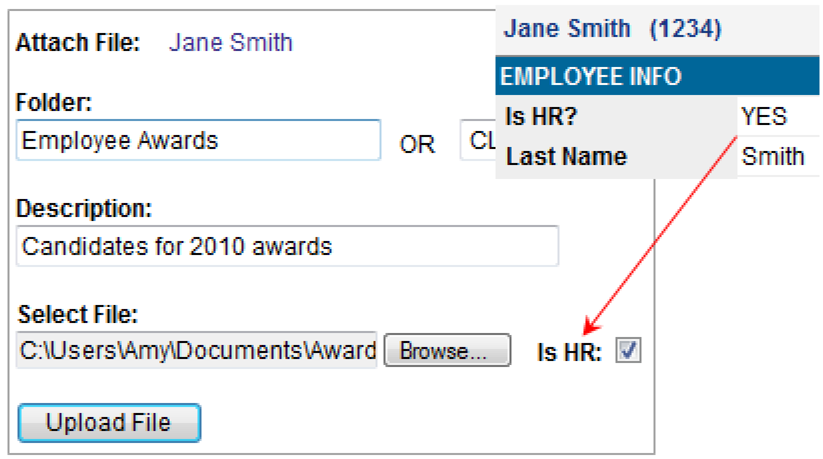


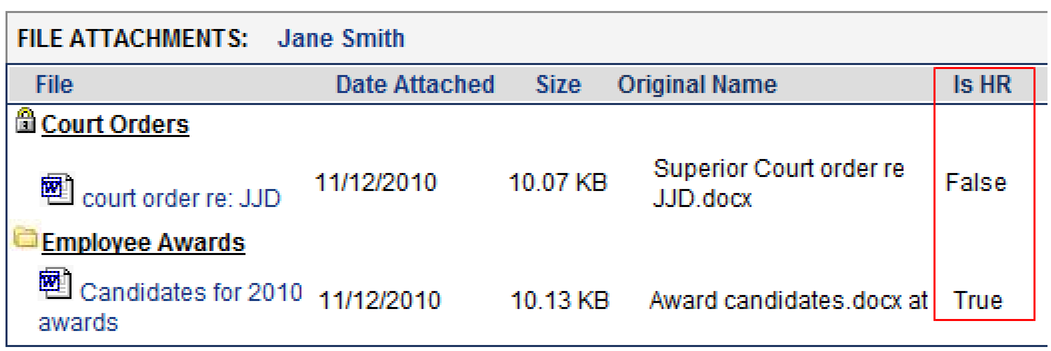
Next release: February 19, 2011

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

There is also a new right to restrict employees from seeing another employee's attachments. If *EmpFilesViewOwn* is selected (and *EmployeeFileView* is not selected), employees will only have access to their own attachments.

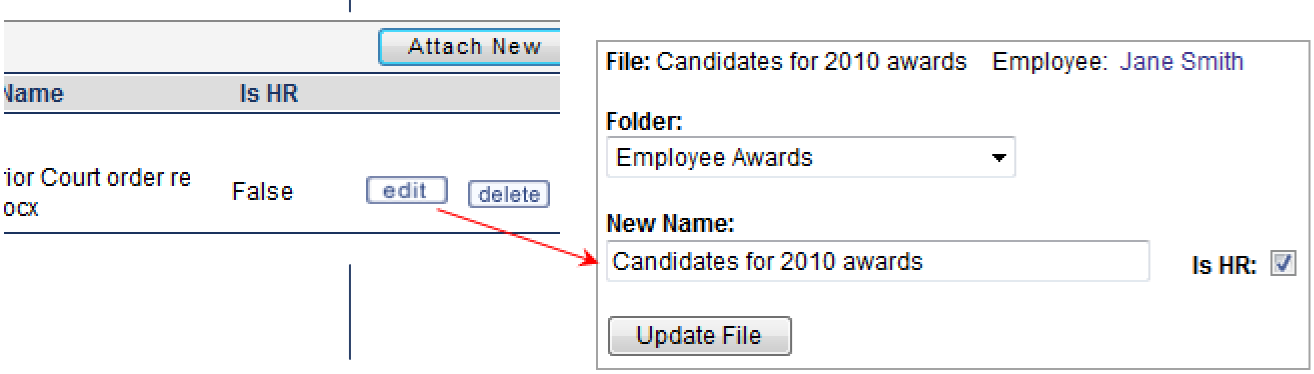
If your organization uses the is_hr field in the Employee Profile to identify HR staff members, you can take advantage of the new Is HR setting for employee attachments to attach files that only those with HR rights can view. Only employees that have is_hr = YES in their employee profiles can designate an attachment for HR use only and view attachments where Is HR = True.





There are two enhancements that apply to both employee and client attachments.

- **Renaming attachments** — The edit functionality for attachments has been expanded to include renaming. With the New Name field, you can change the description of an existing attachment.



