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Introduction

This training guide walks you through the steps needed to perform basic End-User functions in Credible. This guide will cover:

- Logging into Credible
- Basic navigation
- Client record manipulation
- Scheduling
- Visit documentation
- Client check-in workflow
- Form Groups
- Treatment (Tx) Plus
- Group Services
- Client discharge workflow
- Supervisory tasks
- Employee setup tasks

The document highlights some basic navigation strategies and tips for effectively using the software and follows Credible’s standard workflows and settings. Since your Credible system (Domain) is configured to meet your Agency’s specific needs, you may notice some differences between it and the screenshots used in this guide.

*If there are differences between this guide and the directions given by your Agency’s administrator(s) or superusers, your Agency’s model always overrides those discussed here.*

Using this Guide

The End-User Training Guide is designed to be used as a reference during and after the End-User training provided by Credible. It covers all topics discussed during the training in greater detail than can be covered during your live or virtual End-User training.

This document is best used as a printed reference guide and is therefore optimized for printing and binding. The guide should be duplex printed for optimal presentation. While it can be printed in black and white, Credible recommends the chapters on Treatment (Tx) Plus (pages 33–38) and Appendix B (pages 81–83) be printed in color.
Logging in and Credible Tabs

In this section, you will:

1. Learn how to log into Credible.
2. Review the parts of the Credible homepage.
3. Review the features of the main Credible tabs.
Logging into Credible

In order to access Credible for your organization, you need to login to your Credible Domain. A Domain in Credible is the website that has been configured for your organization and contains the data for all your organization’s Clients and employees. Each organization has a unique Domain.

In order to access Credible, you need to use a web browser. Credible supports the following browsers:

- **Internet Explorer**
  - Version 9 (9.0.8112.16421 or higher)
  - Version 10, and version 11

- **Safari**
  - Version 5.2 or higher

- **Chrome**
  - Version 17.0.963.56 or higher

- **Firefox**
  - Version 10.0.1 or higher

Open your browser and go to [www.crediblebh.com](http://www.crediblebh.com). Enter the username, password, and Domain name that was provided to you and click the Login button.

**Please note:** Credible software is not supported on mobile browsers, as found on phones and tablets.
Tabs and Page Header

The page header appears on almost all pages you will access in Credible.

1. **Agency Logo and Name**: Your Agency’s logo and name will display on the top left side of the page.

2. **Help button**: You can access Credible’s Help files by clicking the question mark icon.

3. **Logout button**: Click the **Logout** button to sign out of Credible. It is important that you sign out of the software when you are done using it to keep data confidential and to avoid HIPAA violations.

4. **Login information**: The username of the account that is logged in will display here. You can click on your username to bring you to your Employee profile.

5. **Tabs**: Each page within Credible will have tabs along the top header. As a default, the tab you are currently in will be gray, while the rest of the tabs will be dark blue. Your organization may change these colors. The tabs available to you will depend on the profile and security rights assigned to you in the software.
Homepage

Once logged in, the homepage displays. There are several sections to the homepage. While most of the items on the screen display for all users, some are unique to the individual logged in; for example, only medical staff see prescription messages. Not all Agencies use all sections; your homepage may have different sections than what is shown, based on your organization and your position.

Search

Use this feature to search your Credible Domain for a client or employee using their name or ID number.

Employee Messaging

Employee messaging allows you to send messages within Credible to an individual employee or a team.

Incomplete Visits

If a provider has visits that are not complete, they will show in this area. The provider has the option to delete the visit or begin documentation.

Links

Your Agency can list links to important websites in this section.

Message Board

Your Agency can add important messages for all users to see.
To Do List

Lists tasks that need to be completed. This list is personalized for each user of the software.

<table>
<thead>
<tr>
<th>Summary</th>
<th>For</th>
<th>Begin Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update tx plan</td>
<td>Client: Duggar Josie</td>
<td>4/11/2015</td>
</tr>
<tr>
<td>TxTarDate0026</td>
<td>Client: Duggar Josie</td>
<td>4/11/2015</td>
</tr>
<tr>
<td>Lynne Test</td>
<td>Client: Duggar Josie</td>
<td>4/11/2015</td>
</tr>
<tr>
<td>Update tx plan</td>
<td>Client: Kitty, Soft</td>
<td>2/4/2015</td>
</tr>
<tr>
<td>TxTarDate0026</td>
<td>Client: Kitty, Soft</td>
<td>2/4/2015</td>
</tr>
<tr>
<td>Lynne Test</td>
<td>Client: Kitty, Soft</td>
<td>2/4/2015</td>
</tr>
<tr>
<td>Update tx plan</td>
<td>Client: Hitchcock, Alfred</td>
<td>1/31/2015</td>
</tr>
<tr>
<td>TxTarDate0026</td>
<td>Client: Hitchcock, Alfred</td>
<td>1/31/2015</td>
</tr>
</tbody>
</table>

Notification Events

Lists all notifications relevant to a user.

- Sunny to Beach: Sunny Sioux (LATE - 11/29/2014)
Main Credible Tabs

Each tab gives you access to different software features. Access is determined by the security rights set on your account.

Client Tab

1. **Alpha List**: Allows you to list clients by the first letter of their last name. You can also use the **All** link to list all clients you have access to.

2. **Add Client button**: Click here to add a new client to your system, if authorized by your role in the Agency.

3. **Filter bar**: Allows you to filter client records by a number of identifying factors. Agencies can choose which search criteria appear on this bar. To search, enter the information in the appropriate text box or dropdown and click the **Filter** button on the right.

4. **Client Record**: Each client record can be accessed by clicking on the appropriate **Client ID** or **Last Name**, or by clicking the **View** button in the appropriate row.

5. **My Primary button**: If your organization uses this feature, you can view all the clients that are assigned to you as primary by clicking this button.
1. **Alpha List**: Allows you to list employees by the first letter of their last name.

2. **Add Employee Form**: Allows designated users to assign forms to employees.

3. **Add Employee**: From here, you can create a new employee profile in the Credible software. Only specified users have this ability.

4. **Filter bar**: Much like the Client tab’s filter bar, this allows you to search employees by specified criteria.

5. **Employee Profile**: You can access an employee profile by clicking the Employee ID, Last Name, or View buttons in the specified row.

6. **Instant Message**: When you see this icon, you can send an instant message to this employee within Credible.

