ECHOVANTAGE RELEASE NOTES

VERSION 3.14

NEW FEATURES

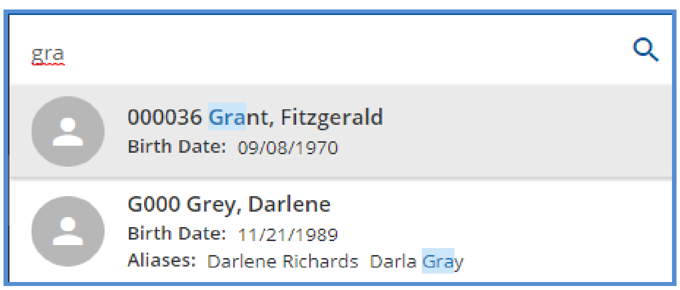
New Client Search

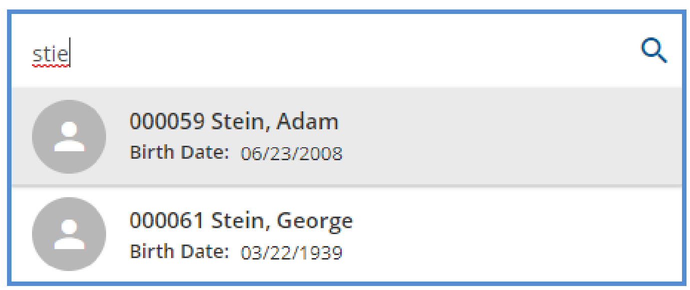
The Client Search from the Client**s** main menu option allows searching in an expanded list of fields and field combinations. This new search is fuzzy, which results in faster, fault-tolerant searches and returns a higher number of partially matching results (even if it contains additional or missing characters or other types of spelling errors) for the user to determine the best match. The new search includes the following Client fields:

- Client Code
- Last Name
- First Name
- Date of Birth
- Alias
- Social Security Number
- Phone Number
- Preferred Name
- Enrollment Location

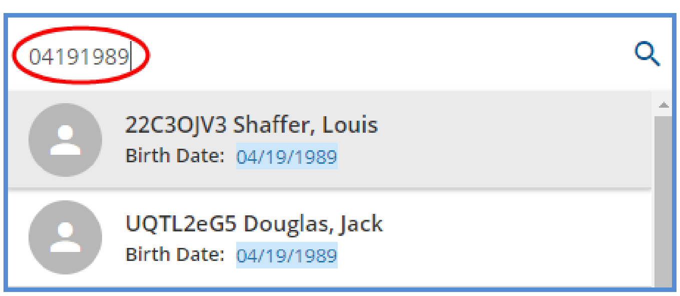
The search list displays up to 30 of the top matching results. If the desired Client is not listed, search again using a revised query to refine the results. *Client Code, Client Name (Last, First),* and *Birth Date* always display on the results card; *Aliases* only display when one exists. Matches on any of the remaining four fields show on the results card after *Birth Date* and *Aliases*. The search results take into account Client List Filters, Emergency Access, and Confidential Client settings as before. When searching, note that:

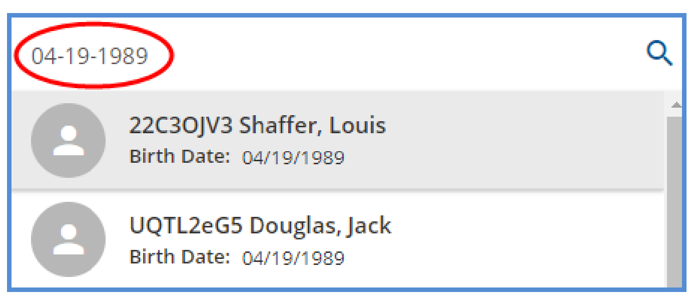
- Entering three or more characters triggers the search automatically – press the enter key to search using just one or two characters.
- Matched field information displays with highlighting when there is an exact full or partial match and without any highlighting when there is a fuzzy match.



