ECHOVANTAGE RELEASE NOTES

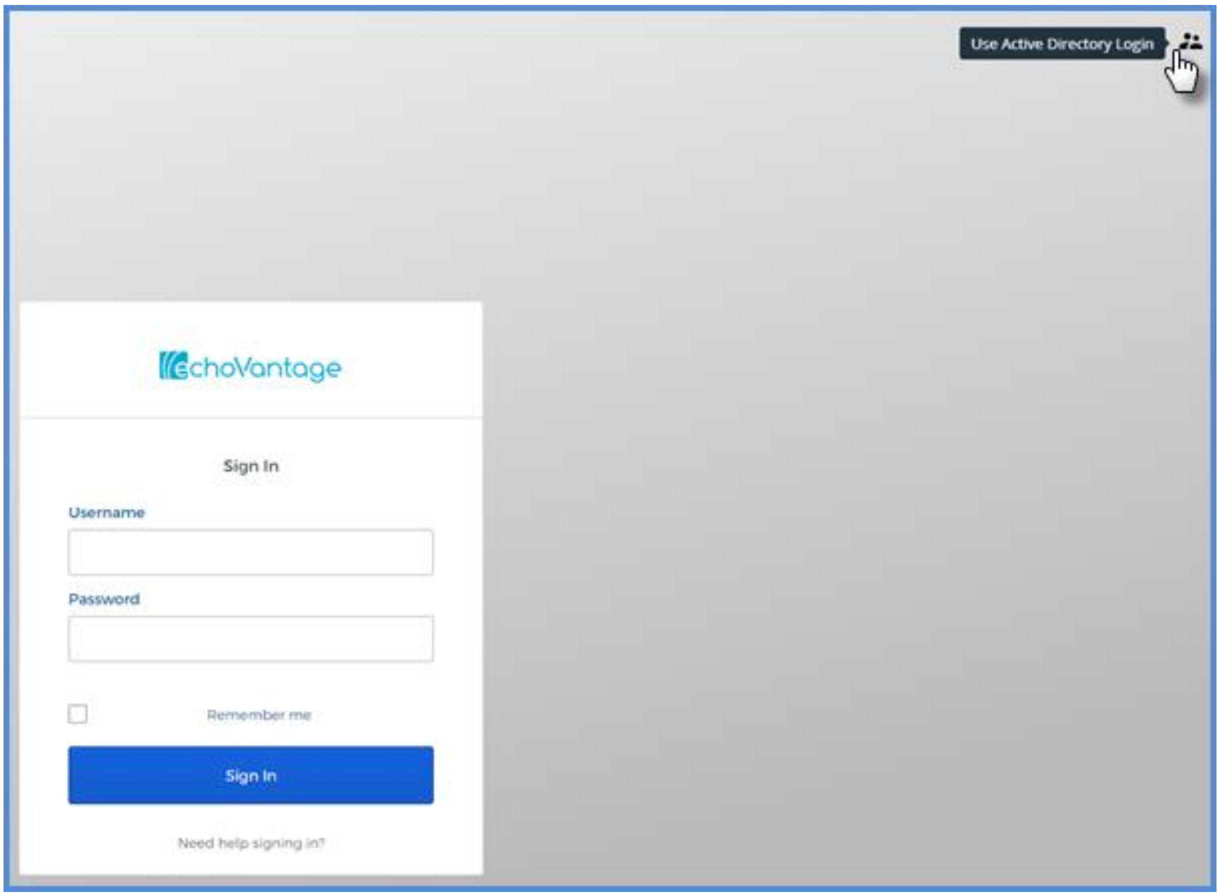
VERSION 3.07

NEW FEATURES

Single Sign On using Okta

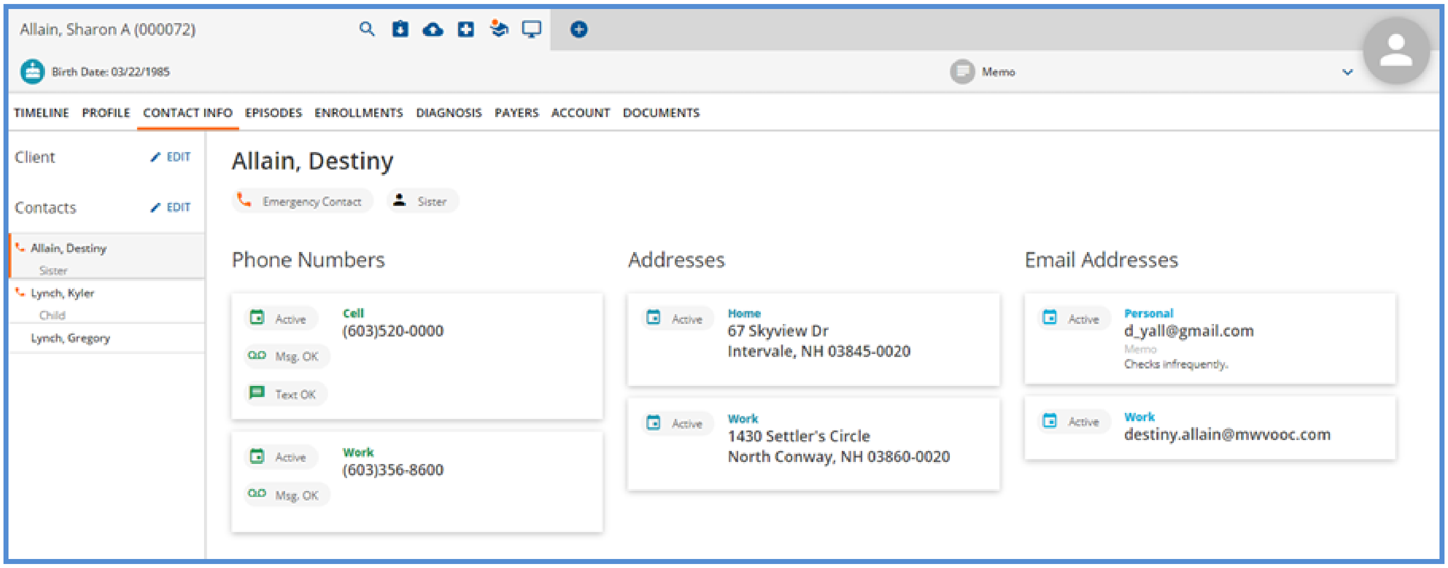
Users of an agency that uses Okta for Single Sign On can now access EchoVantage via the Okta login form. An Okta admin level user for the agency will need to Add the EchoVantage application. Each Okta users Application Access Username needs to be the same as their Okta Username. Detailed instructions for each of these tasks can be found here: Setting Up Okta to Work with EV.

If an agency user does not have an Okta account, the login screen can be changed to the familiar Active Directory login screen by clicking on the Active Directory icon in the upper right-hand corner.



