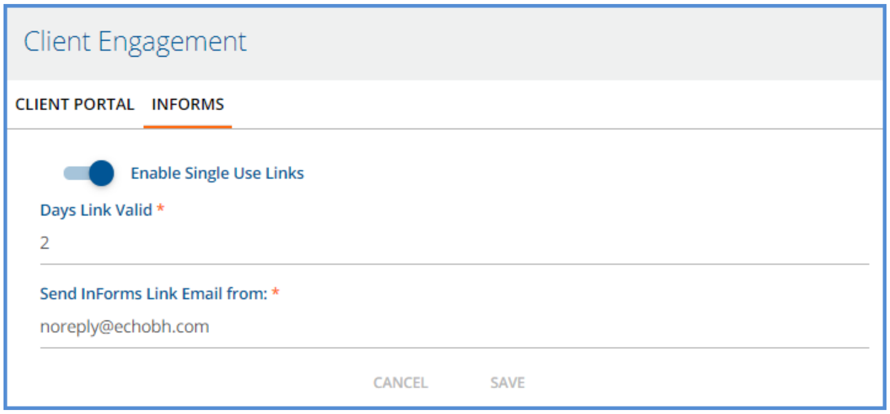
ECHOVANTAGE RELEASE NOTES

VERSION 3.21

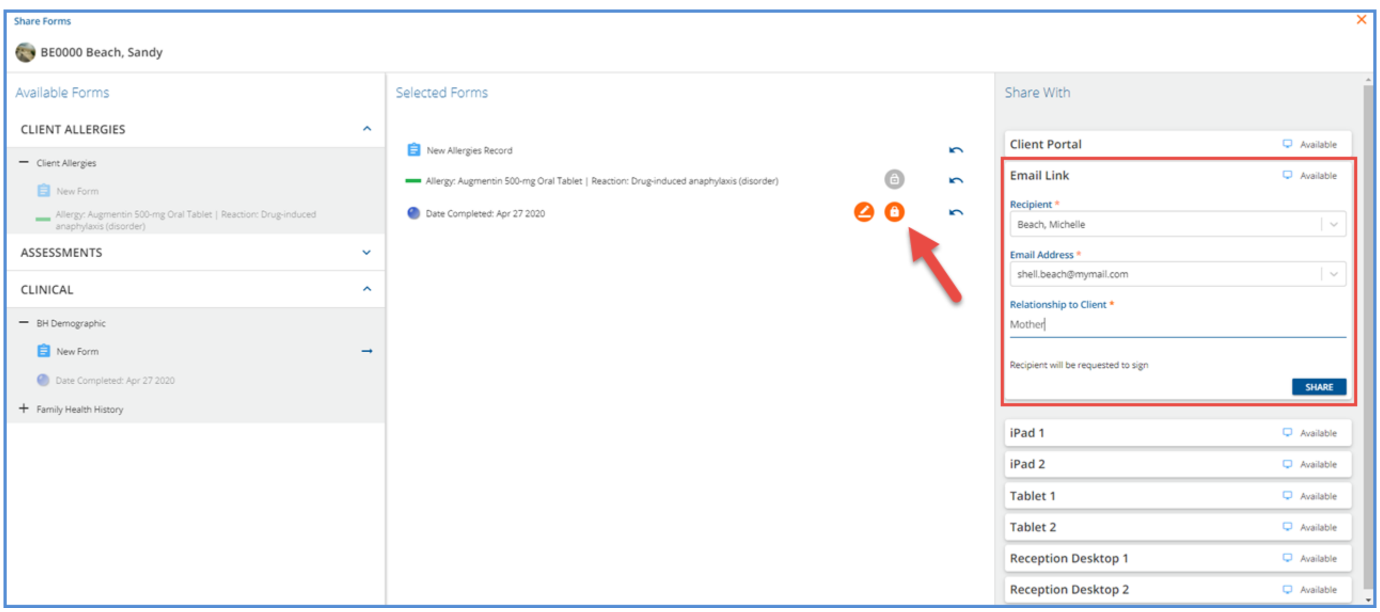
NEW FEATURES

Echo InForms Email Link

The Echo InForms feature now has a new *Email Link* option in the *Share With* column that allows form sharing with Clients or Client contacts via an emailed URL link. Clients or their Contacts must have an active email address to share forms successfully via this link. Administrative users enable this feature in the *Configuration > Setup > Client Engagement > InForms* tab. Agencies determine the number of days until expiration and the sending email address. *Note that Client Engagement in the Setup menu was previously titled Client Portal.*

