

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.

Client Engagement			
Enable Single Use Links Days Link Valid * 2			
Send InForms Link Email from: * noreply@echobh.com			
	CANCEL	SAVE	

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.

Share Forms		×
💿 BE0000 Beach, Sandy		
Available Forms	Selected Forms	Share With
CLIENT ALLERGIES		Client Portal
- Client Allergies	New Allergies Record	
📋 New Form	- Allergr Augmentin 500-mg Oral Tablet Reaction: Drug-induced anaphylaxis (disorder)	Email Link U Available
Allergy: Augmentin 500-mg Oral Tablet Reaction: Drug-induced anaphylaxis (disorder)	O Date Completed: Apr 27 2020 O	Recipient * Beach, Michelle
ASSESSMENTS	· 📃 📃 📃	Email Address *
CLINICAL		shell.beach@mymail.com
- BH Demographic	•	Relationship to Client * Mother
New Form	•	Recipient will be requested to sign
+ Family Health History		SHARE
· · · · · · · · · · · · · · · · · · ·		iPad 1 🗢 Available
		iPad 2 Available
		Tablet 1 Available
		Tablet 2 Quality Available
		Reception Desktop 1 Available
		Reception Desktop 2

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.



Version 3.21

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.

(echoVantage	((e choVantage
Enter the client's birth date to continue 03/07/1957	This link is no longer valid
View Forms	

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.

Save Cancel						
	Please save the form to continue					
	Form Signatures					
	No current signatures					
Previous		Done				

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

Save Cancel			
	Sign your name in the space below		
	CLEAR	SIGN	
	Form Signatures		
			Next

© The Echo Group, All Rights Reserved



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

Save Cancel		
	Sign your name in the space below	
	3 Beach	
	CLEAR SPON	
Pro	wious	Done

• 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.

	Form Sign	atures		
	1 Client	BE0000 Beach, Sandy	3 Buch, 01/25/2021 422 pm	
Previous				Done

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

Sandy Beach 03/20/1985		
	Review your forms	
	PHQ-9 Adult	View
	Allergies	View
▲ Once a form is signed, it becomes lo be sure that the information is correct a	cked and is no longer editable, just as in EchoVantage. Clien nd complete before signing.	ts and Contacts sho



Version 3.21

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.

Share forms		×
n BE0000 Beach, Sandy		
Available Forms	Selected Forms	Share With
CLIENT ALLERGIES		Email Link 🗍 Sure
- Cierc Alergies	Allerge: Augmentin 500-mg Oral Tablet Reaction: Drug-Induced anaphylaxis (disorder)	Entrance Lotter
New Form	Total Score: 1	CLEAR
Allergy: Augmentin 500-mg Oral Tablet Reaction: Drug-induced anaphylaxia (disorder)	Otate Completed jan 25 2021	

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

Share Forms					×.
Available Forms	Selected Forms			Share With	
ASSESSMENTS ~	Date Completed Jun 25 2021	9	~	Email Link Recipient will be requested to sign	Shared
CLINICAL ~	Allergy Augments 500 mg Cral Tablet Reaction: Drug-induced anaphylaxis (disorder)	5	<i>.</i>		CLEAR

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.

Inapplied Payments							
ransaction Start Date		50 of 179 selected	SELECT ALL RE		VERPAYMENTS (1	(79) OTHER (2)	≞ ¢ X
ansaction End Date		000003 Deans, Wil Residential Mental Hea	lliam alth 99899			P	MARK AS DONE
iyer		ANTHBCBS	Amount	Passon			VIEW CLAIM
itart typing to search	-	01/28/2021	\$ 184.65	PAYER PAYMENT			`
tch ID		000003 Deans, Wil Residential Mental Hea	lliam alth 99899			P	MARK AS DONE
ant		ANTHBCBS					VIEW CLAIM
tart typing to search	-	Date 01/28/2021	Amount \$ 184.65	Reason PAYER PAYMENT			~ ~
w I		000003 Deans, Wil Residential Mental Hea	lliam alth 99899			P	MARK AS DONE
		ANTHBCBS					VIEW CLAIM
		Date 01/28/2021	Amount \$ 184.65	Reason PAYER PAYMENT			· · ·
		000003 Deans, Wil Residential Mental Hea	lliam alth 99899			Increase Charge To Payment Amount Mark as Refunded	AS DONE
FILTER	I	< < > > 1 of	4		Action	Start typing to search	APPLY

© The Echo Group, All Rights Reserved



- 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
 - \circ 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
 - o Checkboxes may be selected or deselected individually
 - \circ $\;$ All boxes on a page may be marked by selecting the top-most box $\;$
 - o If multiple pages exist and all boxes on the page are selected, a SELECT ALL RESULTS button is available
 - o 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.