New Client Tab: Contact Info

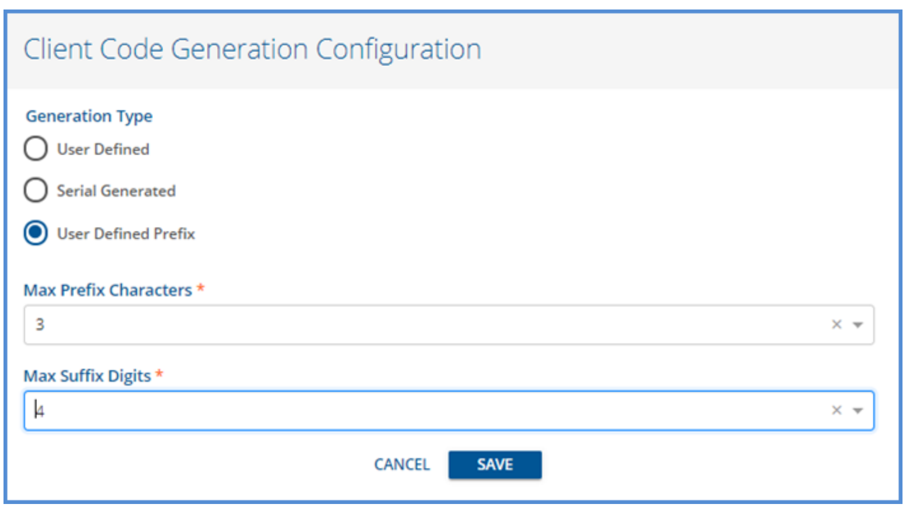
The Contact Info tab allows access to all contact information for a Client in a single location. It consolidates and updates the Client Communications and Client Contacts tabs and has added support for memos and priorities.



- Contacts are listed in priority order and a single click displays all information on file for the current selection.
- Contact specific information is also listed in priority order in the Phone Numbers, Addresses, and Email Addresses columns.
- Users with Edit access can easily navigate to the Communications or Contacts from this tab.

