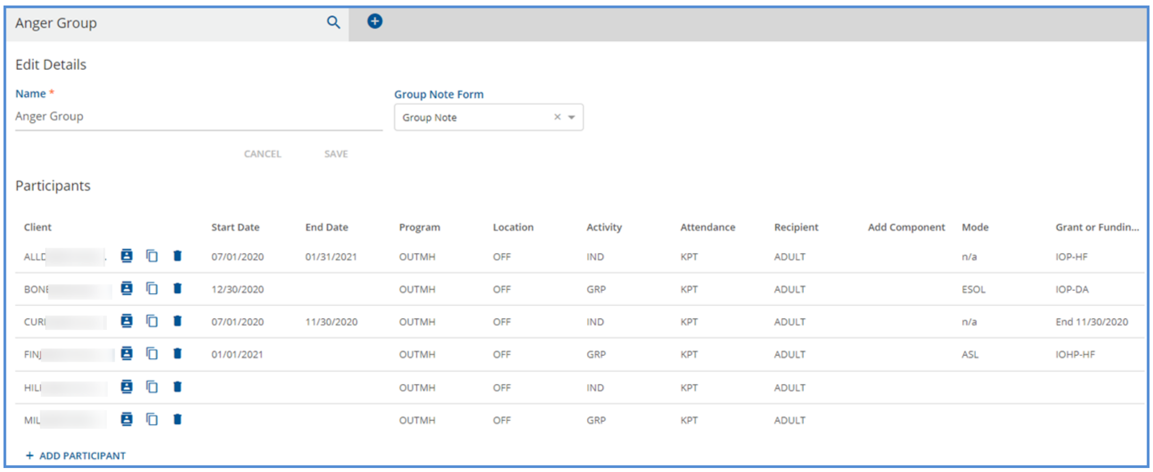
ECHOVANTAGE RELEASE NOTES

VERSION 3.20

NEW FEATURES

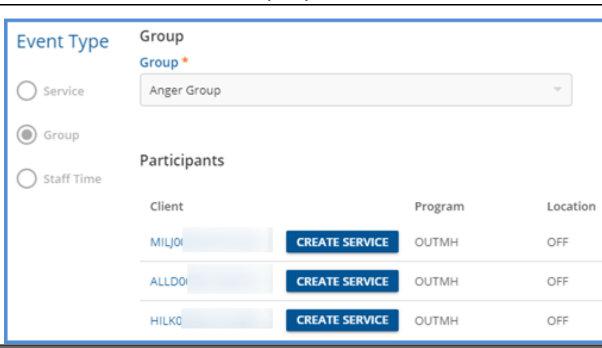
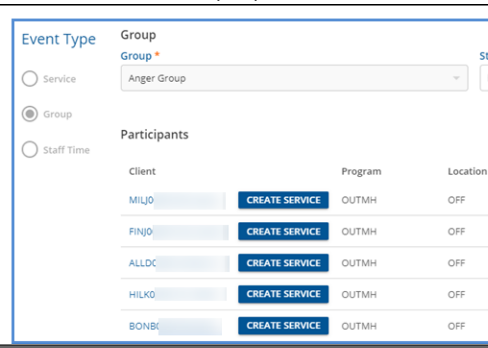
Introducing Groups

The Groups main menu item replaces Event Templates* and ushers in the first phase of changes targeted at providing a more fluid and flexible tool for group management. Groups is in the main navigation menu just below Clients, a far more convenient location for the users most likely to maintain and manage a group. Groups retains the existing features of Event Templates (Name, Note, Participants, and PLAAR), adds the ability to enter Start and End Dates for each participant, and gives access to the additional component codes.

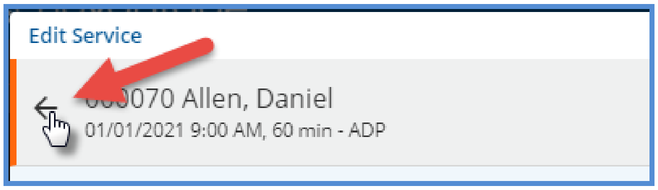


- All existing participants have null Start and End Dates.
- Adding a participant to a group with the Start Date populated adds the Client to existing scheduled future Events without affecting the prior Group Event history.
- Entering an End Date removes the Client from any scheduled future Events and leaves the historical Group Event participation intact and accurate.
- If a participant is added to a group without Start and End Dates, that Client is added to any historical and future Events, just as it did previously in Event Templates.
- A participant may be added to the Group multiple times as long as the date ranges do not overlap.
- Click on the Client's name to edit any portion of an existing Participant's record.

