



ECHOVANTAGE RELEASE NOTES

VERSION 3.21 – HOTFIX 1

OVERVIEW

This hotfix release addresses an issue related to Waterfalling Contractual Adjustments. When a Primary Payer’s Contractual Adjustment waterfalled to the next Payer or Payers, the subsequent Payer’s expected or contractual adjustment was still considered. In some cases, including the subsequent Payer’s expected/contractual adjustment resulted in a charge less than or equal to zero, so the Payer was skipped. In the example below, Payer MEDB should have the \$10.00 charge, not SELF.

Claim Details

Alten, Erica J (000019)

Birth Date: 03/14/1963
SSN: 323-46-5654
Address: 182 Lakeview Circle, Sandwich, NH 03227

Psychotherapy 30 Minutes 90832 01/13/2021

BCBSNH	NH21354654	30
MEDB	HN156464	40
SELF		99

BCBSNH

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
01/13/2021	\$ 75.00	CHARGE CREATED		1216545464 1 UNITS	DONE	90832	269.11
01/13/2021	\$ 40.00	PAYER PAYMENT					
01/13/2021	\$ 10.00	BALANCE ZEROING CREDIT					
01/13/2021	\$ 25.00	CONTRACT ADJ					
Total Balance:	\$ 0.00						

SELF

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
01/13/2021	\$ 10.00	CHARGE CREATED			ACTIVE	90832	
Balance:	\$ 10.00						
Total Balance:	\$ 10.00						

To address the issue, now when a Primary Payer has a contracted rate with the Contractual Adjustments set to waterfall to the next Payer, all subsequent Payers Expected/Contractual Adjustments are ignored. The “Contractual Adjustments Waterfall to the Next Payer(s)” checkbox in *Configuration > Services/Payers > Payers > Processing* determines if Contractual Adjustments waterfall. Reprocessing the Service above now results in the \$10.00 charge to MEDB.

Claim Details

Alten, Erica J (000019)

Birth Date: 03/14/1963
SSN: 323-46-5654
Address: 182 Lakeview Circle, Sandwich, NH 03222

Psychotherapy 30 Minutes 90832 01/13/2021

Name	Policy Number	Priority	Notes
BCBSNH	NH21354654	30	
MEDB	HN156464	40	
SELF		99	

BCBSNH

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
01/13/2021	\$ 75.00	CHARGE CREATED	03/02/2021		DONE	90832	F32.9
01/13/2021	\$ 40.00	PAYER PAYMENT					
01/13/2021	\$ 25.00	CONTRACT ADJ					
01/13/2021	\$ 10.00	BALANCE ZEROING CREDIT					
Total Balance:	\$ 0.00						

MEDB

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
01/13/2021	\$ 75.00	CHARGE CREATED			PRECHARGE	90832	F32.9
01/13/2021	\$ 40.00	PAID BY OTHER					
01/13/2021	\$ 25.00	CONTRACT ADJ					
Balance:	\$ 10.00						
Total Balance:	\$ 10.00						

Finding Affected Claims

Under the Fiscal Reports folder, a temporary report called *Waterfall Hotfix Troubleshooting*, was created to help with troubleshooting. This report will be removed in a future release. Please review each result as there are likely to be some false-positives in the report. The next section outlines the steps to correct any affected Claims.



Correcting Affected Claims

Once Claims are identified where a Contractual or Expected adjustment caused a payer to be skipped, Reprocess All Payers for the Claim(s) so that the Charges are correctly created. To do this,

1. Navigate to the Claims Management screen.

The screenshot shows the 'CLAIMS MANAGEMENT' tab with filters for Client (000001 Barnhill, Kelsey), Staff (HS1), and various dates. A table lists claims with columns for Date, Service, Staff, Active/Last Payer, Charge Status, Service Status, Last Billed, Charge, Paid, Payer Balance, and Client Balance. The row for 02/24/2021 is selected. At the bottom, the 'Action' dropdown is set to 'Reprocess All Payers', and a 'Waterfall Correction' message is entered. A 'Transaction Date' of 03/02/2021 is set, and the 'CONTINUE WITH SELECTION' button is highlighted.

