ECHOVANTAGE RELEASE NOTES

VERSION 3.12

NEW FEATURES

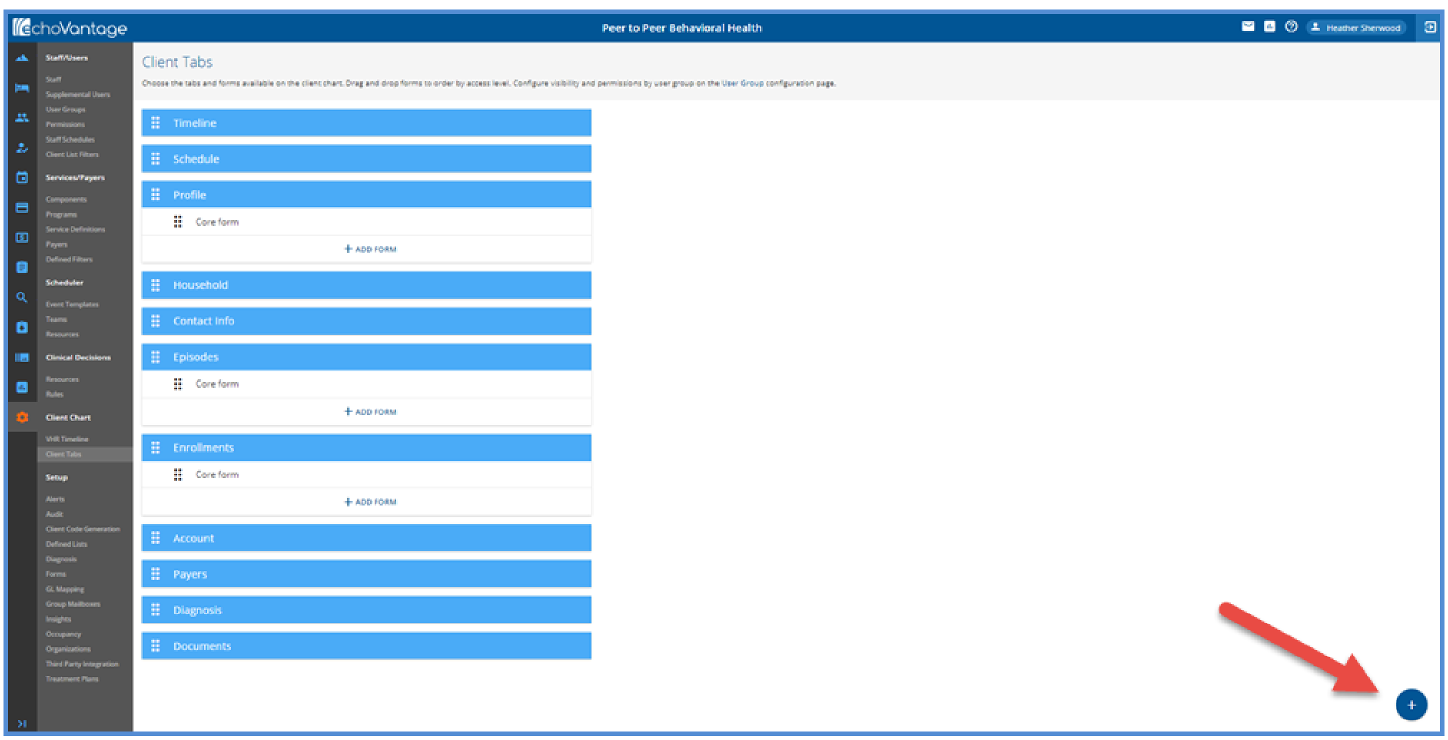
Custom Client Tabs

Client Chart, a new section in the Configuration menu, is now home to the VHR Timeline and the new *Client Tabs* feature. This feature allows an agency to create custom Client Tabs and to add custom forms to the custom tabs and the Profile, Episodes, and Enrollments Core tabs. Client Tabs also offers the ability to change the display order of all the Client tabs. Permissions for this new feature, tab access, and form access is managed through *User Groups>Menu Options.* The *Custom Form Standards for Client Tabs* and *EchoVantage Database Standards* user guides should be reviewed prior to creating custom tabs and forms.