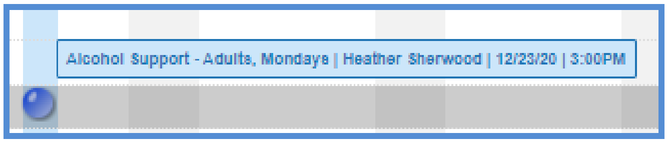
On the Scheduler, the Template Event Type is updated to Groups. When creating a new Group Event, the Service date includes or excludes participants based on the Start and End Dates for that Client on the Group Details screen. Once a Group Event is created and saved, the Group selected cannot be changed. A Group Event created in error must be deleted and a new Event for the correct Group should be created. If an Event is scheduled for the Group in the screen capture above on 12/29/2020, only three participants are included. Scheduling an Event for that same Group on 01/01/2021 shows five Participants.

12/29/2020	01/01/2021
	

When working in any Service created from a Group Event, there is now an icon that makes it easy to return to the Group Event.



The Template Event category name was updated to Group Events. The category depiction label was also updated to display the full text of Group Event-specific information: Group Name, Staff, Date of Event, and Time of Event. Hovering over the Group Event icon on the VHR Timeline displays the label information.

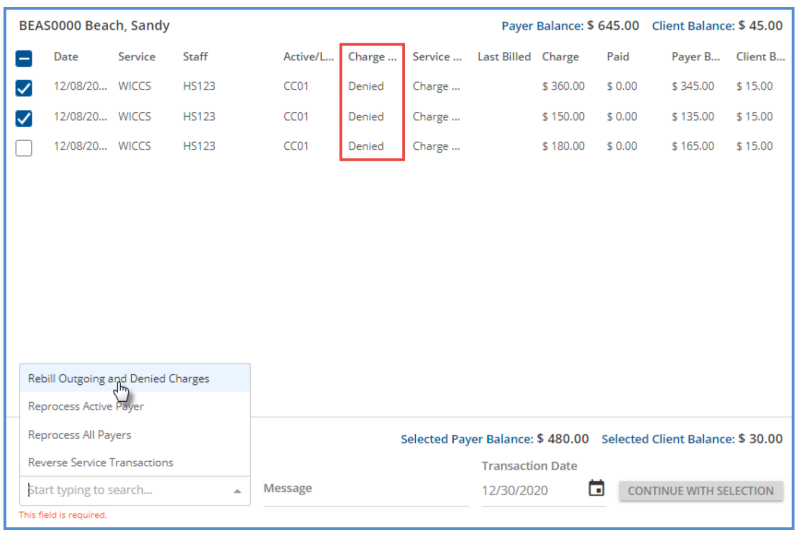


*A significant schema change occurred as part of renaming Event Templates to Groups. Event Template nomenclature was converted to Groups everywhere in the database; the affected tables are listed below. These changes necessitated updates to many existing items (Reports, Forms, Stored Procedures, Functions, Triggers, and Views) to point to the new schema. A script is included with this release to update these items automatically. After upgrading, agencies should verify any custom Reports, Forms, Views etc to ensure that the schema changes updated appropriately.

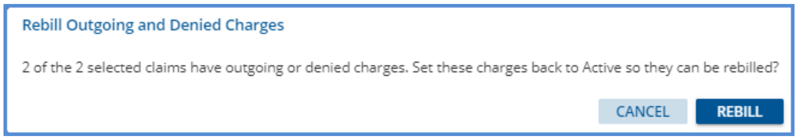
- **EventTemplates to ClientGroups**
- **EventTemplateClients to ClientGroupMembers**
- **EventTemplateClientComponentCodes to ClientGroupMemberComponentCodes**
- **EventTemplateNotes to ClientGroupNotes**

Denials

A *Denied* transaction definition and charge status were added to allow billing users more flexibility and control when working with Denials. When importing an 835, the Remittance transaction type is set to *Denied* if the *CLP02* segment has a value of *4.* When the *Waterfall to next payer (previously Proceed to next payer)* checkbox is not selected and a job is created to post these Remittances, the status of the charges associated with the Denied Remittances is updated to Denied. The *Unpaid Balances total* on the Fiscal Overview page is also updated to include Denied Charges.