- (a) Select the checkbox for each Claim that should be Reprocessed. The use of Filters can help expedite this process.
- (b) Click in the Action drop-down and select the *Reprocess ALL Payers* option.
- (c) Enter a message for the job. The message makes it easy to identify the job on the *Reprocessing History* and the *Reprocessing Errors* tabs.
- (d) Update the Transaction Date if desired; the default is the current date.
- (e) Select the now enabled blue *CONTINUE WITH SELECTION* button.
- (f) A *Reprocess All Payers* confirmation modal displays, select *REPROCESS* to continue.

A modal window titled 'Reprocess All Payers' with a sub-header 'Reverse and recreate charges for the 1 selected service?'. It contains two buttons: 'CANCEL' and 'REPROCESS'.

- Next, navigate to the Claims *Reprocessing History* tab.

The screenshot shows the 'REPROCESSING HISTORY' tab with a table containing one entry: '03/02/2021', 'Reprocess All Payers', 'Preview', 'header.sherwood', 'Waterfall Correction', '1', '0'. A 'FINALIZE' button is visible next to the entry.

- Review and correct any errors. Error details are found on the *Reprocessing Errors* tab.
- (g) When the job is error-free, select *FINALIZE* to complete the *Reprocess All Payers* process.

2. Navigate to Remittances and find the original payment from the first Payer on the Remittances screen. Selecting a Reprocessed in the Status filters helps refine the results.

The screenshot shows the 'Remittances' screen with filters for Client (000001 Barnhill, Kelsey), Payer (NOACORN - No Acorn B37 Payer), and Status (Reprocessed). A table below shows one remittance entry with columns for Status, Payer, Client, Amount, Service Date, Transaction Date, Allowed Amount, Matching Charge, and Messages & Notes.



3. Select the remittance and search for the new Charge that was just created.

000001 Barnhill, Kelsey
02/24/2021 \$ 0.00 NOACORN VIEW CLAIM

Remittance Details

Transaction Type * PAYER PAYMENT Transaction Date * 02/24/2021

Remittance Amount * \$ 0.00 Remittance Date 02/24/2021 RA Number

PCCN Batch ID

Allowed Amount Patient Responsibility Waterfall to next payer

Client & Service

Payer * NOACORN - No Acorn 837 Payer Client 000001 Barnhill, Kelsey Service Date 02/24/2021

Charge 03/02/2021 90866 \$ 0.00 (ACTIVE) Status * Not Ready Messages & Notes

+ SAVE AND ADD ANOTHER DELETE CANCEL SAVE

- The reprocessed Charge has *ACTIVE* status.
- Mark the Remittance as Ready.
- Select *SAVE*.

4. Next, navigate to the Vantage Point and process Remittances.

Unprocessed Remittances > Process Transactions

CREATE HISTORY ERRORS

Payer NOACORN - No Acorn 837 Payer Batch ID Start Date 02/24/2021 End Date SEARCH

Date	Status	Client	Amount	Payer	Charge	Transaction Type	Batch ID
02/24/2021	Ready	000001 Barnhill, Kelsey	0	NOACORN - No Acorn 837 Payer	03/02/2021 90866 \$ 55.00	PAYER PAYMENT	0 Payer Payment

Waterfall Correction

CREATE REMITTANCE JOB WITH RESULTS

5. When the Remittance job is finalized, the corrected Waterfall Create Charges job is in *PREVIEW* Status in the *Unprocessed Services >> Create Charges > History* tab.

Unprocessed Services > Create Charges

CREATE HISTORY ERRORS

Start Date End Date User Status Start typing to search... SEARCH

Date	Status	Created By	Message	Services	Errors
03/02/2021	Preview	heather.shervood	Waterfall: Waterfall Correction	1	0

FINALIZE

- Finalize the Create Charges job.
- Then navigate to the *Unbilled Charges >> Create Bills > Create* tab.



6. Select the now correct waterfall Charge, and create and process bills per your standard workflow.

UPDATES

Ticket #	Description
FW-10798	When generating Self Pay balances, the Primary Payer’s Contractual adjustment is respected if set to Waterfall on the Payers > Processing tab.

BUG FIXES

Ticket #	Case #	Description
FW-11797		Expected Adjustments no longer cause a Payer to be skipped in the waterfall process.
FW-11831		<p>An issue was addressed where no charges were created for Payer(s) with a Contracted/Expected rate of \$0.00. Now the \$0.00 charge is processed, and the Claim Details shows:</p> <ul style="list-style-type: none"> • Charge \$xx.xx • Expected/Contract Adj \$xx.xx • Balance \$0.00