

# ECHOVANTAGE RELEASE NOTES

#### VERSION 3.15

## **NEW FEATURES**

## **Unapplied Payments**

The Unapplied Payments option in the Vantage Point > Fiscal Overview now provides the ability to manage **Payer** Unapplied Payments.\* These Payer payments are reflected in the Unapplied Payments total, which can be refined just like other Fiscal Overview functions by using the filters to the right. In the prior release, only the total of PLB segment amounts, imported with 835 jobs, displayed.

<b>C</b> choVanta	oge			Peer to Peer Behavioral I	lealth	🖼 🗟 🕜 💶 Heather Sherwood 😜		
4 Vantage Point	CLINICAL HOME FISCAL OVERVIEV	V DASHBOARDS INSIGHTS						
Ella Placements	Unprocessed Services	264	Last Processed 08/04/2020	① 358 Errors	5000	Filters		
<ul> <li>Eligibility</li> <li>Services</li> </ul>	Unbilled Charges	\$ 64,878.25	Last Processed 07/22/2020	© 48 Errors	73000	Start Date		
Client Payments Bernitsances	Unpaid Balances	\$ 1,242,466.05			100000	Payer Start typing to search *		
<ul> <li>Claims</li> <li>Audit Search</li> </ul>	Unprocessed Remittances	\$ 0.00	Last Processed 08/04/2020		9500	APPLY		
CCD Export	Unposted GL Transactions	375	Last Processed 07/22/2020		10000			
<ul> <li>State Reporting</li> <li>Configuration</li> </ul>	Unapplied Payments	\$ 6,565.00 <i>\$ 0.00</i>			7500			
14 College								

\*Note that Client Unapplied Payments posted in the Clients > Account tab are still managed in the Client Payments main menu option and are not included in the Unapplied Payments total in Fiscal Overview. Non Specific Payer Payments also are not included in this total as they are processed without a Client and Charge. The totals for both Client and Payer Unapplied Payments, including Non Specific Payer Payments, are listed in the Unapplied Payments Fiscal Report.

During an *Unprocessed Remittances > Process Transactions* job, Unapplied Payments are created when:

- There are duplicate Payments, more than one Payment by a Payer on an open (Active, Outgoing) or closed (Done) charge.
- The total of Payments is higher than the Charge amount, i.e., a rate change.
- A Payer pre-pays for Services that have not yet been rendered. \*Not included in Fiscal Overview > Unapplied Payments as noted above.

The Unapplied Payments function can then be used to view and investigate the validity of these transactions. Unapplied Payments that are determined to be valid can be *Marked as Ready*, and multiple Payments can be applied with a single click. All background processing is handled by the application, which means no manual credits or reprocessing involved.



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Selecting Unapplied Payments in Fiscal Overview opens the following screen:

Unapplied Payments						×
Transaction Start Date	F NEWEST FIRST	AKEBACKS (2) OVERPAY	MENTS (21) OTHER (0)	COLLAPSE ALL	Ready to 000021 Apppleto	Apply
Transaction End Date	000030 Blanchet Alcohol and Drug Prog	tte, Dwayne ram 90837 - U3	P	READY 🔻	Mary Janie Case Management T10 - TE, HE	16
Payer	MITS			VIEW CLAIM	ANTHBCBS	VIEW CLAIM
Start typing to search	Date 08/03/2020	Amount Reason -\$ 65.00 REVERSAL	OF PRIOR PAYMENT	×	-	
Batch ID Client Start typing to search	000021 Apppleto Case Management T10 ANTHBCBS	on, Mary Janie 116 - TE, HE				
Show	Date	Amount Reason		^		
All 👻	Past Transactio	-\$ 600.00 REVERSAL	OF PRIOR PAYMENT			
	Date	Amount Reason				
	05/31/2020	\$ 600.00 CHARGE C	REATED			
	Balance	\$ 0.00				
FILTER	12 2 3 3	1 of 1			ADDIVITDANC	TIONE

