ECHOVANTAGE RELEASE NOTES

VERSION 3.17

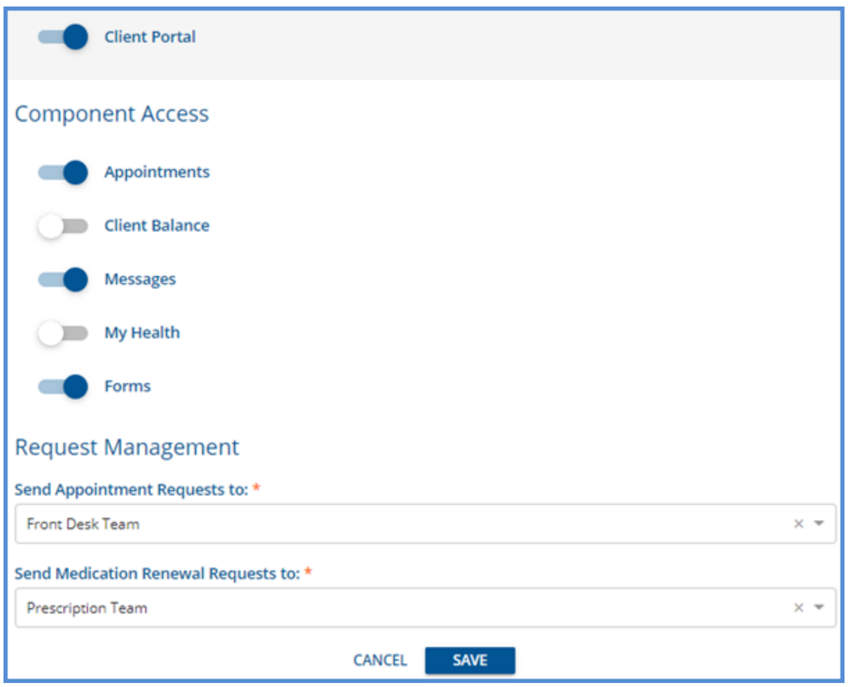
NEW FEATURES

Client Portal

The Client Portal provides Clients with an easy and convenient way to access their account information. Depending on the configuration, appointments, account balance, direct messages, medical and health records, and agency-specific forms can be viewed and managed within the Client Portal. Please note that Appointments, Client Balance, Messages, and My Health are included in the core Client Portal product. The Forms feature works in conjunction with Echo Informs and is available on a trial basis. Cost and licensing information will be shared at a future date.

Configuring the Core Client Portal

1. If EchoVantage is SaaS hosted, notify SaaS which email address should be used for the from address for sending password reset emails. This information goes into the EmailFromAddress column of the Tenant table in the redirector database. This email from address will be moved to the configuration page in the future.
2. In *Configuration > Setup > Group Mailboxes,* set up at least two group mailboxes, one for Appointment Requests and one for Medication Renewal Requests. Even if the Appointments and My Health components are not enabled, the group mailboxes on the Client Portal configuration page are required setup.
3. Navigate to *Configuration > Setup > Client Portal.* Enable the feature by sliding the toggle at the top of the page to the right. Enable or disable each Component Access based on agency needs and select the appropriate group mailboxes in the *Request Management* section.



4. In *Configuration > Staff/Users > Permissions,* set Permissions for the Client App Access feature and Group Mailboxes.
   a. The Client App Access permission allows users to:
      i. Enable the Client Portal Access for clients
      ii. Configure client username
      iii. Reset client password
   b. Group Mailboxes permissions determine which User Groups have View and Send access to the Appointment Request and Medication Renewal Request Group Mailboxes. This step may be skipped if the *Appointments* and *My Health* portal components are not enabled.

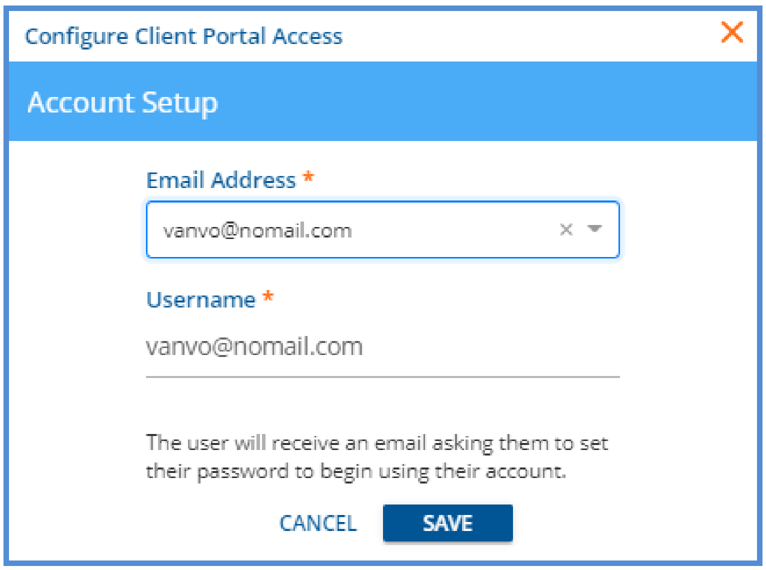
5. In *Configuration > Setup > Defined Lists,* the *Message Subjects* defined list must be populated if the *Appointments* and *My Health* portal components are enabled. This list contains the agency created subjects that Clients may choose from when sending a message from within the portal.

Enabling Client Access

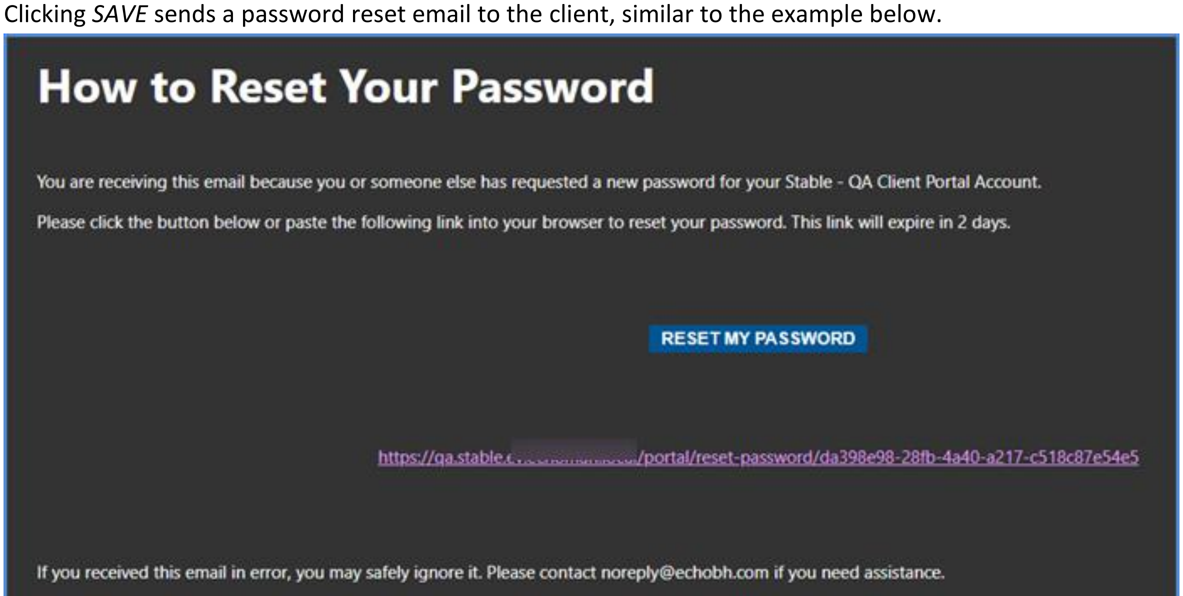
Client Portal access is enabled on a per-client basis. Staff must be a member of a User Group with the Client App Access permission to perform these steps.

