CREDIBLE

September 2009 Software Release

Financial, Reports, and Search Updates

September 2009 Release Schedule Highlights

September 19, 2009

- Credible eRx
- Advanced Accounting and Financial Enhancements
- New and Enhanced Reports
- Task Ticket Reporting
- Diagnosis Filters added to Advanced Search
- Notification Triggers

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 September 19, 2009

Credible introduces Credible eRx and delivers innovative features and upgrades with Release 4.3. Several new and enhanced reports increase productivity and efficiency. Advanced Search Updates make it easier for you to find the exact data you need. The addition of Advanced Ledger Search provides the most advanced accounting and financial capability to date. Changes to Notification Triggers and more are available with this release. Please review the 4.3 configuration notes that detail configuration steps for all Release 4.3 items.

Software Spotlight:
Ledger Advanced Search, Task Tracker Report,
Diagnosis Filters on Advanced Search, Remove Notification Triggers

Credible eRx

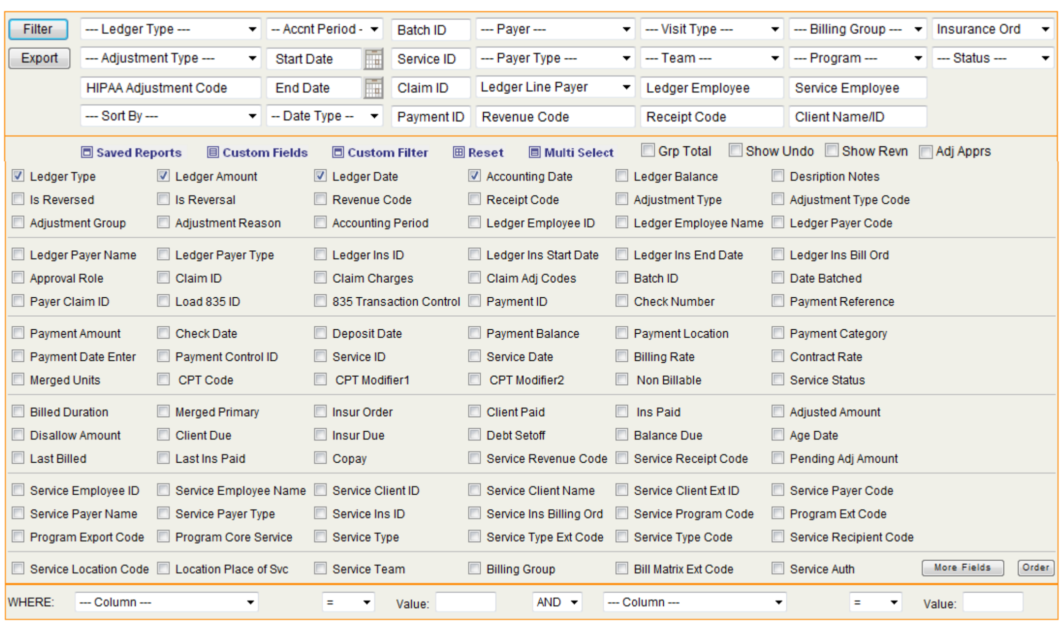
CREDIBLeRx

Looking for a solution to automate your prescription management process? Look no further. Credible now offers Credible eRx, a fully integrated, secured, Web-based prescribing and medication management system! You now have anywhere, anytime access to your clients' medication information! Please read the Credible eRx PDF sent with this attachment for more information.

Advanced Accounting and Financial Enhancements

Ledger Advanced Search

The power and flexibility of Advanced Search is now available for financial data. Create ad hoc accounting and financial reports and leverage the multitude of filter and field combinations to find exactly what you need. Custom Fields, Custom Filter, Multi-Select, and More Fields are all available to capture the data you need. Over 96 data points are now available.



