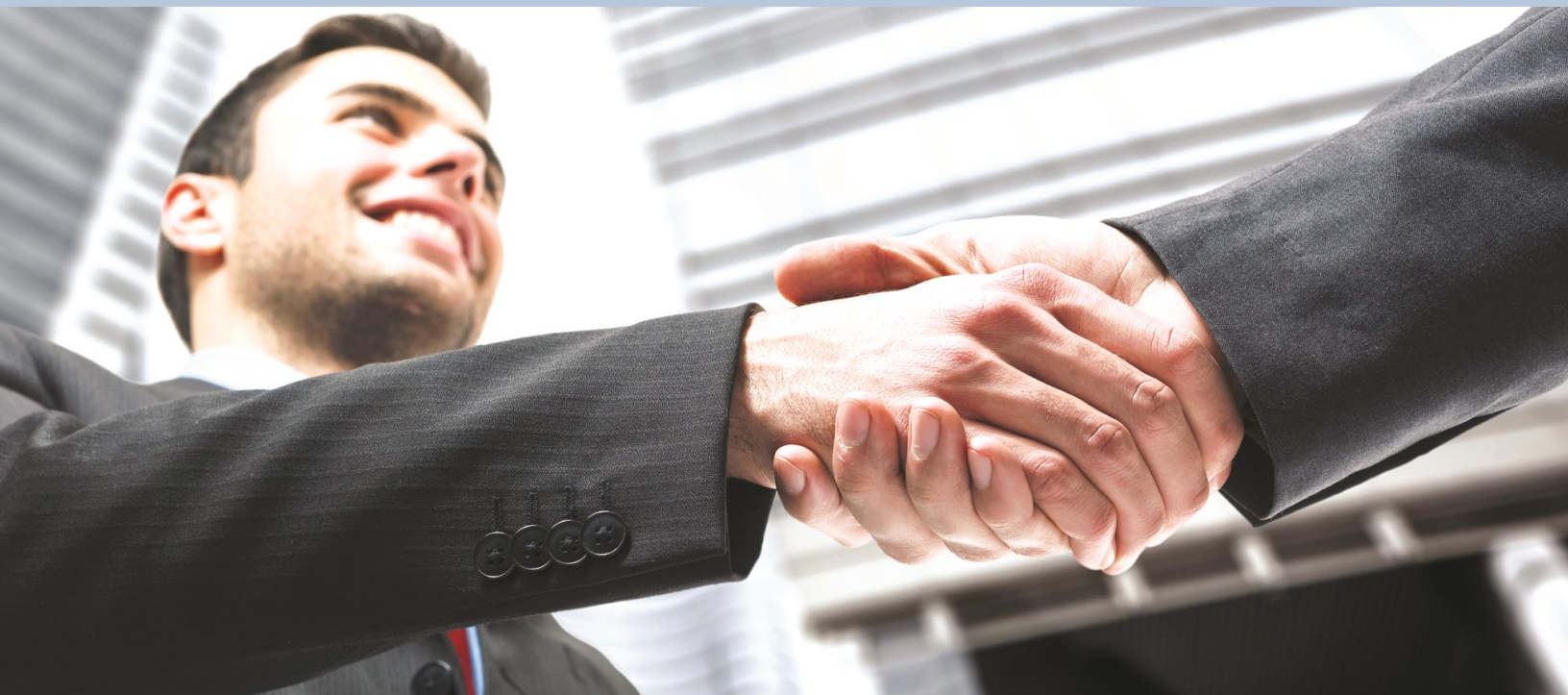


# Credible Mobile

2014v0294



# CREDIBLE

**Behavioral Health Software**

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## CHAPTER 1: THE BASICS

Credible Mobile is a separate module from the web-based version of your Credible system that supports community-based care.

- In connected mode, you can use Credible Mobile to download scheduled appointments and up-to-date client data, perform visits (document via web forms), and upload completed visits and admin time entries.
- When offline, functions that do not involve interaction with the web-based version of your Credible system (also referred to as the server) are available: adding clients and unscheduled visits, reviewing downloaded client data, performing and signing visits, queuing up completed visits for upload, and adding admin time entries.



When you document a visit on your mobile device, the form associated with the visit type displays just like it does when using the web-based version of Credible. After you complete the form, signature capture is available for you, the client, and any other individuals that need to sign the visit.



When you send (upload) a completed visit to the server, it is securely transmitted and available for immediate, real-time review, processing, reporting, and billing.

This guide explains how to install and use Credible Mobile on an iPad®, iPhone®, Android™ tablet, or laptop/desktop that has Chrome™ installed.

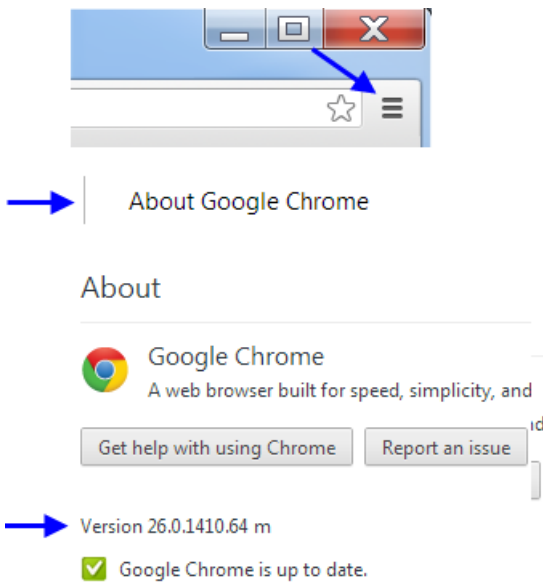
Supported Android tablets include the ASUS®-made Nexus™ 7 and the Samsung Galaxy Tab™. Credible recommends the Nexus 7 based on observed performance and good value.

If you are using Windows® 8 on your laptop/desktop, you need to use a “lite” version of Credible Mobile. Two notes about Credible Mobile Lite:


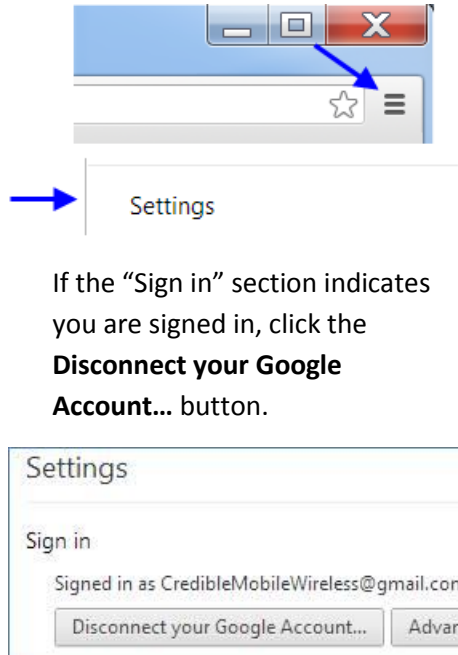
- Touchscreen functionality will be enabled in the application if you are using Windows 8 Pro. Touchscreen functionality is not supported in Windows 8 RT.
- The use of Topaz® signature pads is not supported.