7. **My Record button**: Click this button to go to your own employee profile.
1. **Schedule name**: This is the name of the user or client whose schedule you are viewing.

2. **Notifications**: Shows all notifications for a specific user.

3. **Work Hours**: The grey bars indicate the work hours set in your employee profile.

4. **Scheduled Appointments**: Appointments on your schedule.

5. **Schedule Icons**:

<table>
<thead>
<tr>
<th>Function</th>
<th>Icon</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zoom In/Zoom Out</td>
<td>![icon]</td>
<td>Click the icon to change the time interval on the schedule. The largest interval is one hour and the smallest is 10 minutes. Click the Zoom Out icon to return to the previous interval.</td>
</tr>
<tr>
<td>Day View</td>
<td>![icon]</td>
<td>Shows the schedule for the current day.</td>
</tr>
<tr>
<td>Month View</td>
<td>![icon]</td>
<td>Shows the schedule for the current month.</td>
</tr>
<tr>
<td>Team View</td>
<td>![icon]</td>
<td>Shows the current day’s schedule for all members of your team.</td>
</tr>
<tr>
<td>Printer View</td>
<td>![icon]</td>
<td>Generates a popup with a printer-friendly version of the displayed schedule.</td>
</tr>
<tr>
<td>Block Time</td>
<td>![icon]</td>
<td>Allows you to add non-billable block time to a schedule.</td>
</tr>
<tr>
<td>Add Time</td>
<td>![icon]</td>
<td>Allows you to add billable time to a schedule.</td>
</tr>
<tr>
<td>Copy</td>
<td>![icon]</td>
<td>Allows you to copy a schedule to another employee’s schedule.</td>
</tr>
<tr>
<td>Reassign</td>
<td>![icon]</td>
<td>Allows you to move a schedule to another employee’s schedule.</td>
</tr>
<tr>
<td>Export to Outlook</td>
<td>![icon]</td>
<td>Allows you to export your schedule to Outlook through CSV, vCal, or Outlook Calendar Integration.</td>
</tr>
<tr>
<td>Hide Cancellations</td>
<td>![icon]</td>
<td>Hides cancelled events from the schedule.</td>
</tr>
<tr>
<td>Create Employee Event</td>
<td>![icon]</td>
<td>Allows you to block non-billable time for multiple employees.</td>
</tr>
<tr>
<td>Show Actuals</td>
<td>![icon]</td>
<td>Shows only visits that actually happened (versus those scheduled).</td>
</tr>
<tr>
<td>Relink Notifications</td>
<td>![icon]</td>
<td>Allows you to transfer notifications from one employee’s schedule to a new employee’s schedule if you are unassigned from a client.</td>
</tr>
</tbody>
</table>
Visit Tab

1. **Incomplete Visits button**: Lists only visits that have not yet been Signed & Submitted.

2. **Add Visit**: Allows a user to add a visit to their schedule.

3. **Visit Record**: Shows information for a visit. Several actions can be taken here:
   a. **View**: Displays details of a visit.
   b. **Log**: Shows when the visit was accessed and by which Credible user.
   c. **Print**: Generates a printer-friendly visit report.
   d. **Fax**: Allows a user to eFax a visit report to another Credible Agency.

4. **Approve All Checked button**: Designated users can use this feature to approve visits for billing.

5. **My Visits**: Displays all visits attributed to you.

6. **View All**: Shows all visits.

7. **Print All**: Generates a printer-friendly version of brief visit reports for all visits listed.
Working in the Client Record

In this section, you will:

1. Review the parts of the client record.
2. Learn how to update client information.
3. Review client diagnoses.
Client Record Overview

The Client record contains all the information your Agency has about a specific client. Data will be entered in different sections of the record, which can be accessed using the buttons on the Client Navigation Bar (navbar) within each individual record. This guide will cover the most used sections on the client record overview screen, but your Agency may use different sections from those seen here. These sections contain summaries; full client information can be accessed by clicking the link at the bottom of the section.

Client Info

The first 10-20 fields of the client’s information will appear here, depending on your Agency’s settings in Partner Config. This usually includes their contact information, address, and other information your Agency has selected.

Billing Info

This section contains the client’s insurance information, as well as their open balance.

Warnings

Warnings contain important information about the client that anyone working with them should know.

Diagnosis

Displays client diagnoses from each Axis, or from the Problem List.

Assignments

Shows the staff, programs, and teams the client is assigned to, as well as any inpatient information on the client. You can edit these assignments by clicking on All Assignments and selecting the assignment category.
Updating Client Information

Client Profile

The Client Profile contains basic information for each client, which can be accessed from the Profile button on the Client navbar.

Client Ext

Some Agencies use the Client Extended Info section to store information in excess of the main client profile. To access this section, click the Client Ext button on the Client navbar. You can edit the information in this section by clicking the Update button at the top of the section.

Credible Quick Tip:

Buttons at the top of each profile section will allow you to access client information directly from the profile page.
Teams and Programs

Clients need to be assigned to Teams so employees can access their records, and assigned to Programs in order to receive services. These settings can be changed by clicking on the corresponding button in the Client navbar.

1. Click on the appropriate button on the Client navbar (Team or Program).
2. Find the entry you wish to add to and click the **Assign** button. Assignments will show up with blue highlights.
3. Once assigned, additional options may display with a toggle button. To activate the option, click the **Yes** button.
4. To unassign a Client from a Team or Program, click the **Unassign** button.

<table>
<thead>
<tr>
<th>TEAM ASSIGNMENT: Mille Credible (1058)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ID</strong></td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>6</td>
</tr>
<tr>
<td>12</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>

Contacts

Client contacts are important people, such as social workers, probation officers, and primary care professionals. Their information is accessed through the **Contacts** button on the Client navbar.

To add a contact:

1. Click the **Add Contact** button.
2. Fill in the details for the contact. If a release of information (ROI) has been signed, click the **ROI Obtained** checkbox. Click the **Save Contact** button when you are finished.

To edit a contact:

1. Find the contact on the list and click the **Select** button next to the contact information.
2. Edit the details as necessary and click the **Save Contact** button.
Family

Similar to Contacts, Family allows you to add contact information for people related to the client. To access this feature, click the Family button on the Client navbar.

To add a family member:

1. Click the Add Family Members button.

2. Fill in the relevant information. If the family member is also a client at your Agency, click the Add Link to Existing Client button. A Client search box will pop up. Find the related client and click the Client ID to create a link. If the family member is not a client, click the Add New Family Member button.