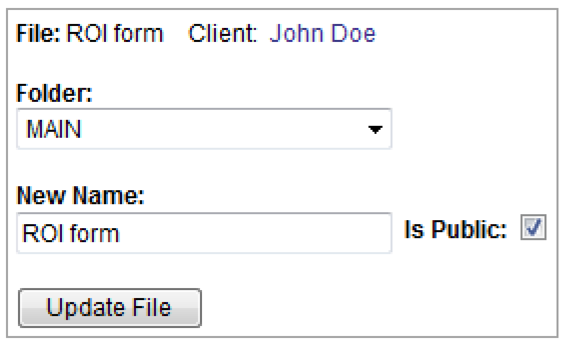
Credible's
2011 Annual Partner Conference: April 5 - 7
in Annapolis, Maryland
For details and to book your hotel room, click here.

- **Client/employee name displayed in Attach File screen** — To help ensure that employees add attachments to the correct client or employee record, the client/employee name is displayed in the Attach File screen. The names are also displayed in the Edit File screen. If you are adding an attachment to a service, the client name and service ID are displayed.

The two enhancements below are specific to client attachments.

- **Closed folders as the default** — If your client records have numerous attachments, it may be easier to locate a specific attachment if the folders are closed when you access the File Attachments screen. The setting *Default Client Attachment Folders Closed* has been added to Partner Config.

- **Client attachments and the Credible Client Portal** — With the **Is Public** checkbox on the Attach File screen for client attachments, you can control whether an attachment is available to clients on the Credible Client Portal.



Credible eRx Enhancements

Help prescribers stay on top of prescriptions that need to be approved by adding the new Unapproved Prescriptions section to the Home Page. If a prescriber has unapproved prescriptions created by a nonprescriber, the first five will be listed on this screen. With the All Unapproved Prescriptions link, the prescriber can go to the Client Medications screen to view all unapproved prescriptions and approve them.

Unapproved Prescriptions

Medication	Client	By Employee	Date
Lobana Body Lotion	Doe, John	Smith	10/26/2010
Ritalin LA 10 mg Cap	Quixote, Don	Cervantes	10/26/2010
Webril II 6" X 144" Ba...	Scrooge, Ebeneezer	Dickens	10/26/2010
Tea Tree Oil (Bulk)	Coyote, Wile	Smith	11/1/2010
Zyprexa 10 mg Tab	Van Pelt, Linus	Schulz	11/1/2010

All Unapproved Prescriptions

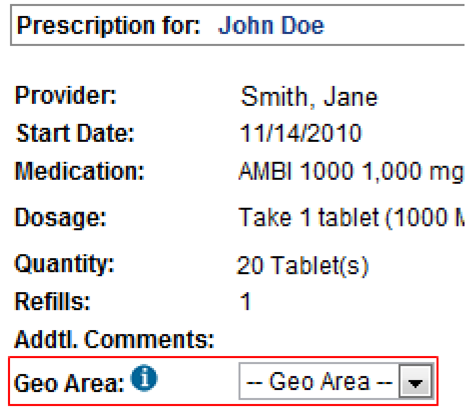
Do you want to share these release notes with a colleague? Email andorinha@credibleinc.com with your request.

We want to hear from you!

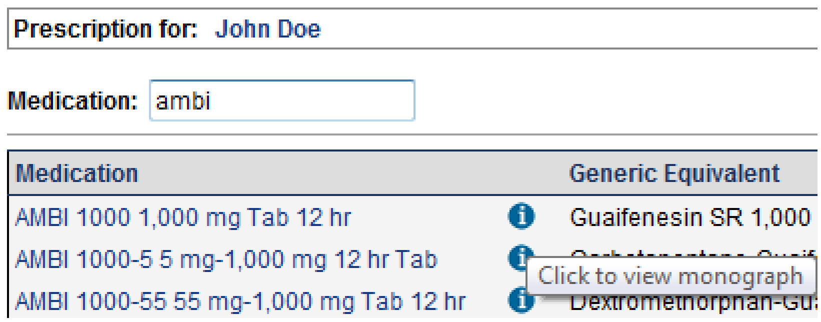
If you have an idea, question, or comment regarding Credible software releases or our release process, please call or email Credible today.

Other enhancements to the Credible eRx module include:

- **Geo area on prescription printout** — You can now use the address of a prescriber's geo area when printing a prescription. If you don't select a geo area (or the selected geo area doesn't have an address), the Printout Address set up in Partner Config is used.



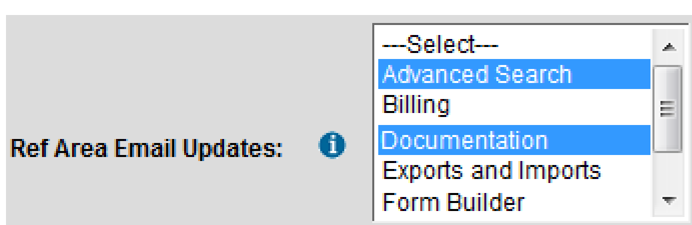
- **Monograph access when creating a prescription** — To help prescribers and nonprescribers select the appropriate medication, they can display or print monographs before creating a prescription.



- **Med history note for discontinued/rejected prescriptions** — When an employee discontinues or rejects a prescription, you can configure the system to display a popup where he or she can enter the reason for the action. Employees can view med history notes in the Client Medications screen and the Medication History screen.

Credible Library Subscriptions

With the addition of a Ref Area Email Updates list in the User Config screen in the Credible Library, you can now subscribe to receive bimonthly email updates for the reference areas that interest you.



Contact Us

888-453-6873
info@credibleinc.com
www.credibleinc.com