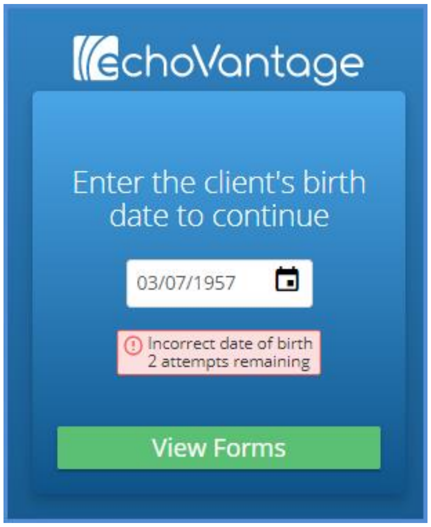


Use the *Share Forms* icon in the Client header to view and select forms for sharing. Note that the *Share With* column has a new *Email Link* option. When *Email Link* is selected, the user must choose the Recipient and the Email Address for the recipient from the drop-down lists. The drop-down list values are pulled from the *Client > Contact Info* tab. The *Relationship to Client* field is required when a signature is requested, and the email recipient is NOT the Client; otherwise, it is not displayed.



Forms selected for sharing are now editable by default. Agency users should select the new lock icon to share a form in read-only mode. The lock icon is not an available selection for *New* versions of a shared form. Like the other icons, the lock turns orange once selected, and clicking again deselects the icon. This change allows the sharing of partially completed forms for the Client or Contact to update and finish via the link or on an agency device, which gives these two *Share With* options the same functionality as forms shared with the Client Portal.

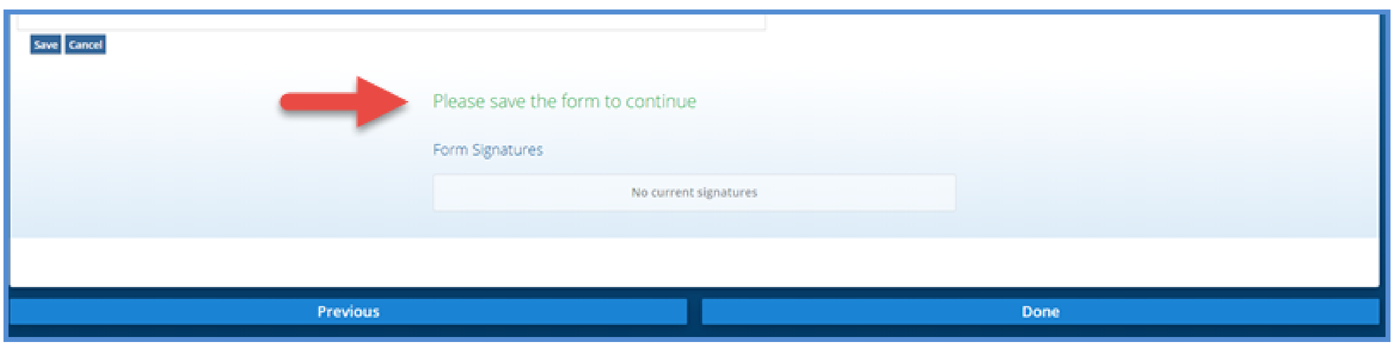
Once the blue *SHARE* button is selected on the *Email Link* option, an email with the URL link is sent to notify the Client or Contact that forms are available. Clients or Contacts have up to three attempts to enter the correct Client date of birth to complete the login verification. The link is valid for the number of days specified in *Client Engagement > InForms* configuration. Clients or Contacts may use the link to login and start forms, then log out and return later to finish, as long as they return before the link expiration date. Attempting to access the forms after the link expires results in a *This link is no longer valid* message.



