



ECHOVANTAGE RELEASE NOTES


VERSION 3.11

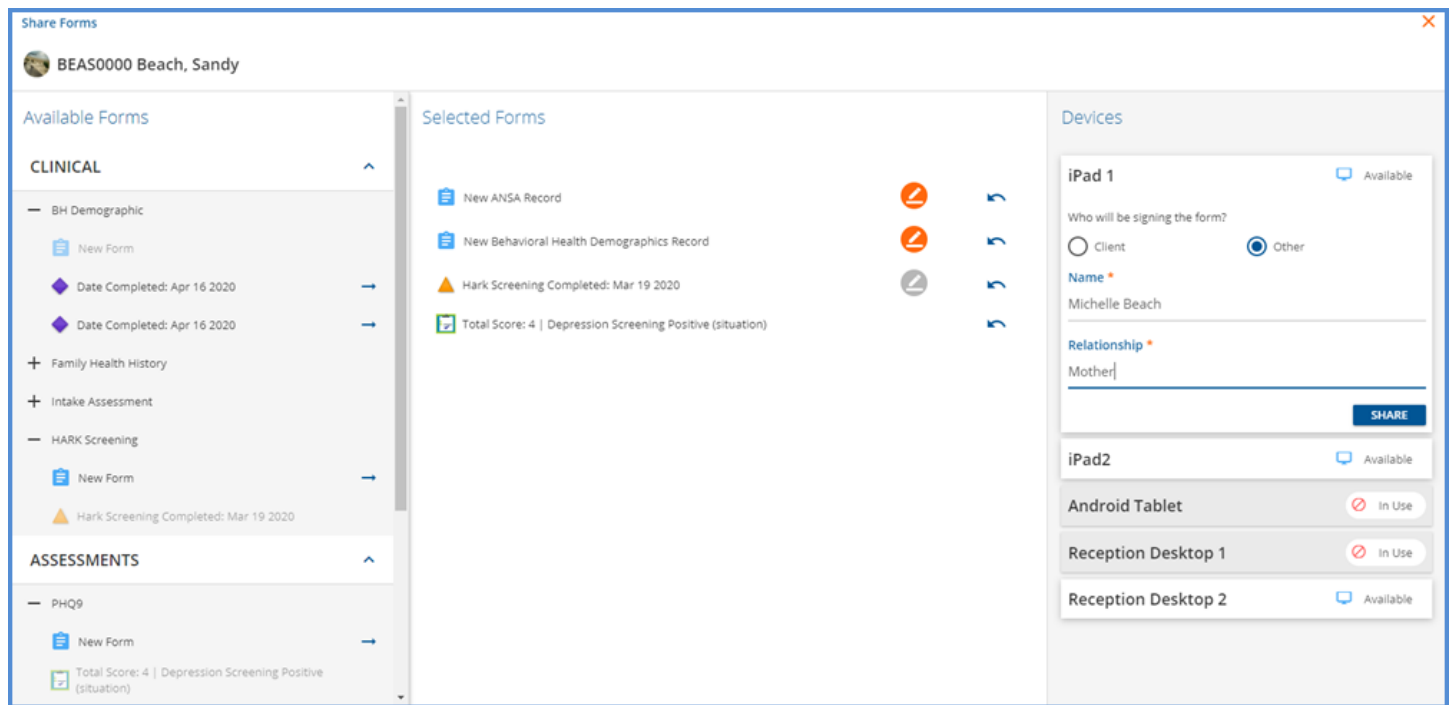
NEW FEATURES

InForms (previously Share Forms)

This exciting new feature allows agency created and EV core Form DesignEHR forms to be shared to another device to be completed by the Client or Other designee. This feature is available on a trial basis for a limited time. Cost and licensing information will be shared at a future date. The following setup must be completed for the feature to be available:

- The Device User(s) need to be setup in *Configuration>Staff/Users>Supplemental Users*.
- The user responsible for sharing forms to the Device User must be a member of a User Group that has the **Sharing Forms** Features Permission enabled.
- Forms must be tagged with the **DEVICE** location.

