



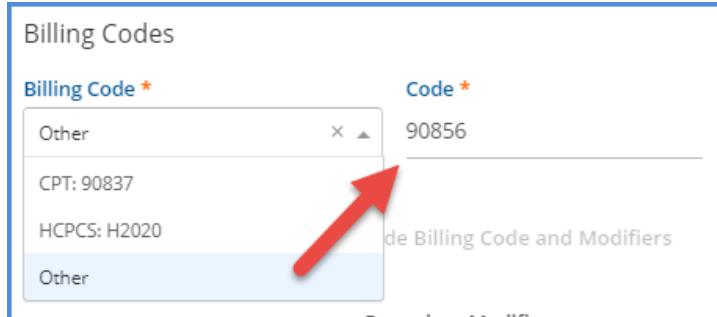
# ECHOVANTAGE RELEASE NOTES

VERSION 3.10

## NEW FEATURES

### Billing Code Overrides by Payer

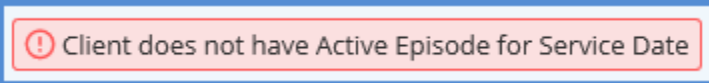
A Billing Code option of “Other” was added to the Billing Code drop-down listing in *Payer > Rates*. When “Other” is selected, a Payer specific code override must be entered. When a charge is created for this Payer and Service Definition combination, the billing code override entered is applied to the charge.



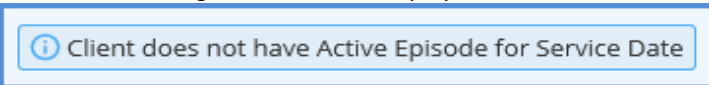
### Service Entry for Clients with No Open Episode

A new feature was added that allows a Service to be created or updated when the Client does not have an open Episode. This is being released under the Feature Flag “*SERVICE\_REQUIRES\_OPEN\_EPISODE*” with the default set to True to maintain the current default behavior of requiring an open Episode.

- When entering or updating a Service for a Client that does not have an open Episode for the Service Date and the Feature Flag is set to True, the following **ERROR** will display and Save is not allowed.



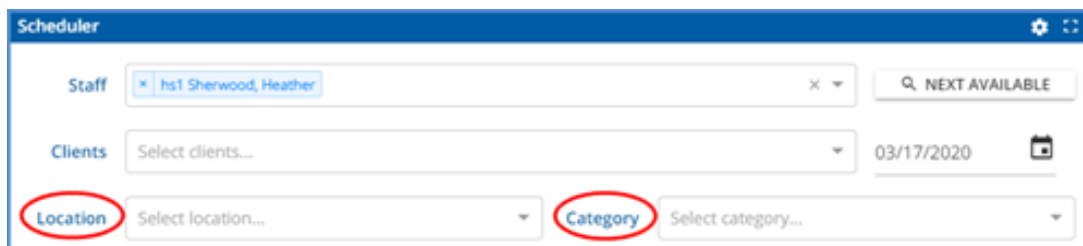
- When saving a Service for a Client that does not have an open Episode for the Service Date and the Feature Flag is set to False, the following **WARNING** will display and Save is allowed.



**\*\* Please contact support to have this feature enabled. \*\***

### Staff Schedule Filters

Once Staff Schedules have Category and Location configured, users can filter visible Staff times as well as search for next available appointments. Access to the filters must be enabled using the toggle via the gear icon before they can be accessed from the Scheduler home page. These filters allow the available Staff time slots to be limited to the selected Location and/or Category. Scheduled Events are not affected by these filters.





### Category and Location Filters in SFNA

Staff Schedule Category and Location are also available filters in the Search for Next Available feature. Staff Schedules must have Locations and Categories configured before these filters return valid results. When a SFNA result is selected, the Staff, Category, and Location filters are applied to the Scheduler filters and the Scheduler view is updated accordingly.

### Bundling Indicator Icons

Bundling icons have been added to the following locations to indicate that the Service or Payer has been bundled. The icon will have a number and tooltip representing the number of services in the bundle.

- Job Details in the Unprocessed Services History Screen

ServiceDate	Client	Duration	Payer	Procedure Code	Units	Charge Amount	Balance
03/02/2020	000033 Bellini, John	<b>Bundled with 1 other Service</b>	MDCD	99292	2	\$ 100.00	\$ 33.89

- Claims Management Screen – the icon is only present if the Active/Last Payer for a Claim was bundled.

000033 Bellini, John										Payer Balance: \$ 31,529.33 Client Balance: -\$ 1,740.00	
Date	Service	Staff	Active/Last Payer	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance	
03/02/2020	COUN		<b>Bundled with 2 other Services</b>	MDCD	Active	Charge Created	\$ 2,000.00	\$ 0.00	\$ 128.89	-\$ 1,740.00	
03/02/2020	COUN	KB1234	ANTHBCBS	Done	Charge Created		\$ 37.50	\$ 11.11	\$ 0.00	\$ 0.00	

- Claims Detail Modal – the icon is present for any Payer that bundled the service

Counseling 90838 03/06/2020							Show Reprocessed Charges	
Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis	
03/06/2020	\$ 1,200.00	CHARGE CREATED			ACTIVE	99292 - HB	F33.1	
03/06/2020	\$ 1,050.00	EXPECTED ADJ						
<b>Balance:</b>	<b>\$ 150.00</b>							
<b>Total Balance:</b>	<b>\$ 150.00</b>							

## IMPROVEMENTS

### Apply Payments Detail Sorted by Service Date

When working in the Apply Payments tab of the Client Payments main menu option, the payment detail row is now sorted by Service Date in descending order. This makes it much easier to locate a specific service for payment allocation.