## Installation Prerequisites

1. Make sure your device has a strong wireless connection.
2. Verify your device meets operating system requirements.

iPad/iPhone	Android tablet	Laptop/Desktop
<p>iOS version 5.1 and higher</p>	<ul style="list-style-type: none"> <li>• Nexus 7 – Android version 4.2 or higher</li> <li>• Samsung Galaxy Tab – Android version 3.2 or higher</li> </ul>	<p>Chrome 23 or higher</p> <p>Verify browser version as follows:</p>  <p>Chrome updates happen automatically so if you are not running Chrome 23 or higher, it means you do not have permission to update your browser or anti-virus software (for example, Sophos) is blocking the update. You need to remedy the situation since Chrome 23 or higher is required for Credible Mobile on a laptop/desktop.</p>

3. Make sure your device meets the other requirements listed below.

iPad/iPhone	Android tablet	Laptop/Desktop
<p>If you have Auto Lockout enabled, make sure it is set to at least 5 minutes.</p> <p>If you want to lock the screen orientation, double-press the Home button. The multitasking bar displays at the bottom of the screen. Flick left until you see the Orientation icon.</p>  <p>Tap it to lock the orientation.</p>	<p>Enable Unknown sources on your tablet:</p> <ul style="list-style-type: none"> <li>• Nexus 7: Settings &gt; Security &gt; select Unknown sources checkbox</li> <li>• Galaxy Tab: Home key &gt; Settings &gt; Applications &gt; select Unknown sources checkbox</li> </ul>	<p>a. Make sure you have a Chrome window open.</p> <p>b. <b>Important:</b> make sure you are <b>not</b> signed into Google Chrome. Verify as follows:</p>  <p>If the "Sign in" section indicates you are signed in, click the <b>Disconnect your Google Account...</b> button.</p>

## iPad/iPhone and Android Tablets: Performing a New Install or Updating the Application

1. Go to [mobile.crediblebh.com](http://mobile.crediblebh.com) and click the iPhone/iPad or Android download link as appropriate.
2. Click Install when the following message displays:

www.crediblebh.com would like to install "Credible Mobile"

The Credible Mobile icon is added to the Home/Apps screen.



## Laptop/Desktop: Performing a New Install

1. Using Chrome and the appropriate link below, access the add page for the Credible Mobile/Credible Mobile Lite Chrome browser extension.


Non-Windows 8 users:

<https://chrome.google.com/webstore/detail/jjfcfbkdddjdadlcbcihndkdjbkdnn>

Windows 8 users: <https://chrome.google.com/webstore/detail/credible-mobile-lite/aaccmciejachdfbpfogagokbmplijb>

2. Click



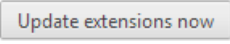
3. Sign into your Google Account or click  and create one.
4. Click Add when the Confirm New App popup displays.

The Credible Mobile icon is added to the Chrome bookmarks bar.

## Laptop/Desktop: Updating the Application

The update of the Credible Mobile Chrome browser extension happens automatically within 24 hours of a new release to the Chrome web store. *Note that you must be logged into Credible Mobile to receive the automatic update.* If you want to update Credible Mobile immediately, you can manually update the application:

In Chrome:  > Tools > Extensions > 

If  is not available, select the Developer mode checkbox, then the button will display.

 ☐ Developer mode

☒ Enabled 

## Logging into Credible Mobile

Note that you must be connected to the Internet for your initial login to Credible Mobile.

1. Click the Credible icon to access the login screen.
2. Enter the same username, password, and domain name that you use to log into the web-based version of Credible.

If this is the first time you are logging into Credible Mobile, all your scheduled visits for the current day and the next six days – and the associated forms and client records – will be automatically downloaded. On subsequent logins, you can set **download schedule** to yes or download scheduled visits once logged in.

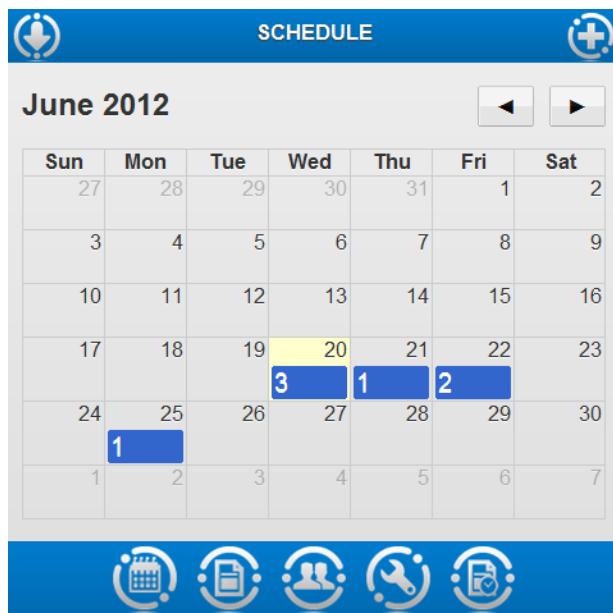
**Note:** on subsequent logins, if you have changed your password for the web-based version of Credible, make sure download schedule is set to No *before* logging in. Once logged in, you will need to change your password in Credible Mobile. Click [here](#) for more information.

3. To have the application to remember your username and domain name so you do not have to enter them each time, set **remember me** to Yes. Do not use the remember me setting if you share the device.
4. Click the LOGIN button.

If this is your initial login, the application loads the necessary lookup tables such as the visit type, recipient, Axis 1, and Axis 2 lookup tables. The Axis 3 lookup table is not automatically loaded due to its size. When you access a form that needs Axis 3 codes, the system will prompt you to 'update Axis 3 lookups' via the Options screen.

When the loading is complete, the Schedule screen displays with your scheduled visits.

**Note:** if an “update available” screen displays, follow the instructions to apply the update(s). Click [here](#) for more information.


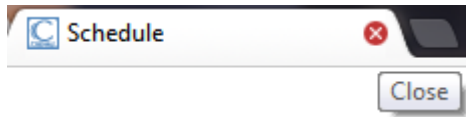




**Chrome refresh note:** if you are using Credible Mobile on your laptop/desktop, do *not* use external screen refresh functions such as Chrome's 'Reload this page' icon, F5, or Ctrl+R. If you need to refresh, click an icon in Credible Mobile that takes you to another screen in the application and then go back to the screen you were on.

Refer to [Appendix B](#) for known issues.

## Logging Out/Closing Credible Mobile

iPad/iPhone	Android	Laptop/Desktop
For security purposes, any time you press the Home button you will automatically be logged out of Credible Mobile.	<ol style="list-style-type: none"> <li>1. Press the double window icon at the bottom of the screen. </li> <li>2. Drag the Credible Mobile application down (if device orientation is horizontal) or left or right (if orientation is vertical) to close.</li> </ol>	<p>Click the x icon on the Credible Mobile tab:</p>  <p>Keyboard shortcuts: Ctrl+W for Windows and Linux and ⌘-W for Mac</p>

## Credible Mobile Application Update

A Credible Mobile application update can come in three different “flavors”: a Database Schema refresh, a File update, or both. If an application update is available when you log in, you will be redirected to an “update available” screen. Follow the instructions on the screen to apply the update(s).

**Note:** if you navigate away from the update available screen without applying the update(s), you will be redirected back to it so the update can be applied. The one exception to this is if you are using the Credible Mobile Chrome Browser Extension. Since the update of the extension happens automatically within 24 hours of a new release to the Chrome web store, the new update available screen will only be displayed once.

Note that the application will only check for an update when you log in. Other actions such as downloading scheduled visits or updating lookup tables will not result in an update available check.

When a Database Schema refresh *and* File update are required:

iPad/iPhone/Android	Laptop/Desktop
To apply the Database Schema refresh, click OK.	To apply the Database Schema refresh, click OK.
To apply the File update, click the ***Download and Install File Update*** button.	To apply the File update, follow the instructions on the screen. If the Update extensions now button is not displayed, select the Developer mode checkbox.
	If you do not apply the File update when prompted, it will be applied automatically within the next 24 hours.