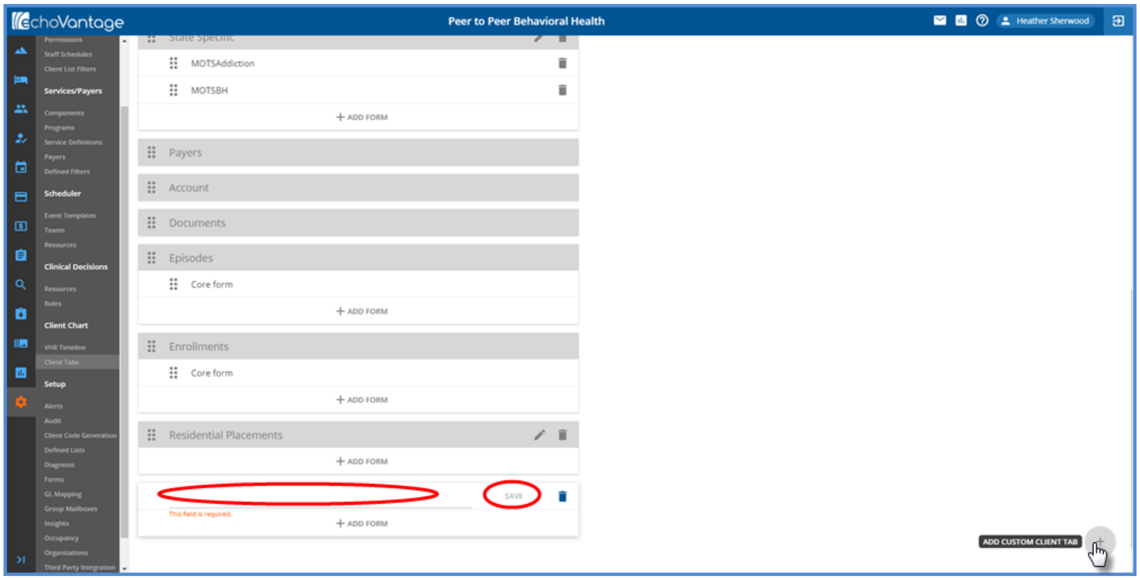
Important Notes

- Custom client forms must have a client column and the table must link back to the core table, ie dbo.enrollments.
- Custom Profile forms are an exception. These forms must have an ID column and link directly to the dbo.clients table.
- Form signatures, the *New* button, and the *Delete* button are disabled on the custom client form.
    - If the form calls a pop-up form, the pop-up can be signable.
    - If the client form has a grid, a new grid entry can be added or an existing entry edited or deleted.
- Permission cannot be granted to an empty tab; a form must be selected.
- Tab/Form permissions may be read-only.
- When a form is removed, every user group that has permission to see that form, no longer has permission to see the tab, unless another groups permission overrides this action.