To edit a family member:

1. Click the Select button next to the contact name.

2. Make the necessary changes and click the Save Family Member button.
Client Diagnoses

Credible supports two different types of diagnosis setups, based on which clinical codes are used. Your agency will either be using multi-axial diagnoses, or a problem list.

**Multi-axial Diagnoses**

Multi-axial diagnoses come from the DSM IV and are separated into four axes: clinical disorders, personality disorders, general medical conditions, and stressors.

To update a diagnosis:

1. Open the corresponding axis, and then click the **Edit** button next to the diagnosis you wish to change.

2. Make any changes that are necessary and click the **Save** button.

To add a diagnosis:

1. Open the corresponding axis and select the diagnosis from the **New** section.

2. Once a diagnosis is selected, fill in the details and click the **Save** button.

**Credible Quick Tip:**

The 📚 icons on the problem list or multi-axial diagnosis screen connect to *MedlinePlus Connect*, and give a summary of each diagnosis.
Problem List

The problem list diagnosis setup corresponds to the DSM-5 ordering of diagnoses. All diagnoses, behavioral and physical, are listed in a problem list.

To update a diagnosis on the problem list:

1. Click the **Update** button at the top of the problem list.
2. Click the **Edit** button next to the diagnosis you wish to update. To delete a diagnosis, click the **Delete** button.
3. Make any changes that are necessary, then click the **Save** button.

To add a diagnosis to the problem list:

1. Click the **Start New Diagnosis** button at the top of the problem list.
2. In the new diagnosis box, start typing the new diagnosis. Credible will generate a list of possible diagnoses. Click on one to use it.
3. Fill in other relevant details, including IDC-10 specifiers, diagnosis date, and SNOMED description, then click the **Save** button.
Print View

Print View is a feature that allows you to easily print parts of the client record.

To use the Print View feature:

1. Click on the Profile button on the Client navbar.

2. On the top of the client’s profile, click the Print View button.

3. A popup will appear. Check off all the fields you wish to add to the print view, then click the Print View button.

4. The popup will generate a printer-friendly view of the features you selected. To print, click the Print icon in the upper right of the window.
Scheduling and Completing Visits

In this section, you will:

1. Review how to schedule a visit.
2. Learn how to block non-billable time in a schedule.
3. Learn how to record a client copay.
4. Learn how to complete progress notes.
5. Learn how to Sign & Submit a visit.
6. Learn how to document a no-show or cancellation.
Scheduling a Visit

There are two ways to start to schedule a visit in Credible.

To schedule an appointment from your own or another employee’s schedule, click on the Schedule tab and click on the day you wish to make the appointment. A popup window will appear.

The first dropdown on the schedule popup will allow you to select the client you would like to add to your schedule.

To schedule an appointment from the client’s schedule, click on the Client tab and find the client you wish to make an appointment with. Click on the Schedule button next to their name.

Once on the schedule popup:

1. If the appropriate client or employee is not in the dropdown list, click the ... button to the right of the Client or Employee dropdown to select the client or employee.
2. Select the Visit Type from the dropdown. You must select a visit type that is part of the same program as your client.
3. If your Agency has multiple locations, select the Location of the visit from the dropdown.
4. Ensure the Date, Time, and Duration are correct.
5. Click the Schedule button if you wish to make a single appointment.

Click on the day you wish to make the appointment. A popup window will show.

The first dropdown on the schedule popup will allow you to select the employee the client will see during their visit.
To make a recurring appointment:

1. Click the **Recurrence** button instead of the **Schedule** button.

2. Decide the recurrence pattern of the appointments and click the radio button to the left of the desired selection.

3. Decide how often the visit should occur and fill in the appropriate information.

4. Select the start and end dates for the recurrence, or select the number of visits the recurrence should end after.

5. Click the **Save** button.

---

**Credible Quick Tip:**

You can tell which program a visit type is in by looking at the dropdown. The program is the portion to the left of the colon.
Blocking Non-billable Time

There will be times you will need to block time for something that is non-billable. The **Block Time** feature will allow you to add non-billable time to a schedule.

1. Navigate to the schedule you wish to block time on.
2. Click on the **Block Time** button, which looks like a page with a purple X across it.

3. A popup will appear. Fill in the date, time, and duration fields; add any necessary notes; and then click the **Add** button.

4. The blocked time will appear in dark blue on the schedule.
Recording a Copay

To simplify the check-in and billing processes, Credible allows you to record a client’s copay as you are checking them in for an appointment.

To record a client copay:

1. Open the client’s schedule and click on the visit. A popup will open.
2. Click on the Add Copay button.

3. Fill in the amount, payment type, location, and payment type information. Click Save Payment, or, if the client would like a receipt, click the Save & Print button.
Changing a Visit Status

Visit statuses are useful and allow other employees to see whether a client has arrived for their appointment. This is especially useful for front desk or reception staff.

To change an appointment status:

1. Open the client’s schedule and click on the visit. A popup will open.

2. In the Status dropdown, select the appropriate status. For example, when a client has checked in, you would click the Arrived status.

3. Click Save to save the status. If you set the status to Arrived, the appointment will show in green on the employee’s schedule.
Documenting a No-show or Cancellation

Inevitably, you will need to cancel a scheduled visit, whether it is due to a client or a provider. Clients will also fail to show up for their appointments. These situations require special documentation in Credible, based on your Agency’s workflow.

1. Go to the client’s schedule and click on the relevant appointment. A popup will open.

2. In the **Status** dropdown, select the appropriate cancellation status. The specific status will vary based on your Agency’s policies and workflows, i.e., *Cancelled, Cancelled by Provider, No Show*, etc.

3. A new button — **Begin Cancellation/No-Show Form** — will appear under the status dropdown. Click the button to open the cancellation form.

4. Enter the reason for the no-show or cancellation and click the **Complete** button.

5. Enter your password and click **Sign & Submit**.
Documenting a Visit

Documenting a client’s progress is the primary use of EHR software. Fortunately, it is easy to document each visit in Credible.