## Submitting Feedback

If you encounter an issue with Credible Mobile, provide an authorized Task Ticket Submitter with the following information:

1. Date and time of the incident
2. Your employee ID and profile code
3. Web browser and version
4. Software module and screen
5. Client name, Visit Type, Visit ID
6. Device you were using (iPad, iPhone, Nexus 7, Samsung Galaxy Tab, or laptop/desktop)
7. Credible Mobile database schema version and file version



Options screen > User Settings > Credible Mobile Application Version

8. Connected or disconnected mode
9. Whether or not you have provided more than 100 services via Credible Mobile
10. Steps taken that resulted in the problem and screenshot of exact error generated

## CHAPTER 2: BASIC CONFIGURATION OPTIONS

This chapter covers the calendar settings and timeout settings that you might want to change before using Credible Mobile. For laptop/desktop users, it also has the steps to enable support for a Topaz signature pad. For information on the other configuration options in Credible Mobile, refer to [Chapter 12](#).

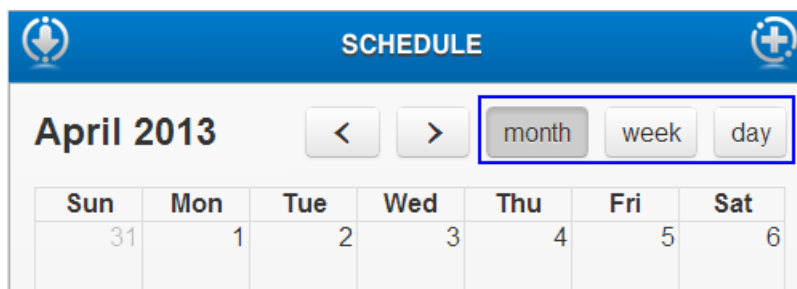
### Calendar Settings



> Device Configuration > Calendar Settings

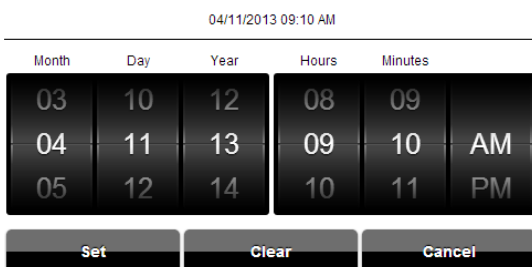
**Calendar days forward count** – By default, Credible Mobile downloads your scheduled visits for the current date and the next six days – “forward count” = 7. The minimum forward count is 2 days and the maximum is 90 days.

**Use Enhanced Calendar** – Adds week and day views to the Schedule; buttons appear at the top of the calendar to let you switch between the different views.

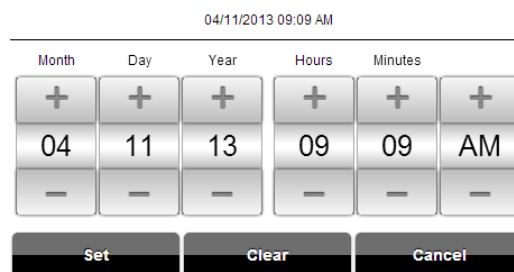


**Date Picker Type** – You use the date picker when entering billing information for a completed visit or scheduling a next visit or unscheduled visit (Datetime field). The two date picker types are shown below.

#### Scroller (default)



#### Click Picker



**Date Picker Display Mode** – The default Popup mode makes the date picker display in the middle of the screen. Bubble is similar to Popup but the data picker displays at the top of the screen (best for tablets). Top and Bottom make the date picker span the entire Credible Mobile screen at the top or bottom of the screen depending on which one you select.

**Date Picker Theme** – The default depends on your device: Classic for Android tablets and laptops/desktops and iOS for iPads/iPhones. Refer to [Appendix A](#) to see what the different themes look like.

## Timeout Settings



> Device Configuration > Calendar Settings

**Login Timeout (Chrome Only)** – If your laptop or desktop is not used for the amount of time specified in Login Timeout, Credible Mobile will automatically log you out of the application. Because the auto logout is based on lack of use of your computer, not using Credible Mobile in and of itself will not result in an auto logout. The default Login Timeout is 5 minutes and is recommended as the minimum timeout setting to ensure enough time for lookup tables to load.

**Send Queue Refresh Timeout** – Lets you control how frequently automatic queue processing occurs (5, 2, or 10 minutes). When you click SEND for a completed visit, it is added to the Unsynced Visit List. After the number of minutes specified in Send Queue Refresh Timeout have passed, the visit is automatically uploaded and moved to the Sent Visit List. Send Queue Refresh Timeout also controls how frequently admin time entries are uploaded.

**Disable Automatic Queue Processing** – Lets you disable automatic queue processing. Visits in the Unsynced Visit List and admin time entries will not be uploaded until you click the “Upload queued visits” icon.




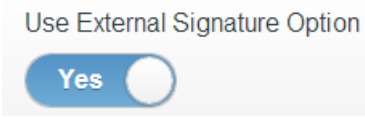
Credible Mobile processes the Unsynced Visit List *one visit at a time* for automatic and manual processing and requires an Internet connection for both.

## Signature Capture Setting for Topaz Device when Using Chrome

If you are using the Credible Mobile Chrome Browser Extension and have a Topaz signature pad, you can use it to capture signatures for completed visits. Topaz SigLite® 1X5 (T-S460-HSB) is the recommended model.

To enable support in Credible Mobile:

1.  > User Settings > Signature Capture

2. 

For information on installing the Topaz Signature Pad Java™ Applet for Chrome, refer to Credible Library reference 37164.

## CHAPTER 3: SCHEDULE SCREEN

The Schedule screen serves as your home page in Credible Mobile. Days with scheduled visits are highlighted in blue and the number of scheduled visits for each day is indicated.