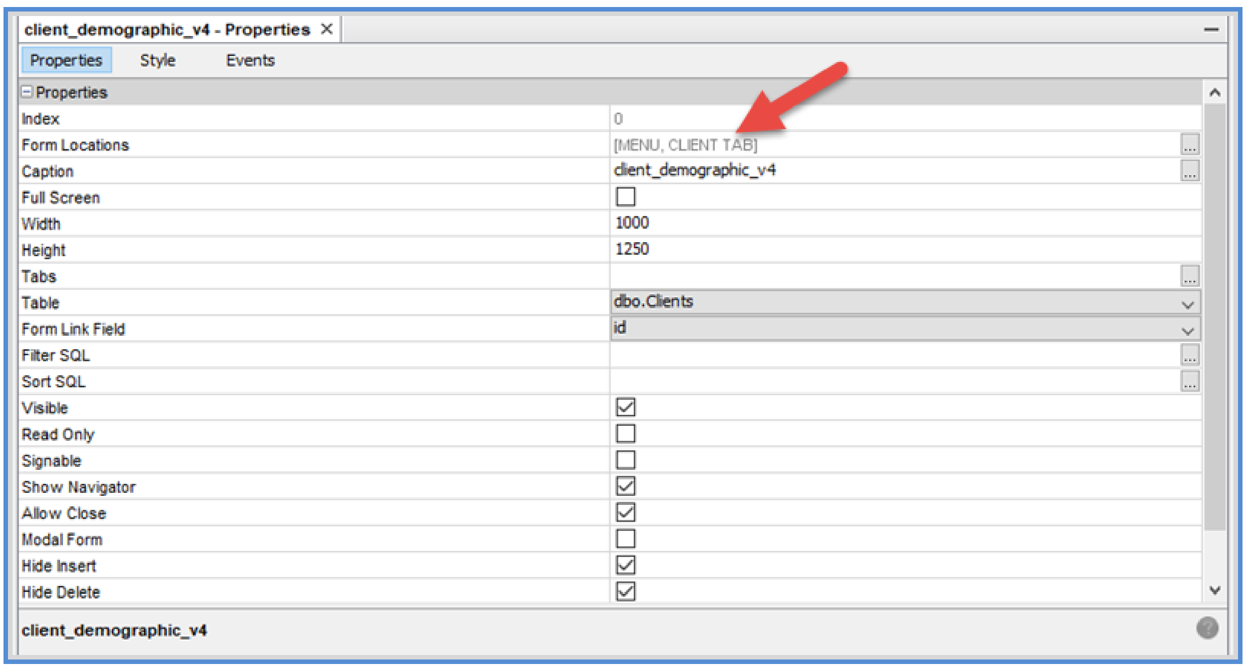
Adding Tabs and Forms



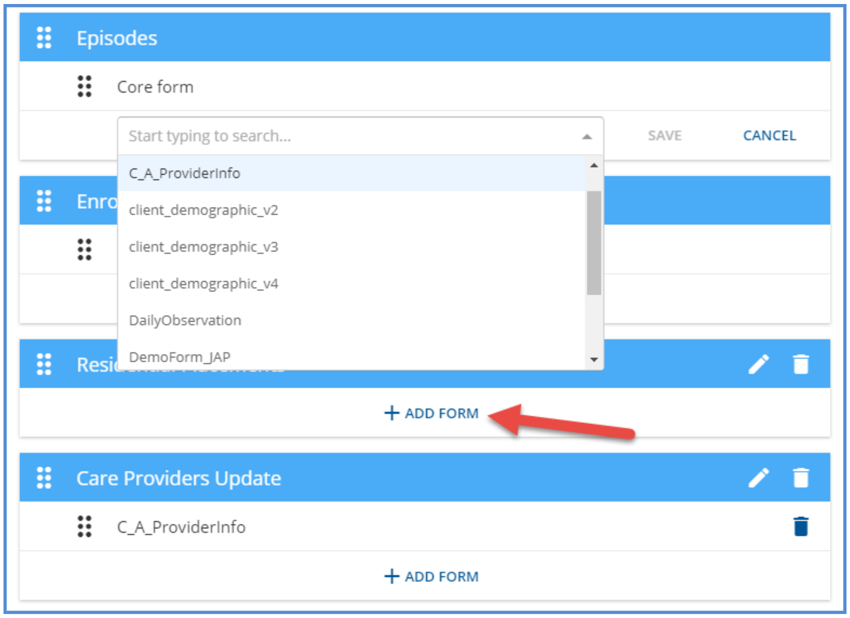
Add a custom tab using the blue plus in the bottom right-hand corner.



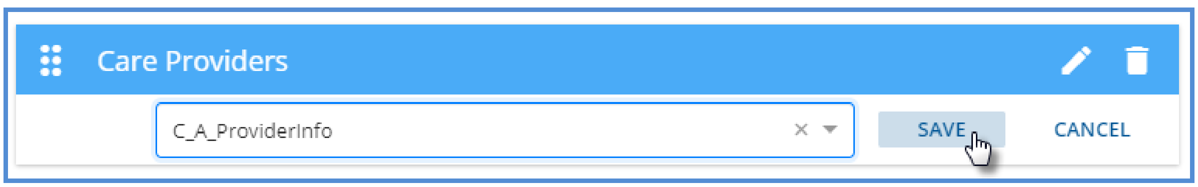
Enter the tab name and select save. The tab headers will return to blue.



