



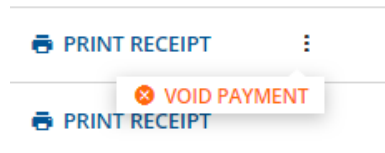
ECHOVANTAGE RELEASE NOTES

VERSION 3.04

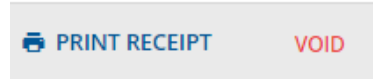
NEW FEATURES

Voiding Client Payments

Until a Client Payment is reconciled and marked Ready, the payment may be voided by clicking the ellipsis:



Voided Payments will continue to display, but will be marked as a Void, and will not be included in Client Payment totals.



Client Payments Allocation Against Charges

The way in which Client Payments become Remittances that can be posted against Active or Outgoing Charges depends upon the setting that was chosen during Client Payment Entry. The two options for applying payments:

Apply Payment To *

- Oldest Unpaid Charges
- Specific Services

When Oldest Unpaid Charges has been selected, Remittance creation is automatic. Remittances are generated to match the oldest Self Pay charges first. These Remittances are marked Ready and will be picked up in the next Remittance processing.

Note: Although this process is automatic, it is not instantaneous. Remittance generation runs on an hourly basis.

When Specific Services has been selected, the Client Payments must be allocated against charges on the Client Payments>Apply Payments screen.



Client ID	Client Name	Total Unapplied Payment	Charge Balance
000034	Bellini, Hortense	\$ 5.00	\$ 40.00
000052	Anderson, Kimberly	\$ 1.99	\$ 40.00
000014	Antilles, Martin	\$ 2.59	\$ 27,209.59
CLOE00	Cloran, Elaine	\$ 100.00	\$ 2,944.50
000028	Cressey, Anthony	\$ 1,200.00	\$ 39,578.88
000032	Hall, Tiyanah	\$ 40.00	\$ 400.00
000017	Ragnar, Josef	\$ 10.00	\$ 3,323.40

A row displays for every client meeting these criteria:

- A Client Payment has been entered for the client with 'Specific Services' selected.
- The Client Payment has been reconciled and marked Ready.
- The Client has a Self Pay balance.
- The balance of Client Payments has not been fully allocated against the client's Self Pay charges.

From this screen, the user can open the Client row to see available Client Payments and Unpaid Charges. Notes entered with the payment are visible here.

Payments may be broken up and allocated against charges as needed. Allocated amounts must not exceed the Payment amount.

Service Date	Program	Service Code	Charge Balance	Allocation
01/28/2019	MED	MED	\$ 200.00	\$ 20.00
01/28/2019	CM	CM	\$ 200.00	\$ 0

Summary: Total Unapplied Payment: \$ 40.00, Charge Balance: \$ 400.00, Payment Received: \$ 40.00, Unapplied: \$ 40.00. \$ 20.00 out of \$ 40.00 allocated.



Clients Payment GL Posting

A new option is available in GL Mapping to define the default Segment 1 and Segment 2 accounts for Client Payments. Because Client Payments are not yet associated with Services, this default will be used when posting Client Payments to the GL.

Hover over the plus sign at the bottom of the screen to access the “Add Default Mapping” button.

The screenshot displays the 'GL Mapping' screen in the EchoVantage application. The top navigation bar includes the EchoVantage logo, the title 'Peer to Peer Behavioral Health', and a user greeting 'Welcome Heather Sherwood'. A left sidebar contains navigation options: Staff/Users, User Groups, Permissions, Setup, and GL Mapping. The main content area shows a table with columns for ACCOUNT CODE, SEGMENT 1, SEGMENT 2 (highlighted), SEGMENT 3, and SEGMENT 4. Below this is a 'Filter Mappings' section with a table containing two rows of mapping data. At the bottom right, a red arrow points to a plus sign button labeled 'ADD DEFAULT MAPPING'.

ACCOUNT CODE	SEGMENT 1	SEGMENT 2	SEGMENT 3	SEGMENT 4
0001				
2134				

Account	Mapping Name	Start Date	End Date
0001	Segment 2: Unapplied Default		
2134	Segment 2: 2134		

Once defined, Client Payments that have been reconciled and Marked Ready will be included in the next GL Posting job. In addition, once Client Payments have become Payments against Charges, GL entries will be created to reverse the Default Account postings and post the amounts against the Service's payment.

Example:

- A Client Payment in the amount of \$20.00 is entered and marked as Ready.
- This \$20.00 is posted to the default account of '0001'
- \$5.00 of this \$20.00 is applied against an Active Charge.
- GL Posting will include a reversal of \$5.00 to '0001', and a positive posting of \$5.00 to account '1234', the account associated with the Service to which the payment has been applied.

UPDATES

Rcopia4 Support

Updated DrFirst functionality to include support for Rcopia4. Will require working with DrFirst and a modification to the 3rd Party Integration DrFirst URLs.



BUG FIXES

Ticket #	Description
8151	Reports are no longer nested in a root folder for customers in SaaS.
7864	Corrections have been made to how dollar values are displayed.