- Use the filters on the left to work with results in a specific date range, Payer, Batch ID, Client, or Flagged Payments (Show).
- View Unapplied Payment details by Type.
  - TAKEBACKS
    - The sum of new payments on a charge is less than the balance of the original charge.
    - *Reversal of Prior Payment* Transaction Type in an 835 job.
    - Light red header on the display card.
    - OVERPAYMENTS
      - The sum of new payments is more than the balance of the original charge.
      - Light green header on the display card.
      - Takebacks, if posted with a positive Payment, display in this Type.
    - OTHER
      - The sum of new payments is the same as the original charge.
      - White header on the display card.
      - This Type only has the option to Mark as Done.
- Sort the results of a *Type* by *NEWEST FIRST* or *OLDEST FIRST*.
- EXPAND ALL or COLLAPSE ALL details for every result of the selected Type with just one click.
- Select the flag icon to mark individual Unapplied Payments for easy recall in another session. Use the "Show" filter to display them.
- Mark transactions as:
  - o *Ready -* to apply, this moves the Unapplied Payment to the right-hand *Ready to Apply* column.



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- If a charge is not eligible for an Unapplied Payments job, the service status is *Batched* for example, a message displays that the Unapplied Payment cannot be added to the *Ready to Apply* list.
- Return the card to the results list by clicking the left arrow on the Ready card.
- Mark As Done No action is needed. For example, a Payer reprocesses a claim with no change to the charge and payment amounts, and the agency does not wish to have this additional information in their records.
- Click the VIEW CLAIM button to open the Claim Details modal of a single payment No need to navigate to Claims.
- Expand or Collapse *Past Transactions* detail associated with a single payment by selecting the up or down arrow on the card.
  Apply the transactions.
  - Only applies the Unapplied Payments marked as *READY*. (Those moved to the right-hand Ready column.)
  - Payments of any Type can be applied at the same time.

# **Functional Overview**

Payer Unapplied Payments are created during an Unprocessed Remittances > Process Transactions job when:

- There are duplicate Payments by a Payer on an open (Active) or closed (Done) charge.
- The total of Payments is higher than the Charge amount (rate change or Overpayment).
- A Payer pre-pays for Services that have not yet been rendered.

When a *Process Transactions* job is run, the *History* tab now displays the total number of Remittances and Unapplied Payments created by the job and the number of Errors the job contains. When the job is finalized, the Unapplied Payments are available to view in Fiscal Overview. The examples below walk through viewing and applying a Takeback and an Overpayment.

# Takeback

For this example, a Counseling service of \$200.00 was billed on 8/1/2020. The Payer remitted Payment in the full amount of \$200.00 on 8/3/2020. On 8/5/2020 the Payer determined the amount paid was in error and submitted a takeback of \$200.00, which was posted in Remittance Entry as a *Reversal of Prior Payment*. A corrected payment of \$175.00 was also submitted and posted in Remittance Entry as a *Payer Payment*. After the Process Transactions job is finalized, the Reversal and new payment show in the Takeback section.

Unapplied Payments						×
	T/	KEBACKS (3) OVERPAYN	IENTS (21) OTHER (0)		Ready to A	poly
Transaction Start Date	T NEWEST FIRST		C EXPAND ALL	COLLAPSE ALL	ANTH0000 Client,	<u>4</u> r
Transaction End Date	000030 Blanchet Alcohol and Drug Progr	te, Dwayne am 90837 - U3	P	READY -	Anthem Counseling 99292 - HB	
Payer	MITS			VIEW CLAIM	ANTHBCBS 🛄	VIEW CLAIM
Start typing to search 👻	Date	Amount Reason		0		
	08/03/2020	-\$ 65.00 REVERSAL (	OF PRIOR PAYMENT			
Batch ID	ANTH0000 Client	, Anthem				
Client	Counseling 99292 - HB					
Start typing to search 👻	ANTHBCBS 📵					
Show	Date	Amount Reason		2 🗸		
All	08/05/2020	\$ 175.00 PAYER PAY	MENT			
	08/05/2020	-\$ 200.00 REVERSAL (	OF PRIOR PAYMENT			
	Past Transactio	ns				
	Date	Amount Reason				
	08/01/2020	\$ 200.00 CHARGE CF	EATED			
	08/03/2020	\$ 200.00 PAYER PAY	MENT			
	08/05/2020	\$ 25.00 CONTRACT	ADJ			
	08/05/2020	-\$ 25.00 BALANCE Z	EROING CREDIT			
	Balance	\$ 0.00				
	ANTH0000 Client	, Anthem	pa .	READY -		
	Alcohol and Drug Progr	am 90837			A	
FILTER	16 6 2 21	1 of 1				TONS



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1. Expand the *Past Transactions* detail by clicking the single down-arrow. The middle card for Anthem Client is expanded.