To document a visit:

1. Go to the Schedule tab and click on the appointment you are starting. A popup will open.
2. Review the visit details and click the Begin Visit button.
3. All the documentation needed for the visit will be shown. To document, click the buttons on the right of the window to view form contents. There may be multiple category buttons per visit type, as seen below. Once you complete each category, click the Complete button at the bottom. When the category is complete, a green checkmark will appear next to the button.
4. When all the sections are complete, click the Complete button beneath the category buttons to go to Sign & Submit.
Sign & Submit a Visit

Once documentation is complete for a visit, it must be Signed & Submitted. This process must be completed before the visit is eligible for approval by a supervisor, or eligible for billing.

To Sign & Submit a visit:

1. Complete all documentation in the visit form. Documentation is complete when all category buttons show a small green checkmark. Click the Complete button under the category buttons.

2. The Sign & Submit screen will display. Ensure all visit information is correct.

3. Fill in the appropriate Location, Recipient, and Billing Group.

4. If your position requires a supervising physician, find the appropriate staff member in the dropdown.

5. Once all information has been confirmed, enter your password. This is the same password you use to log into Credible. Entering your password substitutes for adding your signature.

6. Click the Sign & Submit button.

**Credible Quick Tip:**

Incomplete visits are have not yet been Signed & Submitted. To find your incomplete visits, look on your homepage. Incomplete visits are also shown in pink on your schedule.
Working with Form Groups

Every visit in Credible is linked to one form. *Form Groups* are sets of forms linked to a Form Group visit type. Forms and form groups are set up by your administrator to ensure the correct information is documented for each visit type.

Visits with form groups are documented against the same way other visits are, except more documentation is required. Each form completed in a form group will create its own visit.

To document in a form group:

1. Begin the visit. On the left side of the form, click on the section of the form group you want to document. The form sections will show on the right side.

2. Click on a form button on the right side of the screen and fill in all the information. Repeat for each form section. When finished with the form, click the **Complete** button.

3. **Sign & Submit** the form.

4. Select the next form from the dropdown on the upper left of the screen and repeat the process until all forms are documented.

*Credible Quick Tip:*

You can tell which Visit types have form groups on the schedule popup. (Form Group) will be listed at the end of the name.
Viewing Form Groups

You can view completed and scheduled form groups from the Client navbar. This feature is especially useful for verifying that clients have completed all necessary forms. If a form has not been completed, then the View Visit button below is replaced with a Start Service button.

1. **Program**: The program the form group belongs to.
2. **Form Group Name**: The name of the form group.
3. **Form Group Visit List button**: Shows all visits related to the form group.
4. **Form List**: Shows all the forms in the form group.
5. **View Visit button**: Shows the visit information for the visit in which the form was completed.

To view form groups:

1. Go to the Client navbar of the client you wish to view.
2. Click the Form Groups button.
Discard Visit

In order to Sign & Submit a visit, every form within a form group must be completed. Sometimes, not all forms are needed. You can remove any unnecessary forms from the visit by using the Discard Visit feature.

To discard a form in a form group:

1. Select a form from the dropdown on the upper left of the visit screen.

2. Click the Complete button on the form. This will bring you to the Sign & Submit page.

3. Click the Discard Visit button.

4. A popup will appear. Confirm that you wish to discard the visit by clicking the OK button.

5. Discarded forms are not displayed in the visit list.
In this section, you will:

4. Learn what Tx Plus is and how it is used.
5. Review how to set up Tx Plus for a client.
Tx Plus Basics

Tx Plus uses a multi-level hierarchical structure. The default is a four-level structure with level names and background colors shown here. In Partner Config your administrator can change level names and background colors to fit the needs of your Agency.

Each Tx Plus can have multiple problems and each problem can have multiple goals. Each goal can have multiple objectives and each objective can have multiple interventions.

You can build a Tx Plus for a client from the Client navbar or from within a web form accessed via a visit. You should use the Client navbar option only if the Tx Plus does not require client signatures.

Once a Tx Plus has been built, it can only be documented against from within a web form.

1. **Tx Plus Items**: These are the levels in a Tx Plus. Click on each level, starting at the top, to add them to the client’s treatment plan.

2. **Templates**: If you Agency uses templates, you can select a pre-configured template from the dropdown and personalize it for your client.

3. **Program**: A client can have one active Tx Plus per program they are enrolled in. Use the dropdown to choose the program that the Tx Plus belongs to.

4. **Start, Target, and End Date**: These date are the effective dates of the client’s Treatment Plan. **Start Date** is the day the plan becomes effective, **Target Date** is the day the plan is expected to be completed, **End Date** is the day the plan ends. Documentation can only be entered on the current Tx Plus.

5. **Custom/Wiley Library**: Similar to templates, custom and Wiley libraries pre-populate Tx Plans with accepted language to make the creation of the Tx Plan simpler and more uniform across clients.
Starting a Tx Plus

To start a Tx Plus from the Client navbar, click on the **Tx Plus** button, then the **New Tx Plus** button on the top of the screen.

To start a Tx Plus from a web form, a visit with a treatment plan visit type must be selected. These are visit types that are tied to a form that contains an **Is Tx Plus** category. Once a visit is scheduled, start the service by clicking the **Begin Visit** button. Once you open the visit, you will see **Add Tx Plus** as an option on the left side of the screen.
Building in Tx Plus

Regardless of where the Tx Plus is started, it is built the same way:

1. If your Agency uses templates, select the corresponding template from the dropdown list. If your Agency uses Custom or Wiley libraries, mark the checkbox and then select the correct template from the list.

2. Select the program the Tx Plus is for from the Program dropdown.

3. Fill in the Start Date. Tx Plus will default to the current date.

4. Click on the first level of Tx Plus under Tx Plus Items. By default, this is light blue and labeled Problem. The Tx Plus level will appear in yellow on the bottom half of the screen. Fill in the problem and a short description. Start dates are required for each level. If your Agency uses extended fields, fill in any information relevant to the client’s problem.

5. Once you are done filling out the first-level item, click on the second level and fill in that information. If you are using a template or a library, the entire Tx Plus will populate. In order to edit the items, click on it. When it turns yellow, you can edit it.

6. Click the Save button under Tx Plus Items.

Credible Quick Tip:
When working with Tx Plus, remember that you can only edit a level while it displays in yellow.
Documenting Against a Tx Plus

Once a Tx Plus is created, it should be documented against during each relevant visit. Tx Plus can only be documented against from a web form. Web forms will allow you to review previous documentation on each Tx Plus level.