Charges with a *Denied* charge status are not included in billing jobs. However, including the denied charge in a *Rebill Outgoing and Denied Charges* job in Claims sets the charge status back to Active for inclusion in a future *Create Bills* job.

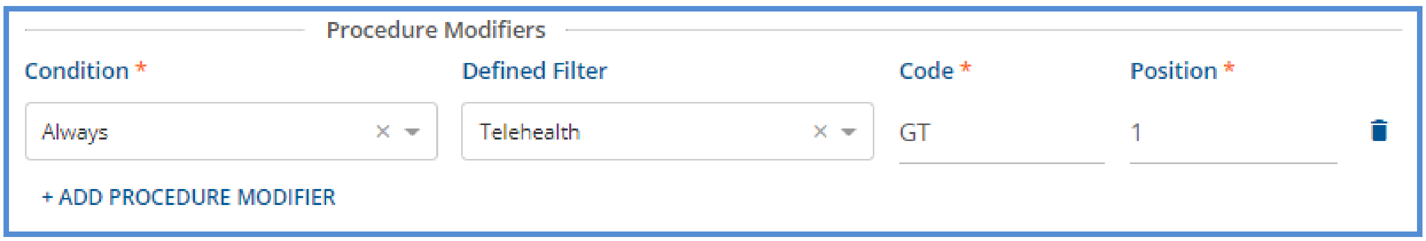


Additional Defined Filters

Defined filters were added to enable users to conditionally 1) apply Procedure Modifiers and 2) to Report Staff/Staff Taxonomy on the 837P/I.

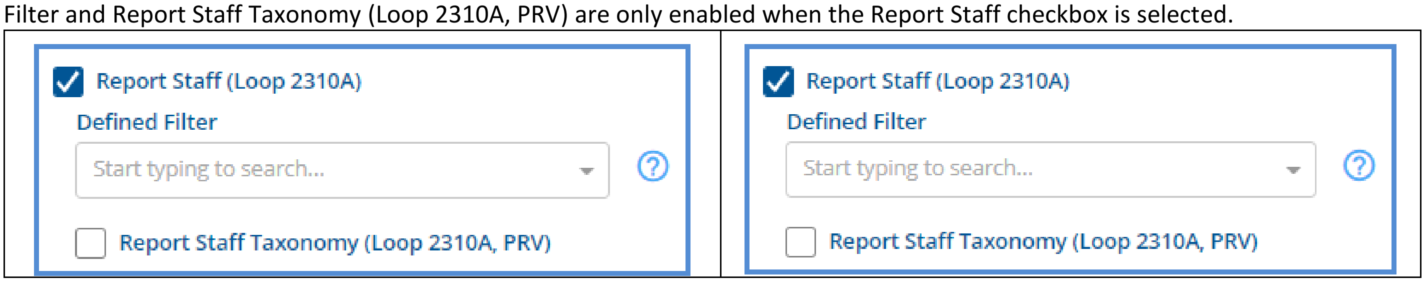
Procedure Modifiers

The Procedure Modifiers may be configured on both the *Payer > Rates* and the *Service Definition > Rates* screens in *Configuration > Staff/Users.* When a Defined Filter is configured for a specified Procedure Modifier, that Modifier is only applied if the Service matches the Defined Filter.



Staff Reporting on 837P/I

To accommodate the new Defined Filter configuration, the Claims and Services section of the 837P/I, in *Configuration > Services/Payers > Payers > Billing Methods,* was reorganized. Defined Filter is beneath the Report Staff (Loop 2310A) option. The Report Staff Taxonomy (Loop 2310A, PRV) was moved up and now is located just beneath the new Defined Filter. Both Defined Filter and Report Staff Taxonomy (Loop 2310A, PRV) are only enabled when the Report Staff checkbox is selected.