1. Navigate to the desired client.
2. Select the Contact Info page to verify that the client has an Email address listed. The email address listing in the Portal Account Setup screen pulls from the Client's *Contact Info*.
3. Select the blue *Configure Client App Access* icon (computer monitor) in the Client header.

4. Select the Client's *Email Address* from the drop-down listing.
5. The *Username* defaults to the Email Address, which is easy to remember and often unique, but can be changed if desired.

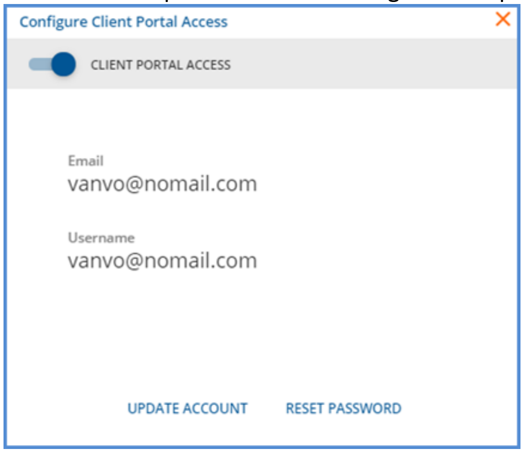


6. Clicking *SAVE* sends a password reset email to the client, similar to the example below.

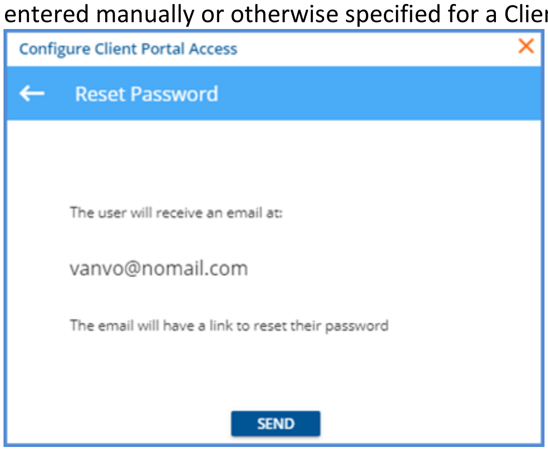


Managing Client Access

1. Select the computer monitor icon again to display the client's Email Address and Username configured for the Portal.



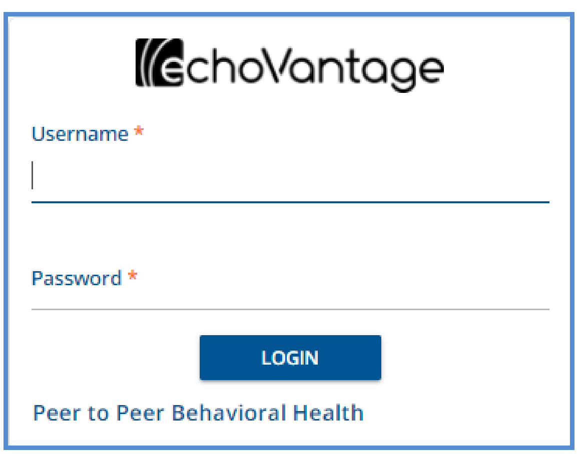
2. The Client Portal Access switch can be toggled to disable the client's access. Their Username and Password are preserved.
3. Click on the blue *UPDATE ACCOUNT* to make changes to the active email address or username. Changes to either of these do NOT require a password reset.
4. Click on the blue *RESET PASSWORD* to send a password reset link to the displayed email address. The password cannot be entered manually or otherwise specified for a Client.



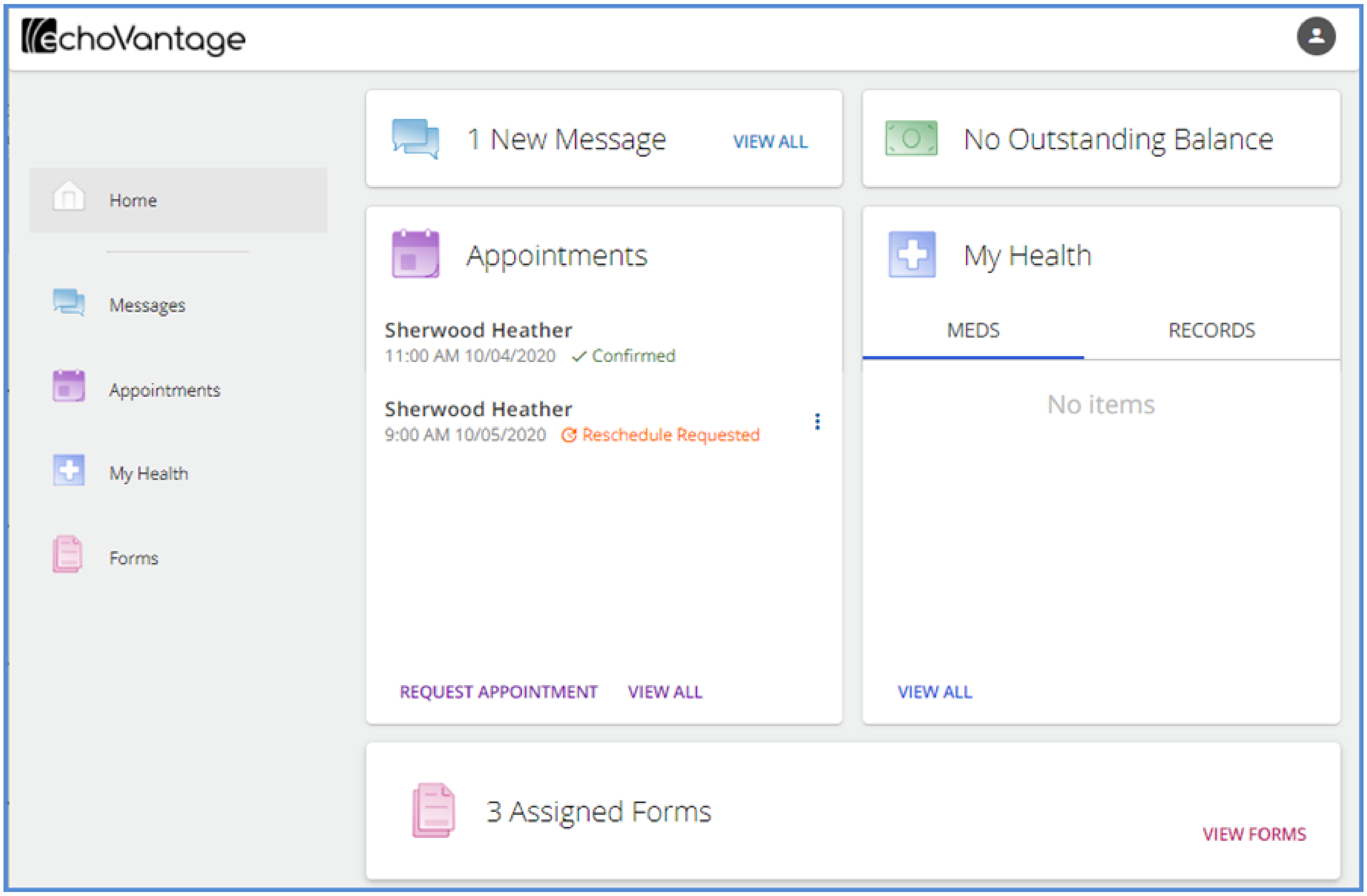
5. The client password reset emails contain a link to the password reset page in the portal. When the password is reset, the client is redirected to the Portal Login screen. The client may want to bookmark the login page.