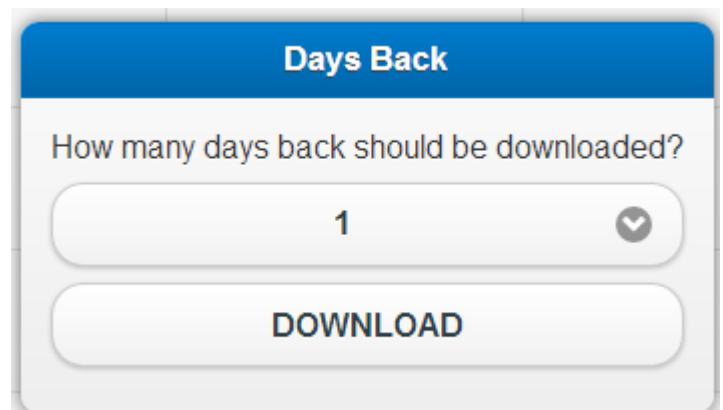
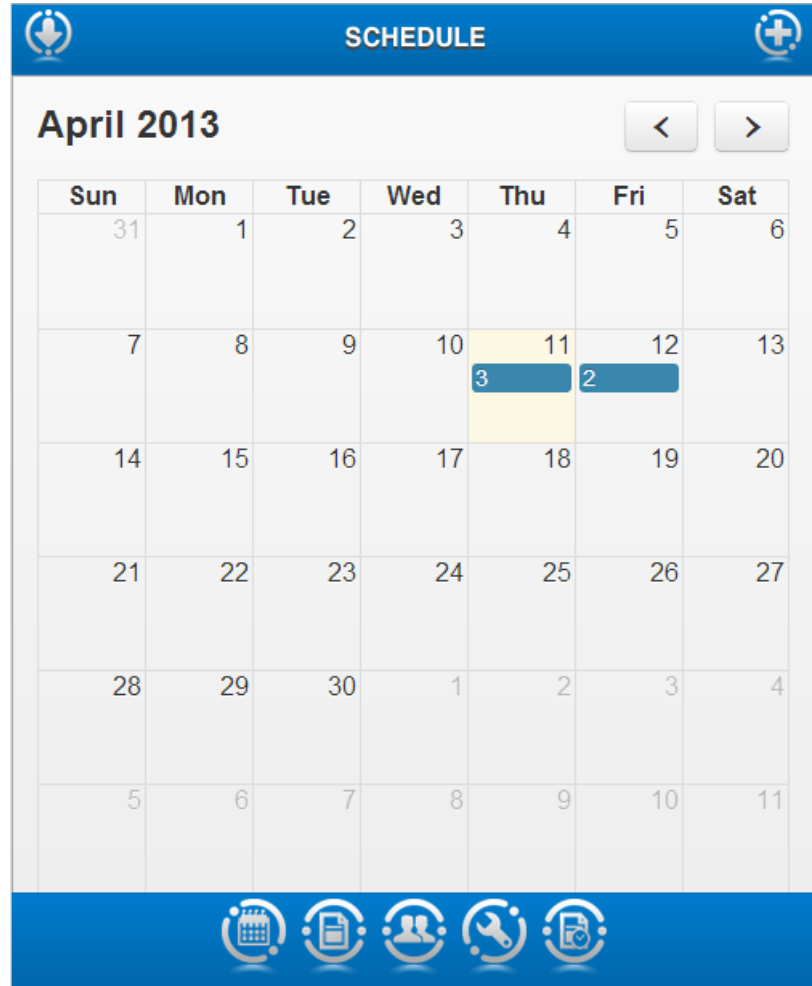
If you have turned on the Enhanced Calendar, there will be buttons to switch between month, week, and day view.

You start a visit by clicking the day and then clicking the visit button that displays. After you complete a scheduled visit, it is removed from the Schedule in Credible Mobile.

**Downloading scheduled visits** – When connected to the Internet, use the Download icon in the upper left corner to manually download scheduled visits for the current date and future days ([Calendar days forward count](#)). The application downloads the forms and client records associated with the scheduled visits and any updates to the following lookup tables: Visit Type, Program, Form Group, Billing Group, Recipient Type, and Location.

You can download scheduled visits and any changes made to those visits for previous dates by *clicking and holding* (or *long pressing*) the Download icon. Use the Days Back popup to specify the number of days you want to go back; available options are 1, 2, 3, 5, 7, 10, 14, or 21 days.

If there are a large number of past scheduled visits, it may take a few minutes for the



download to complete. Once downloaded, you can start and complete the past scheduled visits.

**Adding unscheduled visits** – With the Add New icon in the upper right corner, you can add an unscheduled visit for a client in your Credible Mobile database or a new client. (If the icon is not available, it means your administrator disabled Unscheduled Visit for all mobile users.)



**Accessing other Credible Mobile screens** – From the Schedule screen, you can access all the other main screens in Credible Mobile with the icons at the bottom of the screen. See the next chapter for a description of the main icons and the icons on the different screens.

## CHAPTER 4: ICONS AND SCREENS IN CREDIBLE MOBILE



Schedule



Visit Queue



All Clients



Options



Admin Time  
(only on Schedule screen)

### Schedule screen



Download new scheduled visits for current date/future days and associated forms/client records (updates to six lookup tables are also downloaded)

Click and hold Download icon to download scheduled visits and any changes made to those visits for previous dates (Chrome and Android only)



Add unscheduled visit

(If the icon is not available, it means your administrator disabled Unscheduled Visit for all mobile users.)

**Visit Queue screen** – access open and queued visits, upload queued visits, and view details about sent/uploaded visits



Upload queued visits



**All Clients screen** – access the Manage Client screen for any client that has been downloaded to your mobile device or laptop/desktop



Download updates to all existing clients (OK at prompt) or just retrieve client records for visits recently added to your schedule in Credible Mobile (Cancel at prompt). The second option is useful if the application was not able to download an associated client record when it downloaded a scheduled visit.



Add new client

**Options screen** – configure settings for Credible Mobile and update the forms library and lookup tables

**Admin Time Entries screen** – add, edit, and delete admin time entries



Return to Admin Time Entries screen



Add new admin time entry

**Manage Client screen** – review information about the client and start/resume visits



Sync -- download updated client information



Schedule next visit

(If the icon is not available, it means your administrator disabled Next Visit for all mobile users.)

**Perform Visit screen** – access form associated with visit or Sign & Submit screen



Manage Client screen



Sign & submit

**Sign & Submit screen** – enter billing information for the visit, sign the visit, queue up the visit for upload



Manage Client screen



Discard visit

Note that icons that involve interaction (download/upload) with the Credible website are only available when you are in connected mode.


## CHAPTER 5: PERFORMING A SCHEDULED VISIT

The steps involved in performing a scheduled visit in Credible Mobile are as follows:

1. Select visit on Schedule screen to access Manage Client screen for client
2. Review client information
3. Start visit and access web form
4. Document visit via web form
5. Complete the visit
6. Have client and others sign visit
7. Select/enter billing information for visit
8. Queue up visit for upload
9. Manually upload visit if automatic queue processing is disabled

### Step 1. Select visit on Schedule screen



- A. If you are not on the Schedule screen, click .
- B. In the Schedule screen, click the day that has the visit you want to perform (the number of scheduled visits for the day is indicated). A button for each scheduled visit displays.

in	Mon	Tue	Wed	Thu	F
31	1	2	3	4	
7	8	9	10	11	
			2	2	
14	15	16	17	18	
21	22	23	24	25	

4/11/2013 08:00 PM - GROUP ASSESS FUNCT ASSESS (3) / ASSESS FUNCT ASSESS
4/11/2013 09:15 PM - DOE, JOHN / PROG PROGRESS NOTE

If the visit type is a form group, "FORM GROUP" and the number of forms in the group will also be on the button. In Credible Mobile, you need to complete an individual visit for each form in a form group.

4/11/2013 11:15 AM - DOE, ALEX / ADMIS RIGHTSCONSENTE **FORM GROUP (3)**

If the visit is for a group of clients, "GROUP", the visit type, and the number of clients in the group display on the button. Click [here](#) for information about performing a scheduled group visit.

4/11/2013 08:00 PM - **GROUP ASSESS FUNCT ASSESS (3)** / ASSESS FUNCT ASSESS

- C. Click the appropriate scheduled visit button. The Manage Client screen displays.


**MANAGE CLIENT**

**First Name** John

**Last Name** Doe

**Address 1** 12 Beach Street

**Address2**

**City** Myrtle Beach

**State** SC

**Zip Code** 92421

**Phone** 843-555-1212



**( 1 ) PLANNED VISIT**


**ADDITIONAL INFO**

**MEDICATIONS**

**DIAGNOSIS**

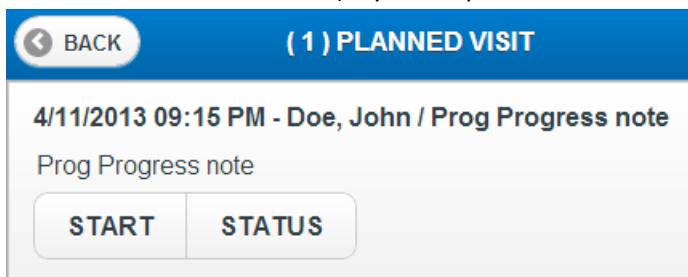
**Tip:** you can also access the Manage Client screen by going to the All Clients screen and clicking the client's name.