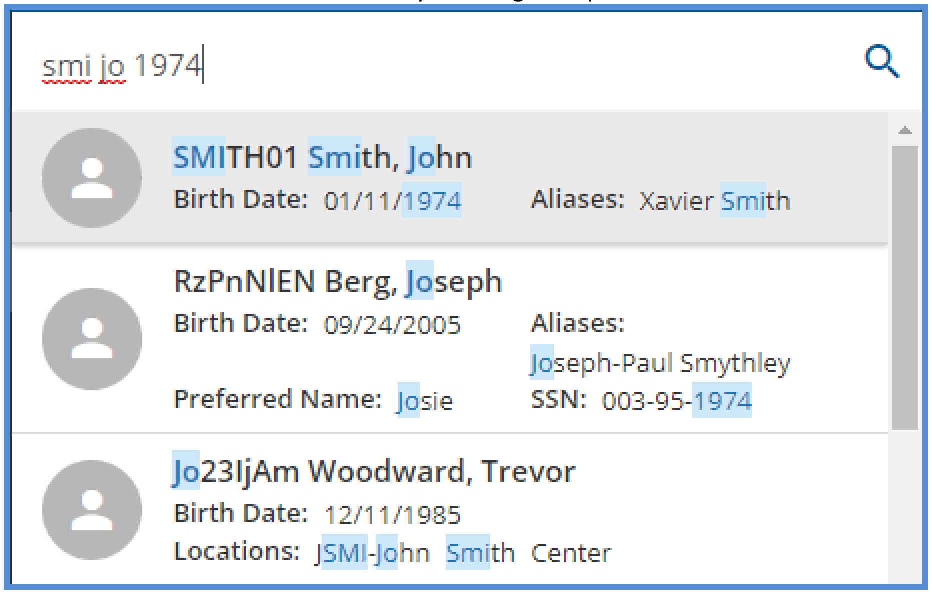


- Numeric searches (*Date of Birth, Social Security Number,* and *Phone Number)* result in exact matches when entered with no formatting or correct formatting. Use of incorrect formatting results in fuzzy matches.