Service Date	Program	Service Code	Charge Balance	Allocation
12/23/2019	ADP	ADP	\$ 10.00	
12/20/2019	ADP	ADP	\$ 10.00	
12/20/2019	ADP	ADP	\$ 10.00	
12/19/2019	ADP	ADP	\$ 10.00	
04/02/2019	CRI	COUN	\$ 33.15	

\$ 0.00 out of \$ 10.00 allocated

APPLY



### Option to Use Allowed Amount as Paid Amount Added to 835 Import

In the Remittances Import 835 screen, a third option to *Use Allowed Amount as Paid Amount* has been added. When selected and the import is complete, the Remittance Amount will be the same as the Allowed Amount on the Remittance screen.

Import 835

MDCDFFS\_1077.835 (788.00 B)  
**Import 835 - 000001077**

Payer \*  
MEDB

Transaction Date \*  
03/12/2020

Include Patient Responsibility  
 Import Contractual Adjustments  
 Use Allowed Amount as Paid Amount

CANCEL SAVE

### Claims Job Messages Updated

The message that displays in the Claims Job confirmation modal now shows the number of eligible records to be included in the job. Either job creation process may be selected: *Continue with Results* or *Continue with Selection*.

Reprocess All Payers  
Reverse and recreate charges for the 1 selected service?  
CANCEL REPROCESS

Reverse Service Transactions  
Reverse charges for the 3 selected services?  
CANCEL REVERSE

If any of the *Results* or *Selection* records do not meet the job selection criteria, like the Service Status is *Batched* for example, a more detailed message displays.

Rebill Outgoing Charges  
19 of the 31 selected claims have outgoing charges. Set these charges back to Active so they can be rebilled?  
CANCEL REBILL

**Reprocess Active Payer**

24 of the 31 selected claims have charges that have a status of Active or Outgoing. Reverse and reprocess those charges?

CANCEL

REPROCESS

**Reprocess All Payers**

3 services are in other jobs and cannot be reprocessed. Reverse and recreate charges for the 28 remaining services?

CANCEL

REPROCESS

**Reverse Service Transactions**

3 services are in other jobs and cannot be reversed. Reverse charges for the 28 remaining services?

CANCEL

REVERSE

**REPORTS**

The following new report has been added:

**Fiscal Reports**

Cash Receipts Journal – Cash Receipts captures Remittance and Client payment information. Report can be filtered by Payer, Status, and Remittance Start and End Dates.

The following reports have been updated:

**Billing Reports**

\_GL Audit Report – Client payment reversals were added to the GL report and the report now displays the correct transaction dates.

**Client Reports**

Event Template Note – The Event date and name were added to the Event Template Note Report and the print date has been included in the footer.

Treatment Plan – Treatment Plan signature indicators are now displayed in a grid at the bottom of the report for both Client and Staff. Signature information displayed includes: Name, Relationship, Role, Date, Time, and also indicates if it is “Not Yet Signed” or “Signature Not Required”.



## UPDATES

Ticket #	Description
6411	Added a Cash Receipts journal to Fiscal Reports.
7865	Added Event Date under Event name on the Event Template Note report.
8752	Route tabs now show a no-permission message instead of redirecting.
9009	The Scheduler now switches to Team view when multiple Staff members have been selected.
9042	Polling for Clinical Decision Support and Educational Resources no longer occurs if permission to the feature has been disabled.
9132	The Treatment Plan report now indicates signers.
9160	The layout and design of the SFNA modal has been redesigned.
9186	Bug fixed for Monthly Fiscal Summary Report so that it now fetches the logo from the correct data source.
9250	Mend is now updated when Client phone number changes.

## BUG FIXES

Ticket #	Case #	Description
8733		Bug fixed that threw an unexpected error using Chrome Form Fill when adding a Client Payor Guarantor.
8781		Job run times no longer display in UTC on the State Reporting History screen.
8784		Bug fixed so that long names/strings no longer extend drop-down modals to the page edge forcing text to continue off screen.
8943		Bug fixed that caused an "Unexpected Occurred" Message when deleting a Payer from the Payer drop-down list while adding a Client Payer.
8957	70784	Bug fixed for FD forms with tabs that were throwing an "Unexpected Error Occurred" message when accessed.
9025		User Group Timeout database column no longer allows a zero. This column now must be $\geq$ to 5. <b>Any existing timeouts that are less than 5 will be set to 5 after upgrading.</b>
9027		Bug fixed so that the Charge Diagnosis used to create a charge gets the principal flag and displays in the Claims detail when the Service has a non-billable, other diagnosis marked as Principal AND a billable, default, Client diagnosis NOT marked as Principal.
9127		Bug fixed for intermittent failure of Menultems endpoint when refreshing browser quickly.
9238		Bug fixed so that Client Payment Account Reversals now show on the GL Audit Report.
9243		Bug fixed that prevented Category and Location shading from displaying on the Scheduler when using Edge browser.
9248		Bug fixed that caused the main menu to overlap the work area after returning from Configuration menu when using Edge browser.
9255		Bug fixed that prevented adding or editing an episode after an existing episode had been edited, even if all existing episodes were closed.