## Step 2. Review client information

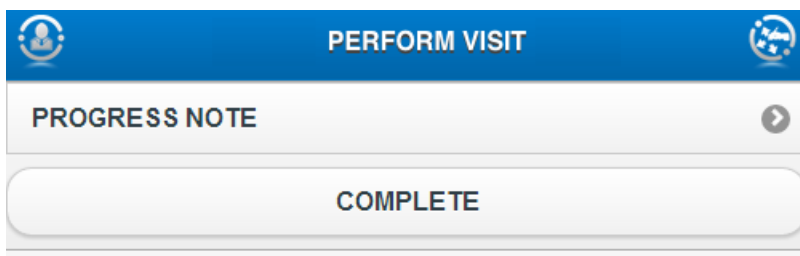
- A. To make sure you are viewing up-to-date information, click  (only available in connected mode) before reviewing the client's information. Credible Mobile downloads any updates to the client's record and displays the All Clients screen.
- B. Click the client's name to reaccess his/her Manage Client screen.
- C. Click the ADDITIONAL INFO buttons to view different parts of the client's record.  
**Reminder:** the client details that you view in Credible Mobile can only be updated on the web-based version of your Credible system.

## Step 3. Start visit and access web form

- A. On the Manage Client screen, click the PLANNED/SCHEDULED VISIT button to access a list of the client's scheduled visits (any incomplete visits will also be included).



- B. Click START for the appropriate visit on Planned Visit screen. After the application builds the form, the Perform Visit screen displays.



If the form uses an Axis 3 dropdown and the corresponding lookup has not been downloaded to your mobile device, a prompt displays asking you to update Axis 3 lookups. Click OK, go to the Options screen, click UPDATE AXIS 3 LOOKUPS, and then resume the visit. If when you click OK the prompt redisplay, click the Prevent this page... checkbox, click OK, and then update the Axis 3 lookups.

If you need to return to the Manage Client screen, click .

- C. Click the form name to access the form contents screen.

## Step 4. Document the visit

In the form contents screen, there is a button for every main (parent) category in the form and an ADD TEXT NOTE button. Some forms only have one main category.

- A. Click a category heading to access the form questions/fields (if a category has subcategories, another contents screen displays – click the appropriate subcategory). Required fields are indicated by a red flag ([form validation](#) is enabled by default). If a field has injected data in it and not all of it is visible, scroll down in the field to see the additional data.
- B. Fill out the required fields and the appropriate optional fields and click COMPLETE. The 'greater than' icon for the section (on the far right) is now a checkmark to indicate it has been completed.

**iPad note:** if you need to clear a numeric field after entering data in it, double-click in the field and then select Select All > Cut.

If there are any incomplete required fields, a popup displays listing them and the fields are highlighted in pink. Click OK to dismiss the popup, fill out the required fields, and click COMPLETE.

- C. Repeat steps A and B for each section in the form. If you cannot complete the form in a single session, you can resume it a later time (see [Saving a Visit and Resuming/Sending It](#)).

**Note:** the ability to add elements to a Tx Plus plan while documenting against it and use other features available in the web version of Credible will be incorporated into future releases of Credible Mobile. See [Appendix B](#) for the known issues with the current Tx Plus documentation functionality.

## Step 5. Complete the visit

- A. If necessary, add a note to the visit via the ADD TEXT NOTE button on the form contents screen. When the completed visit is uploaded, the note displays in the Notes field in the Visit Details screen. Since the note is not part of the official visit documentation, adding one is not recommended.
- B. Click COMPLETE.

If there are any incomplete “form required” fields, a popup displays listing them. Click OK to dismiss the popup and then go into the appropriate sections to complete the required fields.

## Step 6. Have client and others sign visit

- A. On the Perform Visit screen, click COMPLETE or the Sign & Submit icon



to access the Sign & Submit screen.

If needed, you can discard the visit while on the Sign & Submit screen by clicking



**SIGN & SUBMIT**

Client Name:

Program:

Visit Type:

Location:

Diagnosis:

Recipient:

Billing Group:

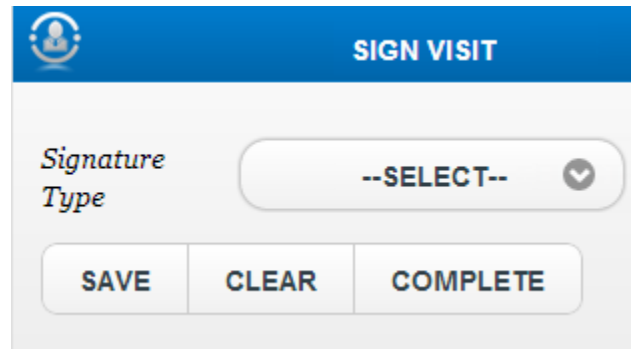
Non-Billable: ☒ No

Visit Start Datetime:

Visit End Datetime:

- B. Click SIGN on the Sign & Submit screen to access the Sign Visit screen.

All signature labels set up in your Credible website are used in Credible Mobile. The configuration settings of the visit type on the Credible website determine whether the client signature box displays and the number of other signatures allowed. The exception to this is if the visit type is set up for more than 10 signatures as 10 is the maximum number of signatures allowed in Credible Mobile.



If you have saved your signature on the Credible website (via Signature function on Employee nav bar), your signature will automatically be added to the visit when it is uploaded.

- C. If necessary, select Employee signature from the dropdown, sign your name in the signature field, and click SAVE. The date and time you click SAVE will be the timestamp for your signature.

- To clear a signature and start over, click CLEAR.
- To delete a signature, click the trash can icon and click OK when the confirmation prompt displays.

**Note:** if your mobile device has a small screen and you are having issues with the signature field: Options > Signature Capture > Select 200px from Adjust Canvas Size dropdown.

- D. Select Client signature from the dropdown. Have the client sign and click SAVE. The date and time SAVE is clicked will be the timestamp for the signature.
- E. If another individual needs to sign the visit, select the appropriate signature from the dropdown and have him or her sign. Repeat as necessary.
- F. Click COMPLETE. The Sign & Submit screen displays.