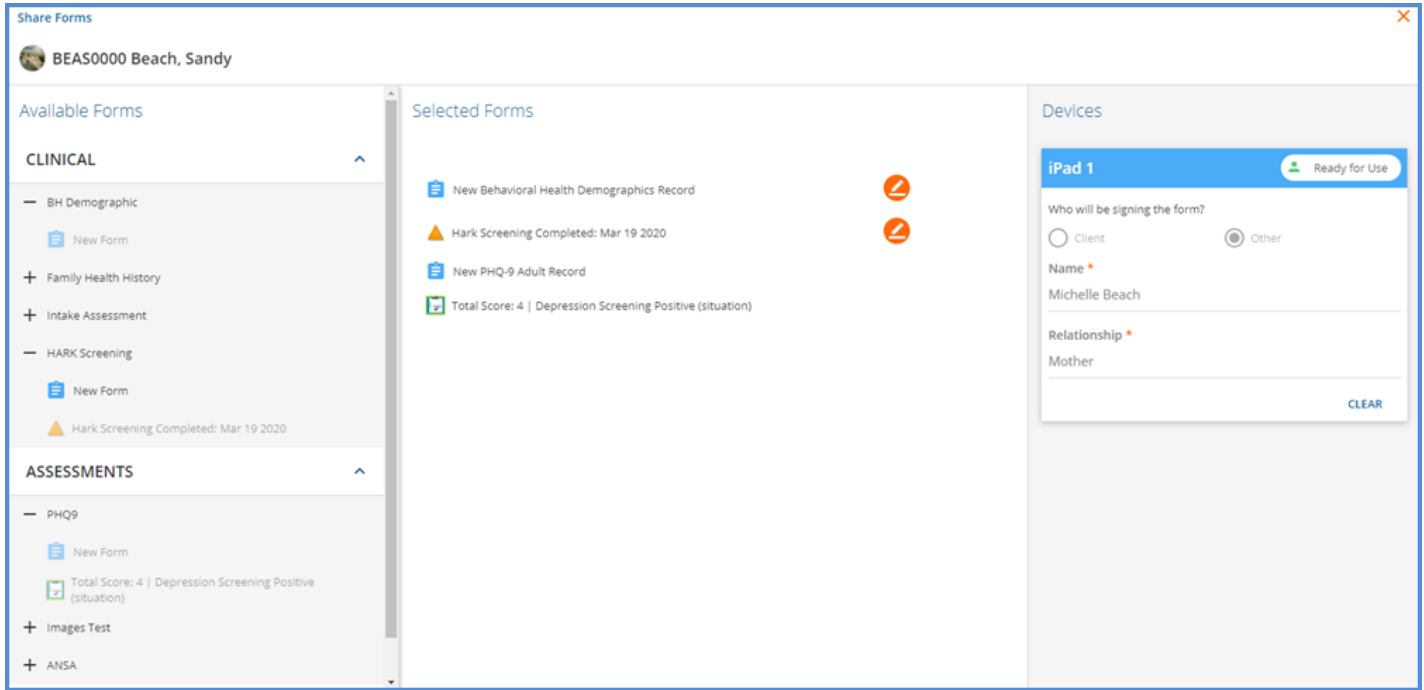
Once that is complete the feature may be accessed from the Client header via the *InForms* icon .