User Defined Client Code Prefix

A third option for a User Defined Prefix can now be defined in *Configuration>Setup>Client Code Generation.* Agencies define a *Max Prefix Characters* and a *Max Suffix Digits* that will be used to generate client codes, allowing more control and flexibility over the codes created without requiring users to ensure each code entered is unique.



- When new clients are added, a user entered *Client Code Prefix* is required.
- The application then appends a serially generated suffix left padded with zeros to the *Max Suffix Digits* defined to create a unique client code.

837I

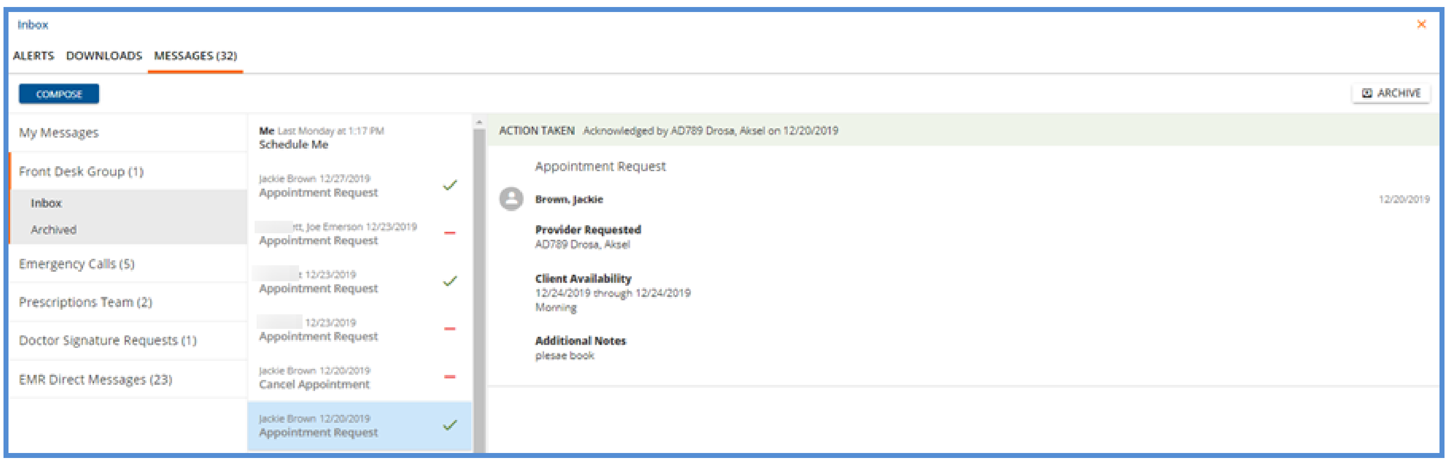
The 837 Institutional billing method can now be configured for Payers. Under the Claims and Services section, the default *Bill Type* has been added and the *Report Staff Taxonomy* prompt has been updated to display (Loop 2310A, PRV). The 837I now displays as a selection in the Unbilled Charges>*Create>Billing Methods* drop-down listing. Changes have also been made to the 837 report and icons on the History screen to clearly indicate the type of 837, Professional or Institutional, that was created.

Inbox Shortcut Key

The Inbox modal can now be accessed from anywhere in the application by using the designated shortcut key *Ctrl+i.* The Inbox will open fully expanded and default to the Inbox under the My Messages heading. Using the 'X' to close the inbox modal returns the user to the page where the inbox shortcut was launched.