Forms need to be tagged with the *CLIENT TAB* location before the *+ ADD FORM* button is enabled.

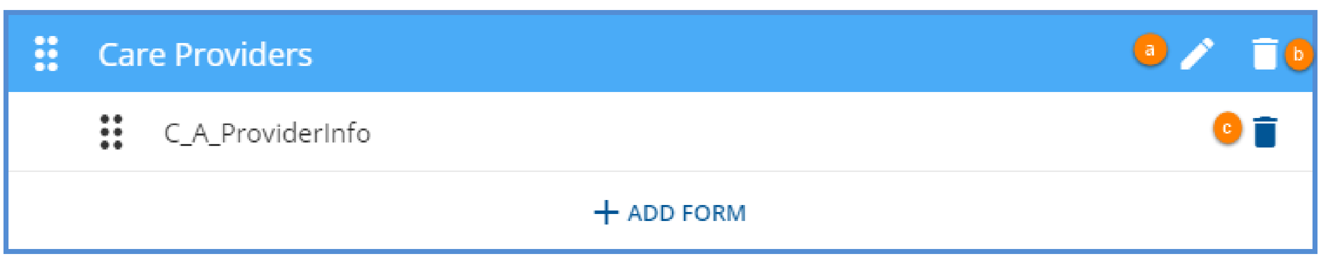


Add forms by clicking the *+ ADD FORM* button and selecting the form from the list.



Then select the blue *SAVE* to add the form to the selected header.

Editing and Deleting Custom Tabs and Forms



- (a) A Custom Tab label can be updated by clicking on the white pencil to edit.
- (b) Delete a custom tab by clicking on the white trash can icon
  - A confirmation box will display.
  - Any custom forms associated with that tab are also removed.
  - A core tab may not be edited or deleted.
- (c) An individual form can be deleted from the tab by clicking on the blue trash can icon.
  - A confirmation box will display.
  - A core from may not be deleted.

Reordering Forms and Tabs

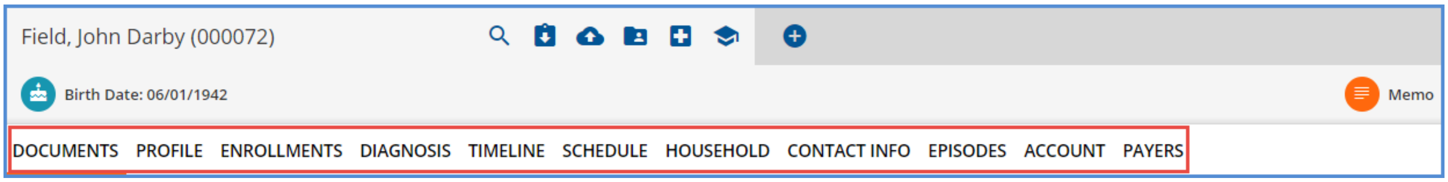
Forms can be reordered within a tab or moved from tab to tab by dragging and dropping using the form double ellipsis (6 white dots).

- Core forms may not be moved from the associated core tab.
- The order of the forms on the tab establishes the form access levels.

- Access levels are used to determine which form should display when a user is a member of more than one User Group with access to different forms on the same tab.
- The user will be granted access to the highest access level form.

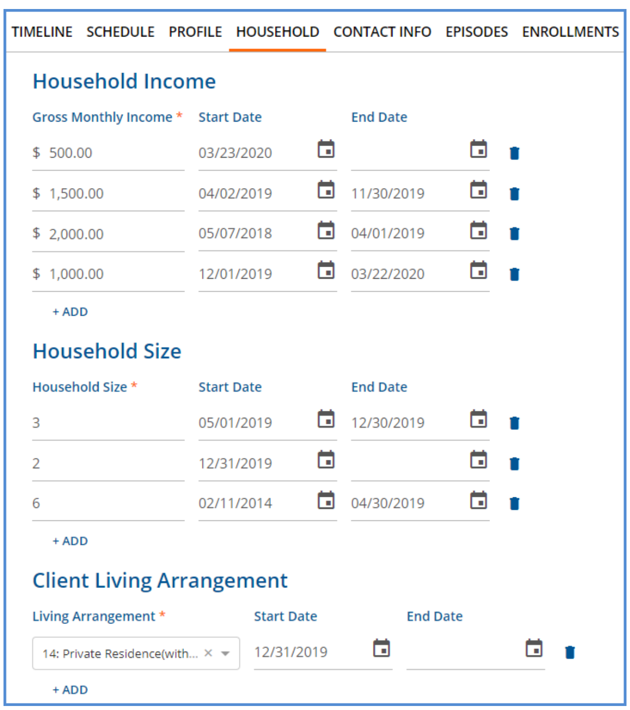
All client tabs can be reordered by dragging and dropping the tab using the tab double ellipsis (6 black dots).