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

Wed, September 23 1:00 PM ET

Thu, September 24 1:00 PM ET

Fri, September 25 1:00 PM ET

Multi-stage Billing Adjustments

In the past, adjustments were immediately applied. Now, approval process can be established. This new feature allows system administrators the option to configure a multi stage approval process for Billing Adjustments instead of immediately applying the adjustment. An adjustment of this kind does not affect the visit until it has received the final approval.

Payer Adjustments in Ledger

You can now record multiple disallowed amounts. The insurance payment will show with all of the adjustment codes listed. Each Disallowed Amount will also have it's own row in the ledger/ledger line except for code PR. PR amounts will appear at the top as "Patient Resp."

New and Enhanced Reports

Task Tracker 2.0

Now you can have direct access to your Task Ticket status. Benefit from greater control and increased customer service transparency with the new Task Tracker report, which displays current status and other information of submitted task tickets. Access the Task Tracker Report from the Reports tab and filter by date range and status. The report will include Task ID, Summary, Entry Date, Status, and Estimated Release. Each row can be expanded to view Notes and Description.

Task Tracker Report

Start Date: 6/1/2009
End Date: 9/1/2009

Task ID	Summary	Entry Date	Status	Est. Release
⊟ 7056	Ext Prov to client profile printopt	8/31/2009 2:08 PM	ACTIVE	4.4
	⊟ Show Notes: Decription:	Add External Providers to the Print Options on Client Profile page		
⊞ 6988	Client Profile mapping in forms	8/25/2009 3:36 PM	ACTIVE	4.4
⊞ 6899	AVS No Totals hides buttons	8/20/2009 12:23 PM	ACTIVE	4.3

Exports Report Tab and Security

Additional security tools give you more control over reports and exports. Individual Exports are accessed via the Reports list and leverage enhanced Report Security. When creating a new export or editing an existing one, simply check off "Show on Reports Tab" and finish creating your export. Go to ADMIN / Security Configuration / Report Security then scroll down and find the Export you just assigned and select desired profiles to allow access to. Scroll to the bottom and press Save All. Row level security, which restricts client/employee/visits information exported by the permissions of the specific employee running the export, is now also an available option in exports. When creating a new export or editing an existing one, simply check off "Row Level Security" and finish creating your export.

Export Builder: OP Psychosocial

Export Name:	OP Psycho Export	Export Format:	HTML Table	Quoted Fields:	☐
Delimiter:	,			Batch Mode:	☐
Date Format:		(ie. MM-DD-YYYY HH:NN)		For Template Printout:	☐
		Row Level Security:	☑	Show on Reports Tab:	☑
Pre-Query:					
Where Clause:					

Credible Software Tips:

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

Need to find a client or employee quickly? Use the search bar on the home page by typing in the name or first few letters of the individual's name and hitting search.

-Josh

Joshua Robinson
Account Manager

Client Appointment History Report

In addition to accessing from the client file of report tab, new filters and features include group, team, and employee sort. This report provides previous months planner status and view all scheduled appointments for the coming weeks. Use the export as a call list which will also include the client's home phone and do not call flag.

HISTORY: -- Status -- / ARRIVED / CANCELLED / CNCLD BY PROV | Appt Only | CISM | 8/16/2009 | 9/16/2009 | Export | Filter
Group Only | -- Team -- | -- Employee --

Client	Date	Scheduled Time	Service Type	Program	Location	Employee	Status	Group	Actual Time	Actual Duration
Client, Purple	9/16/2009		#Psychosoc	CISM	BETH Offic	SQA, A	COMPLETED	False	1:00 PM	71
Abbott, Zackery	9/16/2009	11:30 AM	Psychoanlz	CISM		Sipe, R	SCHEDULED	False		
Abbott, Zackery	9/15/2009	11:30 AM	Psychoanlz	CISM		Sipe, R	SCHEDULED	False		
Client, Vaccination	9/15/2009		Edit Test	CISM	BETH Offic	SQA, A	COMPLETED	False	2:00 AM	60
Client, Vaccination	9/15/2009		Edit Test	CISM	BETH Offic	SQA, A	COMPLETED	False	1:00 AM	60
@Test, Jane	9/15/2009		Steve 2	CISM	BETH Offic	BREWER, S	COMPLETED	False	1:00 AM	60
Client, Tenth	9/14/2009		Edit Test	CISM	BETH Offic	SQA, A	COMPLETED	False	4:00 PM	98
Abbott, Zackery	9/14/2009	11:30 AM	Psychoanlz	CISM		Sipe, R	SCHEDULED	False		
Abbott, Zackery	9/13/2009	1:15 PM	Psychoanlz	CISM		Sipe, R	SCHEDULED	False		

