

ECHOVANTAGE RELEASE NOTES

VERSION 3.16

NEW FEATURES

Direct Fee Service Authorizations

A *Require Authorization* checkbox is now available in *Configuration>Services/Payers>Payers>Rates* when configuring the Payer Rate for a Direct Fee service. When selected, the *Create Charges* process checks for Authorizations entered in the *Client>Payers* tab. Authorizations for *Visit* or *Unit* types have a quantity of one deducted for each Direct Fee service. When the Authorization type is *Dollars*, the dollar amount of the Direct Fee service is deducted. Services with missing or insufficient Authorizations process according to the *'When no authorizations are found'* selection on the *Client>Payers* tab.

Service Definitions Q		Q	Add a Direct Fee Se	rvice
0	Aardvark Di	rect Fee	Charge Calculation Method *	
	Payer Rate		Billable to this payer	
C	Add a Direct Service	Fee	Require Authorization 🧿	
	Default Rate	Units		
C	ADP ADD-C	1 unit will be o service.	deducted for each Direct Fee	
	Default Rate	Visits		× •
0	ADP Add-O	1 visit will be o service.	leducted for each Direct Fee	
	Default Rate	Dollars		Exclude Billing Code and
	ADP clone !	the dollar amo deducted.	ount of the Direct Fee service will be	Exclude bining code and
	No Default Ser			

Updating Authorizations

Used Amount is now a required field when adding Authorizations in the *Client>Payers* tab. Enter zero up to the Authorized Amount to accurately capture the *Remaining* value of *Units, Visits,* or Dollars at the time of entry. The Authorization record in the *Client>Payer>Authorizations* section displays the calculated value of the *Remaining* field. The value in the *Used* field may be updated by clicking on the row to open the *Edit Authorization* screen. When Charges are created from the provided Services, the *Used* and *Remaining* values are updated accordingly.

Authorizations					
Dates	Amount	Used	Remaining	Number	Defined Filter
Start Date: 01/01/2020	\$150.00	\$50.00	\$100.00	NHMD-33405	Third Party Items
08/01/2020 - 12/31/2020	30 Visits	5 Visits	25 Visits	Test Auth	At Home
			+ ADD AUTHORIZATION		

Self-Pay Client Filter

In Fiscal Overview>Unbilled Charges>Create Bills, there is now a Client filter for SELF PAY. This Client filter allows users to locate a specific Self-Pay Client and generate a single Self-Pay statement if desired, without the need to scroll through all Clients with a Self Pay balance.

Unbilled Charges » Create Bills CREATE HISTORY ERRORS					
COMMERCIAL SELF PAY		Client	Guarantor	Relationship	Self Pay Balance
Payer * Image: SELF - Really Real Self Pay X T Client 000020 Ravyn, Wynter X T		000020 Ravyn, Wynter	Ravyn, Wynter	self	\$ 1,150.00



New Form DesignEHR Release

Form DesignEHR version 6.0.26 is available with the release of EchoVantage version 3.16. This new version of Form DesignEHR contains improvements and bug fixes.

- A foreign key can now be passed from the parent record to a pop-up form when the pop-up opens within a grid.
- An issue was addressed where opening a new child form from an already open parent form on the Timeline cleared the parent form data when the child form was closed.
- Audit views are now captured for all Timeline forms, regardless of type. The audit configuration for each form is enabled by default, and the Form Name displays in the Item column on the audit search screen.

State Billing Acorns

New State Acorns are available for RI State Reporting and WI Custom Billing. Click HERE to view the state-specific Release Notes.

IMPROVEMENTS

835 Import

When an 835 file is successfully submitted, a green toast message displays in the upper right-hand corner with a *Processing* 835 message. In addition, the status indicator located just below the blue *SEARCH REMITTANCES* button has an animated icon to show the 835 is actively processing.

Processing 835
Status
× Not Ready × Ready ×
Amount
SEARCH REMITTANCES
💶 🖘 😔 Importing 1 file

Payer Processing

The Processing tab in *Configuration>Services/Payers>Payers* now has a better flow working from left to right. The selection inputs for both *Credentials* and *Diagnoses* now function the same as similar inputs in other areas of the application like *Configuration>Staff/Users>Staff>Credentials* and *Clients>Diagnosis*.

PROFILE COMMUNICATIONS	PROCESSING RA	ATES BILLING METHODS NPI ELIGIBILITY POS MAPPINGS	
Credentials Only Bill for These Staff Cred C-T-M: CT - Master	lentials × +	Diagnoses Do Not Bill for These Diagnoses F32: Major depressive disorder, single epis × ▼	Other Bill for Supervising Staff Use Supervisor's Rate Contractual Adjustments Waterfall to the Next Payer(s)
C-T-B: CT - Bachelor + ADD BILLABLE CREDENTIAL	Χ Ψ	+ ADD BILLABLE DIAGNOSIS Diagnosis Error Action Hold Release	Allow Service Bundling Acorns
Credential Error Action 🔘 H	old () Release	CANCEL	Select Acorn

© The Echo Group, All Rights Reserved www.echobh.com



CMS 1500 Supervisor Reporting

In *Configuration>Services/Payers>Payers>Billing Methods>CMS 1500*, a **Report Supervising Staff in Place of Rendering in Box 31** checkbox is now available. When selected, the Supervising Staff associated with the Service or Services is reported in place of the Rendering Staff. If the **Report Staff Taxonomy in Box 31** checkbox is also selected, the Supervising Staff's NPI is included alongside the Supervising Staff's name in Box 31. If no Supervising Staff is entered with any Services on the claim, or if the checkbox is not selected, the Rendering Staff is reported in Box 31.