To start a Tx Plus from a web form, a visit with a treatment plan visit type must be selected. These are visit types that are tied to a form that contains an Is Tx Plus category. Once a visit is scheduled, start the service by clicking the Begin Visit button.

1. Click the Tx Plus button to access the Tx Plus within the form.

2. For each Tx Plus item, fill in relevant progress notes. If your Agency uses extended fields, fill those in as well.

3. If relevant, add new levels to the Tx Plus by clicking the buttons at the bottom of the Tx Plus level.

4. When documentation is complete, click the Complete button at the bottom of the Tx Plus.
Providing Group Services

In this section, you will:

1. Review how to add a group visit.
2. Learn how to record a group visit copay.
3. Review how to document an individual cancellation.
4. See how to document information for a group visit.
Scheduling a Group Visit

Group Visit is a versatile scheduling feature in Credible with unique documentation abilities. You can schedule a pre-defined group, or create an ad hoc group.

To schedule a pre-defined group:

1. Click on the Schedule tab and click on the day you wish to make the appointment. A popup window will display.

2. In the Client dropdown, find the group you wish to schedule. Schedule Groups will show at the bottom of the client dropdown list.

3. Select the Visit Type from the dropdown.

4. If your Agency has multiple locations, select the Location of the visit from the dropdown.

5. Ensure the date, time, and visit duration are correct.

6. Click the Schedule button to save the appointment.

To schedule an ad hoc group:

1. Click on the Schedule tab and click on the day you wish to make the appointment. A popup window will show.

2. On the popup, check the Group Activity checkbox. The Client dropdown will change to a Client list.

3. Click the ... button next to the list and search for the client. Click the Client ID to select. The clients will populate in the client list. To select multiple clients, hold down the CTRL key while clicking on their names.

4. Fill in the Visit Type, Location, Date, Time, and Duration as you normally would. Click Schedule to save the appointment.

Credible Quick Tip:
You can set a recurring appointment for group visits.
Changing a Status for an Individual in a Group Visit

A group allows you to schedule and document a visit for multiple clients, but certain actions must be documented for individual clients, such as an arrival or a cancellation.

To change the status of an individual in a group visit:

1. On your schedule, access the View Client page by clicking on the icon to the left of the group name on the appointment.

2. Find the client you wish to change the status of and click the Schedule button.

3. Click the appointment on the client’s schedule.

4. The schedule popup will appear. Change the status on the status dropdown.

5. Click the Save button to change the status.
Providing Group Services

Cancelling an Individual in a Group Visit

Cancelling an individual from an appointment is similar to changing their status.

To cancel an individual in a group visit:

1. On your schedule, access the *View Client page* by clicking on the icon to the left of the group name on the appointment.

2. Find the client and click the **Schedule** button.

3. Click the appointment on the client’s schedule.

4. The schedule popup will display. Change the status on the status dropdown.

5. Click the **Begin Cancellation/No-show Form** button.

6. Make sure the correct client is selected on the left side and enter the reason for the cancellation or no-show.

7. Click the **Complete** button to save the information.

8. **Sign & Submit** the form.
Group Visit Copays

Each individual will need to make a copay separately.

To record a copay from a Client for a group session:

1. On your schedule, access the View Client page by clicking on the icon to the left of the group name on the appointment.

2. Find the client and click the Schedule button.

3. Click the appointment on the client’s schedule.

4. The schedule popup will appear. Click the Add Copay button.

4. Fill in the Amount, Payment Type, Location, and other payment information. Click Save Payment, or if the client would like a receipt, click the Save & Print button.
Documenting a Group Visit

Group visit documentation allows you to document group notes and individual notes at the same time. Group notes are copied to all client records for those participating in the group.

Before documenting notes for an individual client, you must document the notes for the entire group:

1. Begin the visit. Open a form and click the form section you wish to share.
2. On the left side of the form, check the Share Form checkbox. (The default is unchecked.) A popup will confirm that sharing is turned on.
3. Document notes for the group.
4. Click the Complete button under the form buttons to save the group note.

To document notes for an individual client:

1. On the left side of the form, find the client’s name in the dropdown.
2. Uncheck the Share Form checkbox.
3. On the right side, document the information you wish to add to the client’s record.
4. Click the Complete button under the form buttons to save the individual note.
5. Repeat for each client requiring an individual note.

Credible Quick Tip:

Before using Sign & Submit All on Sign & Submit screen, all individual forms must be completed. Using Sign & Submit All will complete the forms for each client in the scheduled group.
Discharging a Client

In this section, you will:

1. Review the workflow for discharging a client.
Discharging a Client

When it is time for a client to leave care, your Agency must make sure to remove access to their clinical record. Client records are not fully deleted from Credible, but made inactive. If the client needs to come back for additional services, their record can be made active again.

Deleting Future Appointments

If the client has any future appointments, those appointments should be deleted before a client is made inactive. To do this, run the Appointment History option on the client’s schedule.

Please note: The Appointment History Report run from the Reports tab does not allow you to filter by specific client.

1. Go to the client’s schedule.

2. Click on the Appointment History button on the schedule.

3. All client appointments will show.

4. Click on the date to go to the client’s schedule.

5. Cancel the appointment or remove the client from a group visit.
Removing eMAR Groups

Clients should be removed from any eMAR groups before discharge.

1. From the Client navbar, click on the eMAR Group button.
2. Assigned groups are highlighted in blue. To unassign the client, click the Unassign button next to the assigned group name.

Complete Discharge Forms or Form Groups

If your Agency has forms specific to discharge, they should be completed during the client’s last appointment. Schedule the discharge appointment the same way you would any scheduled appointment, then begin the visit and complete any necessary forms. Sign & Submit the service.

Unassign Programs

Since the client will no longer be receiving services from the Agency, they should be removed from all programs they were assigned to.

1. From the Client navbar, click on the Program button.
2. Assigned programs are highlighted in blue. To unassign the client, click the Unassign button next to the assigned program name.
Update Episodes
If the client is in an episode, you will need to close the episode in order to close the client record.

1. Click the Episodes button on the Client navbar.
2. Click the Update button for the episode.

Once on the Episode Update screen:

1. Change the Status dropdown to Closed.
2. Change the episode discharge date to the correct date.
3. Add a reason for discharge.
4. Click the Update Episode button.

Update Client Status
The final step in the discharge process is to change the client’s status to Closed.