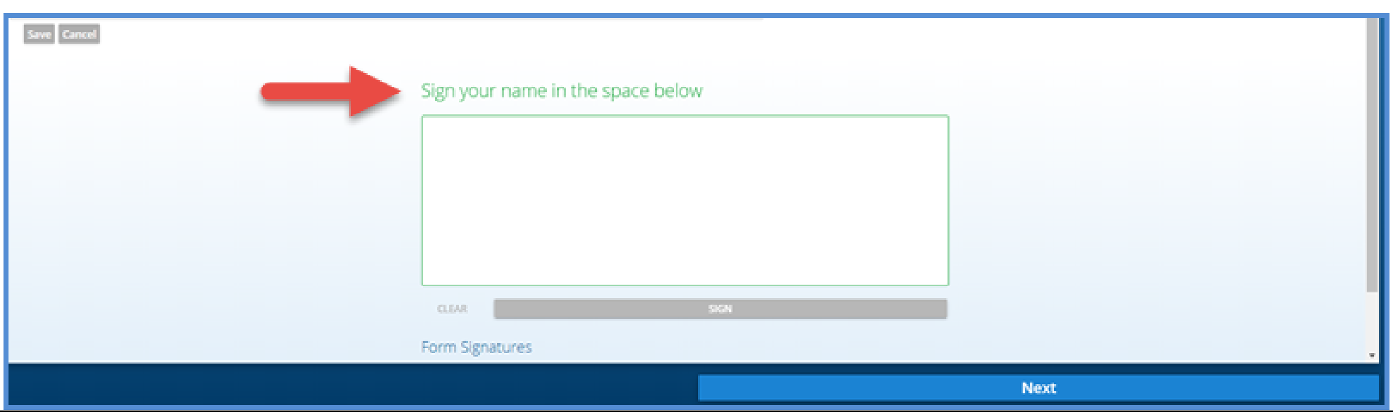
Improvements

Improvements were made to the Echo InForms application to clarify when a signature is required or when forms are complete. The new signature workflow prompts the Client or Contact user through the process.

- After a form is completed or updated, the user is prompted to save the form. Forms shared in read-only mode that require a signature skip this step.

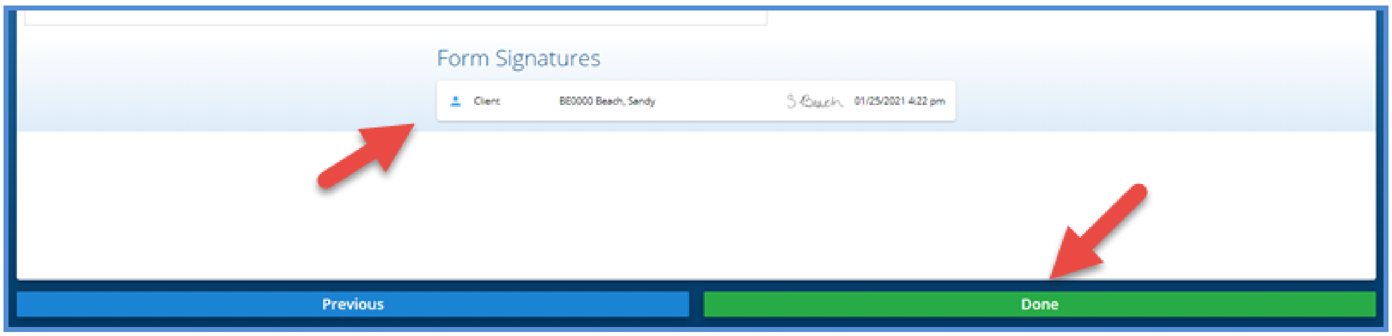


- Once saved, a *Sign your name in the space below* prompt displays in green.

