Client Portal Set Up

Objective: Meaningful Use Stage One requires that individuals seen by Eligible Providers have electronic access to their clinical record. With Credible's Client Portal, Mount Rogers is now able to offer our individuals access to their electronic clinical record.

Below is a set of instructions on how to set up any individual who is interested in having access to their record.

Log into www.crediblebh.com and sign in using your employee username and password with the domain "mtrogers".

Then from the tabs located at the top of your screen, you will choose "Individual". You will then select the individual who would like access to their electronic record by using any of the filters available (Account Number, Name, etc.), then choose your individual. Once on their main page, you will then choose from the navigation bar on the far left, "Users".

This is the screen you will see.

USER ACCOUNTS:	NICK TEST (ZEXCLUDE)		
		Add User	User Log
No records available			

Click "Add User".

USER ADD: NICK TEST (ZEXCLUDE)	
Username:	nicktest01011970
First Name:	Nick
Last Name:	Test
Email:	nick.test@email.com
Requested Date:	07/15/2014
Profile Code:	Individual
Add User	

All the information will need to be filled out. For the username you will need to use the format of firstnamelastnamemmddyyyy (First Name, Last Name, DOB in MMDDYYYY format). Then click "add user". The email address field is required. Please enter the individual's email address for password resetting purposes. If the individual does not have an email address, please enter the phone number they would like to be contacted at when a password reset is required. Please use the telephone format of xxx-xxx-xxxx.   For the Profile Code, the following are options to choose from:

- Guardian – to be used when the login information is given to only the guardian
- Indiv&Guard – to be used when the login information is given to both the individual and the guardian
- Individual – to be used when the login information is given to only the individual

Regardless of the profile code chosen, the username should always be the firstnamelastnamemmddyyyy of the individual receiving services.

Note Users are only to get one login account. For instance, if you have mother and father, there is to be one account. It's up to the guardian or the individual consenting to service to share their username and password.

PASSWORD UPDATE: Test, Nick	
New Password:	
New Password Again:	

Update Password	Cancel

The screen above assigns the temporary password for the individual. You will type in both boxes "welcome2014", then click "Update Password".

If you should see the below message in red when adding an individual user account, please first verify the information you entered was correct, then update the username to include the middle initial.

Please hand the individual the "Client Portal Login Instructions" pamphlet as provided.

Resetting Individual Log-In Account Passwords

Should an individual call your office and need a password reset, you will log into Credible, go to the individuals account, click "Users", and then click "Password". Please reset this password back to "welcome2014", click "Update Password".

Please inform the individual that you will email them their new password (as a part of the verification of the correct individual) or you will call them at the assigned number if no email address was available.