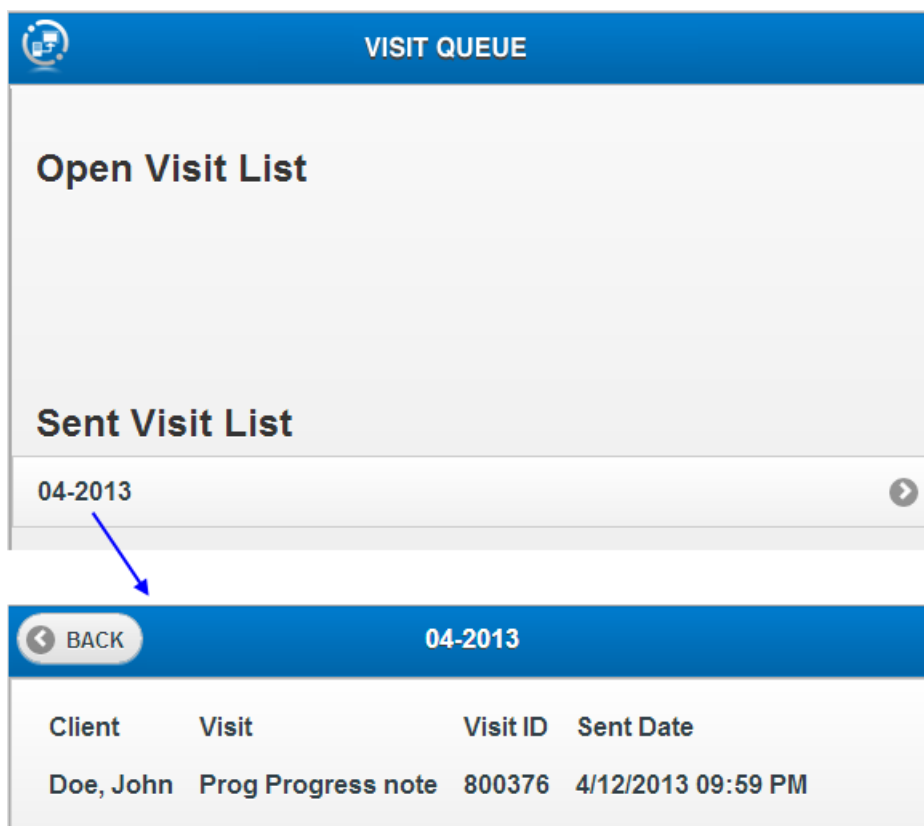
## Step 7. Select/enter billing information for visit

The Program, Visit Type, and Visit Start Date/time are automatically filled in. You can change the Visit Start Datetime if necessary. Location, Diagnosis, and Recipient are required fields.

- A. Enter/change the billing details as appropriate.
- B. Click the Visit End Datetime field to access the Date Picker.

## Step 8. Queue up visit for upload

- A. On the Sign & Submit screen, click SEND.
- B. In the Send Visit popup that displays, enter your password and click SEND. The Schedule screen displays.
- C. If you are using automatic queue processing, click the Visit Queue icon and access the Sent Visit List for the month to verify that the visit was successfully uploaded.



If the upload was not successful, the visit will be highlighted in yellow in the Not Sent Visit List and there will be an error message.

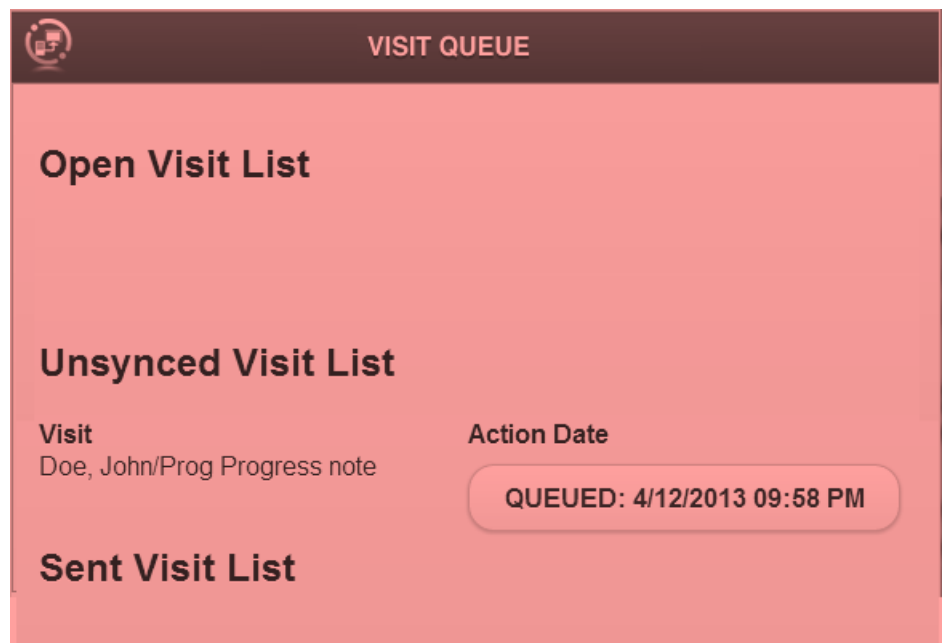
- i. Click OK to dismiss the alert and highlighting. The application will attempt to resend the visit. Because visits are uploaded one at a time, no other visit can be uploaded until the “problem visit” is successfully sent or you remove it from the queue.
- ii. If a queued up visit repeatedly errors, remove it from the queue: click the QUEUED button and click OK when the confirmation prompt displays. Click the visit in the Open Visit List and then click BILLING. On the Sign & Submit screen, make sure a value is selected for each dropdown and the dates/times are formatted correctly. Make changes if necessary and then SEND the visit to the upload queue again.

## Step 9. Manually upload queued visit if no automatic queue processing

- A. On the Schedule screen, click the Visit Queue icon. The visit is queued up in the Not Sent Visit List

If you need to make changes to the visit, you can remove it from the queue (it becomes an open visit) and resume it or access the Sign & Submit screen. Refer to [Saving a Visit and Resuming/Sending It.](#)

- B. Click the Upload icon in the upper left corner to send the visit to the Credible website.



See above for information on successful and unsuccessful uploads.

## CHAPTER 6: PERFORMING A SCHEDULED GROUP VISIT

When you perform a group visit in Credible Mobile, you have to complete an individual visit for each client in the group. With the exception of how you access the Manage Client screen for clients in a group visit, the group visit process is the same as the single-client visit process.

When you click a scheduled group visit button on the schedule, the All Clients in Group screen displays.




When you complete a visit for a client in the group, the client button is removed from the All Clients in Group screen. In addition, the number of clients in the group is updated on the scheduled visit button on the Schedule screen.

## CHAPTER 7: STARTING OR SCHEDULING NEXT VISIT FOR CLIENT

With the Next Visit function, you can start or schedule a visit for an “existing” client. An existing client is one that is already in your Credible Mobile database.



1. On the Manage Client screen, click  to access the Next Visit screen. (If the icon is not available, it means your administrator disabled Next Visit for all mobile users.)

If necessary, you could change the client the next visit is for with the dropdown provided.

2. Click START VISIT or SCHEDULE VISIT as appropriate. If you are scheduling the next visit, the screen that displays has an additional field for you to enter the start date and time for the visit.
3. Select the program, visit type, and location (required fields).
4. If you are scheduling the visit, click the Visit Start Datetime field and use the date picker enter a date and time.
5. Select the duration (optional).
6. Click COMPLETE.
  - If you are starting the next visit, the Manage Client screen displays. Click the PLANNED VISIT button and then click the START button for the visit on the Planned Visit screen.
  - If you scheduled the next visit, the Schedule displays with the newly added scheduled visit. Note that the scheduled visit will not appear on your schedule in the web-based version of your system.

## CHAPTER 8: ADDING UNSCHEDULED VISIT FOR “NEW” CLIENT

In Credible Mobile, there are two types of “new” clients:

- One that exists in the web-based version of Credible but has not yet been downloaded to Credible Mobile
- One that is truly new and does not exist in the web-based version of Credible

If you have an Internet connection, you can look up a client on the web-based version of Credible. When you start or schedule the unscheduled visit, the client's record is downloaded to Credible Mobile.

If you are not connected or the client is truly new, you can add the client to Credible Mobile and then start or schedule the “next” visit. Since the Manage Client screen displays after you add the client, it makes more sense – fewer mouse clicks – to use the Next Visit function (covered in the previous chapter).