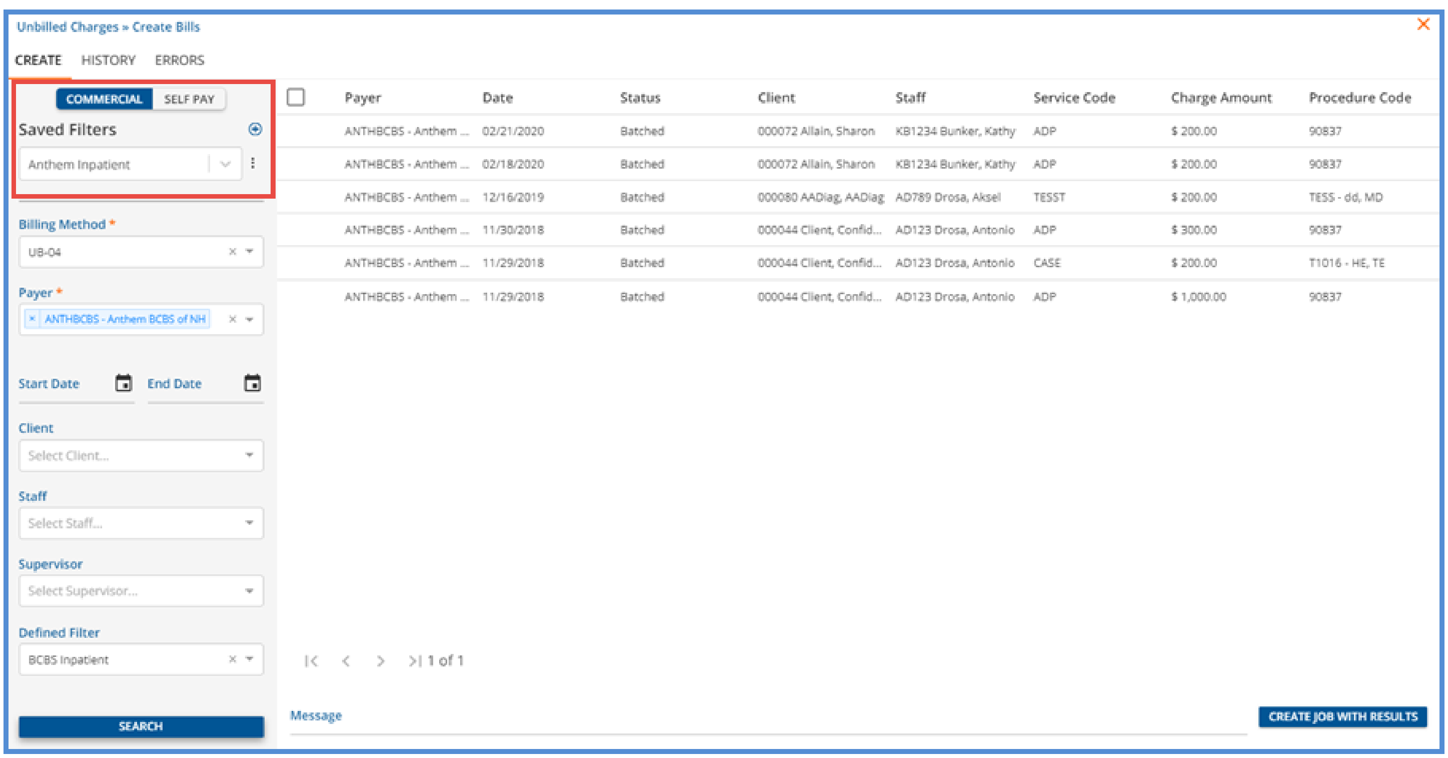


- Search for field match combinations by entering multiple search terms.



Saved Billing Filters

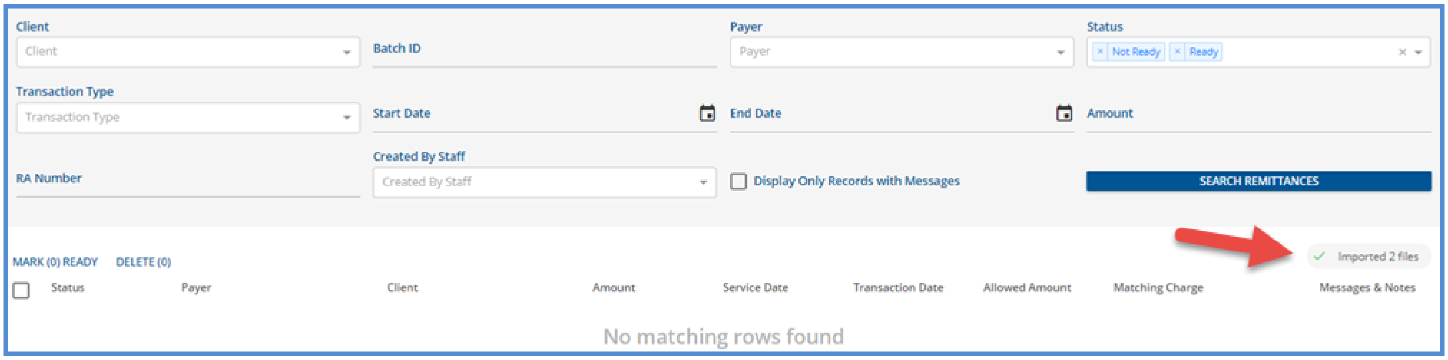
In *Unbilled Charges > Create Bills,* the new *Saved Filters* section allows users to add or recall Billing job filters for Commercial Payers. Click on the blue plus "+" to enter a name and select *SAVE* to preserve the *Billing Method, Payer(s), Defined Filter,* and *Custom Name*. Use the drop-down listing to select a previously saved job and pre-populate the filters with the job-specific criteria, and then select *SEARCH* to view results. Edit or delete already *Saved Filters* by clicking on the ellipsis (three dots) and selecting *Update Filter* or *Delete Filter.* Any *Saved Filters* are available to all users.



IMPROVEMENTS

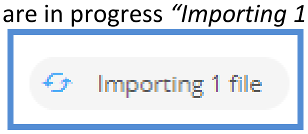
Improved 835 Import Performance

The 835 Import performance has been improved, allowing the import of multiple 835 files AND allowing users to continue using the application while the files upload. On return to the Remittance screen, a chip displays job status information above *Messages & Notes*. If all files successfully imported, a green checkmark shows next to the count of files imported if any file imported successfully but contained errors, an orange triangle displays next to *Recent imports.* If an 835 file fails to import, a red toast message will display in the upper right-hand corner of the screen, shortly after selecting *IMPORT AND CLOSE.*

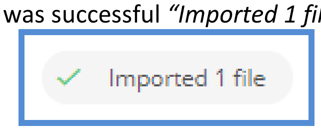


The following types of information displays:

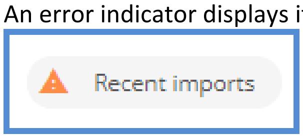
- There are "No recent imports"
- Imports are in progress *"Importing 1 file"*



