



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

Confidential Client (LAUB032018)

Birth Date: 03/20/1999

Memo

TIMELINE PROFILE COMMUNICATIONS CONTACTS EPISODES ENROLLMENTS DIAGNOSIS PAYERS ACCOUNT DOCUMENTS

Current Balance \$ 1,202.00 Primary Payer Self Pay

Payments

Date	Method	Amount	Recorded By	Receipt Number	
11/04/2019	CREDIT	\$ 25.00	Sherwood, Heather	3	PRINT RECEIPT
11/04/2019	CASH	\$ 15.00	Sherwood, Heather	2	PRINT RECEIPT
11/04/2019	CASH	\$ 60.00	Sherwood, Heather	1	PRINT RECEIPT

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.

Created Before * 11/04/2019 Time * 4:00 PM Method Start typing to search... Location Start typing to search... SEARCH

VIEW SUMMARY REPORT

Created	Method	Location	Amount	Transaction Reference
<input type="checkbox"/> 10/31/2019 8:37 am	CASH	Test Locale	\$ 0.15	VIEW
<input checked="" type="checkbox"/> 10/30/2019 12:52 pm	CHECK	Test Locale	\$ 0.23	VIEW
<input type="checkbox"/> 10/30/2019 12:52 pm	CREDIT	Test Locale	\$ 1.20	VIEW
<input checked="" type="checkbox"/> 10/30/2019 10:36 am	CASH	Test Locale	\$ 0.23	VIEW
<input checked="" type="checkbox"/> 10/30/2019 10:36 am	CASH	Default	\$ 0.02	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.

ADP: Alcohol and Drug Program
ADP X2: A second, non-unique ADP

Service 2 Service Definitions Found ⓘ

Program * ADP: Alcohol and Drug Program ×

Location * 11: Office ×

Service * ADP: Alcohol and Drug Program ×

Attendance * KPT: Appointment Kept ×

Recipient * ADULT: Adult over 18 ×

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.

AROCD

Diagnoses 1

ICD10 Code Equals Start typing to search...

+ OR

AND

Type Does not equal Secondary

+ OR

AND

Age at Onset Is greater than 17

OR Is less than 55

+ OR

+ AND

AND

Diagnoses 2

Type Does not equal Secondary

+ OR

AND



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 <i>Payer>Rate</i> 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