- All tab forms, custom and core, will be moved with the tab.
- The tab order in the Client Tab feature is the order the tabs are displayed in the Client Menu.



Client Household Tab

A Household Tab is now available for tracking Gross Monthly Income, Household Size, and Living Arrangement information over time. Access to this tab is determined in *Configuration > Staff/Users > User Groups > Menu Options.* The optional Start and End Date fields are available for tracking historical data. Note that the date range for each row within a section cannot overlap. Existing income, household and living arrangement information on the Client Profile tab will be copied to this new tab during the upgrade process. The Arrangement Date will be copied to the Start Date for Living Arrangement on upgrade; all other date fields will remain empty.



New Client Profile Fields

With the addition of the Client Household tab, income and living arrangement information has been removed from the Profile tab. These changes allowed a redesign of the Client Profile tab with new fields to track additional client information:

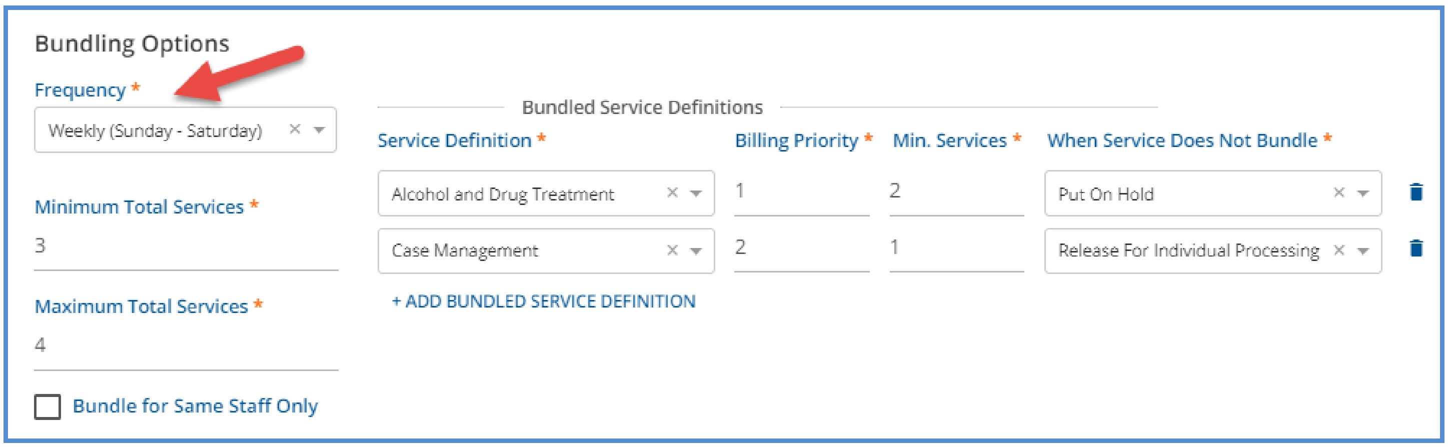
- Preferred Name
- Preferred Pronouns
- Legal Gender (previously Gender)

- Gender At Birth
- Gender Identity
- Religious Preference
- Sexual Orientation

Preferred Name and Preferred Pronouns are both free text fields. *Legal Gender* and *Gender At Birth* use the same existing hard-coded values. *Gender Identities, Religious Preferences,* and *Sexual Orientations* are new Defined Lists that can be configured to use agency specific values.