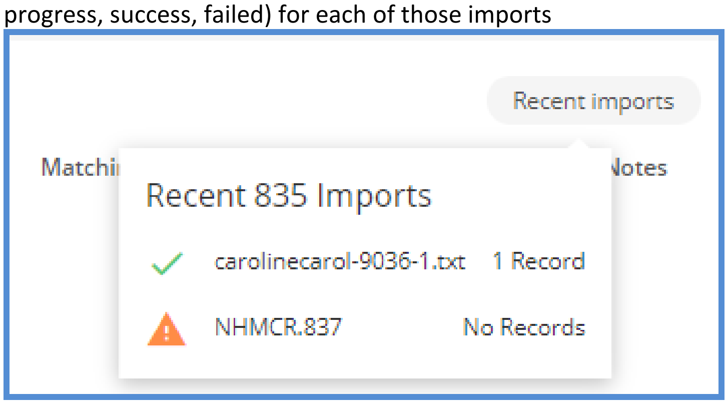
- Import was successful *"Imported 1 file"*



  - Clicking on the message acknowledges and clears the success indicator
- "Recent imports" if at least one import was completed within the last 24 hours
  - An error indicator displays if a prior import contained errors



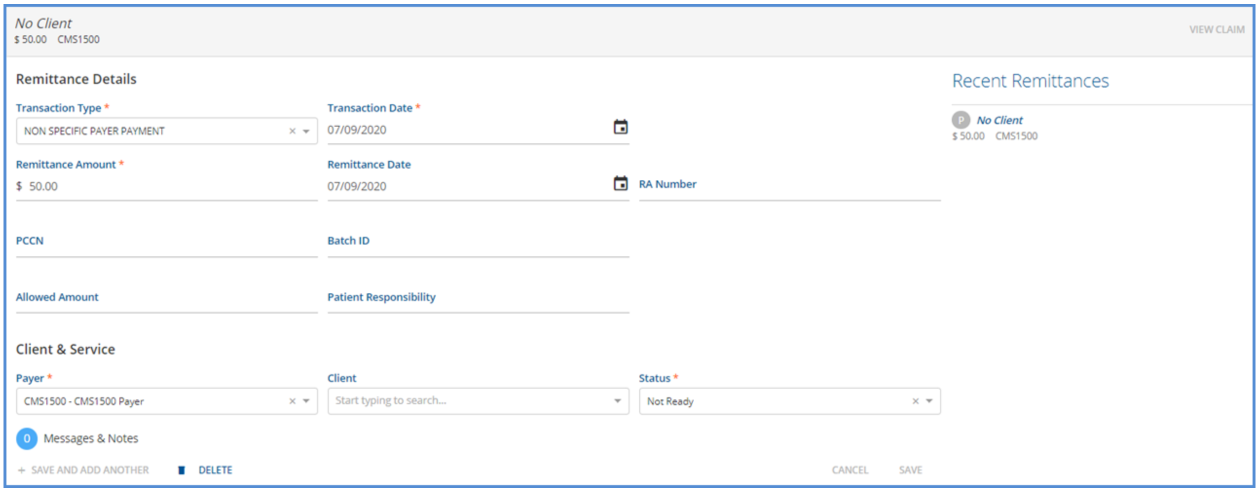
  - Clicking on the "Recent imports" chip shows up to 10 files imported within the last 24 hours AND the Status (in progress, success, failed) for each of those imports



  - And clicking on the chip clears the error indicator

PLB Segments Included with the 835 Import

The PLB segment transmits information about Provider-Level-Adjustments – payments or debts that are not specific to a particular claim or service. These segments are processed as remittances with the 835 import, now with the new Transaction Type of *NON SPECIFIC PAYER PAYMENT* assigned. The dbo.AdjustmentReasons table was updated with the PLB specific adjustment messages.