Accessing the Client Portal

The Client Portal address is ***https:<domain_name>/portal,*** where the domain name is the agency's URL for EchoVantage. The following screen displays.



The client enters their credentials and selects the blue *LOGIN* button. Once logged in, the screen defaults to the Home page, and they see a Card for each feature (Component Access) enabled in the configuration. The *VIEW ALL* option links to the detail page of the corresponding left-hand menu item. In the example below, all five features are enabled.

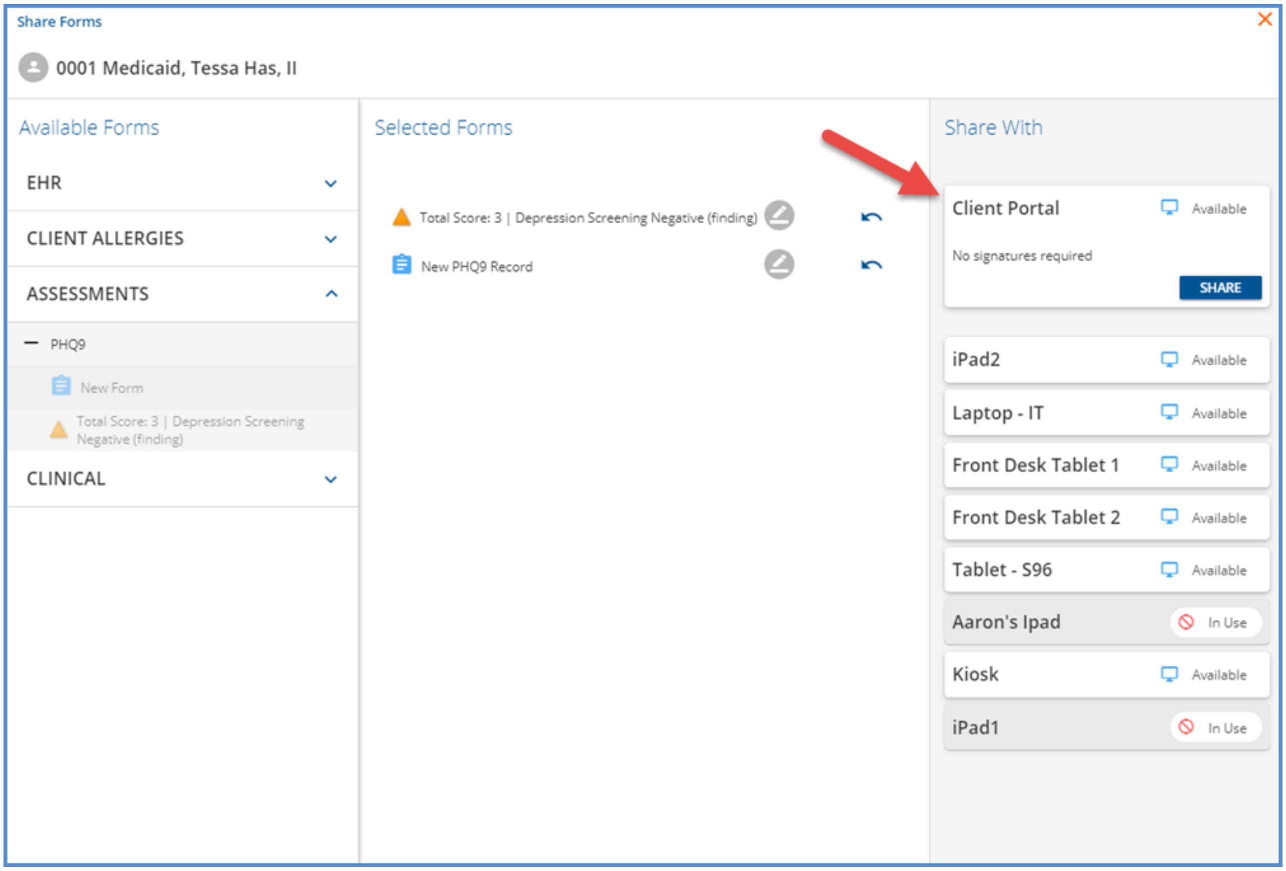


- **Messages –** Shows a count of new messages.
- **Balance –** Displays the current total client account balance, excluding any unapplied Client Payments.
- **Appointments –** Displays scheduled and requested appointments.
    - Click the ellipsis (three dots) to create an Update request for an appointment or Confirm an appointment within 48 hours of the appointment date.
    - Indicators are present if the appointment has been confirmed or if an update request was made.
    - Click on *REQUEST APPOINTMENT* to create a new appointment request.
    - *VIEW ALL* links to the Appointments main menu page.
- **My Health –** Has two tabs, MEDS, and RECORDS. Again *VIEW ALL* links to the *My Health* main menu item details.
    - **MEDS** displays a client's current medications. All Medications may be viewed on the detailed page.
    - **RECORDS** displays the most recent CCD with the date or, in the case of no CCD, a message indicating this. Clients have the option of creating a new CCD.
- **Forms –** Displays the count of forms, if any, that are shared to the Client Portal via the share forms icon from the Client Header. Click on *VIEW FORMS* or select the *Forms* main menu item to review, complete, and sign the shared forms.