Action	Mark as Refunded 🛛 🗙 👻	APPLY
· · · · · ·		

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.

cium becans		Claim Detail	s	
Deans, William (000003)		Deans, W	/illiam (000003)	
Birth Date: 08/08/1969 SSN: 546-45-6879 Phone: (603)731-1813 Address: 15 Old Bridge Rd Conway, NH 03818 Residential Mental Health 99899 10/20/2018		Birth Date: 08 SSN: 546-45-6 Phone: (603)7 Address: 15 Old Bridge Conway, NH 0 Residential	8/08/1969 879 31-1813 Rd 13818 Mental Health 99899	10/20/2018
ANTHBCBS		ANTHBC	35	
ANTHBCBS Unapplied Paym	ients	ANTHBC	3 S Pavments	
ANTHBCBS Unapplied Paym Date	ents Amount Reason	ANTHBCE Unapplied Date	3S Payments Amount R	teason
ANTHBCBS Unapplied Paym Date 01/28/2021	Amount Reason \$ 184.65 PAYER PAYMENT	ANTHBCE Unapplied Date 01/28/2021	3S Payments Amount R \$ 184.65	Reason
ANTHBCBS Unapplied Paym Date 01/28/2021 Date	Amount Reason \$ 184.65 PAYER PAYMENT Amount Reason	ANTHBCE Unapplied Date 01/28/2021 Date	3S Payments Amount R \$ 184.65 R Amount R	leason
ANTHBCBS Unapplied Paym Date 01/28/2021 Date 10/20/2018	Amount Reason \$ 184.65 PAYER PAYMENT Amount Reason \$ 184.65 CHARGE CREATED	ANTHBCE Unapplied Date 01/28/2021 Date 10/20/2018	3S Payments Amount R \$ 184.65 R Amount R \$ 184.65 C	Reason Refund Reason
ANTHBCBS Unapplied Paym Date 01/28/2021 Date 10/20/2018 01/28/2021	Amount Reason \$ 184.65 PAYER PAYMENT Amount Reason \$ 184.65 CHARGE CREATED \$ 184.65 PAYER PAYMENT	ANTHBCE Unapplied Date 01/28/2021 Date 10/20/2018 01/28/2021	35 Payments Amount R \$ 184.65 R Amount R \$ 184.65 C \$ 184.65 P	Reason Refund Reason CHARGE CREATED PAYER PAYMENT

New Form DesignEHR Release

Form DesignEHR version 6.0.28 is available with the release of EchoVantage version 3.21. Click <u>HERE for the Form DesignEHR</u> 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.

ACTIVE PAYERS	ALL PAYERS
Payer Name	Q
PRIORITY 13	
TE Test (TE) Policy Number: TE-12 Start Date: 12/01/202	152020
PRIORITY 14	
TE Test (TE) Policy Number: TE - 0 Start Date: 01/01/202	1152021
TE Test (TE) Policy Number: TE-01 01/01/2019 - 12/31/20	012019 019



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.

dean		Q	first:dea		٩
9	SAMJ0000 Taylor, Scott Birth Date: 05/14/1976 Preferred Name: Dean	*	9	SAMJ0000 Taylor, Scott Birth Date: 05/14/1976 Preferred Name: Dea	in
8	000011 Dean, Jimmy Birth Date: 10/15/2006		8	000002 Thomas, Dean Birth Date: 05/31/1980	
8	000003 Deans, William Birth Date: 08/08/1969		8	000005 Provost, <mark>Dean</mark> n Birth Date: 07/13/1958	
8	000022 Deande, Scott Birth Date: 06/21/2009		0	000013 Hiwan, Chip Birth Date: 12/30/1983 Aliases:	
	000013 Hiwan, Chip Birth Date: 12/30/1983 Aliases:			Chuck Hiwan Scott Hiwan <mark>Dean</mark> Whani Taylor Hiwa HI HIIIIWAAANNNNN	1
	Chuck Hiwan Scott Hiwan <mark>Dean</mark> Whani Taylor Hiwan HI HIIIIWAAANNNNN		8	000028 Ragnar, Bobby Jean Birth Date: 03/24/1978	
8	000002 Thomas, Dean Birth Date: 05/31/1980		8	000001 Taylor, Dawn-Marie Birth Date: 06/15/1999	
8	000005 Provost, Deann Birth Date: 07/13/1958				
9	000016 Plan, Scott Birth Date: 01/01/2001	Ŧ			

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.

"bobby sue"	۹	first:"bobby sue"	٩
000063 Bobby Sue, Scott Birth Date: 07/14/1960		000024 Taylor, Bobby Sue Birth Date: 02/15/1998	
000024 Taylor, Bobby Sue Birth Date: 02/15/1998			
Simple search (no keyword used) and advanced se	earch (field-sp	ecific keyword used) terms may be combined if desire	ed, i.e.
Jim Jimmy James dob:1998-08-27			



February 9, 2020

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	Client Code generated when Client was first added to	code:CANT0000 or clientCode:CANT0000	
clientCode	EchoVantage.		
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	first:dean or firstname:taylor	
	Preferred Name		
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.

© The Echo Group, All Rights Reserved



UPDATES	
Ticket #	Description
	Added two new Create Charges job processing messages:
	 "Service does not meet the requirements for a bundle" (Error)
FW-11609	 "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.
	The Client field now automatically populates when a Form DesignEHR Progress Note is accessed from the
FW-11740	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 <i>,</i> 76705	Fixed an issue where the Date column on the billing <i>History</i> 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 <i>Errors</i> 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 <i>Configuration>Payers>Rates</i> after a current rate was end dated. Now rates save as expected and can be added after end dating a previous rate.