1. Click the Profile button on the Client navbar.
2. Click the Update button.
3. Change the Status dropdown from active to Closed.
4. Click the Update Client button at the bottom of the profile page.
In this section, you will:
1. Review how to run reports in Credible.
2. Learn how to approve services.
4. Learn how to approve services.

Report workflows can be found in Appendix B.
Incomplete Visit Report

Running the Incomplete Visit report will return all incomplete visits, sorted by employee. You will need to follow up with each employee to ensure these visits are completed before they are due for billing.

To run the Incomplete Visit report:

1. Click on the Reports tab.

2. Click on the Visit button in the Reports navbar.

3. Click on the Incomplete Visit Report link.

Once you are on the report filters page:

1. Select the Start Date and End Date for the report.
2. Choose the Program, Visit Type, and/or Employee you wish to filter.
3. If you want to see just billable or non-billable services, select from the Billable dropdown. The best practice is to leave the selection to All.
4. If you want to save the report, check the Save Report box and add a report name.
5. Click the Run Report button.
Incomplete Services

Incomplete services are potentially listed in three places in the software, depending on your Agency.

1. **Visit tab**: Click the **Incomplete Visit** button.

2. **Schedule tab**: Incomplete visits show in red in the schedule.

3. **Employee homepage**: Incomplete visits are shown on the homepage.
Unaddressed Visits

This report captures scheduled visits and completed unscheduled visits added through the Add Visit function for multiple clients. It shows past, present, and future visits that are both planned or completed. It also allows you to observe if employees are documenting services from the Schedule tab.

To run the Unaddressed Visits report:

1. Click on the Reports tab.

2. Click on the Visit button in the Reports navbar.

3. Click on the Appointment History Report link.

4. Select the filters you wish to include in the report and click the Run Report button. Arrived and Scheduled are always available; Emergency, Non-Client, NotPresent, and Walk-in may be available if configured by your Agency.
Uninsured Visit Reports

Uninsured Visits can be managed with the Advanced Visit search in conjunction with the Uncovered Visits Report.

Advanced Visit Search

The advanced search report will show visits that do not have insurance listed due to clients not having insurance added during the intake process, or that have insurance which is not set up to cover that service.

To run the advanced visit search:

1. Click on the Visit tab.
2. Click on the Advanced Search button above the client visit list.

Once you are on the advanced search page:

1. In the Payer dropdown, select the Un-Insured option.
2. Check the Show Unapproved Services checkbox to ensure all applicable services are filtered.
3. Click the Filter button to show the visits in Credible or click the Export button to download data as a .csv file.

Uncovered Visits Report

The Uncovered Visits report lists all services with balances not covered by insurance or by the client during the selected date range.

To run the Uncovered Visits report:

1. Click on the Reports tab.
2. Click on the Billing button in the Reports navbar.
3. Click on the **Uncovered Visits** report link.

![Select a Report](image1)

4. Enter the dates for the period that you would like to report on. If you wish to save the report, check the **Save Report** checkbox and enter a report name. Click **Run Report**.

![Filters for Uncovered Visits](image2)

Uncovered Visits Description
Lists all services with balances not covered by insurance or by client during the entered date range. Report provides totals for each client.
Red X Visit List

Red Xs are rules set up that will block visits from being approved or batched for billing if certain conditions for specific fields are not met.

There are three types of Red Xs that can be flagged in Credible:

1. **No Match in the Billing Matrix**: The visit information does not correlate with a line in the Billing Matrix and therefore Credible cannot process the claim. The matching criteria vary by Agency, but usually include:
   - Date of Service
   - Duration of service
   - Program
   - Location
   - Recipient
   - Group visit
   - Required employee credentials
   - E/M Levels

2. **Custom Red X**: Your Agency sets specific flags related to your payers and billing workflow.

3. **Manual Red X**: Staff with appropriate rights can add Red Xs to individual visits to keep them from going further in the billing claims process.

**Setting a Manual Red X**

To set a manual Red X:

1. Go to the visit you wish to set the Red X for. You can do this from the Visit tab, the client visit list, or a report.

2. On the visit detail screen, click the Update button.

3. Check the **Set Manual Red X** checkbox and add a note on why the Red X was set.

4. Click the **Update Visit** button. The Visit will now show with a Red X. Hover over the X to see the note.
Running the Red X Visit List Report

On the Visit tab you can filter visits to show only services that have a Red X.

To run the report:

1. Go to the Visit tab.

2. On the Filter bar’s first dropdown, click the Only Red X option, then click the Filter button.

3. Once the report is run, you will need to manually fix the errors that caused the Red X.

Correcting Red Xs

Most Red X errors are caused by missing or incorrect information entered in the visit.

To correct Red X errors:

1. Hover over the Red X for more information about the error.

2. Verify that the visit information is correct and update the visit as needed.

3. If the visit information is correct but the visit is still showing a Red X, contact Credible’s billing team.
Approval of Services

Once entered into the software, visits needs to be approved before moving onto the billing claims process.

To approve individual visits:

1. Go to the Visit tab.

2. On the first dropdown on the Visit tab, click the Not Approved option and any other filters (i.e., date range), then click the Filter button.

3. Review services not approved and check the checkbox for each Visit.

4. When all reviewed visits have been checked, click the Approve All Checked button.
In this section, you will:

1. Review creating prescriptions through Medications.
2. Learn about Physician’s Orders and how to document Orders.
3. Learn how to use eRx through Physician’s Orders.
4. Review the features of eMAR.
Managing Medications

The **Medications** button on the Client navbar allows you to add medications, create prescriptions, and check eligibility.

1. **Filter Bar**: Allows you to search the client’s medication list by a number of criteria, including medication name, prescription status, and date.

2. **Medication Status**: Shows the status of the medication, including whether it was approved and if the electronic prescription was accepted by the pharmacy.

3. **Retry button**: Allows you to try resending a prescription that failed.

4. **History button**: Lists the medication history for the client.

5. **Reject button**: Allows you to remove an unapproved prescription or a prescription that failed electronic transmission.

6. **Prescription Notes**: Shows details about the prescribed medication.

**Prescriber Roles**

In order to prescribe medications in Credible, you must be assigned to one of three roles:

- **Prescriber**: A prescriber has a National Provider Identifier (NPI) with prescription privileges. Prescribers can complete prescriptions without approval.

- **Non-prescriber**: With this setting, staff needs approval before printing prescriptions or sending them electronically.