2. Collapse this detail by clicking on the single up-arrow. *Past Transactions* show the detail of the charge that was associated with the Unapplied Payment during Remittance entry.

3. After review, it is determined that the Takeback is valid. It was pushed to the *Ready to Apply* column by clicking on the *Ready* button.

4. To return this card to the Takeback results, simply click on the left arrow on the card.

5. Note that the *Apply Transactions* button is now enabled. Select to apply the transactions, in this example, the \$200.00 Takeback and the corrected \$175.00 Payer Payment.

The Claim Details for this record, before applying the Unapplied Payment, are shown below. Note that the Unapplied Payments are listed at the top.

Claim Details						×
Client, Anthem Test (ANT Birth Date: 05/01/1967 Phone: (603):447-8600 Address: 16 Reimore Dr.	TH0000)		ANTHBCBS SELF	BCBS-ATC-001	15 99	
Nashua, NH 03801						
Counseling 90806 08/01/2020	0					Show Reprocessed Charges
ANTHBCBS						📋 NOTES & TASKS
Unapplied Payments						
Date Amoun	nt Reason					
08/05/2020 \$ 175.00	0 PAYER PAYMENT					
08/05/2020 -\$ 200.00	0 REVERSAL OF PRIOR PAYMENT					
Date Amoun	nt Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
08/01/2020 \$ 200.00	0 CHARGE CREATED	08/05/2020		DONE	99292 - HB	F32.2
08/03/2020 \$ 200.00	0 PAYER PAYMENT					
08/05/2020 \$ 25.00	0 CONTRACT ADJ					
08/05/2020 -\$ 25.00	0 BALANCE ZEROING CREDIT					
Total Balance: \$ 0.00	0					
ANTHBCBS 08/05/2020	History					

#### After applying the Unapplied Payments, the Claim Details are now:

Claim Details						×
Client, Anthem Tes Birth Date: 05/01/1967 Phone: (603)447-8600 Address: 16 Belmont Dr Nashua, NH 03801	st (ANTH0000)		ANTHBCBS SELF	BCBS-ATC-001	15 99	
Counseling 90806 08/	/01/2020					Show Reprocessed Charges
ANTHBCBS						NOTES & TASKS
Date	Amount Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
08/01/2020	\$ 200.00 CHARGE CREATED	08/05/2020		DONE	99292 - HB	F32.2
08/03/2020	\$ 200.00 PAYER PAYMENT					
08/05/2020	-\$ 200.00 PAYER PAYMENT					
08/05/2020	\$ 175.00 PAYER PAYMENT					
08/05/2020	\$ 25.00 BALANCE ZEROING CREDIT					
08/05/2020	\$ 25.00 CONTRACT ADJ					
08/05/2020	-\$ 25.00 BALANCE ZEROING CREDIT					
Total Balance:	\$ 0.00					
	Billing History					
ANTHBCBS 08/05/202	10					

Note that there is no longer an Unapplied Payment section. The application:

- Applied the Takeback of \$200.00, this offset the original \$200 Payer Payment.
- Applied the new payment of \$175.00, leaving a balance of \$25.
- Created a Balance Zeroing Credit to complete the processing, because the Proceed to Next Payer box was not selected when the new payment amount was posted.



### Overpayment

For this example, an ADP service of \$200.00 was billed on 8/2/2020. The Payer had a rate change (increase) that went into effect on 8/1/2020 that was not reflected in the agency's billed amount. On 8/5/2020, a payment was received in the amount of \$225.00. After the Process Transactions job is finalized, the \$25 Overpayment is available to review in the *Fiscal Overview > Unapplied Payments*.