Attendance Report

View and verify daily client attendance in various programs with the new Attendance Report. Attendance Report displays the number of clients in the program for the date range set and the average attendance which divides that number by the number of workdays in the selected date range. The report drills down by day, by client and then by specific visit.

Attendance Report

Start Date: 8/1/2009
End Date: 8/31/2009

Program	Attendance Dt	Client Name	Visit Type
⊟ Outpatient		Total Clients: 3	Average Clients: 14.29%
	⊟ August 17	Total Clients: 1	
		⊞ Purple Client	Visit Type Count: 2
	⊟ August 18	Total Clients: 3	
		⊞ Eighth Client	Visit Type Count: 1
		⊞ Medication Client	Visit Type Count: 2
		⊞ Purple Client	Visit Type Count: 2

Employee Productivity Report

The enhanced Employee Productivity Report groups employees by programs, to most effectively report employees' true productivity. Expected Units are calculated from the Employee Profile by dividing the expected units by the entered number of days in their work week. The original version, renamed Employee Productivity by Team, is still available.

PRODUCTIVITY REPORT

Start Date: 8/1/2009
End Date: 8/31/2009

Employee	Program	Title	Expected Units	Total Units	% Expectations Met
⊟ BREWER, SHELBY			93	22	23.66%
	CISM	CPE		8	8.60%
	Contracted Services	CPE		0	0.00%
	Crawford County	CPE		14	15.05%
	Crisis	CPE		0	0.00%
	Outpatient	CPE		0	0.00%
	WRAP	CPE		0	0.00%
⊞ Mikoy, Danielle				1	
⊞ Sipe, Rob				4	

Release 5.0
Available in
February 2010

Credible's commitment to innovation continues with new features and upgrades available on February 19, 2010. Look for an email from us with more info on what you can expect from the next Credible software release!