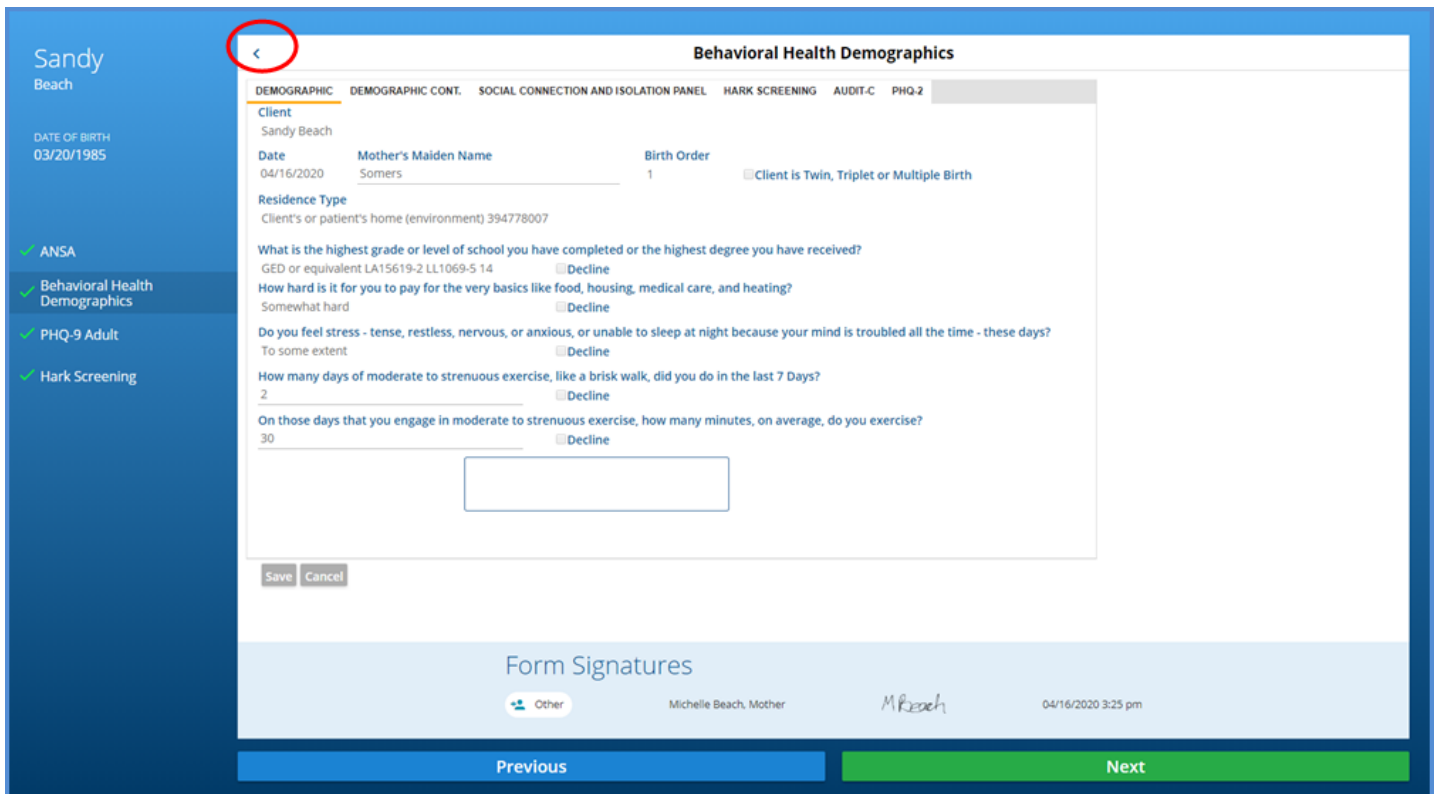
- A list of Available Forms can be viewed on the left.
- Forms are displayed based on the VHR Timeline Configuration using the same categories, depictions, and user group permissions.
- Expand the categories and click the blue arrow to select the forms to share.
 - An existing form can be selected for Review or for a Signature.
 - A new version of the form can be selected to be completed and signed.
 - Click on the Signature icon to enable form signatures.
 - Click on the left arrow to remove a form selected in error from the Selected Forms list.
- Choose a device to share the forms to under Devices.
 - Available indicates that the device is available to share forms to.
 - In Use indicates that forms for another client have been shared to the device.



- If signatures need to be captured, the user can choose who will be signing.
 - Select Client or Other
 - When Other is selected, Name and Relationship must also be entered.



Once forms have been selected and shared to a Device, the *Ready to Use* indicator displays to the right of the Device name. The agency user can log into the selected device or if the device has already been enabled for the day, the screen will refresh with the newly shared information after a short polling interval.