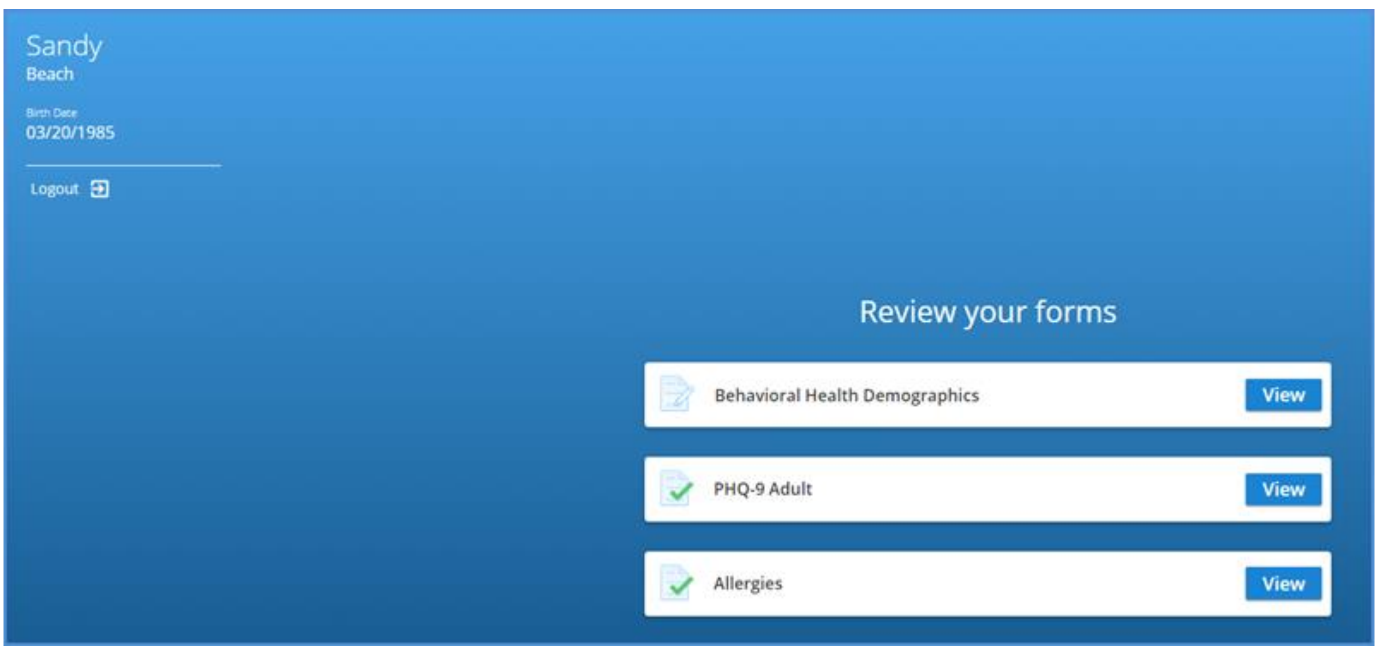


- After signing, the *Sign* button turns green and must be selected to save the signature and continue.

- After the signature is saved, the *Next* or *Done* button turns green. *Done* displays when working on the final form in the list. Select *Next* to continue to the next form or *Done* to review the forms.

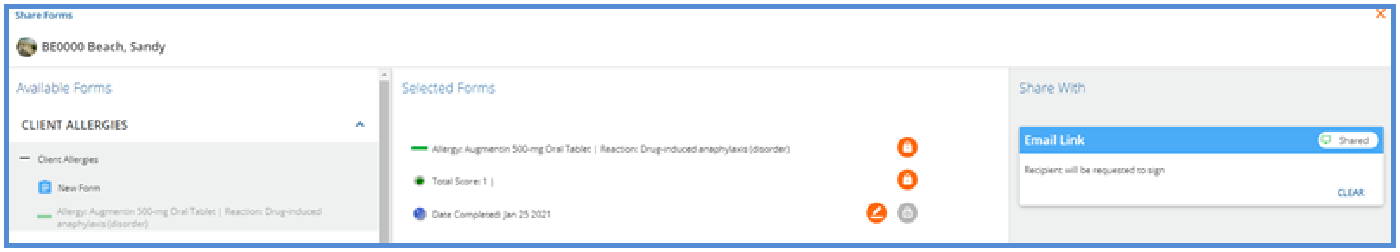


- Forms with a green checkmark are complete. Forms without a green checkmark are not complete—select *View* to access the form again.



⚠ Once a form is signed, it becomes locked and is no longer editable, just as in EchoVantage. Clients and Contacts should be sure that the information is correct and complete before signing.

Indicators were added to the *Share Forms* screen in EchoVantage so that it is easy to tell at-a-glance which forms a Client or Contact has completed. The *Share Forms* screen is similar to the example below when initially shared.



As a Client or Contact completes a form, a green checkmark is added to the Selected Forms column to indicate progress.