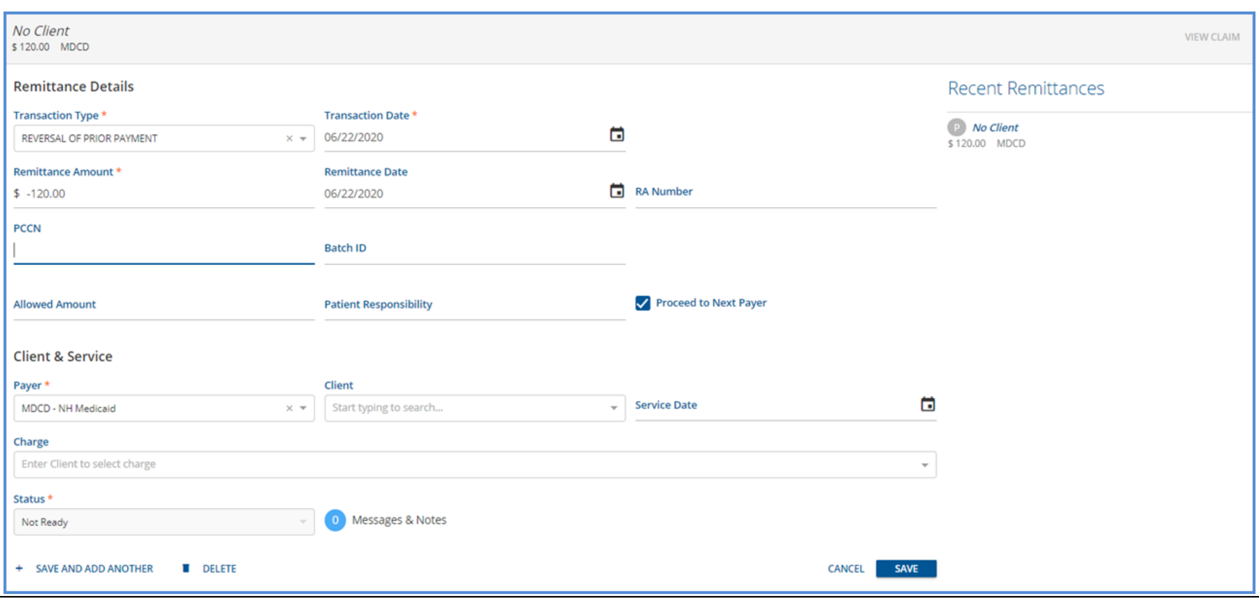


Note that when the Transaction Type of a Remittance is *NON SPECIFIC PAYER PAYMENT:*

- Proceed to Next Payer, Service Date, and Charge fields are no longer visible in the Remittance Details screen.
- Status defaults to *Not Ready.*
- The Remittance can be Marked As *Ready,* creating a Payer *Unapplied Payment.*
- The Payer Unapplied Payment can be posted to facilitate reconciling daily deposits – applying and managing these unapplied payments is planned for a future release.

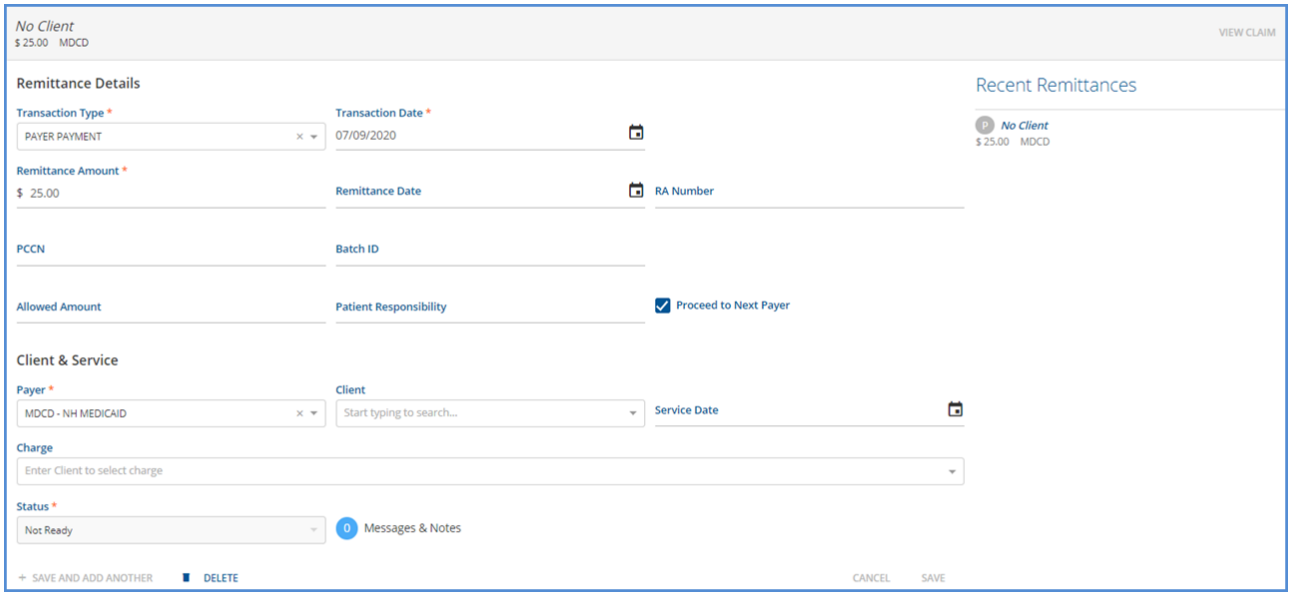
Reversal of Prior Payment in the 835 Import