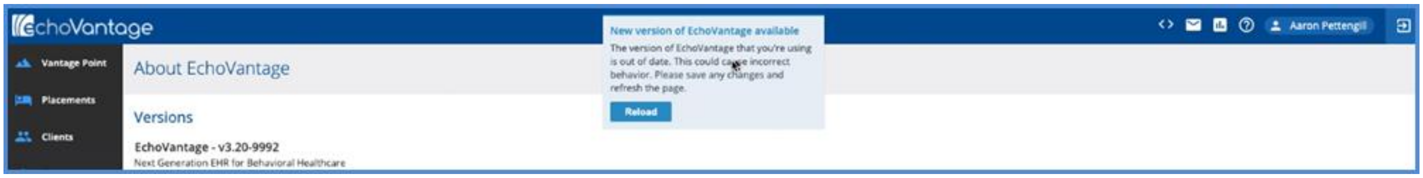
Multiple Defined Filters can be selected. If the Report Staff (Loop 2310A) checkbox is deselected, any configured Defined Filters are cleared. **When the Report Staff (Loop 2310A) checkbox is selected and:**

- The Defined Filter box is empty; Staff are reported for all Services (current behavior).
- The Defined Filter box is Empty, **AND** Report Staff Taxonomy (Loop 2310A, PRV) is checked, Staff and the Staff Taxonomy are reported for all Services (current behavior).
- A Defined Filter is selected, then a Staff is only reported if the Service matches the Defined Filter.
- Report Staff Taxonomy is checked, **AND** a Defined Filter is selected, then Staff Taxonomy is only reported if the Service matches the Defined Filter.

IMPROVEMENTS

Automatic Refresh Notification

If a newer version of EchoVantage becomes available while a user is logged in, a toast message appears to inform the user of the new version, and that incorrect behavior could occur. Users are directed to save any work before refreshing the page. The initial message has a blue background that changes to yellow and then red as time lapses without a page refresh.



Improved GL Job Performance

Work continues in the Fiscal Overview functions to improve processing performance. With this release, the speed of GL Posting jobs is improved by approximately 30%, with further improvements expected in future releases. Users also should no longer see endpoint timeouts and strange errors when starting large GL jobs.

Importing Payments Against *DONE* Charges

When importing an 835 and some payments or adjustments match Charges with *Done* Status, the Remittances created for the payments or adjustments are now created with *Not Ready* status. This change allows users to easily review these Remittances before creating Unapplied Payments using the *Status* filter on the Remittances home screen. The previous behavior created Remittances with a *Ready* status when the payment or adjustment match a *Done* Charge.

Staff Profile, Third Party Configuration

Changes were made to the Third Party information stored in the database to prevent potential issues when accessing their sites. In *Configuration > Staff/Users > Staff > Profile* screen, any trailing or leading whitespace is stripped from the DrFirst ID field, and all letters are changed to lowercase *ON SAVE.* Similarly, leading and trailing spaces are also stripped *ON SAVE* for the values, often provided by Echo, in the *Configuration > Setup > Third Party Integration* pages. The affected fields include Username, Password, Service Account, Service Password, Facility ID, Vendor Name, Vendor Password, and Secret Key.

Multiple SSRS Report Links

Users can now add multiple SSRS report or URL links to a Form DesignEHR form with data elements included via token replacement. The new links build on the existing *ssrsURL* and *reportLink* link pairs by adding a suffix, *ssrsURL_(suffix)* and *reportLink_(suffix).* These new links must be matching pairs and are case-sensitive, for example, *ssrsURL_1* and *reportLink_1* or *ssrsUrl_medDetails* and *reportLink_medDetails.* There is also a new Form *Events* method, *jdesilibcore.Application.buildSsrsUrls* (now plural), which allows both the original links and the new links. More detailed information on Adding Multiple SSRS Report Links is available in the Echo Online Help.