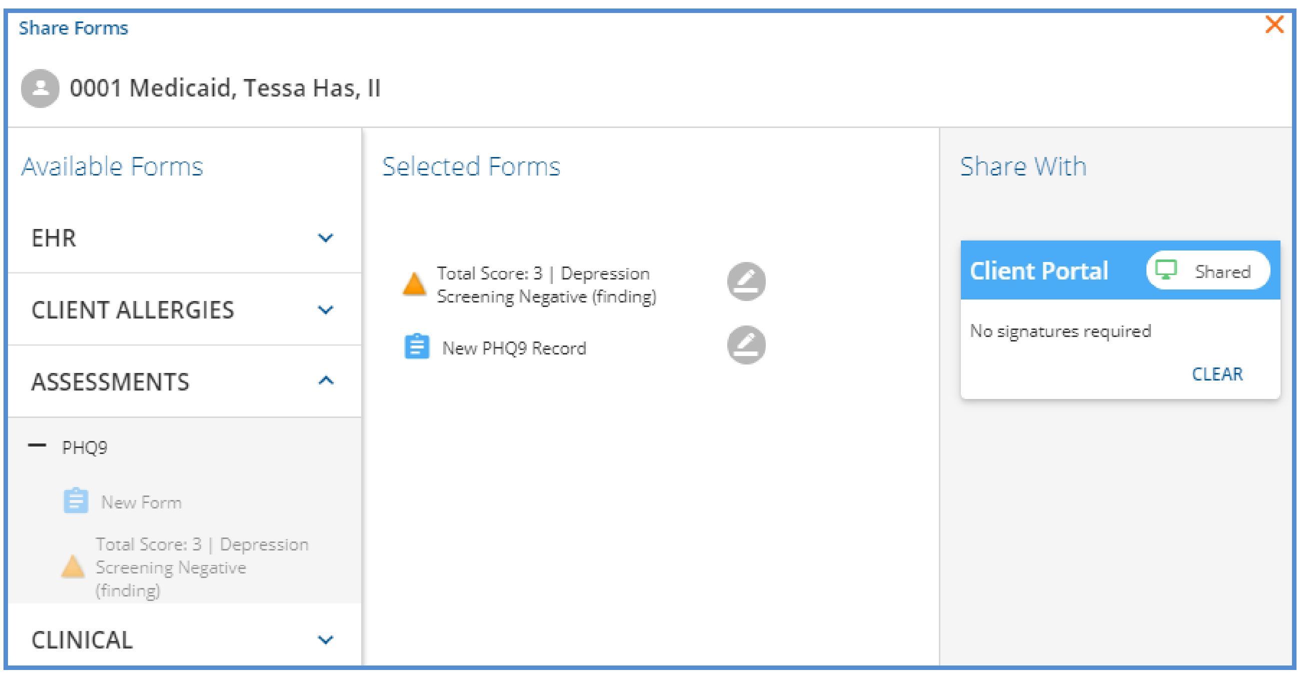
Sharing Forms to the Client Portal

Sharing forms for a client to review, complete, and sign is handled via InForms. Click HERE for detailed information on configuring and sharing forms using InForms. **New with this release, the form location for InForms is changed from *DEVICE* to *INFORMS*.** To share a form to the Client Portal:

- Navigate to the desired client.
- Select the share forms icon.
- Select the forms to share.
- Finally, select **Client Portal** as the *Share With* device.



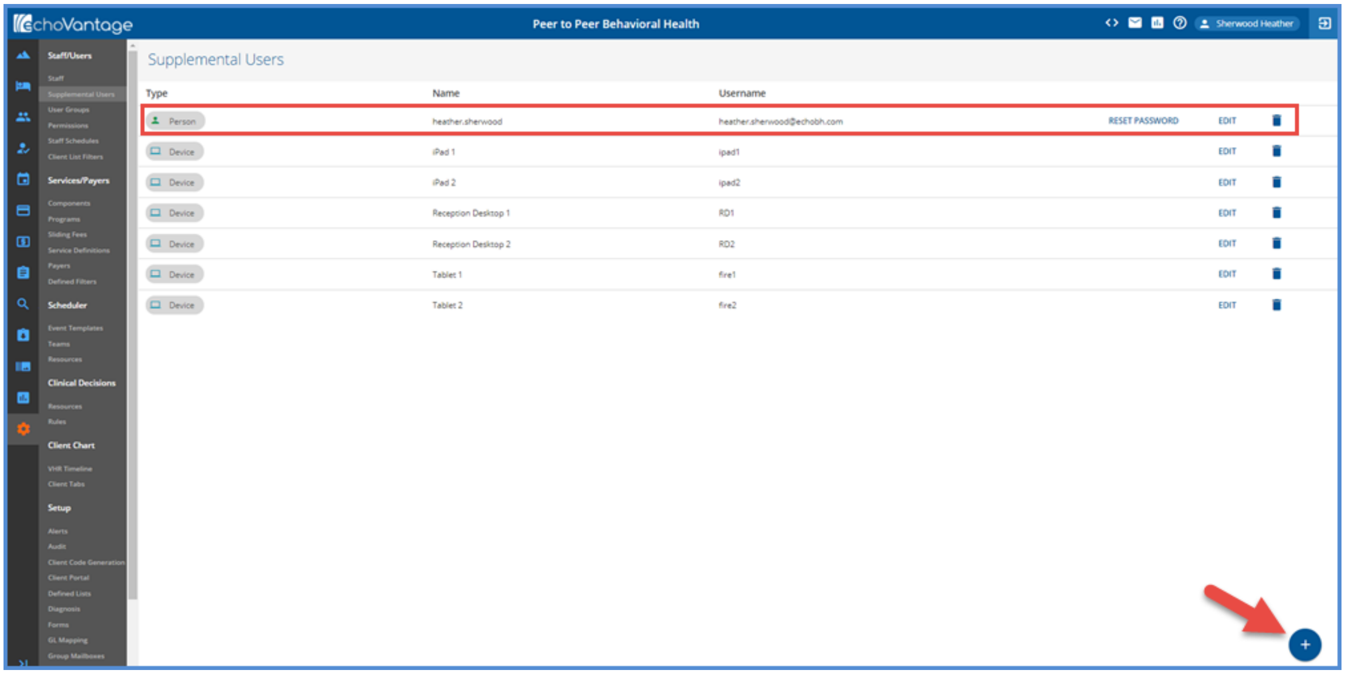
The forms are shared until the *CLEAR* button is selected.