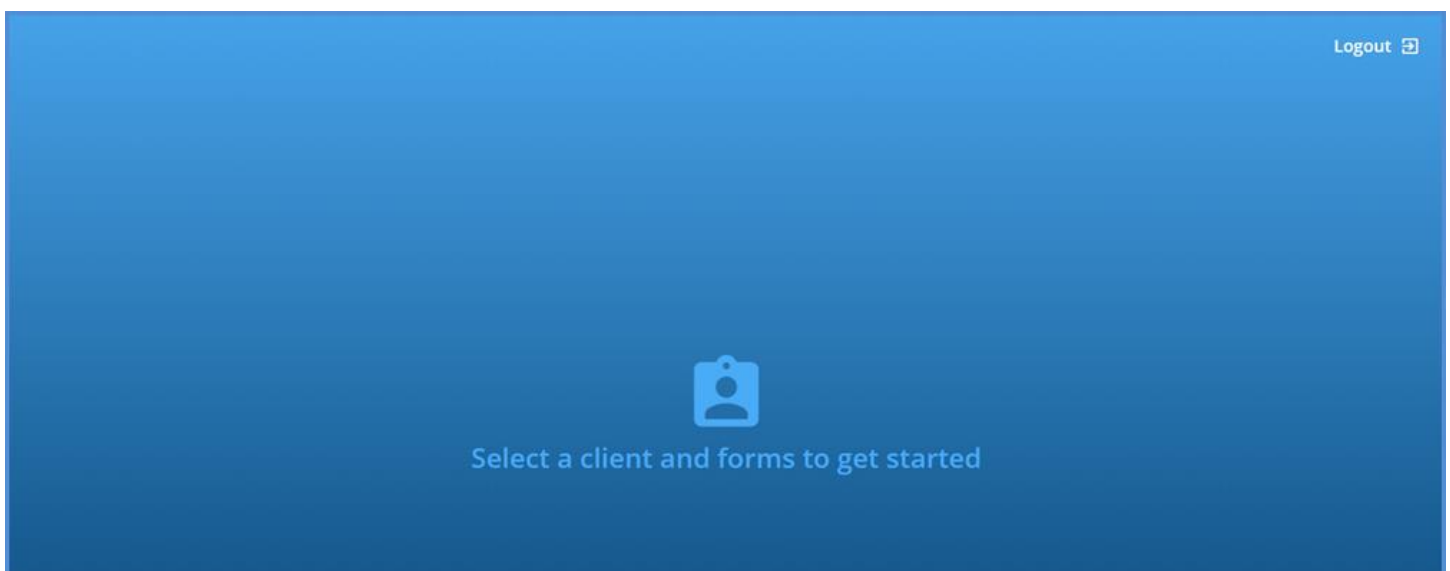
- The selected Forms are listed on the left-hand side.
- Forms display when selected.
- The left arrow on the top left of each form can be used to expand the form to full screen. (This collapses the form menu on the left.)
- When requested actions are complete – review, complete, and/or sign – a green check mark displays for that form.
- The VHR Timeline is updated when a form is saved.
- Navigation prompts at the bottom help the client or other user move through the forms.
- When the client user has completed the assigned forms, the device can be returned to the agency user for review.

The screenshot shows a 'Devices' section with a card for 'iPad 1' labeled 'Ready for Use'. Below the card is a form with the following elements:

- Header: 'iPad 1' and 'Ready for Use' with a user icon.
- Question: 'Who will be signing the form?' with radio buttons for 'Client' and 'Other' (selected).
- Field: 'Name *' with the value 'Michelle Beach'.
- Field: 'Relationship *' with the value 'Mother'.
- Button: 'CLEAR' with a red arrow pointing to it.

To *CLEAR* forms associated with both the Device and Client, the agency user can return to the Client Header, select the Share Forms icon, and simply select the CLEAR option in the Devices column.