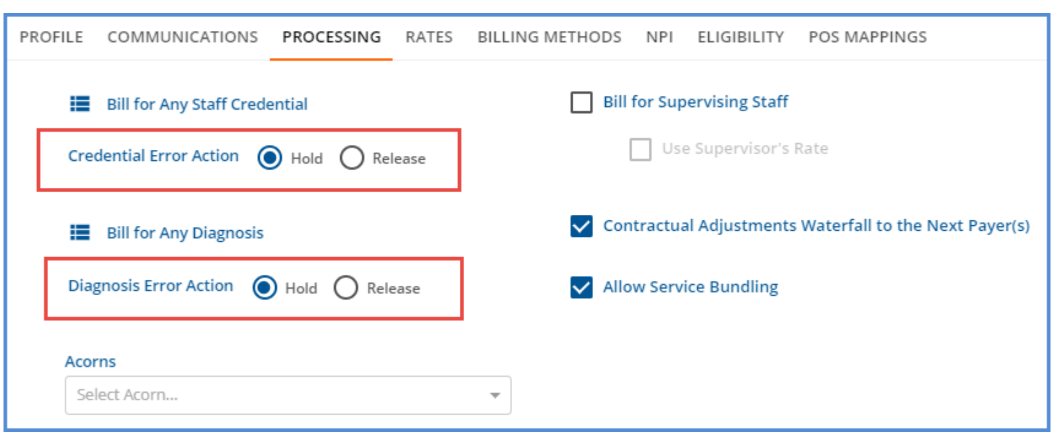
Weekly Bundling

Weekly bundling is now supported in the charge creation process. The option for *Weekly (Sunday – Saturday)* is available in the **Frequency** drop-down listing in the Bundling Options of the Service Definition's Profile tab. When selected, services for the defined bundled service definitions that meet the bundle criteria during the same Sunday - Saturday period will be bundled.



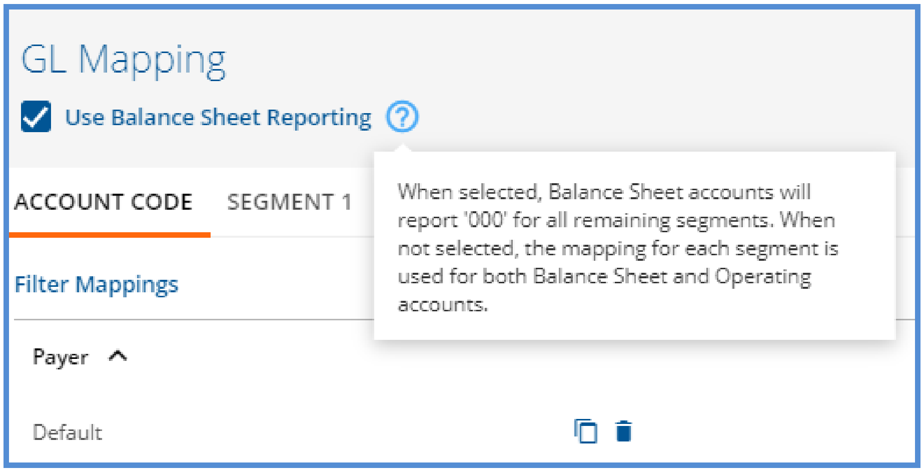
Configurable Options for When a Service Cannot Be Created Due to Diagnosis or Staff Credentials

In *Configuration> Services/Payers > Payers > Processing* tab, there are now configurable options to either *Hold* or *Release* a service when a charge cannot be created due to invalid credentials or diagnoses. The current default is to place the service on hold for the current payer until the issue is resolved. If *Release* is selected for an *Error Action*, the service is allowed to waterfall to the next Payer.



