# ECHOVANTAGE RELEASE NOTES

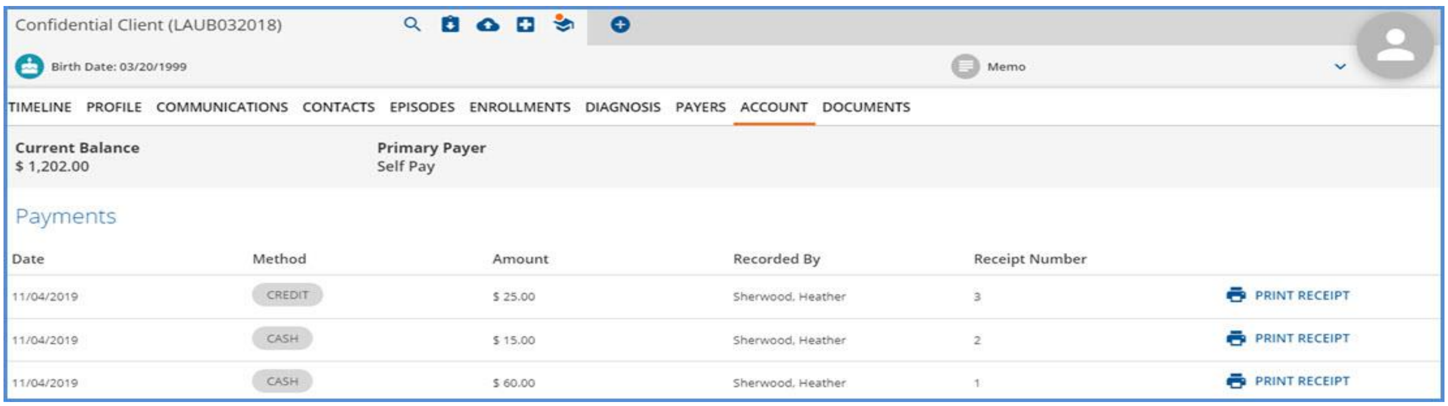
VERSION 3.03

## NEW FEATURES

### Clients Account Access

The Clients menu now has an Account tab that allows client payments to be posted.

- Current Balance and Primary Payer are displayed
- Payment Location options must be configured in *Configuration>Setup>Defined Lists>Payment Locations*
- A Transaction Reference may be manually entered at this time
- A receipt can be printed at the time of entry or a later date

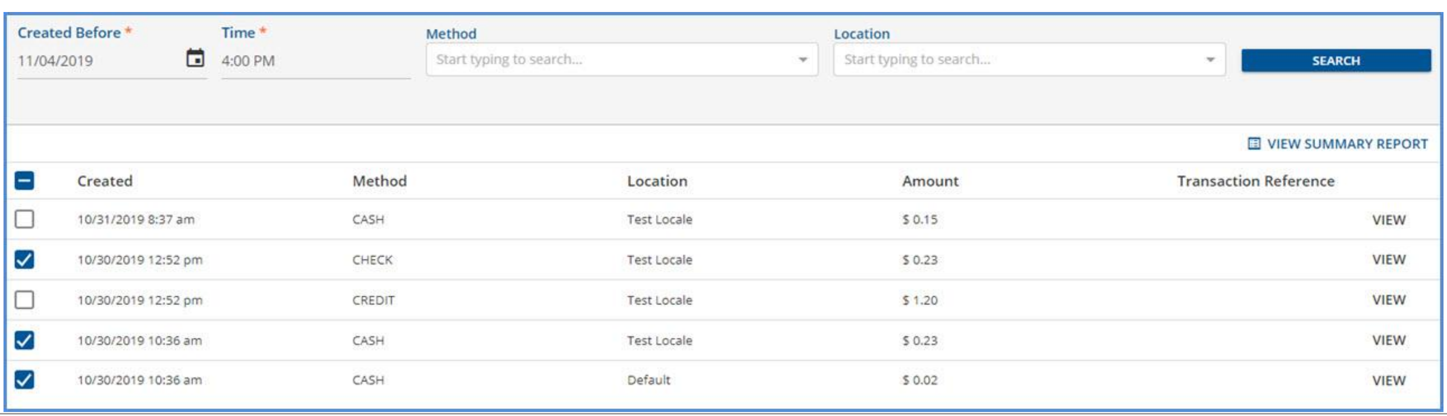



### Client Payments

Client Payments is now available from the main application menu to help reconcile payments received throughout the day.