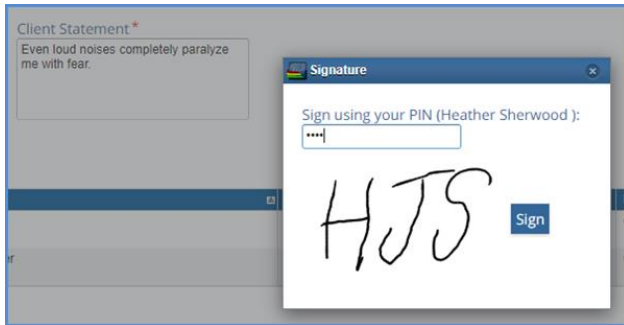
- The Client's Selected Forms are removed.
- The Device refreshes and displays the following message until selected for use again.





PIN Signature Available on Treatment Plans

Once the PIN Signature is configured in *User Preferences* Treatment Plans can be signed by entering the 4 to 6 digit PIN.



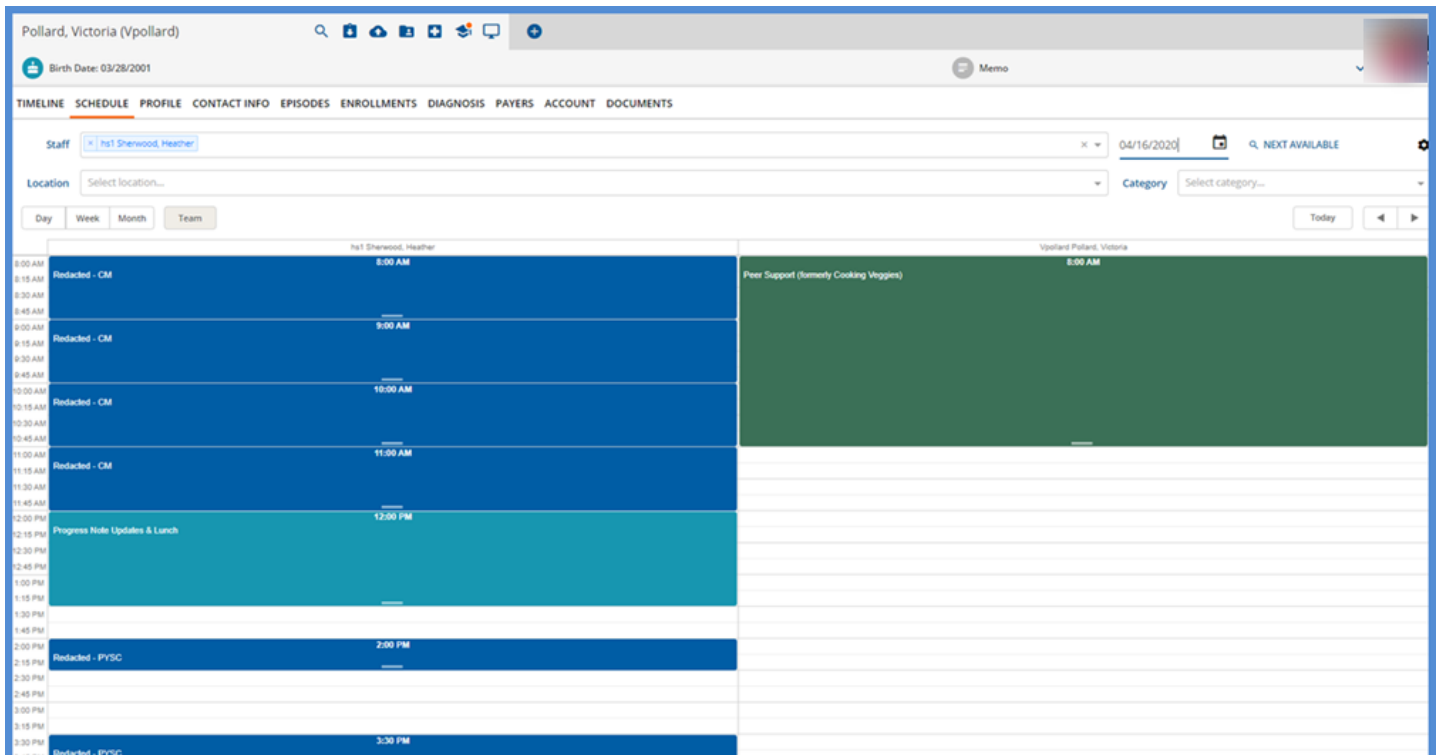
Client List from Client Menu

The Client drop-down list in the Client menu no longer auto-populates. To protect the unwanted display of PHI, at least three characters must be entered to return results. Previously the first ten clients alphabetically were automatically displayed.