Unapplied Payments					×
Transaction Start Date	루 OLDEST FIRST	TAKEBACKS (0) OVERPA	YMENTS (1) OTHER (0)	X COLLAPSE ALL	< Ready to Apply
Transaction End Date	ANTH0000 Clie	nt, Anthem gram 90837	2 С	READY 🔻	
Payer	ANTHBCBS		(		
ANTHBCBS - Anthem BCBS o × 💌	Date 08/05/2020	Amount Reason \$ 25.00 PAYER PA	YMENT	~	
Batch ID					
Client					
Start typing to search					
Flagged *					Mark transactions as ready
FILTER	< < >	>  1 of 1			APPLY TRANSACTIONS

1. The Payer and Show Flagged filters are used to limit the results displayed.

2. To flag or unflag a card, simply select or deselect the flag icon. Flagging cards is an easy way to create a subset of results across Payers, Batches, and Clients.

#### 3. Clicking on the VIEW CLAIM button shows the Claim Details before the Overpayment is applied.

Claim Details							×
Client, Anthem	Test (ANT	H0000)		ANTHBCBS	BCBS-ATC-001	15	
Birth Date: 05/01/196 Phone: (603)447-8600 Address: 16 Belmont Dr Nashua, NH 03801	57			SELF		99	
Alcohol and Drug P	rogram 9083	7 08/02/2020				Show	v Reprocessed Charges
ANTHBCBS							📋 NOTES & TASKS
Unapplied Payme	nts						
Date	Amount	Reason					
08/05/2020	\$ 25.00	PAYER PAYMENT					
Date	Amount	Reason	Last Billed	Authorizati	on Status	Procedure Code	Diagnosis
08/02/2020	\$ 200.00	CHARGE CREATED	08/05/2020	1 VISITS	DONE	90837	F32.2
08/05/2020	\$ 200.00	PAYER PAYMENT					
Total Balance:	\$ 0.00						
	Billing History						
ANTHBCBS 08/0	05/2020						



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Just like the previous example, the Payment was moved to the right-hand *Ready to Apply* column by clicking on the *Ready* button. Then the *APPLY TRANSACTIONS* button was selected. The Claim Details after applying the \$25.00 Overpayment is below.

Claim Details							×
Client, Anthem	Test (ANTI	H0000)		ANTHBCBS SELF	BCBS-ATC-001	15 99	
Phone: (603)447-8600 Address: 16 Belmont Dr Nashua, NH 03801	7			500			
Alcohol and Drug Pr	ogram 9083	7 08/02/2020				Sho	ow Reprocessed Charges
ANTHBCBS							📋 NOTES & TASKS
Date	Amount	Reason	Last Billed	Authorizati	on Status	Procedure Code	Diagnosis
08/02/2020	\$ 200.00	CHARGE CREATED	08/05/2020	1 VISITS	DONE	90837	F32.2
08/05/2020	\$ 200.00	PAYER PAYMENT					
08/05/2020	\$ 25.00	PAYER PAYMENT					
08/05/2020	-\$ 25.00	CHARGE INCREASING CREDIT					
Total Balance:	\$ 0.00						
t	Billing History						
ANTHBCBS 08/0	5/2020						

Note that there is no longer an Unapplied Payment section, and in this example, the system generated a Charge Increasing Credit of \$25.00 to complete the processing.

## Place of Service Mapping by Defined Filter

In *Configuration > Services/Payer > Payers > POS Mapping*, there is now a toggle to enable the *Use Defined Filters For Mapping* feature. When enabled, an agency can define the Place of Service (POS) based on Location, Program, and/or Activity.

Medicai	d	م	•						
Code MDCD	Plan CHIP	<b>Type</b> Commercial	Category Medicaid	Payer ID MDCD	CMS Payer Name MEDICAID(2)	Address 1600 East Main St Payerville, NH 03211	Phone	Web Site	^
PROFILE	COMMUNICATIONS	PROCESSING RATES BIL	LLING METHOD	S NPI ELIGIBILITY	POS MAPPINGS				
-	Use Defined Filters For Map	ping							
		Place of Service	e Mannings						
Defined F	ilter *	hate of service	e moppings	Payer Place of Service *					
WI POS			× •	53: Community Mental H	ealth Center X 👻				
+ ADD									
				CANCE	L SAVE				

When mappings of either Type exist, and the toggle is used to change the existing Configuration, the following confirmation box displays:

Change Mappi	ing Type	
This will clear al	l of your existi	ng mappings.
	CANCEL	CLEAR

#### New 837I Configuration Items

The following information can now be configured for an 8371 in *Configuration > Services/Payers > Payers > Billing Methods:* 

• In the *Providers and Subscribers* section:



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#### • Report Payer Address (Loop 2010BB, N3, N4)

• Pulls from *Configuration* > *Services/Payers* > *Payers* > *Communications* 



- In the Claims and Services section,
  - The following information reports based on the configured values instead of being hard-coded:
    - Admission Type Code (Loop 2300, CL101).
    - Admission Source Code (Loop 2300, CL102).
    - Patient Status Code (Loop 2300, CL103).
    - All three fields are required.
    - These fields default to the previously hard-coded values when adding a new 837I.
  - The following information reports if configured:
    - Report Admission Date/Hour (Loop 2300, DTP) from the Admission Date and Time fields of the matching Enrollment.
    - Report Days instead of Units (Loop 2400, SV204) 'DA' instead of 'UN.'

Claim Level	× 🔻 🗌 Report Staff (Loop 2310A)
Authorization Level *	
Claim Level	× •
Supervisor Reporting *	Report Admission Date/Hour (E00) 2300, DTP)
Do not report Supervising Staff	X 🔻
Bill Type	Report Days in Place of Units (Loop 2400, SV204
Claim	
Admission Type Code (Loop 2300 CL101) *	Provider Accepts Assignment (CLM07)
Admission Source Code (Loop 2300, CL102) *	
	Assignment of Benefits Indicator (CLM08)
30	
Claims per Subscriber Loop *	Report Staff Taxonomy (Loop 2310A, PRV)
25	
Services per Claim Loop *	Paver Accepts Corrected Claims
1	



## State Billing Acorns

A new State Acorn is available for NC Custom Billing. Click HERE to view the online state-specific Release Notes.

## IMPROVEMENTS

## **Diagnosis Selection in Treatment Plans**

The Treatment Plan Diagnosis drop-down list is now validated to include only active Client Diagnoses preventing users from selecting an end-dated Diagnosis when creating a new Treatment Plan.

### **Episode Improvements**

With this release, Clients can now have multiple open Episodes with a restriction of only one open Episode per Episode Category. If multiple Episodes are used, the new Episode Category defined list must be populated in *Configuration > Setup > Defined Lists*.

The Episode Categories defined list is a single description field with a 50 character maximum. All existing Episodes are assigned a default category description of *Standard*. This default category description may be renamed if desired.

In addition to Categories, an Episode End Reason can now be captured. The *Episode Discharge Reason* defined list must be populated for the Episode End Reason drop-down list to contain values. This field is optional.

						0	8	¢
Туре	Start Date	End Date	Status	Category	End Reason			
PRE-ADMISSION	04/01/2019	04/07/2019	CLOSED	Standard	04 Transfer to other comm. resource			
ADMISSION	04/08/2019	05/31/2019	CLOSED	Standard	09 Incarcerated			
CRISIS	06/01/2019		OPEN	CORE				
ADMISSION	07/23/2020		OPEN	MH				

### **Remittances Improvements**

### Selecting a Charge in Remittance Entry

The Remittance Entry form now displays charges with a Status of *Done* in the drop-down listing when a Client and Date are selected, allowing *Reversal of Prior Payment* and duplicate *Payer Payment* Transaction Types to be matched with a charge. Once matched, these Payment types may be marked as *Ready* and processed. Previously only *Outgoing* and *Batched* charges were listed.

Client & Service						
Payer *	Client	Service Date				
ANTHBCBS - Anthem BCBS of NH 🛛 👻 🔻	000074 Johnson, Lawrence R 🛛 × 👻	06/03/2019				
Charge						
5elect Charge			*			
06/03/2019 90816 \$ 1,920.00 (DONE)						
06/03/2019 90816 \$ 1,920.00 (DONE)						
06/03/2019 90816 \$ 1,920.00 (OUTGOING)						
+ SAVE AND ADD ANOTHER DELETE			CANCEL SAVE			



#### Processing Transactions

Now when Processing Transactions in *Vantage Point > Fiscal Overview > Unprocessed Remittances*, additional job information is displayed on the History screen. Users can now see the total number of Remittances included in the job in addition to the number of Unapplied Payments created and the number of errors contained in the job.