Group Mailboxes

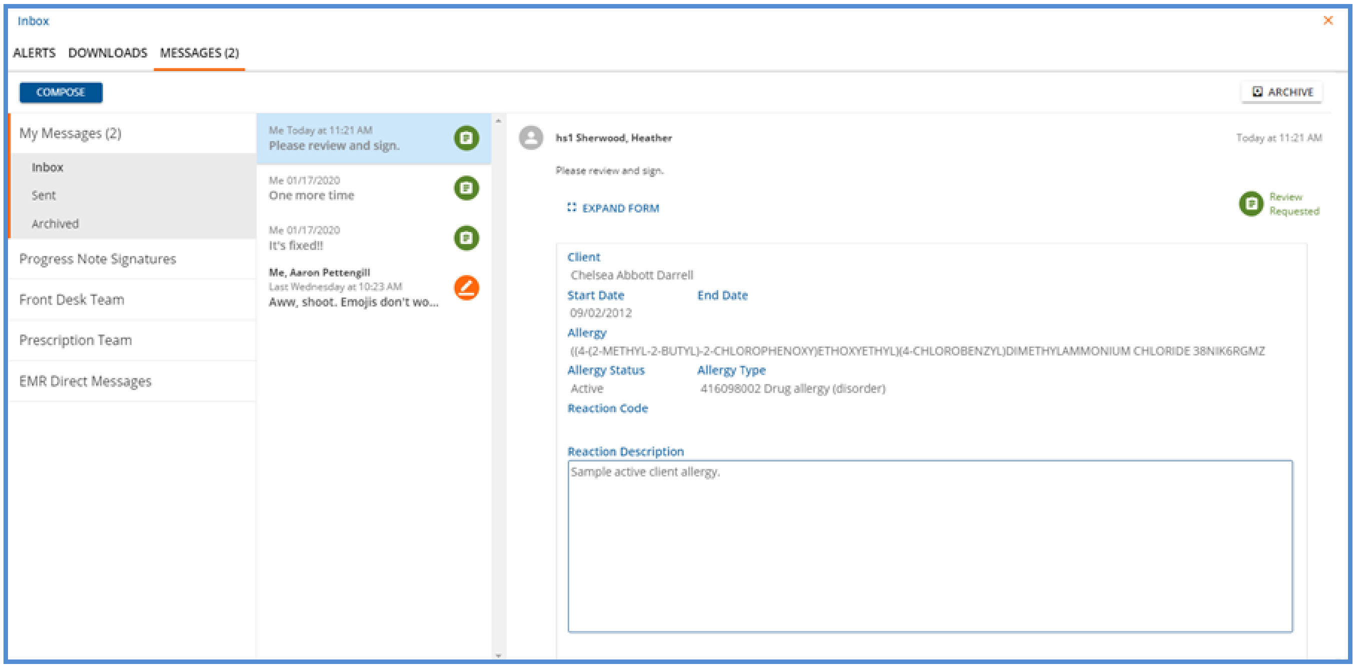
Agencies can now define Group Mailboxes to allow multiple users message access for shared responsibilities such as appointment requests, prescription refills, or signature requests. Group Mailboxes are defined in *Configuration>Setup>Group Mailboxes.* User Groups can be granted permission by Group Mailbox to View messages, Send messages to a mailbox, or both. Once configured, group mailboxes can be accessed by navigating to the Inbox and selecting Expand when in the Messages screen.



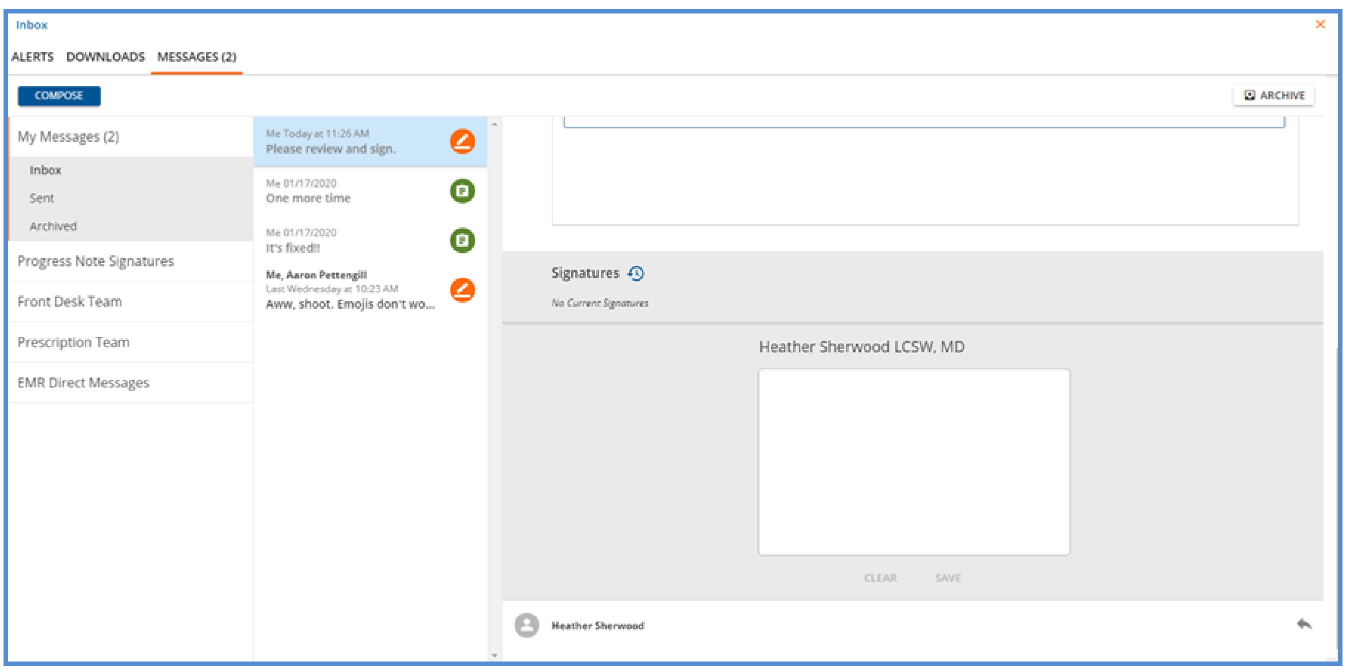
- Group Mailbox messages are visible to all members of the authorized user group.
- New messages display the Sender and message text preview in bold.
- These messages remain bold until it is marked with an agency defined action.