- **Non-prescriber with Prescriber Rights**: A non-prescriber with these rights can print or send electronic prescriptions prior to prescriber approval. This role can also process electronic refill requests.
Physician’s Orders

Physician’s Orders allows you to add medications, labs, consults, and other types of orders. Orders can be accessed from the Orders button on the Client navbar.

If a client has current, pending, or completed Orders, the details will be in the corresponding sections of the Physician’s Orders screen. Orders begin the cycle as current Orders, become pending Orders once they are signed, and move to Order History once they are completed.
Entering a New Order

Regardless of the type of Order, all Orders are entered the same way.

To enter an Order:

1. Review the client’s current medications and allergies.
2. Click on the tab of the desired Order. Enter the Order in the text box.

3. Pick the Order type from the dropdown. Order types are as follows:

<table>
<thead>
<tr>
<th>Order Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>Orders that care called in.</td>
</tr>
<tr>
<td>Physician</td>
<td>Ordered usually entered by a doctor.</td>
</tr>
<tr>
<td>Standing</td>
<td>Agency-defined</td>
</tr>
<tr>
<td>Verbal</td>
<td>Orders given by a doctor to someone to enter. These must be reviewed and signed.</td>
</tr>
</tbody>
</table>

4. Select the doctor prescribing the Orders or self from the dropdown.
5. Click the Add Order button.

Physician’s Orders with eRx

Prescribing medications through Orders is the preferred way of ePrescribing within Credible. The process is very similar to prescribing through the Medications button.

To create a prescription:

1. Open the Orders feature from the Client navbar.
2. Review the client’s current medications and allergies.
3. Under New Order, click on the Meds tab, then click the Create Prescription button.
4. Start typing the medication name into the *Medication* box. A list will generate with matching medications. Click the medication you wish to prescribe. This search can include abbreviations and will also include generic medication names when searching for the brand name and vice versa. Inactive medications are shown on the bottom of the list.

5. Check the formulary status, contraindications, and drug interactions for the medication.

6. Fill out the fields on the *Create Prescription* screen. To use the recommended dosage feature, click the link.

7. Specify the prescription delivery method.

8. If ePrescribing, select the pharmacy or search a pharmacy using the filters. Click the *Finalize Prescription* button.
9. Verify the prescription and click the appropriate button at the bottom of the screen.
eMAR

Electronic Medication Administration Record (eMAR) helps your Agency accurately track the administration of client medication and reduce the likelihood of medication errors.

1. **Client Information**: Client information is pulled into eMAR from the client’s medical profile.
2. **Pillbox Admin button**: Allows you to access the Pillbox function in eMAR.
3. **Admin Schedule**: Allows you to access and edit the client’s medication administration schedule.
4. **PRN Medication list**: Lists the PRN medications prescribed to the client.
5. **My eMAR button**: Allows you to access the My eMAR feature.
6. **Medication Schedule**: Shows all the medications the client is scheduled to take and when.
7. **STAT Medications**: STAT medications are indicated by an orange icon.

**STAT and PRN Medications**

When adding a medication to the eMAR schedule, it is best practice to type STAT or PRN into the *Frequency* field when adding medications to the client’s chart.

<table>
<thead>
<tr>
<th>Med Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRN</td>
<td>Medications given on an as needed basis.</td>
</tr>
<tr>
<td>STAT</td>
<td>One-time administration of a medication.</td>
</tr>
</tbody>
</table>
Medication Admin Schedule

A medication administration schedule must be set up for every client that will have an eMAR.

To set up a medication admin schedule:

1. Click on the **Admin Schedule** button at the top of the eMAR screen.

2. Select a medication from the dropdown, then click the **Add Medication** button. Only medications without eMAR schedules already will be shown in the dropdown.

Once on the medication schedule screen:

1. If the medication is PRN or STAT, check the corresponding box.

2. Fill in the **Dosage** information and **Admin Window**. The Admin Window is the time before and after a scheduled medication that it can be given while being considered on time. The default is two hours.

3. If your Agency uses med counts, check the checkbox.

4. If you need to inject the medication and document the injection site, check the checkbox.

5. Fill in any other important information in the **Administration Comments** section.

6. Set the reoccurrence pattern and times.

7. If you need to be notified when the reoccurrence pattern ends, check the box.

8. Click the **Create Med Administration Schedule** button to save.
Documenting Medication Administration

eMAR allows you to document medication administration in detail for your clients. Before administering any medication, you should review the client’s medical profile, allergies, and warnings. You can do so within eMAR by clicking the magnifying glass icon next to each field.

To document medication administration:

1. Find the medication on the list and click the **Administer** button within the administration windows. For STAT meds, click the **Administer** button when the medication is needed.

Once on the **Log Medication Administration** window:

1. Log the **Time Administered**.
2. Select the **Administration Result** from the dropdown menu (i.e., swallowed, spit out, etc.)
3. Document the **Quantity (Qty) Administered** and any relevant **Dosage Notes**.

4. If your agency uses counts, document the number of doses remaining.
5. Click the **Submit** button.

To document PRN medication administration:

1. PRN meds show at the top of the client’s medication list. Each medication will show the last time it was administered. The **Administer** button will always be available.
eMAR Groups

eMAR groups make it easier to administer medications to multiple clients by creating one multi-client admin schedule.

You can access eMar Groups by clicking the eMAR Group button on the Employee navbar or from the My eMAR button within a client’s eMAR screen. To administer a medication from the eMAR group, simply click the client’s medication. The Log Medication Administration window will show and allow you to document administration as you would when using other eMAR functions.

Creating Pillboxes

A Pillbox schedule can be used if you need to send your client home with medications that they take themselves.

To create a pillbox:

1. Click the Pillbox Admin button on the client’s eMAR screen.

2. Click the Add Pillbox button.

3. Add a Description, Start Date, Duration (in days), as well as the Delivered Date (when pillbox was given to the client), and the employee it was Delivered By. Last, click the Save button.
4. Select the medications and click the Save button.

Reconciling Pillboxes

When the client comes back to your Agency, you must reconcile the pillbox by documenting medication administration.