Like the Next Visit function, you can start or schedule a visit for a new client.

When you upload a completed visit for a client you added to Credible Mobile, it will be an orphan visit and manual intervention will be necessary to link it to the appropriate client record.

### Looking Up a Client and Adding an Unscheduled Visit

An Internet connection required to look up a client.

1. On the Schedule screen,



click . (If the icon is not available, it means your administrator disabled Unscheduled Visit for all mobile users.) The Unscheduled Visit screen displays.

You have the option of selecting an existing client from this screen – doing so is equivalent to using the Next Visit function.


2. Enter the last name of the client you want to look up in the corresponding field (required) and click LOOKUP CLIENT.

If Credible Mobile does not find an exact match, the search results will include clients with last names that start with the first letter of the name you enter. To narrow the search results, you can enter additional criteria in the other search fields.

3. Select the appropriate client from the dropdown. The START VISIT and SCHEDULE VISIT buttons display.
4. Click START VISIT or SCHEDULE VISIT as appropriate. If you are scheduling the visit, the screen that displays has an additional field for you to enter the start date and time for the visit.
5. Select the program, visit type, and location (required fields).
6. If you are scheduling the visit, click the Visit Start Datetime field and use the date picker enter a date and time.
7. Select the duration (optional) and click COMPLETE.
  - If you are starting the unscheduled visit, the Manage Client screen for the client you looked up displays. Click the PLANNED VISIT button and then click the START button for the visit on the Planned Visit screen.
  - If you scheduled the unscheduled visit, the Schedule displays with the newly added scheduled visit. Note that the scheduled visit will not appear on your schedule in the web-based version of your system. If you go to the All Clients screen, you can access the record for the client you looked up.

## Adding a Client and Starting/Scheduling “Next” Visit



1. On the Schedule screen, click . (If the icon is not available, it means your administrator disabled Unscheduled Visit/Next Visit for all mobile users.) The Unscheduled Visit screen displays.
2. Click ADD NEW CLIENT.

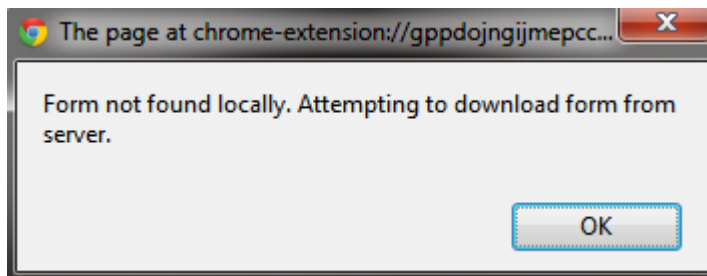
The Add New Client screen displays. You can also access this screen via the Add New icon on the All Clients screen.

3. Fill out the fields and click SAVE NEW CLIENT. The Manage Client screen for the new client displays.

Now that you have added the client to Credible Mobile, you can use the [Next Visit](#) function instead of the Add New function on the Schedule screen.

## Form Not Found Locally

When you start an unscheduled or next visit, Credible Mobile checks to see if the form associated with the visit type has already been downloaded. If it has not and you have an Internet connection, the following message displays:



Click OK. If the message redisplay, click OK again. If after three tries the application cannot find the form, have your administrator verify that the form is linked to the visit type in the web-based version of Credible.

## CHAPTER 9: CHANGING THE STATUS OF A SCHEDULED VISIT

If a client needs to reschedule, cancels a scheduled visit, or is a no-show, you can change the status of the visit in Credible Mobile. If you are using automatic queue processing and have an Internet connection, the status change will automatically be reflected in your schedule on the web-based version of your Credible system. There will be a red X to the right of the client's name and the new status will be reflected in the Scheduled Visit popup.

**Note:** you cannot change the status of a visit once it has been started.

1. Access the Manage Client screen and access the Planned Visits screen.
2. Click STATUS for the appropriate visit. The Change Visit Status screen displays.
3. Select the new status from the dropdown and click PERFORM STATUS CHANGE. The Schedule screen displays and the visit has been removed from the schedule.
4. If you have disabled automatic queue processing, you need to manually upload the status change:
  - a. Click the Visit Queue icon. The status change is listed in the Pending Schedule Changes section.
  - b. Click the Upload icon in the upper left corner. The status change is uploaded and the Pending Schedule Changes section is removed from the screen.



## CHAPTER 10: SAVING A VISIT AND RESUMING/SENDING IT

If you start a visit in Credible Mobile but cannot complete and upload it right away, you can save it. The visit becomes an open visit and when you reaccess it, there are two options:

- Resume the visit to add to the form data or change it
- Access the Sign & Submit screen to queue up the visit for upload (if necessary, you can change the billing information)


Note that if you remove a visit from the upload queue, it also becomes an open visit.

1. Click the Visit Queue icon so you can see the visit in the Open Visit List. You can also access open visits via the PLANNED VISIT button on the Manage Client screen.
2. Click the visit. RESUME and BILLING buttons are available. RESUME takes you to the Perform Visit screen so you can add to or change the form data. BILLING takes you the Sign & Submit screen.
3. Click RESUME. The Perform Visit screen displays for the form.
4. Open the form, fill out one field in one section, and click COMPLETE until you are at the Sign & Submit screen.
5. Click SEND to queue up the visit for upload.


## CHAPTER 11: ADDING AND UPLOADING ADMIN TIME ENTRIES

Admin time entries are uploaded automatically like visits in the upload queue or manually via the Upload icon on the Visit Queue screen. The entries will need to be approved on the Credible website.



1. On the Schedule screen, click . The Admin Time Entries screen displays. If there are entries in the list, it means they have not been uploaded yet.



2. To add an entry, click . The Add New Admin Time Entry screen displays.

3. Fill out the fields and click SAVE ADMIN TIME. The Admin Time Entries screen displays with your entry.

ADMIN TIME ENTRIES				
Actions	Admin Time Type	Time In	Time Out	Notes
<div>EDIT</div> <div>DELETE</div>	Training	6/23/2012 08:30 AM	6/23/2012 10:30 AM	Training on Credible Mobile

If necessary, you can edit or delete an entry with the corresponding buttons. Once an admin time entry is uploaded, it is removed from the Admin Time Entries screen.

4. If you have disabled automatic queue processing, you need to manually upload the admin time entry. Click the Visit Queue icon and click the Upload icon in the upper left corner. Note that if there is a queued up visit, it will be uploaded as well.

## CHAPTER 12: CREDIBLE MOBILE CONFIGURATION OPTIONS

The Options screen lets you change your local password, determine the versions of Credible Mobile you are using, and control other configuration options. The User Settings and Manage Local Data sections are expanded by default.



### + USER SETTINGS

**Change Local Password** – You should only use this option if your password has been changed for the Credible website. You use it to make your Credible Mobile password match your new password for the Credible website.

**Important:** do *not* change your local password until your password has been changed on the Credible website.

1. Log into Credible Mobile with your old password.
2. Options screen > User Settings > Change Local Password.
3. Enter your old Credible website password in the first Password field.
4. Enter your new password in the second and third Password fields and click CHANGE PASSWORD.

**Credible Mobile Application Version** – Displays the version information you need to include when submitting a Task ticket.

### Signature Capture

**Use External Signature Option (Chrome Only)** – If you want to capture signatures in Credible Mobile with a Topaz signature pad, set the field to Yes.

**Adjust Canvas Size** -- Lets you adjust the canvas size of the signature field. Only use if your mobile device has a small screen and you are having issues with the signature field.