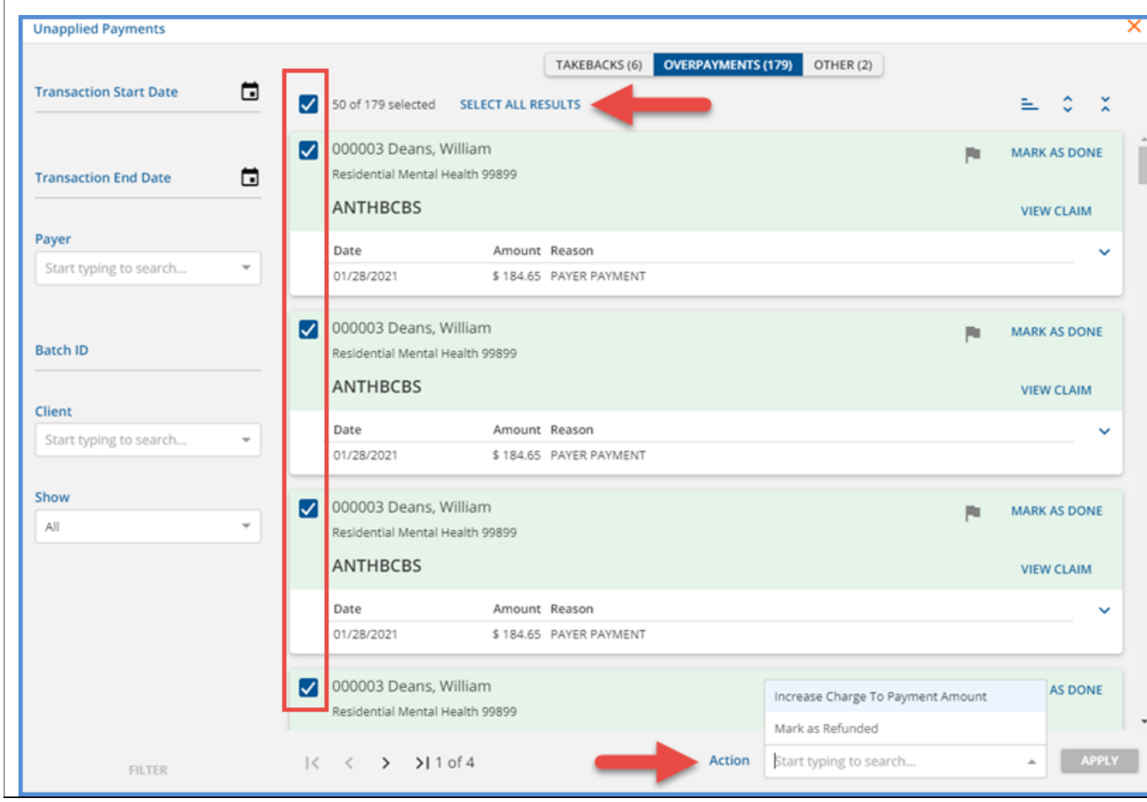
Use the *CLEAR* button to stop sharing the forms and clear the URL link. If a Client or Contact accesses the link after it is cleared, the *This link is no longer valid* message displays.

Refunding Unapplied Payments

Overpayments can now be marked as refunded in *Vantage Point > Fiscal Overview > Unapplied Payments.* When refunded,

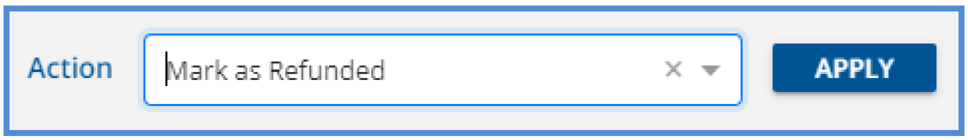
- The Overpayment is cleared from the Unapplied Payments screen
- The Claim Detail for the associated charge shows *Refund* as the reason for the Unapplied Payment
- The refund posts to the GL as a reversal of the Overpayment
- The refunded payment is included in the new Fiscal Report, *Refunds*

Significant changes were made to the Unapplied Payments screen to accommodate Payer refunds.