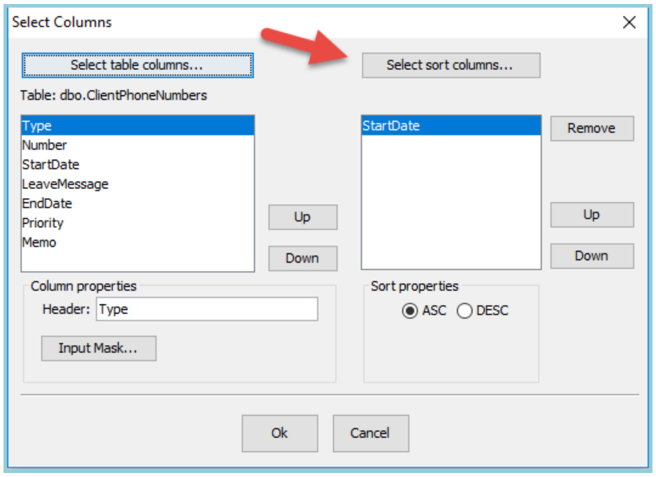
Dynamic Form Changes

Reopening a Popup-From-Field-Value Form

In Form DesignEHR, a pop-up form can be set to auto-open when a field is a particular value, and the user either *Saves* the parent form or *Tabs* away from the field. An issue arose where the popup-from-field-value form could not be reopened unless the form was changed and saved because the parent form was in *View* mode and no longer in *Add or Edit* mode. Now, the popup-from-field-value form can be reopened without changing the form by tabbing out of the field or on *Save,* provided the pop-up field contains the correct value.

FD Grid *Select sort columns…*

In some instances, grid records were not displayed in the proper sort order per the field selected in the *Select sort columns…* setting defined in the grid's Table Columns Properties. An example was the Phone Numbers grid on the Client Communication form. Now, this grid is always sorted based on the field selected in the *Select sort columns…* section.



835 Import, Charge ID

The 835 Import process was updated to pull the Charge ID from the CLP01 segment when a Payer does not return an REF segment. If the CLP01 segment matches a charge's *id837* value, the payment is matched to that charge on the Remittance screen.

State Acorns

The following Acorns were updated:

- BHOLD RI State Reporting, 1.0.66.RELEASE
- WI PPS State Reporting, 1.0.184.RELEASE

Click HERE for the Acorn Release Notes page of the Echo Online Help site.

REPORTS

Updated and New Reports

The following Reports were updated:

Administration

Schedule Report – Updated to reflect the rename of Event Templates to Groups.

Billing Reports

_GL Audit Report – The margins were updated to prevent the GL Audit Report from printing a blank page.

_837 & *837I* – Updates were made to both 837 reports to include Procedure Modifiers when these exist in the 837 billing file.

Client Reports

_Signatures – The Signatures subreport was updated to fetch the SignerName from the dbo.Signatures table rather than from dbo.Staff. This change allows the reports that provide signature information to accurately reflect the Signer's name as of the signing date.

Fiscal Reports

AR Status Report for Export – Updated to exclude charges that are denied.

Cash Receipts Journal – Updated to include an *Entered By* column that shows the name of the staff member who entered the payment and removed adjustments so these no longer show in this report.

_*Cash Receipts Journal for Export* – This is the CSV friendly report accessed within the *Cash Receipts Journal,* updated as referenced above.

Claims Report – Updated to exclude charges that are denied.

_*Claims report for Export* – This is the CSV friendly report accessed within the *Claims Report,* updated as referenced above.

Historical Aging – Updated the totals to include all charges, payments, and adjustments, including unposted GL transactions, and to exclude denied charges.

_*Historical Aging for Export* – This is the CSV friendly report accessed within the *Historical Aging* report, updated as referenced above.

The following new Report was added:

Client Reports

Group Note – This report **replaces** the *Event Template Note* report and uses the new Group Events schema to produce Group Notes' listing for the user entered date range.

⚠ **The *Event Template Note* report currently in the Client Reports folder should be removed. It is replaced by the *Group Note* report referenced above.**

UPDATES

Ticket #	Case #	Description
9358	71490	Removed 50 pixels of added white space previously added between the bottom of the form and the navigation bar (New, Delete, Save, Cancel) when rendering a form.
11249		When viewing an alert with a long description, the full text now displays when hovering the cursor over the description. Previously, if the alert was long, it was truncated and did not display fully in the title attribute.
11251		A styling update was applied to the Waitlist cards to keep them in line with the rest of the application's card style.
11376		On the Claims Management screen, the Status filter is now Charge Status.
11445	76084	FD Improvement, there is now a way to reopen a popup-from-field-value popup without changing the form.
11469		On the CMS1500 billing report, the credentials now display in the priority order specified on the Configuration > Staff/Users > Staff > Credentials page. Previously, credentials were being reported in alphabetical order. This change occurred in oak rather than in the report itself.