- View a list of collected payments by date and time.
- Filter payments by Method and/or Location
- View and Print a summary report

In future releases this screen will be the Reconcile tab, an Apply Payments tab will be added, and payments marked as Ready will be picked up by GL Posting and cleared from the Clients Payment View.

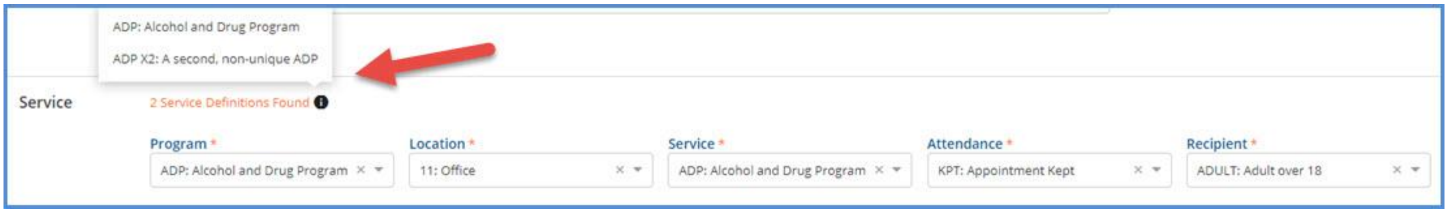


## ENHANCEMENTS

### Updated Service Definition Display

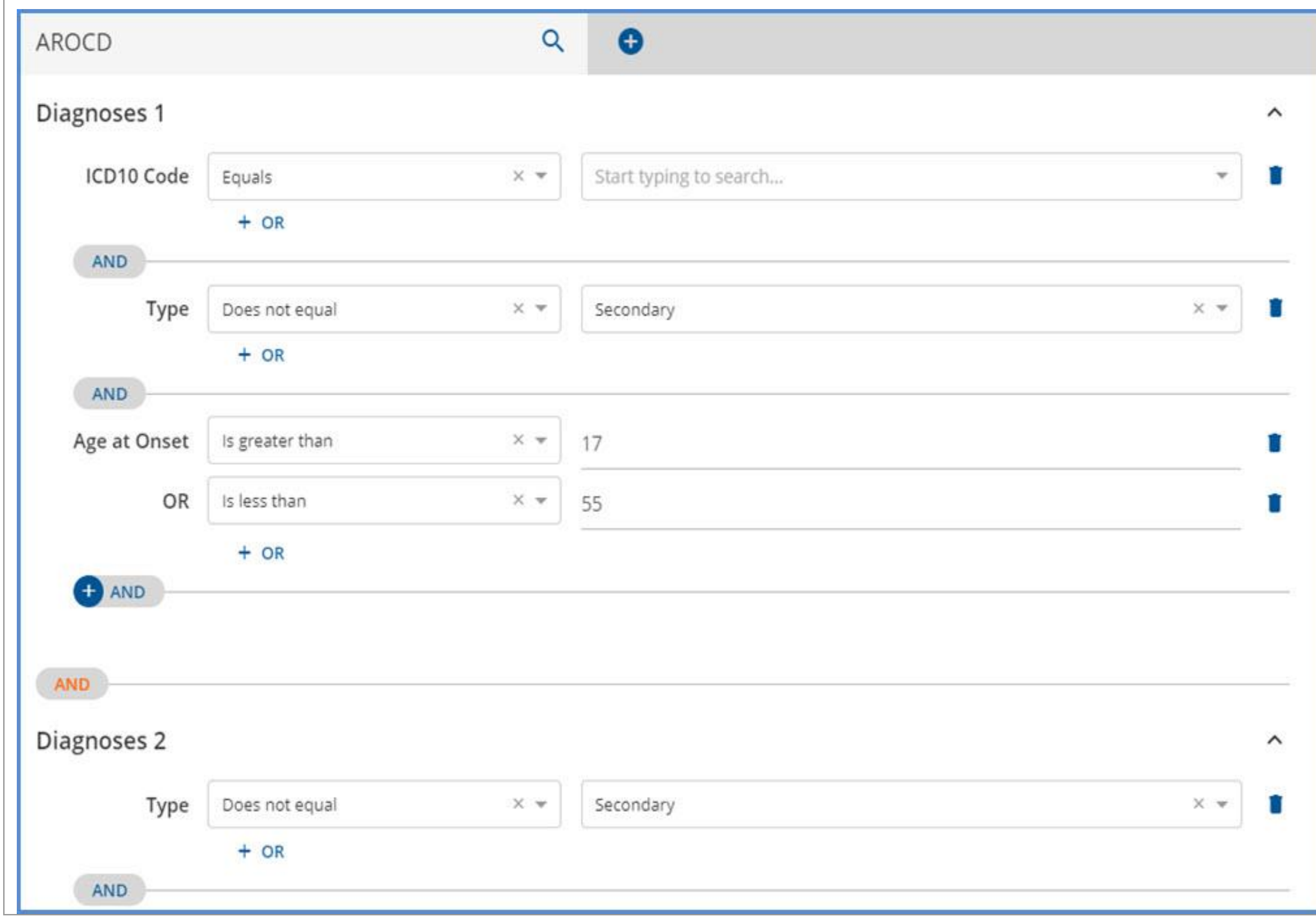
Additional information is provided during service entry to help resolve overlapping Service Definition components.