Viewing and Signing Forms from the Inbox

Timeline forms sent for review or signature requests will now display in Read Only mode within the message in the inbox. The form can still be accessed in its original location by clicking on the *Review Requested* or *Signature Requested* button links. A form signature box will show in the inbox when a signable form is sent for Signature Requested.



Form displayed within inbox message



Form signature box from within inbox message

MOTS Non-Medicaid Services Reporting

The Mots Non-Medicaid Service File report can be run from the State Reporting menu once the state specific acorn is updated. The report includes services based on charges for a MOTS specific payer that fall within the user entered date range.

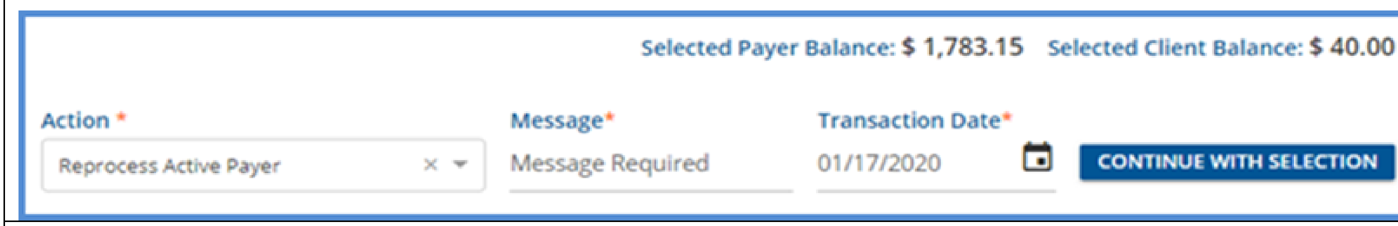
ENHANCEMENTS

Claim Screen Enhancements

The Claims screen and processes have been redesigned so that the functionality is more like the job screens in Fiscal Overview.

- Filters may be left blank to display all results or can be used to drill down the results.
- Claims screen is paginated displaying 50 records per page.
- Bulk Actions may now be performed in the Claims screen by choosing to *Continue With Results.*

- Individual claim records may be selected which changes the Action button message to *Continue With Selection.*



Updated and New Reports

The Following Reports have been Updated:

Billing

_837Audit

Clients Reports

Medical Face Sheet

Services Without Progress Notes

Fiscal Reports

Claims Report

Service Detail By Defined Filter

Service Detail With Charges By Client

Service Detail With Charges By Staff

Service Detail With Charges

The Following New Reports have been added:

Administration

Events Missing Services

Expiring Credentials

Schedule Report

Staff List

Billing Reports

_837iAudit

Clients Reports

Clients By Enrollments

Fiscal Reports

Average Days In AR

UPDATES

Ticket #	Description
3847	Schedule report created and enhanced for EV.
6407	Added Fiscal Report: Average Days in AR
8387	Added Maple version and number in Help/About section.
8451	Charges.ChargeStrategy is now no longer nullable.
5976	Renamed *Clients by Enrollment Programs* Clients report to *Active Residents by Program*
8384	Added staff filter to Claims report.
8488	Styled 0's on Fiscal Overview screen.

BUG FIXES

Ticket #	Description
7711	Services Without Progress Notes report now includes other Progress Note types.
8320	EV Config/Defined Lists: Address list sorting issues.
8323	Copays are no longer generated for add-on services.
8340	Financial reports now account for EV bundling structure.
8352	EV Config/Setup/Alerts - Client Missing Payer: Notice & Warning Alerts set for Days After functions as expected.
8375	Double Clicking on Today's column no longer launches a confirmation box in Staff Schedules.