When importing an 835 file with a CLP02 code of 22, the payment is now imported with a Transaction Type of *REVERSAL OF PRIOR PAYMENT.* These reversals are shown as a negative payment amount on both the Remittances screen listing and on the Remittance Details. If manually entering a Remittance with the *REVERSAL OF PRIOR PAYMENT* Transaction Type, the amount must be entered with a negative number. This can be entered without a Client, Service Date, and Charge but may not be *Marked as Ready* until it has been applied to a specific charge.



Remittance Entry without Specifying a Client

Users are now able to enter a Remittance without being required to select a Client. In the Remittance Details screen, *Client, Service Date,* and *Charge* are no longer required fields. When a Remittance is entered without a Client, *Status* defaults to *Not Ready* and is disabled. The payment cannot be marked *Ready* until a *Client* and *Charge* is associated with the payment.



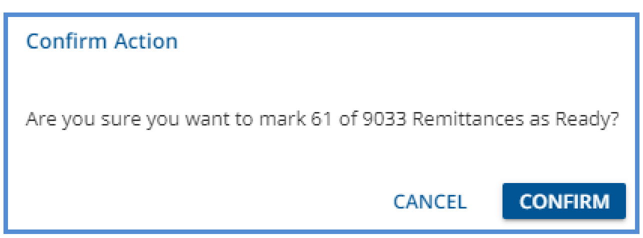
Remittances Bulk Operations

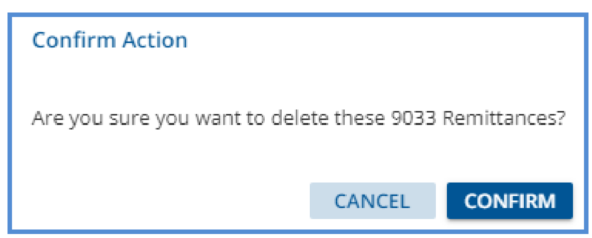
MARK READY or *DELETE* a large number of Remittances using the new Bulk Operations. Similar to Services, each *Ready* and *Not Ready* Remittance now has a checkbox next to it. Use the box to the left of *Status* to select or deselect all. Edit individual Remittance boxes as needed. Checking and unchecking the boxes updates the blue *MARK READY,* and *DELETE* bulk action counts.

MARK (16) READY   DELETE (16)

☑	Status	Payer	Client	Amount		Service Date
☑	Ready	CMS1500 - CMS1500 Payer	000001 Client, Confidential	$ 100.00	P	
☑	Not Ready	BCBS1 - Blue Cross Blue Shield	000011 Pollard, Vicky	$ 200.00	P	

When selections are final, click on either *MARK READY* or *DELETE* to perform the bulk action. The *MARK READY* confirmation count filters out existing *Ready* Remittances, while the *DELETE* confirmation count includes existing *Ready* transactions.

