CREDIBLE
Behavioral Health Software

Security Enhancements, Appointment Reminders, and More

November 2014
Release Highlights

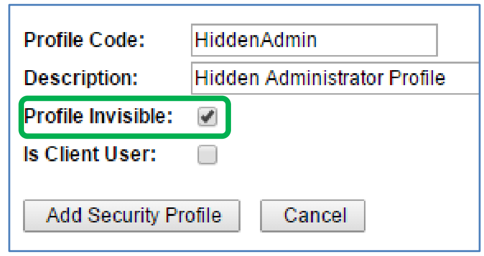
- Login Profile Security Enhancement
- Require Employee Team Assignment
- Enhanced Attachment Folder Security
- Client and Employee Assignment Restrictions
- Auto-assignment of Billing Groups
- Text and Email Appointment Reminders

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

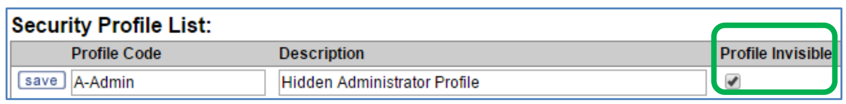
Release 9.2 Available November 15, 2014

Login Profile Security Enhancement

Agencies may now choose to limit access to any Login Profile, even when updating or creating new employees.



To do this a new value has been added to the Login Profile: Profile Invisible. When this is selected for a profile, it is only visible in dropdown lists to users who have that profile themselves.



For example, responsibility for adding new Employees to the system is often assigned to Human Resources personnel or Supervisors, neither of whom typically have Admin rights. When all Profile Codes are visible, they have the ability to create a new Admin level user.

When the Admin Profile is set to Invisible, it will not be available in the dropdown list when HR or Supervisors (or other non-Admin users) create or update new Employees.

Require Employee Team Assignment

When adding a new Employee, Agencies may now require the assignment of that Employee to a Team before allowing the Employee to be saved to the system. (This is essentially the same as the **Force Client Teams** setting.) Requiring this assignment will help ensure that Employees are placed in the proper Teams immediately.

This setting is applied in **Partner Config**, at the end of the **General Settings** section, and is a simple checkbox.

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Complimentary Webinar Tutorial on Release Highlights!

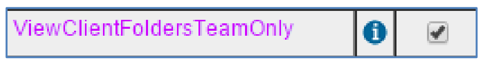
Register for the webinar by clicking on the link below. Once registered, you will receive an email confirming your registration with information you need to join the webinar.

November 15, 2014
11:00am-12:00pm

Enhanced Attachment Folder Security

Three new lines have been added to the Security Matrix relating to Attachment Folders. This enhances an Agency's ability to control access to Folders via Login Profiles.

- **View Client Folders by Team** limits the Employee to viewing those Folders that are assigned to their own Teams.
- **Create Client Folders by Team** limits the Employee to creating new Folders assigned to their own Teams.
- **Add Client Files by Team** limits the Employee to attaching files to Folders assigned to their own Teams.



All of these Folder security controls are set via the Security Matrix.

Client and Employee Assignment Restrictions

Agencies may now limit Employees to assigning a Client or Employee to a Team of which the Employee is a member.

For example: An Agency provides PACT services and has five PACT teams. A Client is placed on one of the PACT teams by a high-level supervisor. The PACT supervisor is assigned to all five PACT teams and has the new **AssignClientTeamOnly** and **AssignEmployeeTeamOnly** rights. She can move the client to a different PACT team as needed but cannot assign the client to a Medical services team.

The same scenario applies to the Employees she supervises; she can add an Employee to a second PACT team for vacation coverage, but can't add that Employee to a Medical services team.

These restrictions are applied to the relevant Profiles in the Assignments section of the Security Matrix.

The full Release 9.2 Configuration Notes are available online in the Credible Help system.

Auto-Assignment of Billing Groups

Billing Groups may now be automatically assigned to all Employee members of a specified Team. If an Employee is removed from a Team, any Billing Groups automatically assigned to that Employee are unassigned.

Team Name	Ext ID	Employees	Clients	Programs	Billing Groups
A_New_team		1 Edit	0 Edit	0 Edit	1 Edit
Adult Services		12 Edit	102 Edit	2 Edit	0 Edit

Please note: Billing Groups assigned directly to an Employee via the Nav Bar are not unassigned by this process.

Text and Email Appointment Reminders

Several enhancements have been made to the delivery of Client appointment reminders.

Previously, all Client-requested email and text appointment reminders were sent at 8:00pm Eastern Time.

Reminder Days Ahead	2

Reminders are now sent based on the appointment time in the Partner's time zone. For example, if the Client requests reminders one day ahead, a 3:00pm Monday appointment will be sent at approximately 3:00pm on Sunday local time (or 3:00pm Saturday for two days ahead, or 3:00pm Friday for three days ahead, etc.). Additionally, same-day reminders can now be sent four hours prior to the appointment by setting Reminder Days Ahead to 0.