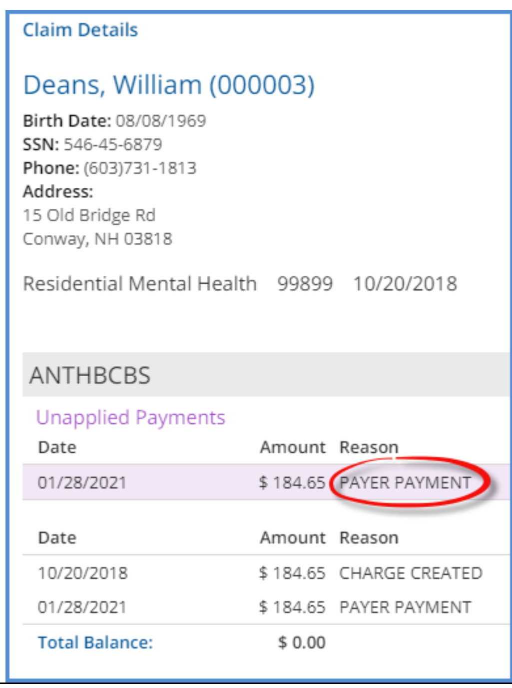


- The *Ready to Apply* column was removed and replaced by checkboxes and an *Action* drop-down list
- The Actions available are specific to the type of Unapplied Payment in focus
    - Takebacks
        - Apply Payment Reversal (Same as previous behavior)
    - Overpayments
        - Increase Charge To Payment Amount (Same as previous behavior)
        - Mark as Refunded
    - Other
        - No Actions available at this time
- The checkboxes allow individual selections across multiple pages to be submitted at the same time, provided they reside in the same tab or type - Takebacks, Overpayments, or Other
    - Checkboxes may be selected or deselected individually
    - All boxes on a page may be marked by selecting the top-most box
    - If multiple pages exist and all boxes on the page are selected, a *SELECT ALL RESULTS* button is available
    - If *SELECT ALL RESULTS* is selected, the *CLEAR SELECTION* button is enabled

Once the desired selections are made and an *Action* is chosen, the *APPLY* button is enabled.



When the *Mark as Refunded* action is applied to an Overpayment, it is cleared from the Overpayments tab of the Unapplied Payments screen. The Unapplied Payments section in the Claim Details is also updated to *Refund* in the Claim Details.



New Form DesignEHR Release

Form DesignEHR version 6.0.28 is available with the release of EchoVantage version 3.21. Click *HERE* for the Form DesignEHR release notes.

IMPROVEMENTS

Improved GL Job Performance

The final pass of GL Job performance improvements is complete with considerable gains in processing speeds. Large posting jobs saw up to a 1200% speed improvement.

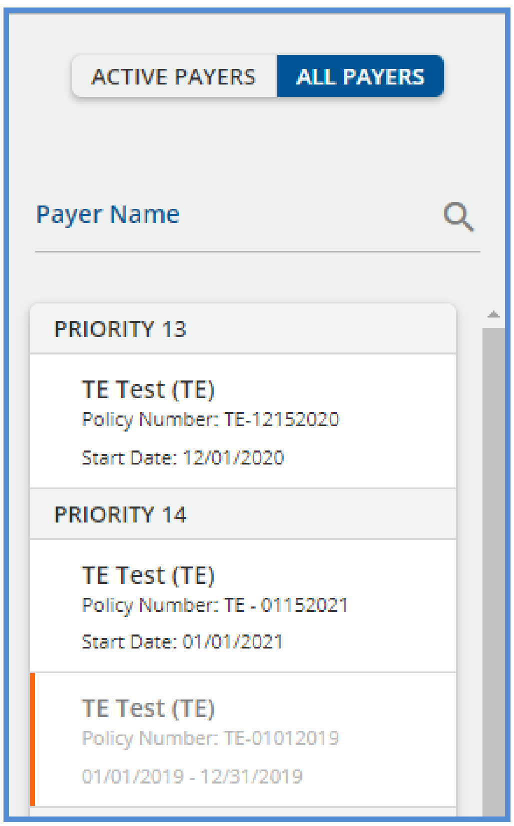
New Group Events Tables

In preparation for future improvements that will allow dynamic Group management from the Events screen, two new tables were introduced for managing Group Event Participants – *GroupEventClients* and *GroupEventClientComponentCodes.* Participants of any existing Group Events are migrated to these tables during the upgrade process, and the application now uses these tables when creating, updating, and deleting Group Events. Updates were also made to core Form DesignEHR forms and Reports that reference a Client participant in a Group Event to pull from these tables.

⚠ ***Any custom forms or reports that reference Group Event Clients need to be updated to pull that information from the new GroupEventClients table.***