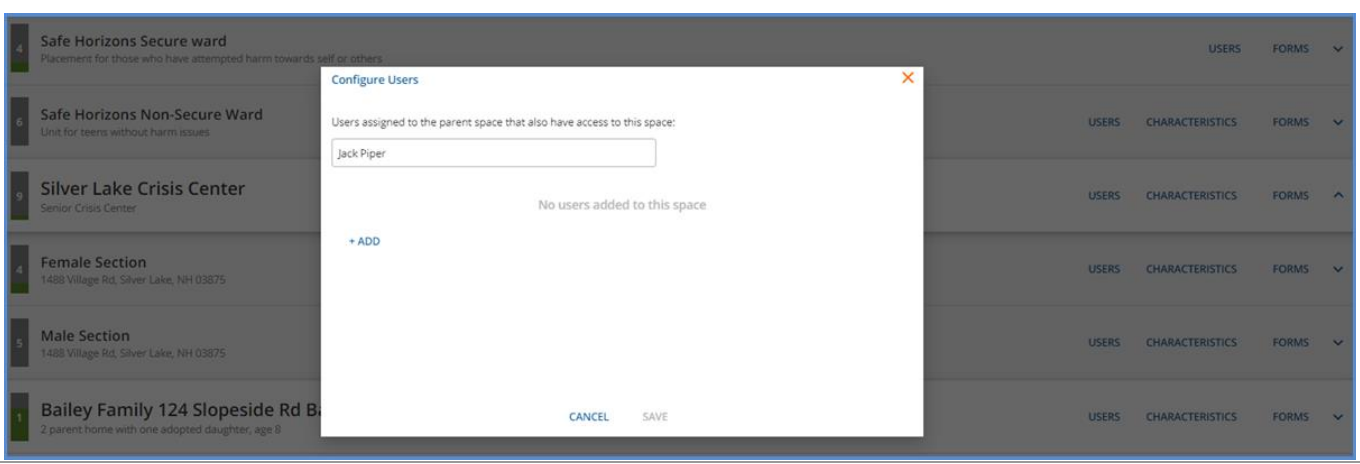
Authorized Representatives

Access to the Client Portal may also be configured for Authorized Representatives. This feature is also provided on a trial basis; cost and licensing information to be shared at a future date. Follow the steps below to enable an Authorized Representative after the Client Portal configuration is complete.

Configuring Authorized Representatives



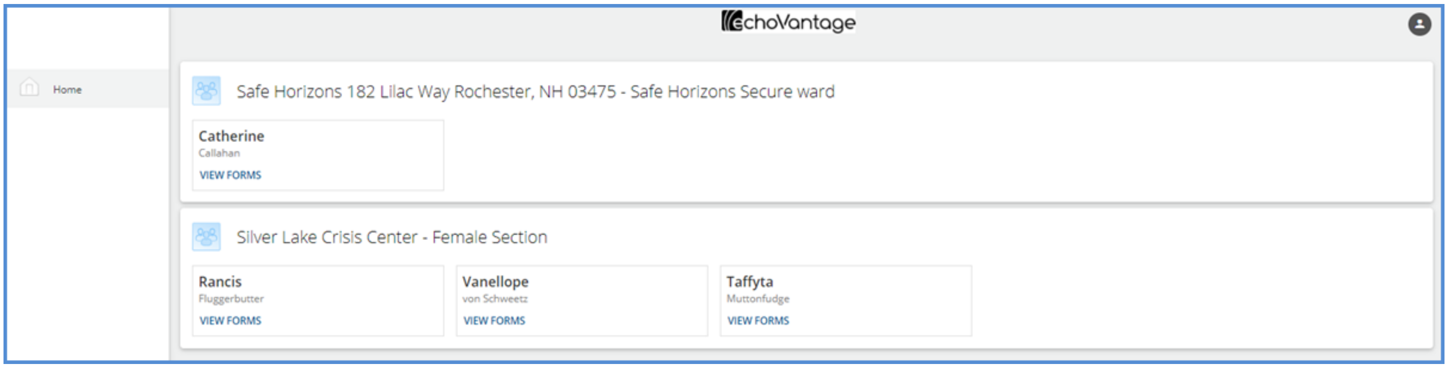
1. In *Configuration > Staff/Users > Supplemental Users,* click the blue plus to add an Authorized Representative.
   a. The *Create User* pop-up displays and defaults to *PERSON*.
   b. Complete the three required fields: ***Name, Email Address,*** and ***Username.***
   c. The Username defaults to the entered Email Address but can be changed if desired.
   d. Remember to *SAVE* when the data entry is complete.
   e. When saved, a Password Reset email is sent to the email address entered. This link is valid for 48 hours.
2. If a new link is needed or if a Password is lost, simply click on the blue *RESET PASSWORD* link. This link opens a confirmation box and displays the email address where the reset request will be sent.
3. In *Configuration > Staff/Users > User Groups,* review the Authorized Reps User Groups **MENU OPTIONS**. The default is no application menu access. If desired, Staff Users may also be added to the Authorized Representative User Group.
4. Determine the forms that will be accessed by the Authorized Representatives from the Client Portal. These forms must be tagged with the location of *OCCUPANCY_CLIENT* in Form DesignEHR.
5. In *Placements > Occupancy,* assign Authorized Representatives to a space by selecting the blue *USERS* link. *Note that assigning Users in Placements is controlled by the User Group Permissions configuration.
   a. A *Configure Users* modal displays.
   b. View and edit existing Users in this modal.
   c. Adding a User to a Parent space also grants access to all Child spaces of that Parent.
   d. To limit a user to a specific Child space or Child spaces, expand the Parent space and select the *USERS* link for the desired Child space(s).



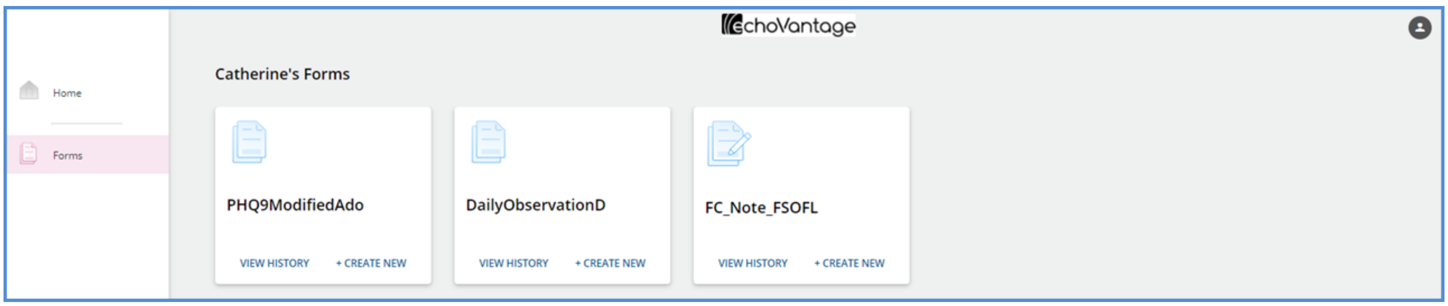
Accessing the Portal

Once the Authorized Representative completes the password reset, they are redirected to the portal login screen. Again the Client Portal address is ***https:<domain_name>/portal,*** where the domain name is the agency's URL for EchoVantage. After logging in, Authorized Representatives see a Home link on the main navigation panel.