Balance Sheet Reporting

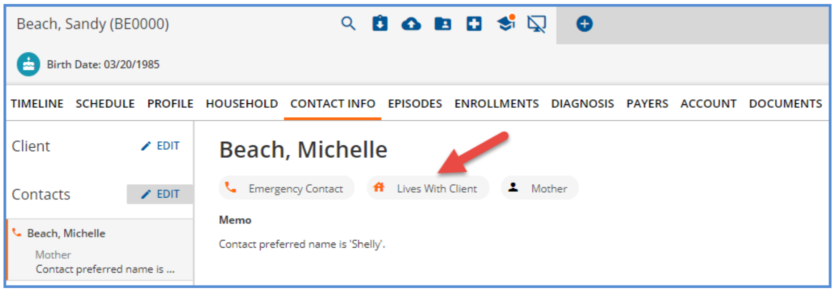
When the *Use Balance Sheet Reporting* checkbox is selected, Balance Sheet accounts will report '000' for segments 1-4 or for the number of segments that have been enabled. When not selected, the mapping for each segment is used for both Balance Sheet and Operating Statement accounts.



IMPROVEMENTS

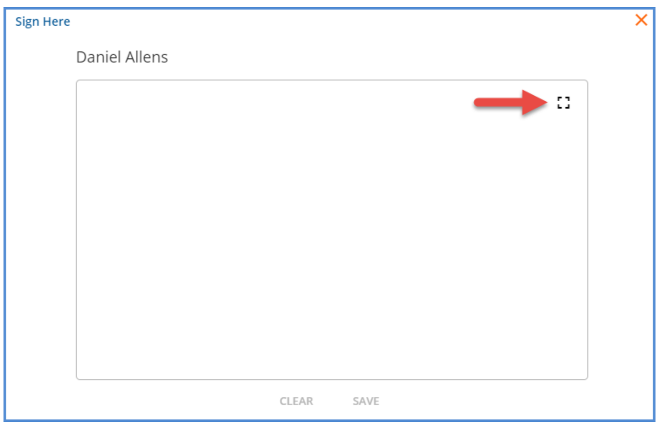
Client Lives with Contact

The Contacts form on the Client Contact Info tab now has a required **LivesWithClient** column. When the value in this column is **Yes**, an icon on the summary page displays to indicate that the current contact lives with the client.



Expanding the Signature Pad to Full Screen

The signature pad can now be expanded to full screen when non-PIN signature are being collected. This is especially helpful when working on devices with smaller screens. Click or tap the expand icon to enter full screen mode and tap again to return to the original size.



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Service Job Error Handling

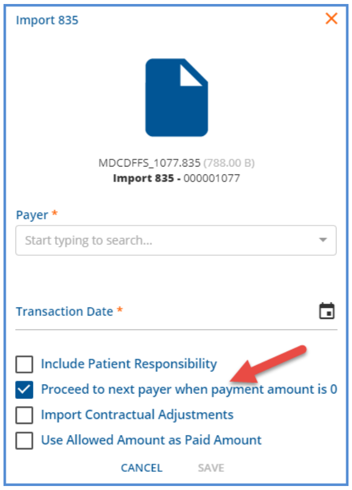
To prepare for upcoming improvements to Service Job Error Handling, Errors are now recorded in a new table, dbo.ServiceProcessingMessages, instead of being linked to job items. Additional enhancements will be included in coming releases.

Scheduler Settings Retained During Current Session

The scheduler now retains the current Staff, Client, and Filter parameters when the user navigates away and returns during the current session. The previous default was to reset to the currently logged-in staff and clear the filters. The current session ends when the user logs out, the session times out, or the browser window is refreshed.

835 Import Proceed to Next Payer Option

A *Proceed to Next Payer When Payment Amount is 0* is now an available option to select on the Import 835 screen. The checkbox is selected by default. When this box is deselected and the imported Payment Amount is 0, then the *Proceed to Next Payer* flag is set to false. If the *Use Allowed Amount as paid Amount* is selected for the import, then the Allowed Amount is used to determine the *Proceed to Next Payer* Flag.



REPORTS

Updated and New Reports

The Following Reports have been Updated:

Administration

Schedule Report – This report now includes templated events.

Billing Reports

_837Audit – the 837P Audit report has been updated: to include Program, to display Code as Billing Code, and the Client/Staff name format is now consistent with other reports.

_837IAudit - the 837I Audit report has been updated: to include Program, to display Code as Billing Code, and the Client/Staff name format is now consistent with other reports.