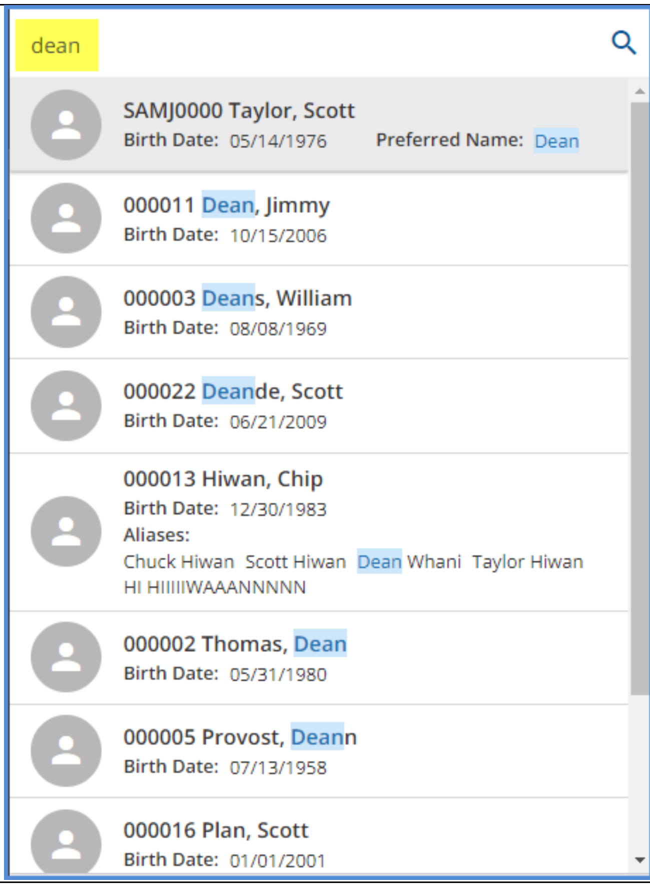
Client Payer Improvements

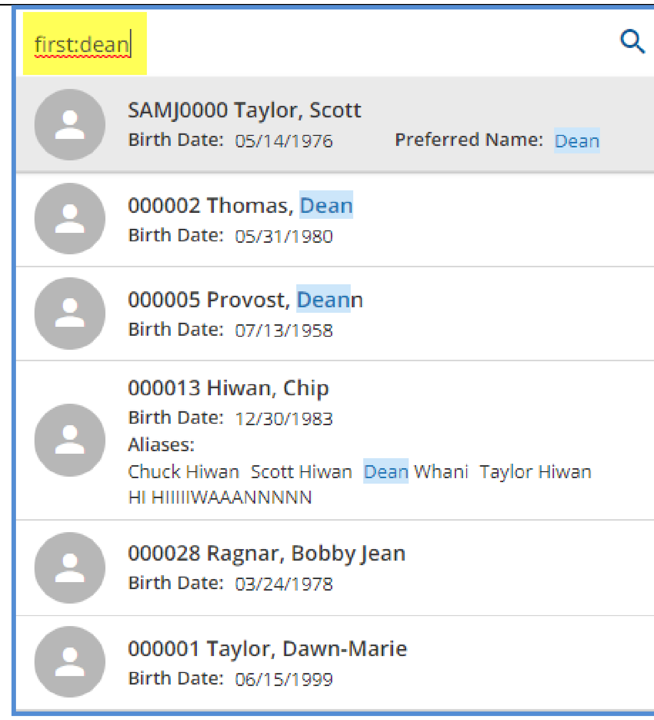
The same Payer can now be entered multiple times for a single Client provided that the Policy Number entered is unique for the Client and Payer combination. Just as before, when adding a new Client Payer, the priority number assigned cannot already be active for this or any other Payer. The Policy Number is now displayed on the cards in the left-hand Payer list.



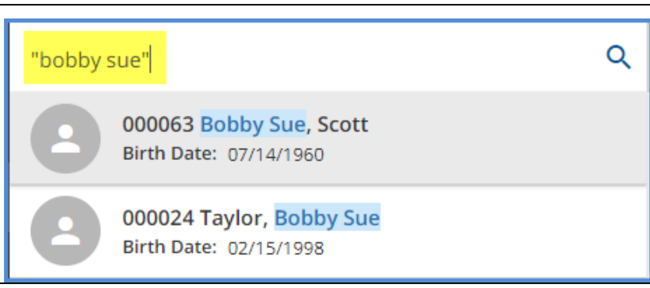
Advanced Client Search

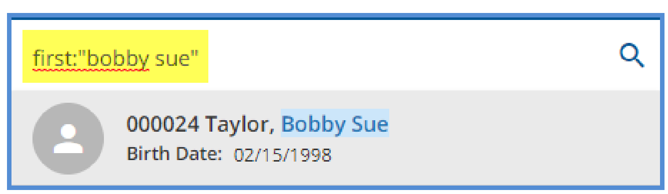
The Search in the Clients menu now allows users to query specific fields using keywords and group search terms together. When using a field-specific keyword search, results must match on the field searched to display, resulting in more targeted results. For example, a standard simple search for *Dean* (no data field specified) returns all matching results, exact or fuzzy, with exact matches highlighted. Using the advanced search syntax, *first:dean* in the example, the search is more specific and returns matches, exact or fuzzy, with *Dean* in the first name, alias first name, or preferred name but no last names. Just like the smart search, exact matches are highlighted.