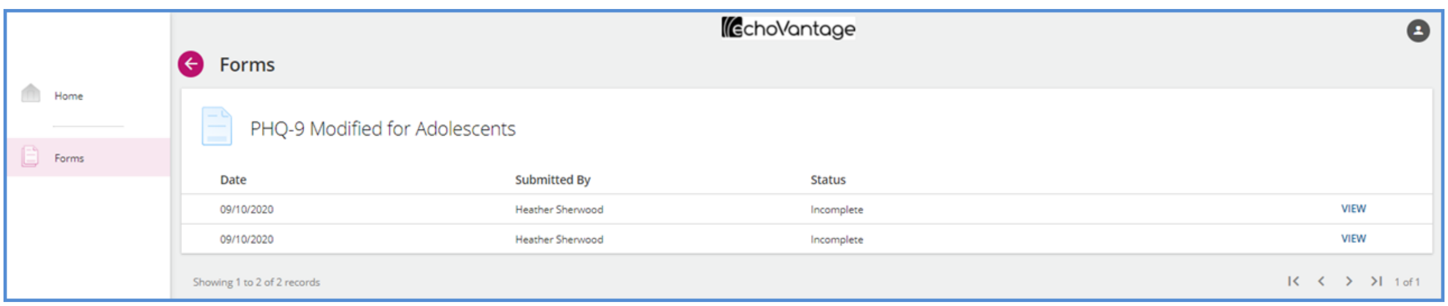
1. If the Authorized Representative has access to a space with a Client or Clients assigned, a row displays for each space with a card for each assigned client in the associated row.



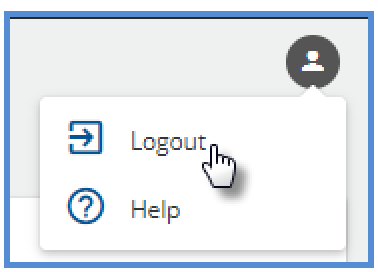
2. Click on the blue *VIEW FORMS* of the desired Client to access the available forms.



3. Create a new form by selecting the blue + *CREATE NEW* button of the desired form.



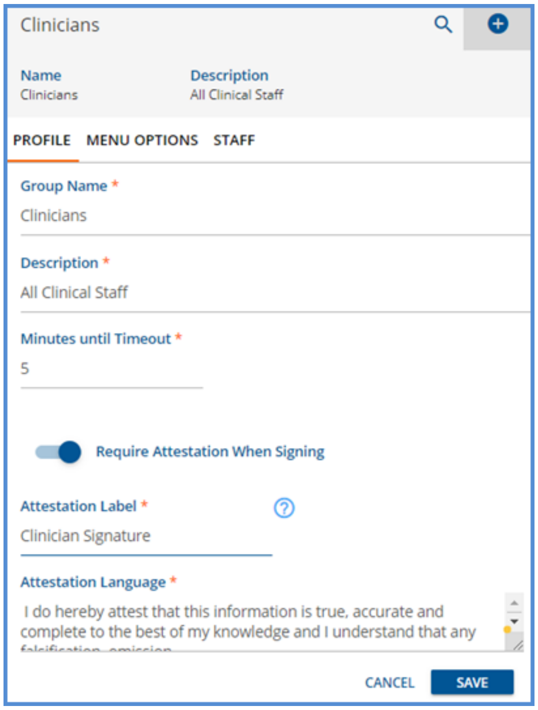
4. View previously completed forms by selecting the blue *VIEW HISTORY* button of the desired form.



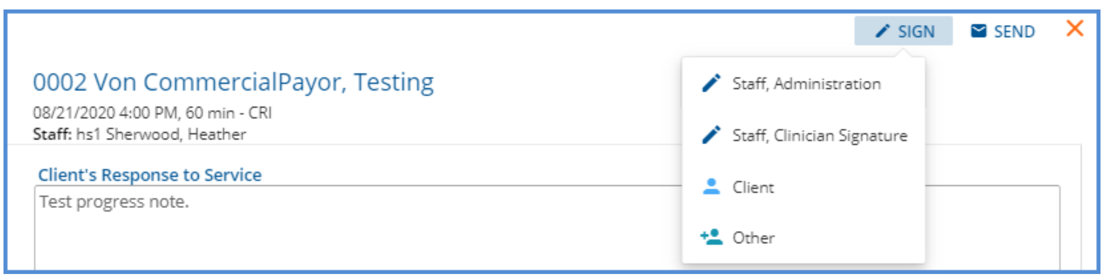
5. When finished, end the session and logout by selecting the person icon in the upper right-hand corner and selecting *Logout.*

Attestations

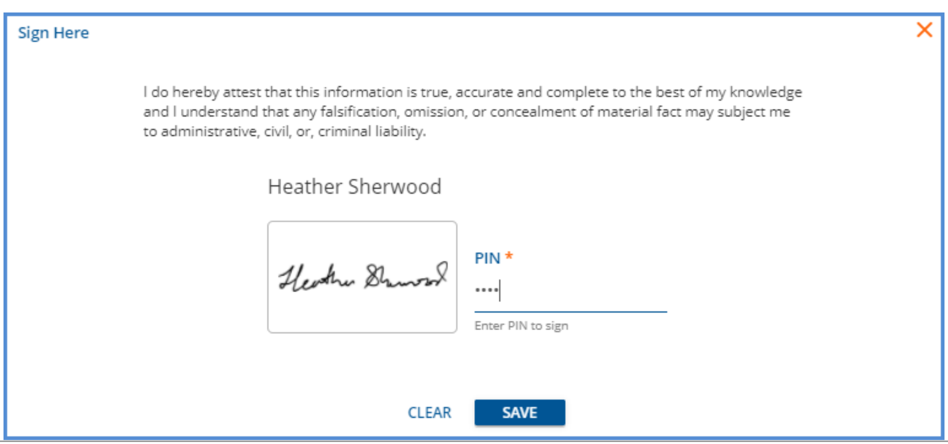
Attestations can now be configured for User Groups in *Configuration > Staff/Users > User Groups > Profile.* Attestations are not required by default, but if toggled on for a User Group, the Attestation Label (50 character maximum) and Attestation Language (500 character maximum) must be entered before *SAVE* is enabled.



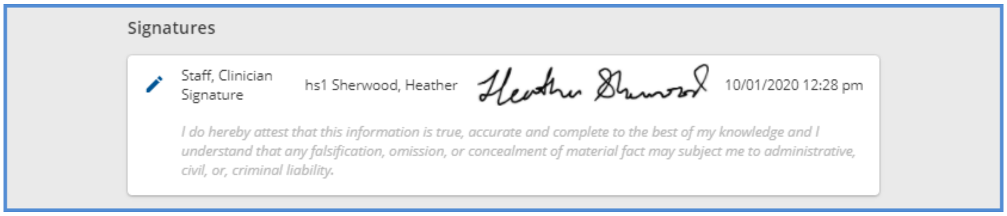
When a user is a member of a User Group that requires an attestation, they will no longer have the option to sign as just Staff but must select the appropriate Staff, Attestation Label pairing. If the user belongs to multiple groups requiring an attestation, a Staff, Attestation Label pairing for each group is listed. Attestations, if used, appear anywhere signatures are captured in EchoVantage. Updates for signatures with Attestations will be available in the client Portal and InForms in a future release.