Unprocessed Remittances » Process Transactions											
CREATE HIS	ORY ERRORS										
Batch ID								Start Date	End Date	•	SEARCH
Date	Status	Created By	Batch ID	Message	Remittance	Unapplied	Errors				
07/29/2020	Preview	heather.sherwood	Client Payment	Self-Pay 8/15/18 Clean Up	3	0	0	FINALIZE 🔻			
07/29/2020	Preview	heather.sherwood		FHC Remittances	2	2	0	FINALIZE 🔻			
07/28/2020	Done	heather.sherwood	Client Payment	Self-Pay Remittances	10	4	0				

# Increased Number of Blank Default Rows in Sliding Fees Configuration

In *Configuration > Services/Payers > Sliding Fees,* the number of default blank rows when adding a new Sliding Fee Configuration is now 100 instead of 10. The higher number of default rows should reduce the need to add rows and help avoid validation issues that can occur if an empty row is not left after the entered values.

# REPORTS

### Updated and New Reports

The following Reports have been updated:

### **Fiscal Reports**

All Aging reports now use the Service Date instead of the Transaction Date to prevent conflicting information from being displayed when there is a Waterfall Charge across multiple months. Any Claims with a *Charge Status* of 'Done' are not included in these reports.

- Aging Report by Payer
- Aging Report by Program
- Aging Detail by Payer
- Aging Detail by Program
- \_Aging Detail for Export
- \_Aging Report for Export

The following new Reports have been added:

#### **Fiscal Configuration**

- Service Definition and Payer Rates This report is grouped by Service Definition and by Payer with detail rows for the credential rate(s). The default rate for the Service Definition is displayed in the grouping header. There is also a CSV Friendly export version of the report.
- \_Service Definition and Payer Rates for Export Report This is the CSV Friendly Export version of the report above.

## UPDATES

Ticket #	Description
9933	As a WI billing user, I want my services to bundle according to WI Bundling rules.
10241	When entering a Reversal of Prior Payment transaction in Remittances, it must be entered as a negative number.
10356	Adjustments are now displayed for the second Payer in the Aging Reports.
10361	Direct Fee Services no longer display as "Undefined" charge in the Remittances Charge drop-down list.



10385	Unapplied Payment modal no longer changes size horizontally when expanding/collapsing all cards.				
BUG FIXES					
Ticket #	Case #	Description			
9516	72652	Fixed an issue where FD was unable to pass the value of a field with a display mask to a stored procedure.			
9644		Timeline forms no longer experience intermittent page refreshes when they are signed and unsigned.			
9760		Page no longer reloads when unlocking Signatures in Service Progress Notes			
9993		Multiple Monthly Maximums using defined filters are now independently treated when calculating the charge amount.			
10134		The <i>Progress note signed</i> icon no longer displays when the signature is removed from a previously signed Progress Note. It now defaults to the unsigned note (orange pencil) icon.			
10153		CMS 1500 no longer reports the Staff Phone Number in Box 33 instead of the Organization phone number			
10207		Credentials are no longer validated for Payers that do not have a billable Charge Strategy for a Service.			
10299		Removed dual scroll bars from Config>Service Definitions>Rates and Clients>Payers.			
10364		In all <i>Configuration</i> screens, the "+ ADD" <component> beneath the "No <components> have been added" message is now clickable.</components></component>			
10365		In <i>Configuration&gt;Services/Payers&gt;Components,</i> the checkbox visually changes states (checked or unchecked) when clicked. Previously the modal would need to be opened and closed.			
10377		Updated the CCD Header namespace by removing reference to a C32 file and replaced it with the currently used standard.			
10414		Resolved z index issues that caused forms to display over the Client Search in some cases.			
10422		Updated the appearance of the loading spinner on the cards in <i>Vantage Point &gt; Insights</i> . All other functionality remains the same.			
10436		The logged-in app user and current date now update the CreateUser/CreateDate or UpdateUser/UpdateDate columns in the database.			