Client Schedule

A Schedule tab is now available from the Client menu for Users that have been granted Edit access in the User Group Menu Options. The Client Schedule:

- Schedule settings may be configured using the gear icon like the Clinical Home Scheduler.
- Is locked down to Single Client Mode, even when creating Events or Services.
- Supports Team View by displaying Staff and Client in a split view.
- Appointments for other clients are displayed on the Staff Schedule with names redacted.





Referring Provider on CMS 1500

The referring provider is now reported on the CMS 1500 when configured in the *Referrals* grid on the *Clients>Enrollments* tab. The referring provider name in first name, middle name, last name format will be reported in box 17. Box 17b will be populated with the NPI if present.

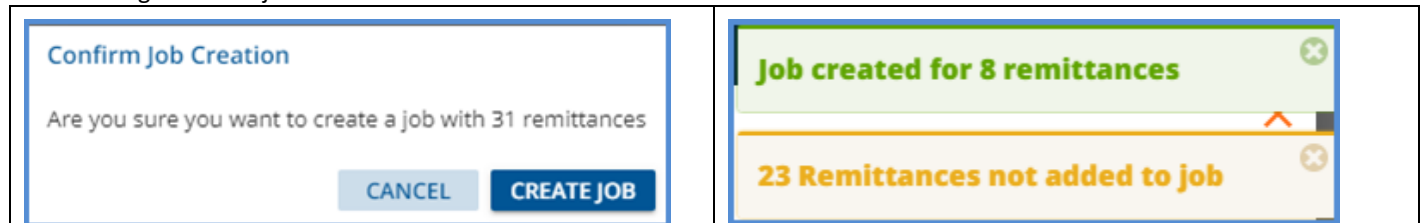
IMPROVEMENTS

New Form DesignEHR Release Version 6.0.25

With the release of Form DesignEHR version 6.0.25, Form Locations can be updated or changed on forms that have been signed without requiring a new version. Previously a signed form was locked requiring a copy be made for a new version before a location could be added or an existing location removed.

Remittance Job Error Messages Improvements

When creating a Remittance job, a Success Toast message (green box) displays indicating the number of records successfully added to the job when creating the job with either all or selected records. If the job fails to include any record, selected or all, a Warning Toast message (orange box) displays with the count of items that could not be added. The prior behavior was a single error message that the job could not be created.



Logging in Without Permission to Vantage Point

Users without access to the Vantage Point will no longer receive a *No Access* error when first logging in. The application now redirects to the first tab to which the user has access.

REPORTS

Updated and New Reports

The Following Reports have been Updated:

Administration

Enrollment Census Report – There is now an option to run the report to see all clients *active* in a date range.

Staff Caseload Detail - There is now an option to select active enrollments, no active enrollments, or both.

Client Reports

No Show Report – This report has been renamed **Attendance Report** as users can now enter any Attendance Code value and view the report.

Fiscal Reports

Aging Report – This report has been renamed **Aging Report by Payer** as it is grouped by payer. Aging buckets and bucket labels have been updated so that they do not overlap and now only includes totals for charges and payments with a transaction date that falls on or before the *As of* Date.

Aging Detail Report – This report has been renamed **Aging Detail Report by Payer** as it is grouped by payer. Aging buckets and bucket labels have been updated so that they do not overlap and now only includes charge and payment details with transaction dates that fall on or before the *As of* Date.

Outstanding Charges – There are now options to see all outstanding charges in a date range, per Payer, per Client, or per Service.



Service Detail by Defined Filter – Defined Filters are now displayed in a drop-down list and an option was added to run report for a date range. A hyperlink to drill down report for csv export has also been added.