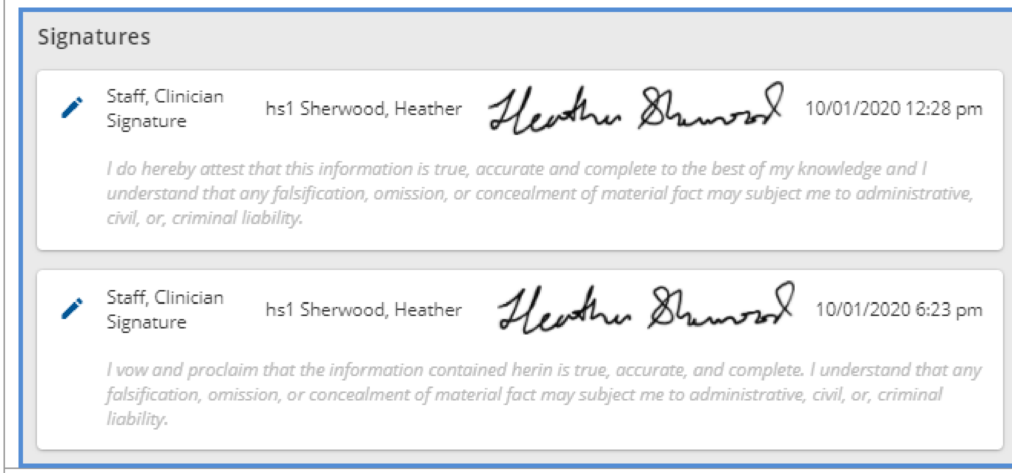
Once the appropriate signature type is selected, the Attestation Language is visible above the signature and PIN input, if applicable.



When viewing a saved signature with an attestation, the full text is visible with the signature.



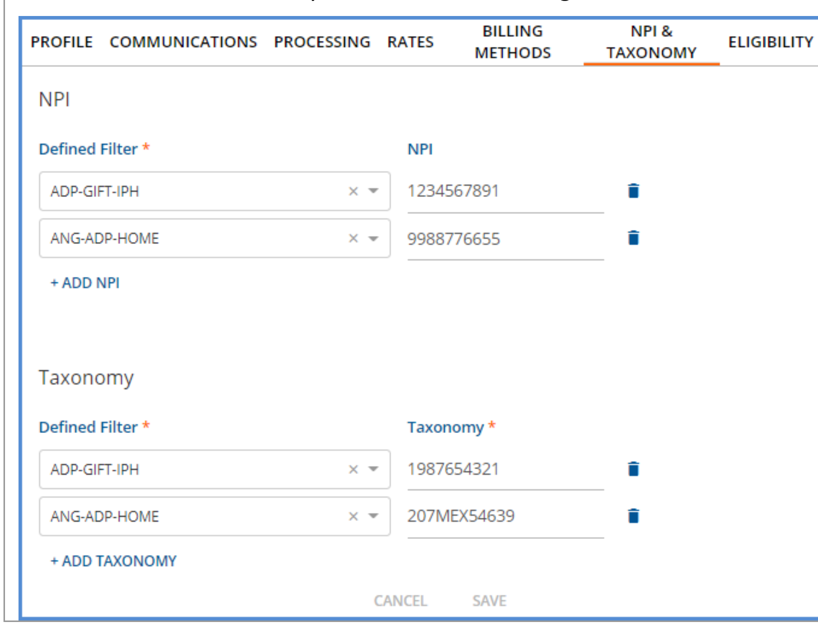
The attestation text is preserved with the signature. Any changes made to the Attestation Language in the User Group configuration will only apply to new signatures.



Payer-Specific NPI & Taxonomy

In *Configuration > Services/Payers > Payers,* there is a new *NPI & Taxonomy* tab for agencies to enter Payer-specific NPI and Taxonomy codes by Defined Filter. When these code mappings are entered on the new Payer tab, the *Report Organization Taxonomy (Loop 2000A, PRV)* checkbox is selected on the 837 Billing Methods Configuration, and the Services billed meet the defined filter criteria:

- The Payer-specific NPI and Taxonomy codes are reported on the 837P, and the Payer-specific NPI is only reported on the 837I.
- If there are no Payer Defined Filter NPI/Taxonomy mappings, the NPI and Taxonomy from the Organization are reported on the 837P, and the Organization NPI is only reported on the 837I.
- If there are no Payer Defined Filter or Organization NPI and Taxonomy codes, nothing is reported in the Loop 2000A.



State Billing Acorns

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

IMPROVEMENTS

Bundled Services Released for Processing

During the Create Charges process, the application now checks for other matching Bundles before processing Services separately that were released because they did not meet the Bundling criteria. Individual Bundled Service Definitions configured to *Put On Hold* when the Bundle criteria are not met are still held during processing and then returned to *Ready* status after job Finalization to be picked up in a future bundling job.

Create Charges Job Finalization

In *Fiscal Overview > Unprocessed Services > History* large *Create Charges* jobs now complete without errors. Users can navigate away from the History screen to work in other parts of the application while the Finalize process completes in the background.

Reprocessing Job Finalization

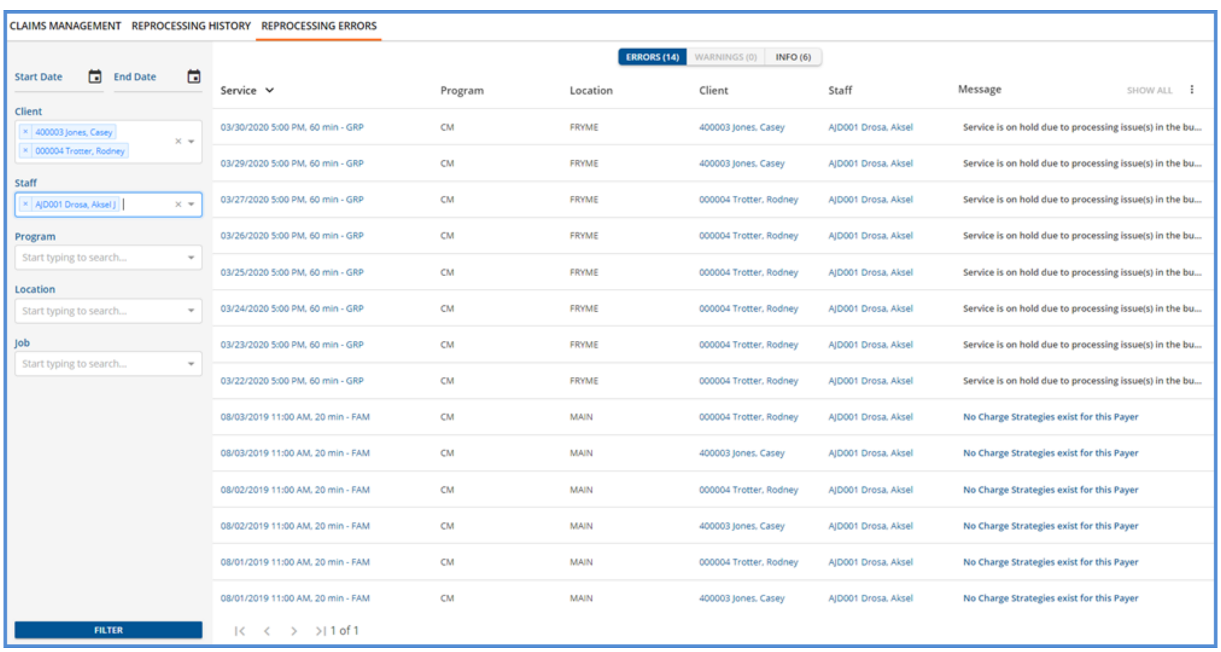
Performance improvements were made to the Reprocessing job Finalization process to handle large, 3000+ records, reprocessing jobs. After clicking OK in the confirmation box to start the Finalize process, users can work in other parts of the application while the reprocessing job completes in the background.