Search text may be enclosed in quotes to group multiple words for treatment as a single search term, such as a location of "Main Office" or a multi-word name like "Bobby Sue". Combine grouped terms with an advanced search keyword, i.e. first:"Bobby Sue", for more specificity.





Simple search (no keyword used) and advanced search (field-specific keyword used) terms may be combined if desired, i.e.

Jim Jimmy James dob:1998-08-27

Following is the list of search terms, the associated data fields in EV, and examples of each.

Search Term	Data Field Searched in EV	Examples
ssn, social	Clients>Profile>Social Security #	ssn:999999999 or social:999999999
dob,birthday, or birthdate	Clients>Profile>Birth Date	dob:19551013, birthday:10131955, or birthdate: 10/13/1955 ***The date can be entered in any order with or without formatting.***
code or clientCode	Client Code generated when Client was first added to EchoVantage.	code:CANT0000 or clientCode:CANT0000
phone	Client Phone Numbers (Not Contacts)	phone:6034478600 phone:603-447-8600 ***The phone number can be entered with or without formatting.***
location	Clients>Enrollment>Location	location:53
first, firstname	Clients>Profile>First Name or Alias First Name or Preferred Name	first:dean or firstname:taylor
last, lastname	Clients>Profile>Last Name or Alias Last Name	last:taylor or lastname:smith

Client ID Field on Form DesignEHR Progress Notes

The Client id is now passed to Form DesignEHR progress notes when opened in the Services screen, making the id available to additional validation criteria or list restrictions. Previously only the Service id was passed to the progress note. A Client column in the progress note table is required to capture the Client id information in the database.

State Acorns

The following Acorns were updated:

- RI Custom Billing, 1.0.44.RELEASE
- NC DSS Custom Billing, 1.0.12.RELEASE
- WI PPS State Reporting, 1.0.186.Release

The following Acorns were added:

- Amethyst, 1.0.30.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:

Billing Reports

_GL Audit Report – Updated the GL Audit report to display Refunds. The summary query was also updated, and now both the detail and summary totals are correct.

_UB04 – Fixed an issue that caused the report to time out with a bad gateway error when processing a large run.

Fiscal Reports

Unapplied Payments – Added an Unapplied Balance column so the report could include partially applied Unapplied Payments. Previously the Unapplied Payment report total and the Unapplied Payments total in Fiscal Overview would only match if there were no partially applied payments.

The following new Report was added:

Fiscal Reports

Refunds – The *Refunds* report lists Payer refund information for tracking purposes. Filters are available for Service Start and End Date, Client Code, and Payer.

UPDATES

Ticket #	Description
FW-11609	Added two new *Create Charges* job processing messages: • "Service does not meet the requirements for a bundle" (Error) • "Service cannot be added to bundle. Setting Service to DONE" (Info)
FW-11610	Updated oak to handle services set to DONE by an Acorn.
FW-11665	Updated core forms to use "Validation Description SQL." Additional details in the Form DesignEHR v6.0.28 Release Notes.
FW-11740	The Client field now automatically populates when a Form DesignEHR Progress Note is accessed from the Service Entry screen.
FW-11769	Specific services were excluded from the CCDs exchanged with the HIE based on a JobProperty.

BUG FIXES

Ticket #	Case #	Description
FW-11076	75172, 76705	Fixed an issue where the Date column on the billing *History* screens (Unprocessed Services, Unbilled Charges, Unprocessed Remittances, and Unposted GL Transactions) was displayed using UTC (Universal Time Coordinated). Now the Dates display based on the user's time zone. The next release addresses this same issue on the Fiscal Overview *Errors* screens.
FW-11382	75808	Fixed an issue where the label was overflowing past the End Date on the VHR Timeline display. Now labels display the proper end-date regardless of the date in focus on the Timeline.
FW-11739		Updated Client Search to exclude filtered Clients from a user's search results when they do not have access. Previously the name would return but selecting the Client resulted in a "not authorized" message.
FW-11760		Fixed an issue where red "Authorization" error messages displayed in error upon logging out of the Informs form viewer.
FW-11822		Updated the CCD Export - All Active Clients options, one-time and recurring, to process as expected even when Clients have more than one open episode.
FW-11887	77197	Fixed an issue where a new Charge Calculation would not save in *Configuration>Payers>Rates* after a current rate was end dated. Now rates save as expected and can be added after end dating a previous rate.