To reconcile a pillbox:

1. Click the Pillbox Admin button on the client’s eMAR screen.

2. Click the Reconcile button next to the pillbox.

3. Document the Dispense On date, Quantity, and Result of each scheduled dose, then click the Reconcile Pillbox button.

4. Doses taken while using the pillbox will show up in the eMAR schedule with a pillbox icon.
Appendix A: Employee Setup Tasks

In this section, you will:

1. Set up your work hours and schedule.
2. Review and edit your assignments in Credible.
3. Select the appropriate Employee Config settings.
4. Set up your employee signature.
Work Hours and Schedule

Several Credible features depend on having employee work hours and schedules set in the software. To access these features, go to your employee profile. You can access your profile by:

1. Clicking your username on the page header.
2. Clicking on the Employee tab and then clicking the My Record button.

This is the basic employee overview screen. As more data is associated with your account, you will see more information on the page relating to your clients and schedule.

Credible Quick Tip:
If the navbar on the left shows only icons, click the green + icon to display the corresponding labels.

Set Work Hours

1. From the navbar, click the Work Hours button.
2. Set up your default work hours. These are the usual times you are expected to work. The schedule allows you to set up to two shifts per day. Define the hours by selecting the start and end times from the dropdowns.
3. Click the **Save Hours** button.

![Work Schedule Table]

### Credible Quick Tip:
When your schedule is different from your default work hours, the modified work hours will show up in yellow on your schedule in the **Schedule** tab.

### Set Work Schedule

Your work schedule allows you to set up specific schedules that differ from the standard work hours.

1. From the navbar, click the **Work Schedule** button.
2. Scroll to the week that will have a different schedule.
3. Click the **Edit Schedule** button.
4. Fill in the new work hours. If the new work hours are similar to your current work hours, click the **Use Default Schedule** button to generate your usual schedule, and then change it where necessary.
5. Click the **Save Schedule** button.
Assignments

Assignments designate what information you can access in Credible. This includes Client, Program, Team, and Geo Area assignments as well as assigned supervisors. Your assignments will show on your employee overview screen.

There are several places in Credible where you can change your assignments, but the best practice is to make these edits from the Employee navbar. The ability to change assignments is controlled by your Agency’s security rights, so not every user will be able to do this.

Client Assignment

1. Click on the Client button on the Employee navbar.
2. Use the alpha bar or the filter bar to find the client you wish to assign, then click the Assign button in the same row.
3. If you need to assign yourself as a case manager or primary, click the No button, which will change to Yes once the assignment is made. If you select the client as a primary or case manager, use the dropdown to assign them to a program.
4. To unassign a client, click the Unassign button.

Credible Quick Tip:

You can indirectly assign a client to a user by assigning the client and the employee to the same team.
Team, Program, Supervisor, and Billing Group Assignments

The Team, Program, Supervisor, and Billing Group assignments are set up in a similar fashion.

1. Click on the appropriate button on the Employee navbar (Team, Program, Supervisor, or Billing Group).
2. Find the entry you wish to add yourself to and click the **Assign** button. Assignments will show up with blue highlights.
3. Once assigned, additional options may display with a toggle button. To activate the option, click the **Yes** button.
4. To unassign yourself from an assignment, click the **Unassign** button.

![Image of Team, Program, Supervisor, and Billing Group assignments]

Credentials

Employee credentials are necessary for proper billing and other functions within Credible.

1. Click on the **Credentials** button on the Employee navbar.
2. Find the correct credential and enter the **Start Date** and **End Date**, if applicable.
3. Enter the **External ID**, if applicable.
4. Assign the credential an order by selecting the corresponding number from the **Order** dropdown.
5. Click the **Assign** button.

![Image of Employee Credentials]
Employee Config

The Employee Config screen contains numerous settings that determine how the software will work for you individually. You need to specify if you will be using a signature pad or mouse/stylus to sign visits. This is also how you access the scan on messaging functions within Credible. These settings are accessed through the Config button on the Employee navbar.

There are other settings in this section, which differ greatly depending on the Agency using the software. Please discuss other settings with your administrator.

1. **Signature Pad**: Check the checkbox if you will be collecting signatures using a Topaz signature pad.

2. **Tablet Signature**: Mark the checkbox if you are accessing Credible using a tablet and will use the screen to collect signatures.

3. **Insurance Card/Attachment Scanner**: Check the checkbox if you are using a scanner to collect insurance card information.

4. **Employee Messaging**: Mark the checkbox to permit Employee Messaging within Credible.

5. **Submit Task Ticket**: Allows user to submit task tickets to Credible staff.
Employee Signature

Employee signatures are required for many functions in Credible, including *Signing & Submitting* visits, approving visits for billing, and other administrative functions. Credible allows you to save an electronic signature for use throughout the software, so you do not have to sign each visit manually.

1. Ensure that the correct signature settings are checked in your *Employee Config*.

2. Go to your employee profile by clicking your username on the page header or *My Record* from the *Employee* tab.

3. Click on the *Signature* button on the Employee navbar.

4. Using your mouse, tablet, or signature pad, sign in the appropriate space. If you need to clear your signature, click the red *Clear* link. When you are satisfied with your signature, click the *Save Signature* button.

5. If you have a saved signature you wish to upload instead, click the *Upload Scanned Signature* link and upload the file.
Appendix B: Report Review Workflows

Incomplete Visit Report

Identify:
• Who is responsible?
• What is the time frame?

Identify incomplete services with INCOMPLETE VISIT REPORT

Any incomplete services?
Yes
NOTIFY appropriate staff or supervisors
No
Pre-approval Report #2

Unaddressed Visits Report

Identify:
• Who is responsible?
• What is the time frame?

Run Appointment History Report

Items need to be addressed?
Yes
Investigate and resolve items on Schedule
No
Pre-approval Report #3
Uninsured Visits Report

Identify:
• Who is responsible?
• What is the time frame?

Define acceptable levels of uninsured visits

Verify services are covered by insurance using AVS & Uncovered Visits Report

Any uninsured services? No

Pre-approval report #4

Enter manual red X’s

Yes

Red X Visit List Report

Identify:
• Who is responsible?
• What is the time frame?

Filter service list on Only RedX status

Any red X’d services? Yes

NOTIFY appropriate staff to correct or update

No

Approve Services
Approval of Services

1. Identify who is responsible. What is the time frame?
2. Filter service list on Not Approved status.
3. Reviewed services be approved?
   - Yes: Approve services.
   - No: Using multi-stage approval?
     - Yes: Audit multi-stage services.
     - No: Move to Batch Claim Error Report.

4. Identify issue & notify appropriate staff.