Remittances Bulk Operations

Remittances improvements continue with the *Mark as Ready* bulk operation. Now the bulk Mark as Ready operation allows more than two thousand Remittances to be marked Ready at one time.

Claims Errors Screen

The Claims Errors screen, newly titled *Reprocessing Errors,* now has the same look and similar functionality as the *Vantage Point > Fiscal Overview > Unprocessed Services > Errors* screen. The *Reprocessing Errors* screen specifically shows errors created during reprocessing jobs, and only reprocessing jobs are available to select from the jobs drop-down. Just like the Unprocessed Services Errors screen, users may filter the errors by Date range, Client, Staff, Program, Location, and Error type, and there are links to the Service, Client, and Staff on each error row.



Diagnosis Types

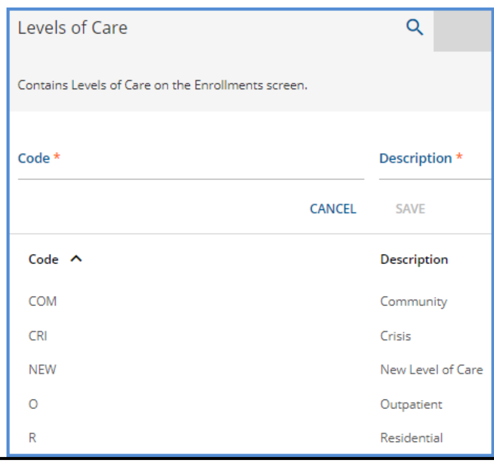
The values for the Type drop-down listing in the *Clients > Diagnosis > Add* screen are now stored in the database in the new dbo.DiagnosisTypes table. This new table allows an agency to script in any custom Types needed.

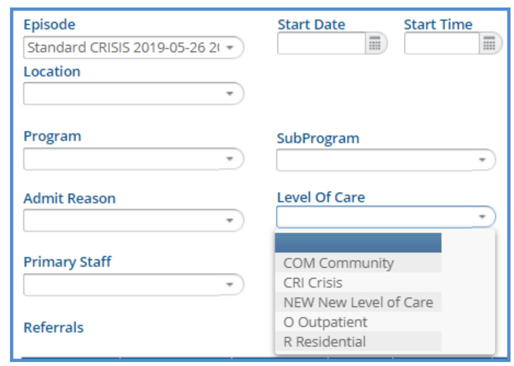
Staff.AppUser Constraint

A unique constraint was added to the AppUser column in dbo.Staff to prevent the same AppUser ID from being assigned to multiple Staff records. The application prevents adding a new Staff with an existing Username and prevents assigning an existing Username to existing Staff. This change adds this same protection to the database level.

Levels of Care Defined List

The *Client > Enrollment* screen Levels of Care drop-down options now pull from a Defined List in *Configuration > Setup > Defined Lists > Levels of Care.* This change allows agencies to customize the Level of Care codes and descriptions used when entering Client Enrollments.





REPORTS

Updated and New Reports

The following Reports have been updated:

Billing Reports

_GL Audit Report – The GL Audit Report now accurately reflects the client payment information contained in the GL Posting job without duplicating reprocessed payment.

_837 Audit Reports – Updated queries to ensure that duplicate data is not reported if charges were previously billed but later reversed or if the client is marked confidential and has an alias.

_837IAudit – Same as 837 Audit report.

_SelfPayStatement – Removed white space after the last field to prevent additional pages from creating when saved as a PDF.

_SelfPayStatementSubReport – Same as _SelfPayStatement report.

Client Reports

Treatment Plan – Updated report to display Staff Title and Attestation with signatures.

Progress Note Basic – Updated report to display Staff Title and Attestation with signatures.

The following new Reports have been added:

Client

_Signatures – This new sub-report fetches the Staff Title and Attestations for the Progress Note Basic report.

UPDATES

Ticket #	Description
10542	Supplemental User "Reset Password" column no longer disappears in smaller screens.
10573	In Unapplied Payments, partial reversals are now applied to the charge, and the charge is left open. In the case of a zero payment, the charge is closed. Previously an error would persist because the reversal and payment amounts did not match, leaving the payment unapplied.
10608	Update front-end trees to use the latest version of the nginx Alpine container
10675	Staff Title is only displayed in reports when *Configuration > Staff/Users > Staff > Employment* Title field has data and Include in Signature field is set to Yes.
10729	Allow for connection pool to be changed during runtime in all trees
10760	Updated all places that displayed a form name to use the Form Caption.
10767	Renamed the "DEVICE" form location to "INFORMS."
10795	Updated the Self Pay Statement report so that spaces are not added on subsequent pages when the report is saved as a PDF.
10814	Reviewed the required field asterisk and updated it to orange color if blue.
11043	Investigated Sycamore connection pool issues.

BUG FIXES

Ticket #	Case #	Description
9741		Mend interface now respects the start and end dates on contact info.
9742		When a Client phone number's priority assignment changes, Mend is now updated with the new phone number.
10505		A validation was added to the *Payers > Rates* screen to prevent the ability to override a Service Definition that does not have a billing code.
10508	74287	Long component codes now display without being cut-off in *Configuration > Services/Payers > Components.*
10713		Add-on billing error messages now link correctly to the Client and Service that triggered the error.
10722		Effective Dates are now observed when validating Credentialed Rates.
10822		Updated the Charge Strategy matcher used during Charge Creation and included a check for the $0.00 total to prevent a divide by zero error when Finalizing.
10910		GL Report no longer duplicates reprocessed payments.
10918		Fixed an issue where Oak tried to add a duplicate modifier to a charge when processing Services with an Acorn that customizes charge modifiers.
11054		Fixed an issue where Client Diagnosis did not auto-populate in service entry.
11075		271 import that is missing DMG segment(s) no longer throws a Null Pointer Exception error.
11079		GL Report is now reflects all Client Payments that were included in the GL Posting job.