## + MANAGE LOCAL DATA

### Update Forms Library

- Checks forms used in completed visits in Credible Mobile and then downloads newer versions of the forms if they exist. Note that the older versions are not deleted locally.
- Checks your scheduled visits on the web-based version of Credible and if any are for clients not currently in your Credible Mobile database, the client records are downloaded. Note that the scheduled visits are not downloaded.

**Update Axis 1 & 2 Lookups** – Updates the corresponding lookup tables on your device with the versions on the Credible website.

**Update Axis 3 Lookups** – There is a separate button for the Axis 3 lookup table because it is large and may take longer to update than the Axis 1 and 2 lookup tables.

**Update Billing Lookup Tables** – Updates the following lookup tables on your device with the versions on the Credible website:

- Admin Time Type
- Programs
- Visit Types
- Billing Groups
- Recipient Types

**Update All Lookup Tables** – Updates the following lookup tables on your device with the versions on the Credible website:

- Admin Time Type
- Axis1, Axis2, and Axis3
- Billing Groups
- Form Groups
- ICD9CM/Axis3
- Locations and Programs
- Recipient Type
- States (not used currently)
- Visit Status and Visit Types

## + DEVICE CONFIGURATION

[Update Partner Configuration](#) – Updates your Credible Mobile configuration with mobile-related Partner Config settings and the values in the Device Settings screen (for example, terminology labels for Client, Service, Employee, and Schedule).

[Default Data Server](#) – Lets you change the domain name Credible Mobile communicates with. Also lets you specify if the communications are done via HTTPS or not. USE HTTPS ONLY is selected by default. Do *not* change these settings unless instructed to by Credible staff.

[Calendar Settings](#)

[Timeout Settings](#)

Form Rules – Use to disable form validation.

## + MANAGEMENT

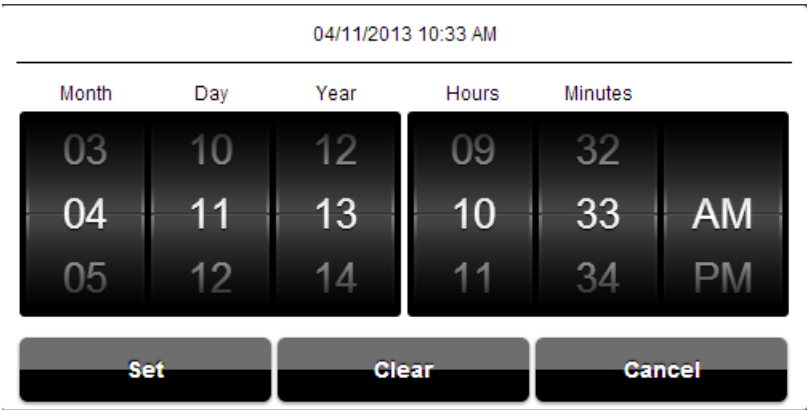
[Refresh Database Schema](#) –You should only use this option if instructed to by Credible staff.

APPENDIX A: DATE PICKER THEMES

ios



Classic



Modern



## Android ICS

04/11/2013 10:13 AM

Feb	09	2011	08	11	
Mar	10	2012	09	12	
Apr	11	2013	10	13	AM
May	12	2014	11	14	PM
Jun	13			15	

Set Clear Cancel

**Android ICS Light** – same as above but with white background. (ICS stands for Ice Cream Sandwich, the release name of Android version 4.0.X)

## Android

04/11/2013 10:19 AM

Mar	10	2012	09	18	
Apr	11	2013	10	19	AM
May	12	2014	11	20	PM

Set Clear Cancel

## Windows Phone

04 April 11 Thursday 2013 10 23 AM

set clear cancel

**Windows Phone Light** – same as above but with white background

## APPENDIX B: KNOWN ISSUES

### All Platforms

- The application uploads visits one at a time. If you are using automatic queue processing (Options > Timeout Settings), be aware that each visit is sent one at a time and the “send refresh queue timer” resets after each send. This means if using the default Send Queue Refresh Timeout setting of 5 minutes and there are 2 visits in the queue, it will take 10 minutes total to send them. For this reason, you might want to change the setting to 2 minutes when in the office or near a dedicated WIFI signal so it will only take 4 minutes to send the 2 visits.
- The following are known issues with the Tx Plus documentation functionality:
  - Tx Plus extended fields and program-specific labels are not currently available in Credible Mobile.
  - All elements in the treatment plan are left aligned; indentation to convey the hierarchy of elements is not currently available.
  - If an element was flagged as inactive when the treatment plan was built, you can still document against it in Credible Mobile; it is not grayed out.
  - If a diagnosis was associated with a top-level element when the treatment plan was built, it will not be displayed in Credible Mobile.

### iPhone

Admin Time screen may not resize as expected on the iPhone.

### iPhone/iPad

During initial login, a client record associated with a downloaded scheduled visit may not display in the Manage Client screen. To correct the situation, navigate away from the Manage Client screen and then reaccess it.

### Android

When selecting an option from a dropdown (for example, client, visit type, program, or location), the dropdown does not clear until you click somewhere else on the screen.




## APPENDIX C: TROUBLESHOOTING

**Laptop/Desktop:** if the Credible Mobile extension disappears from Chrome or if your Credible Mobile settings change randomly, you need to make sure you are **not** signed into Google Chrome. Click [here](#) for steps to verify.

## APPENDIX D: FORCING THE APPLICATION TO CLOSE

### Android

1. Press the double window icon at the bottom of the screen. 
2. Drag the Credible Mobile application down (if device orientation is horizontal) or left or right (if orientation is vertical) to close.

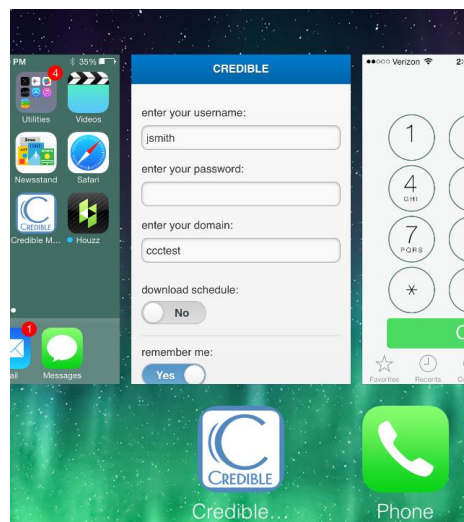
Alternate method:

1. Access Settings and press Apps/Applications.
2. Select the Credible Mobile application and then press Force Stop.

### iPad/iPhone

1. Press the Home button to put the Credible Mobile application in the background.
2. Double-press the Home button to display the multitasking bar (pre-iOS 7.0) or “card view” (iOS 7.0 or higher).
3. If necessary, flick left or right to find the Credible icon/card.
4. Multitasking bar: touch and hold the Credible icon until it begins to jiggle and then tap the close icon in the upper left corner.

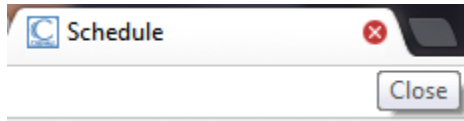
Multitasking card view: flick the Credible card up.



5. To return to the Home screen, tap the screen (pre-iOS 7) or press the Home button (iOS 7.0 or higher).

## Laptop/Desktop

Click the x icon on the Credible Mobile tab:



Keyboard shortcuts: **Ctrl+W** for Windows and Linux) and **⌘-W** for Mac

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