- If the PLAAR components selected are not unique, a warning message displays to indicate the number of matching Service Definitions found.
- A clickable information icon produces a list of up to five matching service definitions.




### Updated Rules Engine

The Rules Engine has been updated to allow a Category, ie Diagnoses, to be used more than one time. For example, a rule may now be created to trigger for a client that has a diagnosis for Depression and a diagnosis for Anxiety. Previously these could only have an *OR* relationship. In addition, the relationship of the Conditions selected within the Category can now be specified as *AND* or *OR* allowing more flexibility when creating Rules.



## UPDATES

| Ticket # | Description |
|---|---|
| 5741 | Rules engine columns can be typecast to other types |
| 7575 | Rates screen redesigned for better workflow |
| 7591 | A message now shows if no credential (payer) rate is entered on the *Payer>Rate* tab |
| 7887 | Updated version of FormDesignEHR to 6.0.23 |

## BUG FIXES

| Ticket # | Description |
|---|---|
| 7324 | Staff Caseload Detail report should not show future appointments in the "Last Appointment" column |
| 7404 | CCD Preview not rendering correctly in Firefox |
| 7405 | Forms with date/time fields cannot be submitted with Firefox or on IPAD |
| 7415 | New Client data not updated in Dr First |
| 7425 | Self-Pay Statement displays Charge TransactionDate instead of Services.StartDate |
| 7432 | Rules with Diagnosis Types are not working |
| 7560 | 837 Audit Report is including reprocessed transactions |
| 7566 | Negative payments display as positive in Remittance records |
| 7568 | Aging Detail report is not respecting date range |
| 7573 | Aging Report is not respecting As Of date |
| 7608 | Some dollar values are not formatted correctly when displaying |
| 7609 | Text not wrapping correctly in Treatment Plans |
| 7626 | Reprocessing all Payers when there will not be a charge created leaves invalid data |
| 7647 | Job Items that succeed and have multiple job messages cause total amount to be incorrect |
| 7667 | Form DesignEHR forms aren't triggering onClose callbacks sometimes |
| 7736 | CDM allowing improper sql formatting in Depiction Filter then errors when attempting to fix |
| 7796 | 837 Billing job failing due to lazy-load exception |
| 7877 | Allow negative values in Allowed Amount and Patient Responsibility when entering a Remittance |
| 7934 | Per Diem not finding distinct service definitions |