Client Reports

Attendance Report – Updated to include Events in addition to services. Report may be filtered by Program, Location, and Staff Code(s).

Client List – The Client List report now populates immediately with a default filter of clients with open episodes. Filters are available for program enrollment, episode status, and client code.

Clients By Enrollment – This report can now be run between date ranges. Also added Total Counts by Program and a *CSV Export Friendly Format* link in the report header.

Clients Without Treatment Plans – This report can now be sorted by Client Name, Admit Date, Primary Staff, or Status in Ascending or Descending order. In addition, interactive sorting is available from the column headings which allows sorting and refreshing the report on the screen.

Fiscal Reports

Unapplied Payments - This report now correctly reports the client payment date and time based on the organizations time zone configuration setting.

Cash Receipts Journal - This report now correctly reports the client payment date and time based on the organizations time zone configuration setting. Also added a *CSV Export Friendly Format* link in the report header.

Aging Detail By Payer - This report now correctly reports the client payment date and time base on the organizations time zone configuration setting. Also added a *CSV Export Friendly Format* link in the report header.

Aging Detail By Program - This report now correctly reports the client payment date and time base on the organizations time zone configuration setting. Also added a *CSV Export Friendly Format* link in the report header.

Aging Report By Payer - This report now correctly reports the client payment date and time base on the organizations time zone configuration setting.

Aging Report By Program - This report now correctly reports the client payment date and time base on the organizations time zone configuration setting.

Outstanding Charges – The following prompts have been added: Service Date Range, Service Code, Client Code, and Payer Code. The Service Program header has been renamed to Program. A Service Code column has been added. The Activity Date label has been changed to Service Date. The Client/Staff label/formats are now consistent with other reports.

Bundled Services – This report is updated to display weekly bundles. Added summary sections by Client and Billcode AND Staff and Billcode. Also added a *CSV Export Friendly Format* link in the report header.

The Following New Reports have been Added:

Fiscal Reports

Client Payment Allocation Report – Allows entry of client code and payment date in the parameters to view a list of services the client payment has and has not been applied against.

_AgingDetail for Export – The report that the *CSV Export Friendly Format* link opens from the main reports, Aging Detail By Payer and Aging Detail By Program.

_Cash Receipts Journal for Export – The report that the *CSV Export Friendly Format* link opens from the main report, Cash Receipts Journal.

_Bundled Services for Export – The report that the *CSV Export Friendly Format* link opens from the main report, Bundled Services.

Client Reports

_Clients By Enrollment for Export – The report that the *CSV Export Friendly Format* link opens from the main report, Clients By Enrollment.

UPDATES

Ticket #	Description
9162	Client Payments > Apply Payments tab responsive design issues
9225	MOTS state reporting should get Household Income and Size for correct date
9474	837 Audit Report I & P - FSYR
9477	Client List - FSYR
9478	Clients by Enrollment - FSYR
9506	No Show report should include Events too
9563	Update Service Processing Report (Fiscal Report)
9582	Records can disappear from a grid in FD form when the form is double clicked.

9632	Give Users the option to sort Clients Without Treatment Plans report
9635	Convert UTC date times to the Organizations default time zone

BUG FIXES

Ticket #	Case #	Description
6862		Event Templates - Add Another option doesn't clear Client field after first use
9261		Required indicator missing form Service Components when they are marked as "Requried for Service"
9293		Category Name spills into next line in Client Timeline if the name is too long
9337		Charge creation tries to bundle services when a prior payer is bundled even if the payer who should have a charge does not bundle.
9339		Remittances & Placements Screen Filters cutting off dropdown menus
9340		Save and Add Another button is active on page load in existing Remittance pages
9348		Eligibility Details/Manage link gets "You don't have access to this page" error in Payers
9371		Drop down values are not visible while adding ICD Codes to DSM Mapping
9420		Service Entry: Fatal error on Save and New Service button
9440		Create Charges jobs fail when staff have multiple credentials that map to the same modifier.
9451		Balances will not waterfall to Self Pay when a Transaction Type of 'Deductible' is used.
9587		Only the first save works on VHR Time line category depiction manager
9711		Mend integration now uses priority in contact information.
9712		Audit search now filters by tenant type.