EchoVantage Release Notes

Version 2.21.00

December 13, 2018

ECHOVANTAGE RELEASE NOTES

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NEW FEATURES

Occupancy

The Occupancy module allows agencies to track available capacity in "Spaces." These Spaces may be facilities, program services, foster homes, housing units, or anything else that has a fixed capacity.

Enabling Occupancy

- Occupancy may be enabled for different user groups in Configuration>Staff/Users>Use Groups>Menu Options.
- Occupancy resides between the Vantage Point and Clients.

Configuring Occupancy

- Occupancy Characteristics are configured in Configuration>Defined Lists>Space Characteristics. This is a list of items that may be associated to Spaces and will be used in searching for appropriate placements.
- Occupancy is configured from Configuration>Setup>Occupancy
- Click the plus sign (+) to add a new Space.
- Each Space may have a Name and Description.
- Add a number for Capacity.
- Up to 2 levels of spaces are allowed. Select a Parent Space if the space resides under a parent space.
- Select from previously-defined Characteristics. Up to 10 may be selected.
- Using the handles on the left side of each card, a space may be repositioned in the list.

Viewing Spaces

- The Occupancy screens shows the configured list of spaces.
- Clicking "Show Occupants" displays all client placements for every space.
- Clicking on the Space will expand or collapse that Space.
- Clicking "Characteristics" displays all associated Characteristics for that space.
- If a space is below capacity it will display a card showing "Vacancy".
- If the user has a Client List Filter set, the names and pictures of clients not in the user's Client List will not display.

Assigning Clients

- Click "Assign Client" to place a client in a space.
- Client, Admit Date, and Admit Time are required.
- If the user has a Client List Filter set, the names of clients not in the user's Client List will not display.
- After saving that Client will appear in a new card, and a new "Vacancy" card is displayed if Capacity allows.
- If a space becomes full, an "Overbook" button is available, and clients may be assigned despite exceeding Capacity.

Searching Occupancy

- When looking for placements, Occupancy spaces may be filtered by Name or Description of the space, Characteristics, Clients currently placed and/or whether or not the space has Vacancy.
- All search criteria are ANDed together, so searching multiple Characteristics returns only Spaces matching all selected.
- Characteristics are inherited from parents. If a Space is configured to represent a building, and it has the "Wheelchair Accessible" characteristic, plus a child Space representing a room, then searching for "Wheelchair Accessible" will return that room.

Payer-Specific NPIs

Configuration

- National Provider Identifiers that must be reported to specific Payers may be stored in Payers>NPI
- Multiple NPIs may be entered.
- A Defined Filter must be assigned to each.

837 Changes

- During 837 processing, the job will look to see if any Payer-specific NPIS have been entered for the payer being processed. If so, those will be used in grouping and reporting Loop 2010AA.
- If no payer-specific NPIs have been entered for the payer being reported, the NPIs from Organization will be reported.

UPDATES

Ticket #	Description
4373	AgeAtOnset was set to allow NULLs in the ClientDiagnoses table

BUG FIXES

Ticket #	Description
4257	Full Commercial Payer payment leaves Copay balances active at Self Pay
4648	Invalid date entry in Add Client Diagnosis pop-up creates an invalid AgeAtOnset
4752	Adjustment remittances are not processed against Charges if a payment is in the same processing job