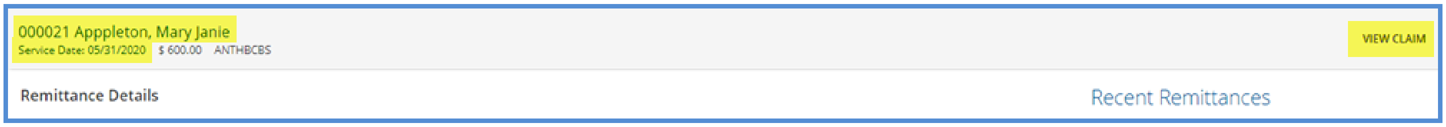




Remittance Details

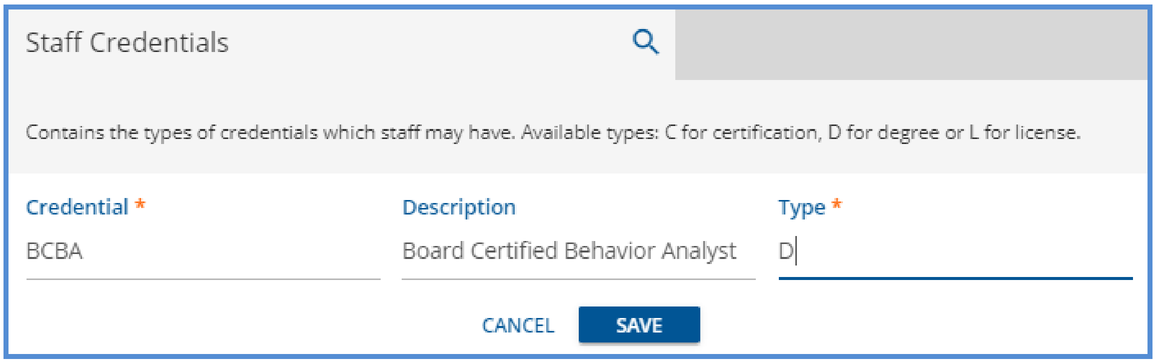
The Remittance Details screen has new links to facilitate Remittance processing and Claims Management. In the grey header area, the Client Name links directly to the Client menu on the first tab to which the current user has access. When a Remittance has a

Charge selected, the Service Date beneath Client name links to the Service detail for that charge, and the *VIEW CLAIM* button to the far right is enabled—clicking on *VIEW CLAIM* links directly to the Claims Detail for the charge.

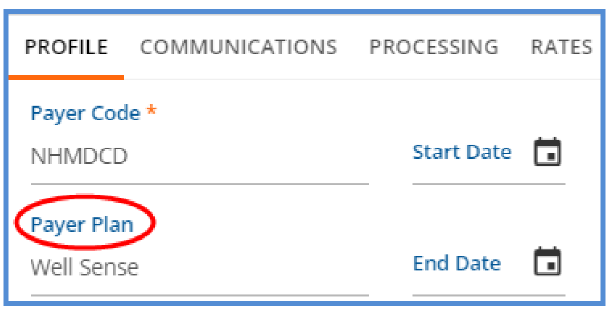


Expanded Fields

In *Configuration > Setup > Defined Lists > Staff Credentials,* the Description field (dbo.Credentials, Description) now allows 100 characters – the previous maximum was 30 characters.

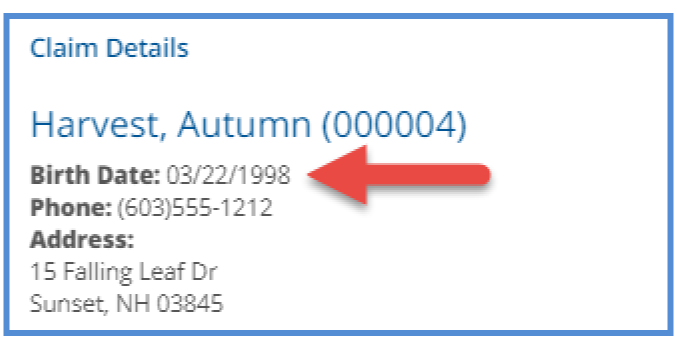


In *Configuration > Services/Payers > Payers > Profile,* the Payer Plan field (dbo.Payers, PayerPlan) increased from 10 characters to 25 characters.



Claim Details Modal

The Claim Details modal now displays the Client's birth date below the Client's name. This provides information often needed while researching claims without requiring additional clicking.



REPORTS

Updated and New Reports

The Following Reports have been Updated:

Fiscal Reports

Claims Report – Added *PAYER* as a search to select One or All Payers

Outstanding Charges Report – Unit amounts now display two decimal places. Also added a .csv friendly link to the new subreport, *_Outstanding Charges for Export*

Remittance Report – Added a .csv friendly link to the new subreport, *_Remittance Report for Export*

Service Authorization Status Report – Added a .csv friendly link to the new subreport, *_Service Authorization Status for Export*

Service Processing Report – Added a .csv friendly link to the new subreport, *_Service Processing Report for Export*

Service Status Report – Added a .csv friendly link to the new subreport, *_Service Status Report for Export*

Unapplied Payments Report – Updated report to include Unapplied Payments from Payers and updated the CSV Header labels to match the main report

Unprocessed Service for Export – The CSV Header labels were updated to match the main report

Billing Reports

_GL Audit Report – Updated report to include Unapplied Payments from Payers

_CMS1500 Report – Report now displays partial units in box 24G

The Following New Reports have been Added:

Fiscal Reports

AR Status Report Export - this detailed report is intended for export as a CSV file for working accounts receivable. The report includes additional information such as Charge, Adjust(ment), Payment, Balance, Diagnosis Code, Billing Code, Charge Status, Billed Date, Denial Reason, and Auth Number

GL Activity Report – Lists any transaction between a user-entered date range that affects the GL

_Claims Report for Export – the report that the *CSV Export Friendly* link opens from the main report, *Claims Report*

_Outstanding Charges for Export – the report that the *CSV Export Friendly* link opens from the main report, *Outstanding Charges*

_Remittance Report for Export – the report that the *CSV Export Friendly* link opens from the main report, *Remittance Report*

_Service Authorization Status for Export – the report that the *CSV Friendly* link opens from the main report, *Service Authorization Status*

_Service Processing Report for Export – the report that the *CSV Friendly* link opens from the main report, *Service Processing Report*

_Service Status Report for Export – the report that the *CSV Friendly* link opens from the main report, *Service Status Report*

UPDATES

Ticket #	Description
5346	In *Configuration > Staff/Users > User Groups* Staff tab, the list of staff now displays in alphabetical order (last, first).
9370	The Template Event Table display is now responsive when the screen is resized
9561	Removed old Service Errors components ensuring that all messages are logged in dbo.ServiceProcessingMessage table NOT dbo.JobMessages
9613	Create Claims report for Export report

9615	Create Outstanding Charges for Export report
9616	Create Remittance Report for Export report
9617	Create Service Authorization Status for Export Report
9621	Create Service Processing Report for Export report
9622	Create Service Status Report For Export Report
9623	Unapplied Payments Report CSV headers should be consistent with other Financial Reports
9625	Unprocessed Services CSV Headers should be consistent with other Financial reports
9759	Renamed Share Forms to Echo InForms in *Configuration > Staff/Users > Permissions > Features*
9872	Save the PLB segment when importing an 835
9912	In *Configuration > Services/Payers > Payers > Billing Methods > CMS-1500 Paper,* capitalized all words in "Payer Accepts Corrected Claims"
9937	In Vantage Point > Fiscal Overview > *Unprocessed Services > Create,* the Create Job confirmation modal question now has a question mark "?"
9907	Updated ServiceProcessingMessages to have a one-to-many relationship for ResourceType
9960	Create AR Status Report
10022	When importing an 835 with CLP02 = 22, the payment now imports with a Transaction Type of *REVERSAL OF PRIOR PAYMENT*
10048	Add all of the PLB Adjustment Reasons
10052	Updated Service Definition icons & tooltips to use the HelpPopover component
10053	Added a label to the CCD import button and fixed icon styling
10054	Added aria-label anywhere an IconButton was used
10057	Change displayed fields when "Non-specific Payer Payment" Transaction Type selected
10058	Renamed the CARC Messages tab to Adjustment Messages
10063	Updated Audit Search to include Billing Reports run from Fiscal Overview
10066	In *Vantage Point > Fiscal Overview > Unpaid Balances,* "Last Processed" is hidden if there is no date.
10091	Added Payer as a search parameter to the Claims report
10092	The Service Definition *Other* field now allows decimals
10249	Increased the allowed number of rows in Sliding Fee Configuration to 100 - the previous maximum was 40

BUG FIXES

Ticket #	Case #	Description
8520		In *Configuration > Forms > Add Forms,* the display name field now has validation to prevent entering a name that exceeds 30 characters. Previously a SQL error would display on Save when display name exceeded the 30 character maximum
9650		Long Payer names are now hidden after reaching the field maximum, to prevent the functionality of the Unbilled Charges History table from being affected
9770		Addressed errors in the User Defined Prefix option of Client Code Generation that prevented these codes from generating and saving
10145		Telemed Services can now be deleted in EchoVantage without canceling the Telemed session with Mend
10151		Outstanding charges report previously rounded up partial units in the detail – it now correctly displays partial untils when applicable
10152		CMS 1500 report previously did not display partial units – it now correctly displays the units in Box 24G
10189		CCD generation failed when Medication Dosage was text. Now nullFlavor of Unknown is reported in the XML file (to indicate that a proper value is applicable but is not known), and the view displays the text
10195		“Unsaved Changes” confirmations were added in Progress Notes, Forms on the Timeline (including Medications and Service Entry), and Space Forms
10224		Fixed double scrollbars on claims screen
10246		Fixed double scrollbars displaying in Services & Payers/Config Billing Methods 837s