	CMS 1500 Configuration
Create CMS Paper claims for	
O All Charges	
O Secondary Claims Only	
Insurance Type *	
Medicaid	× •
Other Payer Reporting *	
Report Prior Payer in Boxes 9 and 11	× •
Services per Claim (1-6) *	
6	
Report Referring Provider in Box 17	
Report Organization Taxonomy in Box 32B	
Report Organization Taxonomy in Box 33B	
Report Staff Taxonomy in Box 24J	
Report Supervising Staff in Place of Rendering in Box 31	
Report Staff Taxonomy in Box 31	
Accept Assignment	
Payer Accepts Corrected Claims	

Client Search

Now when entering a numeric value in Client Search, any field containing that number is returned in the results. Exact matches are ranked higher in the results list than any partial matches. Previously, fields searched were filtered based on the formatting of the search value, if any, and the number of digits entered.

Default Message Type

When creating a message using the send button in a modal, i.e., from a form on the Timeline, the *Request Review* button is now selected by default, and *Review Requested* is displayed in green. Any time a message requires a Signature, click on *Request Signature* to change the default selection.

Client Diagnoses		SEND ×
ICD Code *		Recipient *
F30: Manic episode	X 🔻	Start typing to search
Type *	Episode *	
Primary	× 🔻 Standard ADMISSION (07/01/2017 - 09/09/2019)	Message * × 🔻
Start Date *	Enrollment	
02/05/2018 End Date	Alcohol and Drug Program (Start Date: 07/01/2017)	Request Signature Review
Age at Onset	Program	DISCARD SEND
35	Start typing to search	

REPORTS

Updated and New Reports

The following Reports have been updated:

Billing Reports

• _*CMS 1500 Report* – Added taxonomy to Box 31 on the CMS 1500 Billing Report to accommodate the option of reporting Supervising Staff in place of Rendering Staff on a Service.



Client Reports

• *Client List* – This report now displays Client Name, last name first, in addition to Client Code.

Fiscal Reports

- Average Days in AR Updated the CSV report header labels to match the main report labels.
- Cash Receipts Journal Updated the query in the Cash Receipts journal to only include Remittances for the date range entered.
- Services List An Include filter was added to this report to refine the results to include only Billable Services, only Not Billable Services, or Both in the report.

The following new Reports have been added:

Administration

- *Expiring Authorizations* This report lists Clients with authorizations that have expired in the previous 90 days or will expire in the coming 90 days as of the current date. The results are grouped, and may also be filtered, by Payer.
- Staff Time Events This report displays all Staff Time Events that fall within the specified date range, including the Reason and Short Description, and Reminder Note if entered. The list is grouped by Staff Name.

Fiscal Reports

- *Historical Aging* Provides an aging list by GL Period. This report may be grouped by Location or Program and filtered by Location Code, Program Code, and Payer. It has a clickable link for a CSV Friendly version.
- _*Historical Aging Detail* This is the CSV Friendly version accessible from the report above.

UPDATES

Ticket #	Description
9610	Updated the CSV report header labels to match the main report.
10378	Fixed the Validation Error "The reversalAmount may not be greater than 0" to display "The reversal amount may not be greater than 0".
10507	Added Client Name to Client List Report.
10538	Added aria-labels to Fiscal Overview Create Job & Reverse/Retry/Finalize modal buttons.
10540	Added a Historical Aging by Location with Payer.
10553	In Fiscal Overview>Unprocessed Services>Create Charges, the Service error "Charge Strategy cannot be configured with zero minutes per unit" now links to the charge strategy.
10581	A filter was added to the Services List report that allows the user to indicate which Services to include: Billable, Non-Billable, or Both.

BUG FIXES

Ticket #	Case #	Description
9938		The Payer is no longer skipped when a staff credential processing is set to release, and the diagnosis is set to hold.
10429		The Household tab no longer produces an error if Living Arrangements are not configured in Configuration>Setup>Defined Lists.
10456		Failed jobs now display on the Errors screen with information to help understand why a job failed.
10619		The Cash Receipts Journal was including an extra day in the Remittance results. Updated the query to a simple compare statement to resolve this issue.
		 Services with No Authorization now correctly trigger an Error and get put on HOLD when: The Place Charge on Hold is selected in the <i>Clients>Payer</i> tab. And the Payer Bate for a Service Definition <i>Bequires Authorization</i> is checked.
10704		 And a Flat Rate calculation with a Fixed Unit Unit calculation is selected.