BUG FIXES

Ticket #	Case #	Description
10511		Resolved an issue where the sycamore version was not always correctly stamped in the database. Now the sycamore version is always up-to-date.
10711		The Client Search in the Clients main menu option now finds Clients with hyphenated names, even if the full name is typed out exactly.

11325	75771	Resolved an error that prevented GL Posting Errors from displaying on the Errors tab. Now the errors display as expected in *Fiscal Overview > Unposted GL Transactions > Errors.*
11342		Fixed an error in the Client Fee and CoPay sections of Self Pay Payers that did not allow a zero percentage or copay amount. Now when adding or editing a Client Fee or CoPay, a zero "0" percentage or dollar amount can be entered.
11343		Corrected the query so that the *Client > Account* balance amount displays the correct amount even when there are expected, or fee adjustments for Self Pay claims.
11384		Insufficient Authorizations now throws a Warning and an Error during Charge creation (in *Fiscal Overview > Unprocessed Services)* when the *Place Charge on* Hold option is selected in the *Clients > Payers > When no authorizations are found* section. Previously, Insufficient Authorizations would only throw a warning, still allowing the charge to finalize.
11425		Resolved an issue in Form DeisgnEHR where clicking on the date picker would lose the previously entered field value on save. Clicking in another field (blurring the previous field) before selecting the date picker mitigated the problem. Now all data saves, even if the data entered in the prior field is not blurred before the date picker button is selected.
11430		Updates were made to dynamic-form to prevent line breaks preventing FD Hint text from displaying in forms.
11457		In the Clients menu Client Search, a backslash at the end of the search term now no longer produces a Fatal Error.
11467		Fixed an issue that allowed a progress note to be edited in the inbox. Now it is not possible to edit any forms, including progress notes, in the inbox. ****Note – At this time, if any form sent to the inbox contains a pop-up, those pop-up forms are still editable.**
11482		Fixed an issue where a reprocessed transaction was still assigned the original transaction date while Reversals were assigned the Transaction Date used for reprocessing. This caused revenue to be doubled when reprocessing happened in a subsequent month before the previous month's GL Transactions were posted. Now the Reversal and the subsequently reprocessed Charge both use the reprocessing transaction date.
11493		The Procedure & Staff Modifiers sections are now disabled in *Configuration > Services/Payers > Payers > Rates* when the Service Definition's Default Rate is used.
11503, 11666	76258	An error was reported with linking forms in Form DesignEHR. Found that some data containers were renamed, and the currentFormLinkFieldContainer was still pointing to the old container name. Resaving the tabs corrected the issue. To prevent this from occurring in the future, changes were made so that the following references also update when a data container is renamed: • ParentContainer object property • currentFormLinkFieldContainer on popupFromFieldValue properties • Form Link From Key Field
11515		Fixed an issue where the header icons, lock and progress note, were missing when the Scheduler was used in Compare view, and two columns had the same event. Events now display as expected.
11524		Fixed an issue in Form DesignEHR where the Client was not correctly passed to a new record if an existing grid record was highlighted before selecting the green "+" plus. Now the new pop-up form has the correct Client in focus when added from a grid, even if a grid record was previously selected.
11582		**Expected Adjustments are not being populated with Transaction Dates for Self-Pay Payers only. Once the upgrade is complete, additional GL entries will be pushed over for previously expected adjustments that did not have a transaction date.**
11630		Updated the minimum length of the Payer Priority field in *Client > Payers* to keep it from disappearing when using a smaller screen (i.e., table or iPad) to access the tab.

11672		Fixed an issue where the 835 import failed with a Null Pointer Exception error when service level detail was NOT included but Remark Codes needed to be added. Now the 835 import also checks the claim-level detail.
11690		Fixed a Timeline Date field error that showed "Required field [Date] cannot be blank" when entering a date. Now, this error does not show unless the required date is not entered.