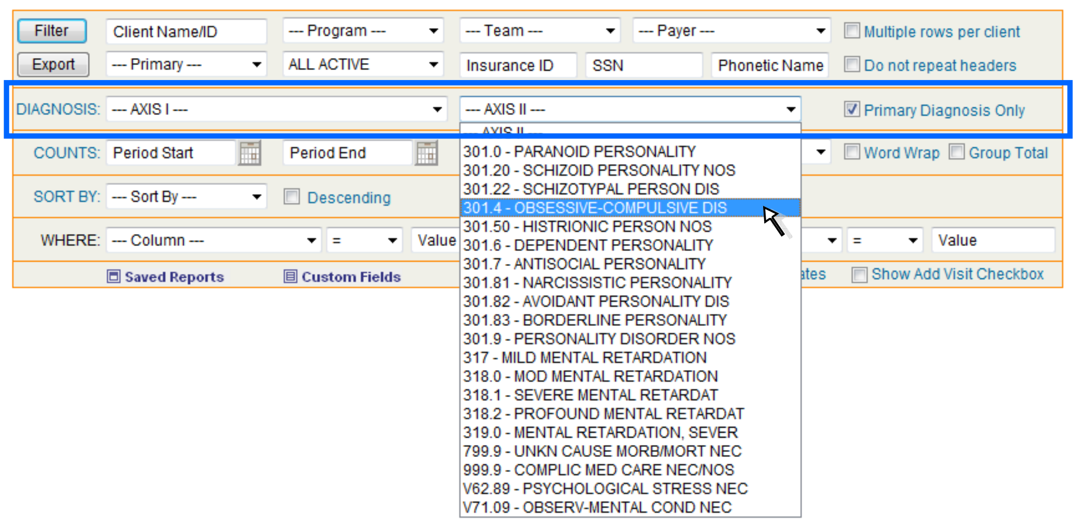
Advanced Search Updates

Client Advanced Search

Diagnosis Filters

Axis I and Axis II have now been added to Client Advanced Search to report on clients by selected diagnosis. These filters can be used together or separately and can both be expanded to multi select. Limit the search to only include Primary diagnosis from selected axis by checking the Primary Diagnosis Only box, or leave it unchecked and search on all diagnoses in selected axis.

The axis search can be utilized in various ways. First you can search without Period Start/End dates to search solely on currentl effective diagnosis. Second, add a Period Start date to search on all diagnosis effective on or after the set Start Date. Add a Period End date to search on all diagnosis effective on or before the set End Date. Add a Period Start and End date to search on diagnosis effective between the set dates.

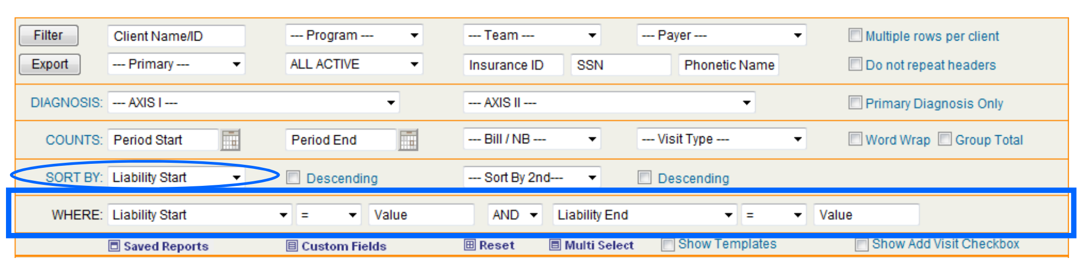


Active Episode Count

Active Episode Count has also been added for reporting on Active Episode Counts quickly with this new filter. Use the Period Start and Period End dates to determine active count during a selected time frame.

Liability Dates

New fields have been added that allows you to search on Liability Dates for clients. Liability Start and End Date have been added to the Custom field, Where clause, and Sort By options in Client Advanced Search.



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!

Visit Advanced Search

Recipient Type
Recipient has been added as filter option and that can be expanded as a multi select. Recipient Code had also been added as a custom field option.

General Updates
When you select "Advanced Search" from the Visit List of an Employee's or Client's page, the search screen will be pre-populated with that individual's ID. Press filter and all visits for that employee or client will be displayed. Duration throughout Advance Search will now be formatted as hour:minute instead of total minutes. Totals displayed in the same hour:minute format.

Notification Triggers

Remove Notifications
You now have the ability to remove notifications from schedules based on specific actions. Below is a list of Removal Triggers and notifications affected:

- Client Unassigned From Employee: deletes all future notifications for the client from the unassigned employee.
- Client Unassigned From Team: deletes all future notifications for the client from the employees in the unassigned team.
- Client Status Inactive: deletes all future notifications for the newly inactive client.
- Client Deleted: deletes all future notifications for the deleted client.
- Visit Deleted: deletes all future notifications for the deleted visit.
- Employee Unassigned From Supervisor: deletes all future notifications for the unassigned employee from the supervisor.
- Employee Unassigned From Team: deletes all future notifications for the unassigned employee.
- Employee Status Inactive: deletes all future notifications for the inactive employee.
- Employee Deleted: deletes all future notifications for the deleted employee.
- Notification Trigger Deleted: deletes all future notifications created by the deleted trigger.

Trigger Admin Time
An admin time entry trigger has been added for management's use.

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

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