Service Detail with Charges – Changed column name from “Activity Date” to “Service Date”. Set Staff and Client names to display in “Last, First (code)” format.

Service Detail with Charges By Client – Same changes as the Service Detail with Charges report.

Service Detail with Charges By Staff - Same changes as the Service Detail with Charges report.

The Following New Reports have been Added:

Fiscal Reports

Aging Report by Program – Same Aging Report grouped by Program.

Aging Detail Report by Program – Same Aging Detail Report grouped by Program.

Service Processing Report – Lists the number of services and net payer balance by job for a user entered date range. A Job Message parameter can be entered to further filter the results.

Unapplied Payments – Lists all unapplied payments for a user defined date range for all or a specified client. The report displays in ascending payment date order and is grouped by client.

UPDATES

Ticket #	Description
9080	Performance enhancements to <i>Unprocessed Services > Create Charges</i> History Screen including pagination, sorting by descending date, and retained filters.
9086	The <i>View Matches</i> button now takes the user to the cleared space when the waitlist clears.
9095	Performance enhancements to <i>Unbilled Charges > Create Bills</i> History Screen including pagination, sorting by descending date, and retained filters.
9096	Performance enhancements to <i>Remittances > Process Transactions</i> History Screen including pagination, sorting by descending date, and retained filters.
9131	Aging Reports no longer show overlapping buckets.
9143	Client Payer memo box was relocated slightly to avoid interfering with controls and has a larger minimum height set.
9152	Added helpful message to PIN Signature <i>Enter PIN to sign</i> near PIN input.
9157	A refresh button was added to the Fiscal Overview job History pages.
9158	Fiscal Overview now refreshes every time a job modal is closed.
9231	The <i>No Show Report</i> now allows entry of Attendance Codes.
9232	There is now an option to select active enrollments, no active enrollments, or both in the Staff Caseload Detail Report.
9253	The Signature Date and Time is now displayed in the user’s local time when viewing a Treatment Plan.
9280	In Fiscal Overview History tabs, the grid clears and a <i>Please search to see results</i> message displays when filters have been populated.
9283	There is now a new Fiscal Report that lists all Unapplied Payments.
9284	Aging Detail report now only returns Charges and Payments that are on or before the <i>As of Date</i> .
9460	There is now an option to run the Enrollment Census Report to see all clients active in a date range rather than started in the date range.
9493	The 25MB limit for Client Document imports has been increased to 50MB .



BUG FIXES

Ticket #	Case #	Description
5324		Enrollments with End Dates are now listed below Enrollments that are still open.
5689		URL column in Dashboards table was increased from 100 to 2000.
7359		CDM no longer errors when column names contain trigger words from the dangerous syntax list.
8006		Addressed handling of columns named with SQL reserved words in Form DesignEHR.
8188		Pressing ESC now exits and closes one modal at a time.
9035		Options to retry or reverse a Failed Remittance Finalize job have been removed to prevent data from reaching a broken state. Users are directed to contact support. The Create Remittance job process remains the same.
9081, 9169		The prior job message no longer persists in Unbilled Charges <i>Create Bills</i> process.
9111		Rules Engine, ICD-10 codes again display a value for Equals/Does not Equal operators.
9123	71494	Form DesignEHR forms no longer appear on top the <i>Send</i> and <i>Sign</i> buttons in popover modals.
9135		Progress notes now display with the same information in the Inbox as they do from within a Service.
9150		Closing a pop-up that was opened from within a progress note no longer resets the progress note.
9173		<i>Unprocessed Remittances > Process Transactions</i> tab job messages no longer stay active after job is created.
9251		Added a “?” to fix typo in <i>Delete Spaces</i> confirmation dialog.
9267		Start and End times are validated for Staff Schedules.
9289		In Rules Engine, the typecasting gear icon now also displays typecasting options instead of just the column.
9326	72422	Add-on Services no longer display on the Scheduler.
9341		Clicking back in the browser after logging in now routes the user to the last successfully loaded page, ie log-in screen.